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Resorts Reservations User Guide

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PEBBLE BEACH COMPANY

Contents

Introduction **7**

Supplemental Documentation 7

Getting Started **8**

Log in to SMS Host 9

Common Keyboard Functions 10

Guest Tiles **11**

Guest Tile Walkthrough 12

Profiles 18

Search for Existing Guest Tiles 23

Create A New Guest Tile 24

Booking Center **32**

Booking Center Walkthrough 33

Universal Lookup **41**

Accessing the Universal Lookup 42

Filters 43

Best Searching Practices 45

Work Slate **46**

Notes & Traces **47**

Dining **49**

When Reservations Cannot Book Dining 49

Dining Special Requests 49

Pets at Restaurants 49

Dining Tile Walkthrough 50

Same Day Dining Reservations 51

Large Group Reservations 53

Search for Dining Availability 54

Complete a Dining Reservation 56

Clean Up a Dining Reservation 60

Smart-Booking Dining 62

Search for Existing Dining Reservations 64

Dining Changes 65
Dining Cancellations 66
Golf 68
Golf Tile Walkthrough 68
Day Guest Golf 74
Outside Guest (Rack Rate) Golf 75
Search for Day Guest Golf Availability 77
Complete A Day Guest Golf Booking 84
Clean Up A Day Guest Golf Booking 90
Smart-Booking Golf 92
Golf Add-Ons 96
Carts 96
Caddies 97
Rental Clubs 101
Aeration 102
Identify Major Aeration 103
Complete an Aeration Golf Booking 107
The Exception Calendar for Golf 108
Priority of Sale 109
Complete an Exception Calendar Booking 110
Club Member Golf Guidelines 112
Verify a Club Member 113
Complete a Beach Club or Spanish Bay Club Golf Booking 117
Complete a Duke's Club Golf Booking 121
Forest Resident / Condo Owner Golf Guidelines 124
Verify A Resident or Condo Owners 126
Complete A Forest Resident Booking 129
Lariat Lane 132
Tee Sheets 138
Tee Sheet Color Codes 140
Tee Sheet Notes 141
Locate an Existing Golf Reservation 144
Golf Changes 147

Golf Cancellations 149
Golf Special Situations 150
Room Reservation Basics 152
Room Reservation Guidelines 153
Reservation Tile Walkthrough 155
Arrival / Departure 156
Room 157
Package 158
Name 163
Notes & Communications 165
Other 168
Payment 170
Search for Room Availability 171
Complete A Room Reservation 176
Clean Up a Room Reservation 185
Special Occasions 189
Third Adults 194
Pets 196
General Availability (F7) 201
Availability Notes 202
Availability by Property 205
Availability by Room Type 207
View Obstruction 210
Negotiated Rates 212
Room Reservation Changes 213
Room Reservation Cancellations 225
Room with Golf/Dining/Spa Cancellations 226
Reinstate a Cancelled Booking 229
Hotel Guests who cancel Golf within 14 Days 230
How to Refund Room Deposits in SMS 231
Multiple Room Itineraries 233
10 Day Arrivals 235
Front Desk Billing Traces 236

Billing Scenarios 237
Multiple Rooms | Same Room Type 243
C/O Guest Tiles 257
Create a C/O Guest Tile 258
Multiple Rooms | Different Room Types 262
Shares 270
Identify A Share 271
Book A Room with Shares 272
Un-share / Re-share 278
Tape Chart (F8) 279
ADA Accessibility 281
Find ADA Accessible Rooms via the Tape Chart 282
Book ADA Rooms and Golf 284
Resort Guest Dining 285
Resort Guest Golf 286
Resort Guest Golf Guidelines 287
Book A Room + Golf + Dining Itinerary 289
Clean Up A Room + Golf + Dining Booking 296
10 Day Arrivals | Golf Splitting 300
Pre-Blocking 301
Casa Palmero / Inspirato 302
How to Pre-Block / Auto Book 303
Two Bedroom Suites 305
Book A Two Bedroom Suite 306
Clean Up A 2 Bedroom Suite Booking 309
Families with Children 314
Book A Family with Children in the Second Room 315
Fairway One Cottages 317
Cottage Booking Guidelines 318
Book A Four Bedroom Cottage 319
Clean Up Your Cottage Booking 321
10 Day Arrival | Cottage Booking 326
Packages 329

What Packages Include 330
Package Pricing 332
Past Guest Offer 334
Package Promo Code 335
Book A Package 336
Clean Up A Package Booking 340
Book Multiple Packages 345
Split Golf 346
Multiple Package Resort Credit 350
Package Conversion 351
Zoom + X 352
Convert from Rack to Package 354
Upgrade Package Golf 359
City Ledgers 360
City Ledger Tile Walk-Through 361
Locate A City Ledger 363
Create A City Ledger for a Cancellation Within 14 Days 364
Apply City Ledger Funds to A New Booking 370
Third Party Bookings 373
Assistants 374
Letter of Authorization (LOA) 377
Book A 3rd Party Reservation (w/LOA) 378
Clean Up A 3rd Party Booking (w/LOA) 380
Complete A Cost Breakdown 383
Send A Letter of Authorization via Sertifi 388
LOA Follow Up 392
Third Party Outside Guest Golf 394
Travel Agents 398
Book A Travel Agent Reservation 399
Clean Up A Travel Agent Reservation 403
Set Up A New Travel Agent in SMS 405
Create A Travel Agent Tile 406
Send A New Travel Agent Form 408

Virtuoso 411
Trip Advisor 412
IAGTO 413
Booking IAGTO Reservations 414
Search IAGTO Availability 414
Sending IAGTO Availability Quotes 414
IAGTO Rates 415
IAGTO Guest Tiles 416
IAGTO Payment 417
Clean Up an IAGTO Reservation 420
Travel Desk Documentation 425
IAGTO Packages ..... **Error! Bookmark not defined.**
IAGTO Golf Only Booking ..... **Error! Bookmark not defined.**
IAGTO 14 Day Final Payment 429
IAGTO Golfbreaks Direct Billing 430
VIP Guests 437
Identifying VIP Reservation Codes 438
How to Handle / Refer VIP Callers 439
Groups 440
Identify A Group Reservation 442
Find the Group Coordinator Contact 443
Locate A Group Sales Reservation 445
Search by Reservation Tile 445
Search by City Ledger 446
Book Recreation for a Group Attendee 448
F7 General Availability for Groups 453
Itinerary Holds 454
Place an Itinerary on Hold 455
Multiple Deposit Itinerary Holds 457
Waitlists 458
Not Booked Guest – Wants to be Waitlisted for Rooms or Room/Golf 459
Booked Guest – Wants to be Waitlisted for Nights, Another Property or Additional Golf 460
Booked Guest – Wants to be Waitlisted for Golf 461

Special Events 462
Editing and Closing Waitlists 463
How to Run a Waitlist Report 464
Payment Methods 466
Credit Cards 466
Check 467
ACH / Wire Transfer 468
MasterCard Promotion 469
Gift Cards 470
How to Check A Gift Card Balance 471
How to Charge A Gift Card 472
Gift Card Return Policy 473
Charity Gift Certificates 474
How to Book A Gift Certificate Redemption 475
Charity Gift Certificate Upgrades and Surcharges 479
Comp Letters 480
Spa 481
Reduce Spa Service Duration 484
Spa Cancellations 485
Beach Club Members Spa 486

Introduction

This guide is intended to serve as a reference for the Reservations Agents of Pebble Beach Company.

In addition to instruction regarding searching for guests, viewing availability, making new reservations, posting transactions, and using the folio, this document also includes information regarding corporate, group, travel agent and secretary reservations as well as instruction regarding the use of the wait list and rate quotes in SMS Host.

This guide is not intended to replace SMS Host training for reservations staff, rather to provide supplemental information and instruction needed to perform the most common tasks related managing reservations.

Supplemental Documentation

- SMS Help Site
- Digital Binder
- Property Knowledge Excel Sheet

Getting Started



A **Reservations Agents**, The SMS Booking Center will be your *home base.* All Pebble Beach Resorts reservations are created through the Booking Center and maintained within the SMS Program.

However, the Reservations Center of Pebble Beach is not the only department that utilizes SMS. Several departments use SMS in very different ways:

Reservations Managers use SMS to access reports

Pro-Shops use SMS to manage golf tee times

Restaurants use SMS to accommodate dining reservations.

The Front Desks use SMS to assign rooms and manage guests during their stay.

The Spa uses SMS to book spa services and manage guest contact information.

It is important to understand that not all departments function within SMS in the same manner. With these differences in mind, the many processes explained throughout this manual are designed to create the best possible cohesion between our work done at the Reservations Center and the work done by all other departments within the Pebble Beach company.

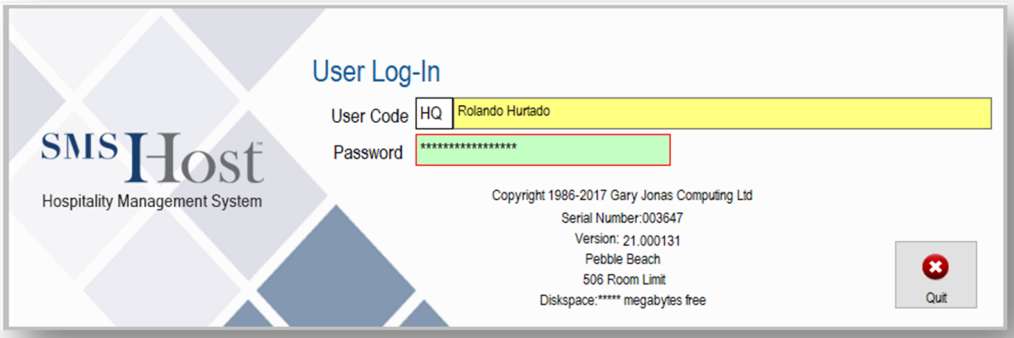
Log in to SMS Host

You must log in to SMS Host to gain access to the features and functionality it provides.



Locate the **SMS Host** application icon on your desktop
Double-click to run.

When the log in screen appears, enter your assigned (2-character) **User Code** and **Password**, then press **Enter**.



Following successful login, SMS main menu is presented with toolbars along the top and left side of yourscreen. Click on the **Booking Center** Button to get started!

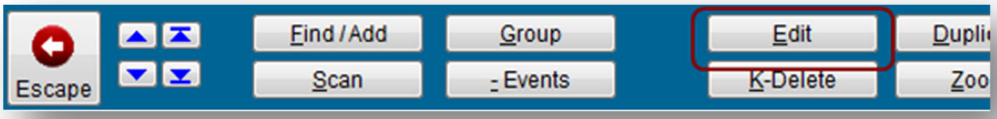


Common Keyboard Functions

Buttons with Underlined Characters

Each button within the button bar has an underlined character (letter, number, or symbol). Typing the underlined letter on your keyboard will activate the function.

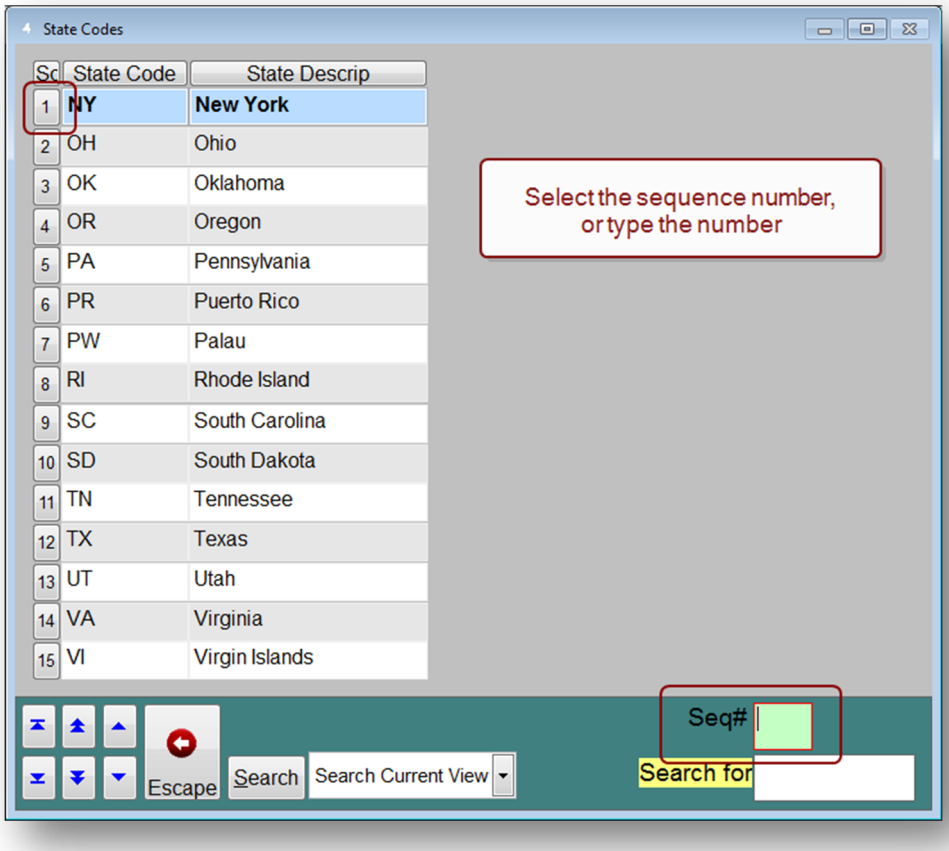
For example, per the image below, you could type "E" on your keyboard to begin editing this page.



Pick Lists

Some fields require you to select an option from a pop-up menu. These fields have a down arrow next to them. You can open the list of options by clicking the arrow with your curser, or, you can simply type **Alt +↓** on your keyboard.

When a list is opened, your curser will automatically be set into the green box as indicated in the image below. You can use your curser to choose on the option you want to select within a list, or, you can save time by typing your selection using your keyboard.



If the options on the list are **numbered**, you type the number of the option you want to select and hit Page Down. (Numbers 1-10 will need to be typed with a zero in front, i.e. "01".)

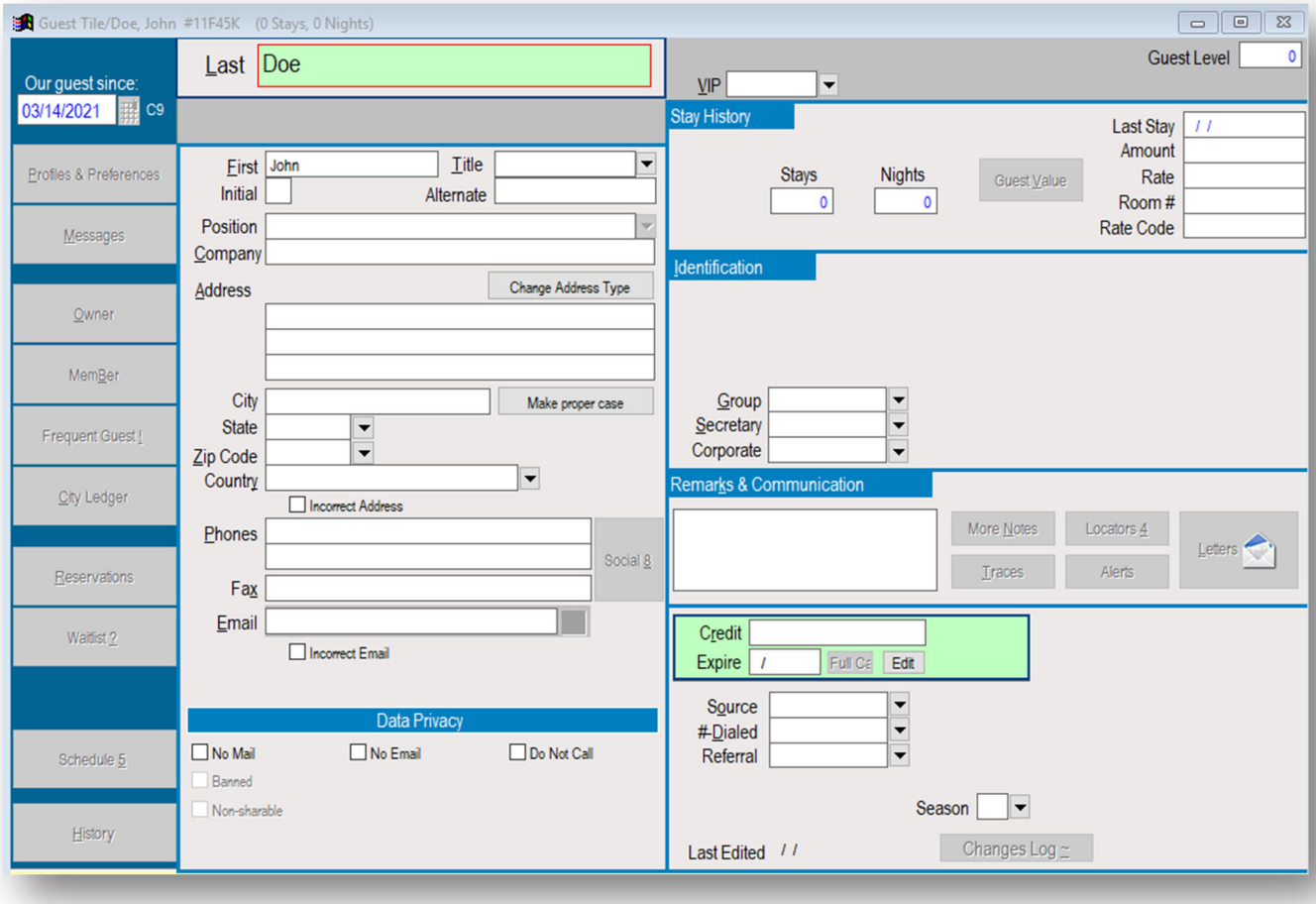
If the options on the list are **letters**, you can simply type the letter and hit Page Down

Guest Tiles



A **Guest Tile** is like a file folder that we keep for each guest containing all of their contact information, special notes, and history with Pebble Beach Resorts.

Whenever you book a reservation, you will need to either find an existing Guest Tile or create a new Guest Tile to connect with that booking.



A Guest Tile will list one primary family member as the lead name, which will usually be the guest who is calling to create a reservation.

Within each Guest Tile are **Profiles** where additional family members will be listed.

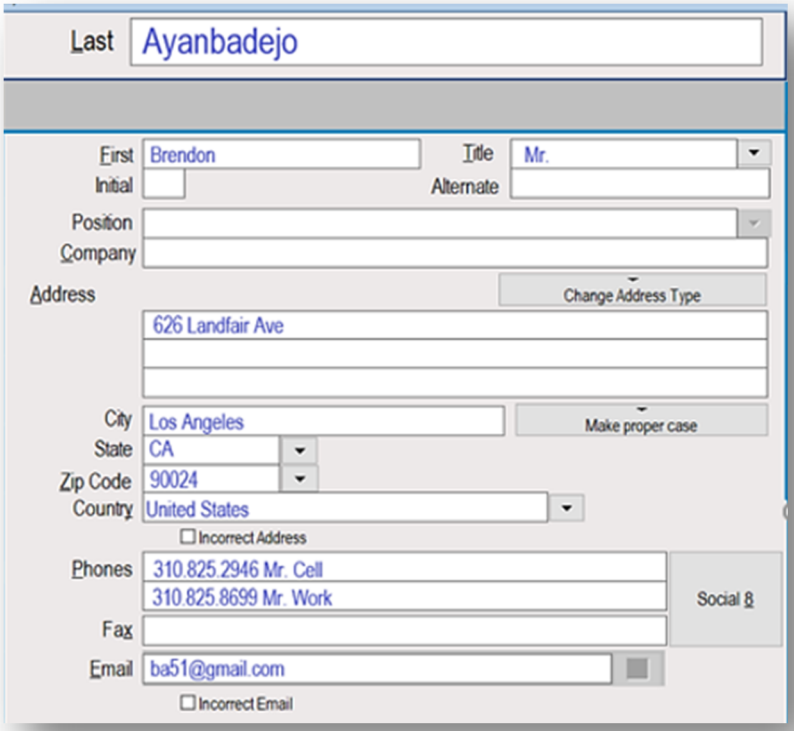
Guest Tile Walkthrough

The left side of the Guest Tile is where contact Information and Data Privacy preferences are stored.

Contact Information

These are the primary fields that will need to be completed in order to save a new Guest Tile:

- **Guest name**
- **Billing address**
- **Phone number(s)**
- **Email Address**



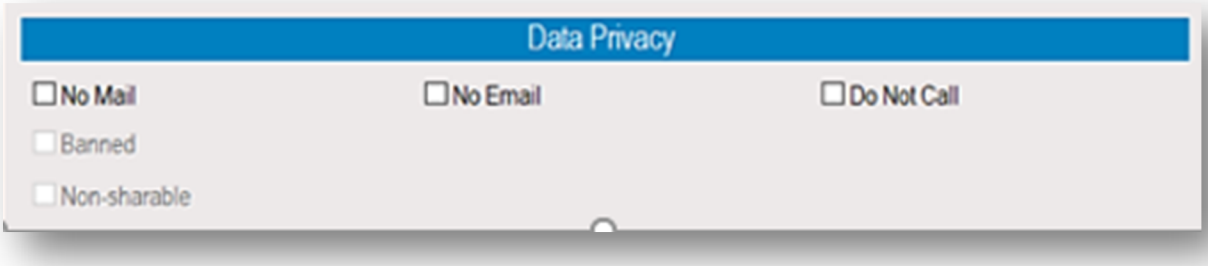
Data Privacy

Pebble Beach Resorts is required to maintain a certain standard of data security for our guests. This standard is known as **PCI: Payment Card Industry Data Security Standard.**

In order to maintain **PCI compliance**, whenever an email address is obtained from a guest, we are required to ask that guest if they wish to be included on our email list for future offers at Pebble Beach.

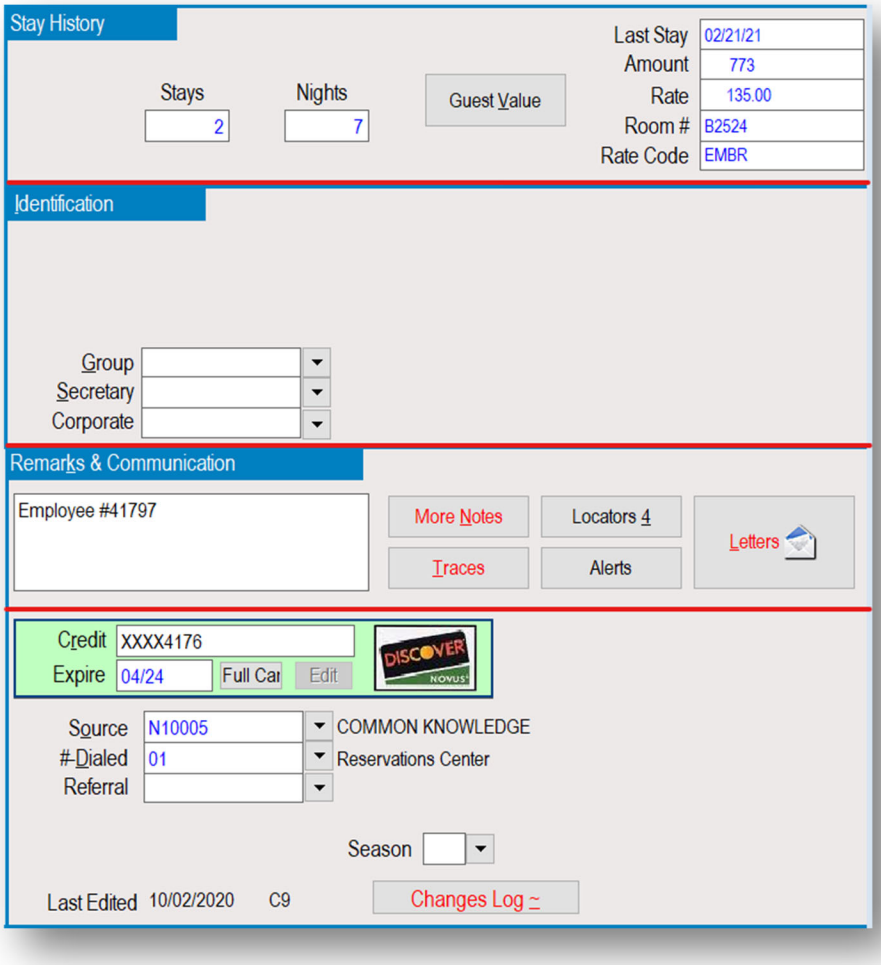
If they say no, the "No Email" box in the Guest Tile **Data Privacy** section will need to be checked and saved. This prevents the guest's email address from being included on marketing email distribution lists.

Upon request, we can also check the No Mail or Do Not Call checkboxes to prevent unsolicited phone calls and marketing mailers.



The right side of the Guest Tile is broken into four sections:

- **Stay History**
- **Identification**
- **Remarks & Communication**
- **Credit Card Information**

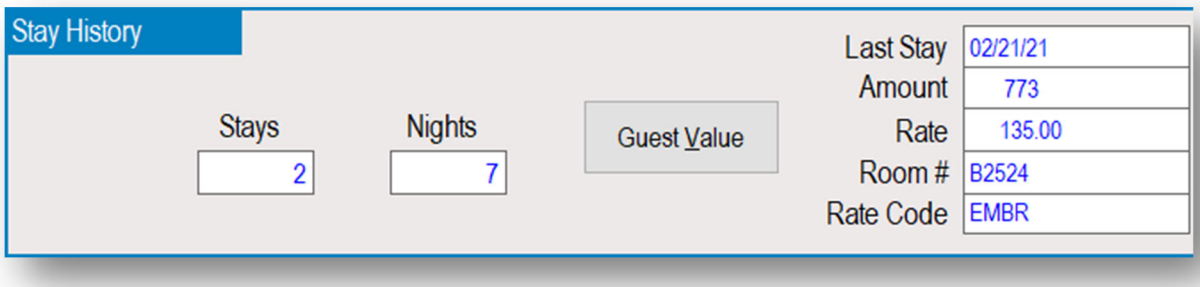


Stay History

The **Stay History** section is a synopsis of the guest's history at our Resort.

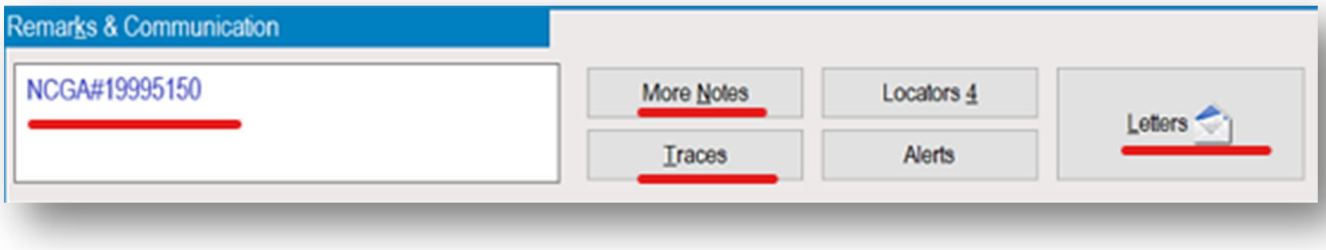
In the example below, this guest has stayed at our resorts twice for a total of 7 nights, the most recent of which occurred on February 21st, 2021 in room number B2524 which is an Ocean View room at The Inn at Spanish Bay.

The Rate Code explains the type of pricing that was applied to the stay, such as Rack Rate or a special discounted rate.



Remarks and Communications

This section includes important notations and explanations about each guest and their bookings. As a Reservations Agent, you will use the following fields:

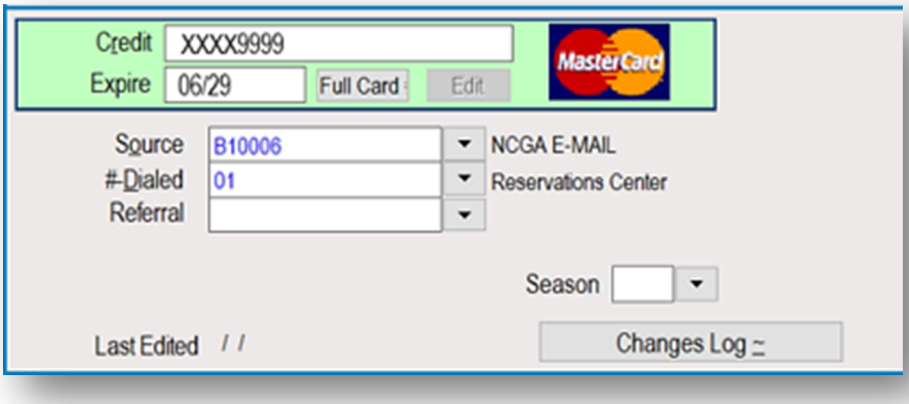


Remarks	The Remarks field is the white text box. This box will most often be blank, but there are certain situations for which we enter data that needs to be immediately seen by anyone reviewing the Guest Tile. Common Remarks will be name pronunciation notes, secondary email addresses, and NCGA membership numbers.
More Notes	Notes is where we document important information, special instruction, and changes about a guest and their bookings. Unlike the Remarks box, we can enter multiple notes without the limitation on how many characters can be entered.
Traces	Traces are messages that we direct to specific departments with a request for a specific action. In other words, it is a "To Do" item as opposed to a fact.
Letters	Letters is where we send confirmation emails to guests. Emails will come from reservation@pebblebeach.com with a no-reply warning Replies to this email address filter into a folder that is monitored by Supervisors. Supervisors will only respond to these emails if the guest is requesting a booking change or a cancellation. Emails are sent in batches at top and bottom of each hour, so we guests that they will receive their confirmation in approximately 1 hour.

Credit Card Information & Call Data

When booking a room reservation, we must collect a deposit for the first two nights of the guest's stay. When booking a tee time for a guest visiting for the day, we must collect a credit card to hold on file.

In both cases, you will need to utilize the **Credit Card** section of the Guest Tile to collect and save that guest's card information to SMS. *We will cover payment collection in detail further in this manual.*



This is the **Call Data** Field:
By clicking the Down Arrows, you can set the Source and #-Dialed fields appropriately.



When you save a new Guest Tile, you will automatically be prompted to select the information that will populate in these fields.

The **Call Data** fields capture information about which department the guest spoke with and what marketing campaign they were responding to when their Guest Tile was created.

A simpler way to put that is:
Who did this guest call and why?

When you save a new guest tile, you will be prompted to select the appropriate codes from Pick Lists that will then auto-populate in the Call Data fields of the Guest Tile.

Media Types

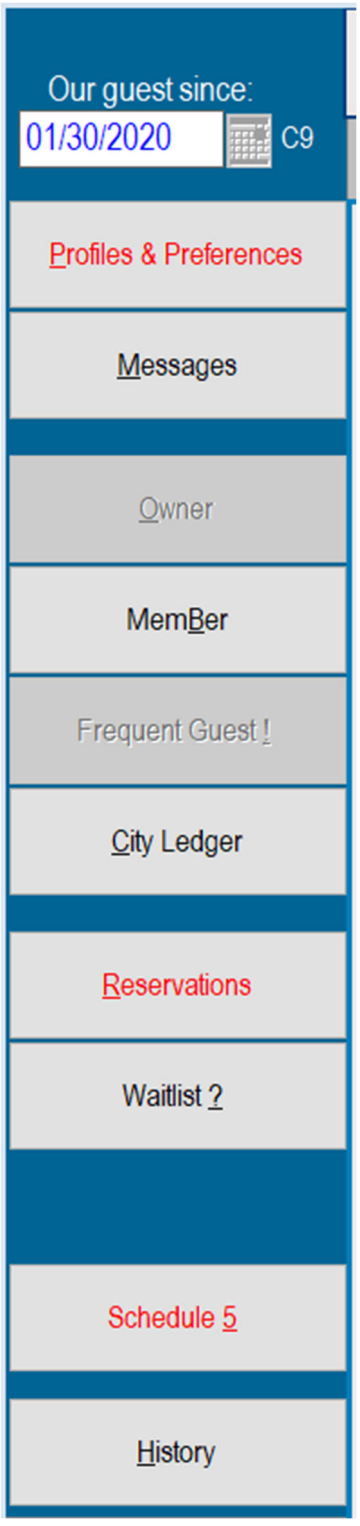
Sq	Type	Description
1	A1	Direct Mail
2	B1	E-Mail
3	C1	Internet
4	D1	Magazines
5	E1	Newspaper
6	F1	On-Site Lead Generation
7	G1	Pebble Beach Company
8	H1	Public Relations
9	I1	Group
10	J1	Radio
11	K1	Travel Industry
12	M1	Television
13	N1	Brand Awareness
14	O1	PBC Special Event

Incoming Phone Number - By Code

Sq	Features	Description
1	01	Reservations Center
2	02	PBX
3	03	Front Desk
4	04	Concierge
5	05	Sales
6	06	PB Preferred
7	07	Brand Partners
8	08	Partners
9	09	Special Services
10	10	Club Pro Desk
11	11	Spa
12	12	Food & Beverage
13	13	Golf
14	14	Clubs
15	15	Golf Academy

Vertical Button Bar

A Guest Tile can hold a wealth of information beyond the fields on the main screen.
The left side of the Guest Tile hosts a Button Bar that can take you to additional screens.



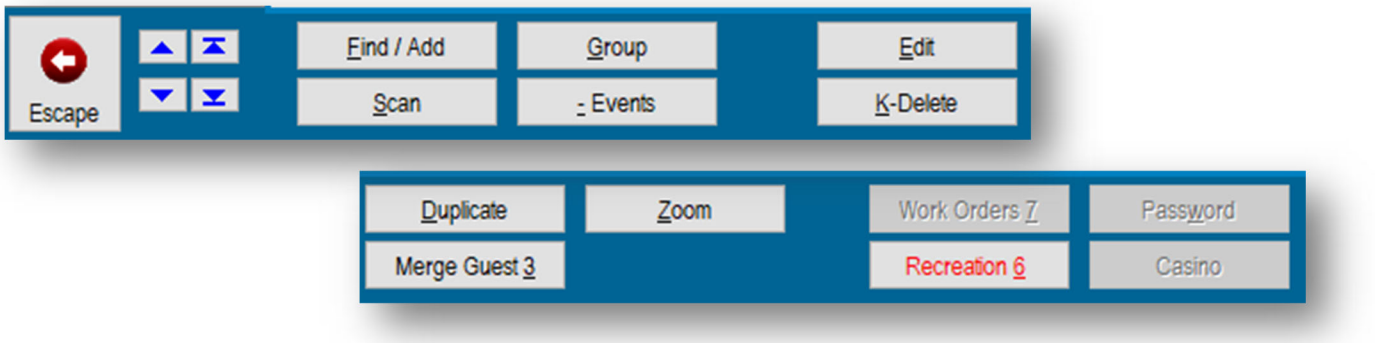
As A Reservations Agent, you will utilize the following buttons from the Vertical Button Bar:

Profiles & Preferences	This is where additional family members will be listed as well as guest preferences such as allergies and notes from past experiences.
Members	This is where you will see details about clubs to which the guest belongs or has belonged to in the past. The most common will be Duke's, Beach Club, and Spanish Bay Club Memberships.
City Ledger	A City Ledger is an account on which a guest's funds are stored, but not applied to any particular reservation.
Reservations	This is where you can see each guest's current and past Room Reservations
Schedule 5	This is where you can see each guest's current and past Recreation Reservation

Not every screen will be used for every guest, but a great way to tell if information is present within these available screens is to scan for **Red Lettering**.

If the title of a button is red, that means information has been saved for the guest within that screen. In the example to the left, this guest does not have any memberships, but has had at least one room stay and at least one recreation booking.

Horizontal Button Bar



There are many buttons along the bottom of the Guest Tile. This can seem intimidating, but most of these buttons will not be used on a daily basis.

The following are the primary buttons you will utilize when creating and editing Guest Tiles:

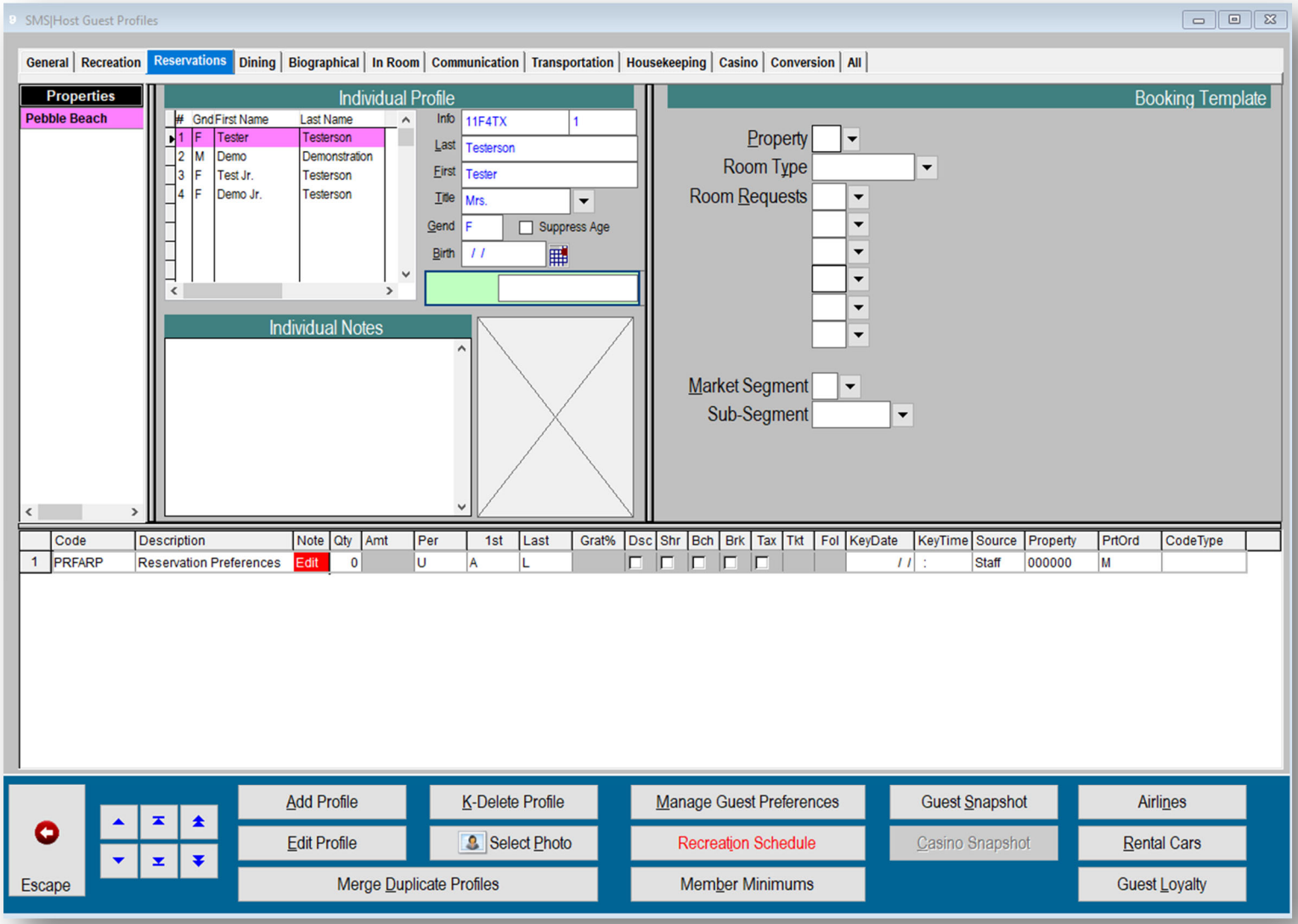
Escape	This will exit the current Guest Tile you are viewing.
Edit	This button will allow you to edit the Guest Tile fields. Once you are don editing, you can click the "OK" with your curser or Page Down on your keyboard.
Duplicate	If you are creating multiple Guest, once you have completed one, you click Duplicate to begin a new Guest Tile with the same data pre-populated.

Profiles

Within each **Guest Tile** are **Profiles.** This is where information about the Primary Guest's family will be stored.

If a family of four (2 adults / 2 kids) calls to make a reservation with Pebble Beach for the first time, you will need to create a Guest Tile .

- The caller will be the primary name on the guest tile.
- You will then create four Profiles: one for each family member.



A **Guest Tile** may include **Profiles** for:

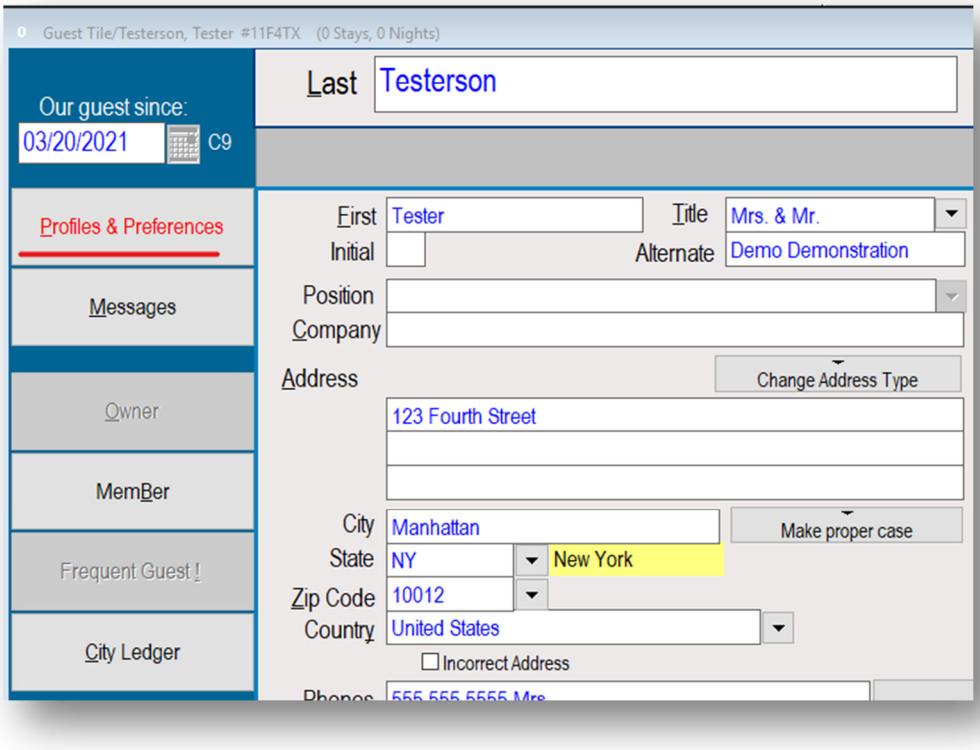
- Spouses (does not include non-married partners)
- Children Under 18 Years Old
- Disabled Dependents (can be 18+)
- Permanent Traveling Companions/Aides

Profiles not only include basic information such as Name, Title, and Gender; they also can include:

- Biographical information
- Health restrictions
- Notes on past experiences with Pebble Beach Resorts
- Important dates such as birthdays and anniversaries

To Access the Profile:

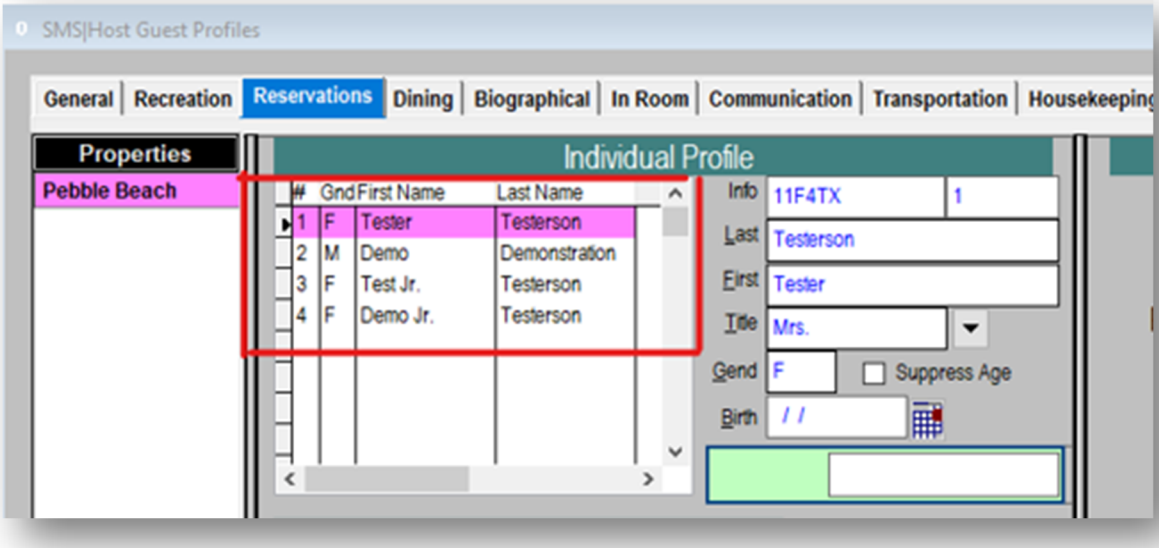
Click the Profiles and Preferences button at the top of the Vertical Button Bar:



Reservations Tab

When you open a Profile, by default, you will be on the **Reservations Tab**. This is where you can see basic information on each member of the family.

In this example, this guest, Test Testerson, has a spouse and two children:

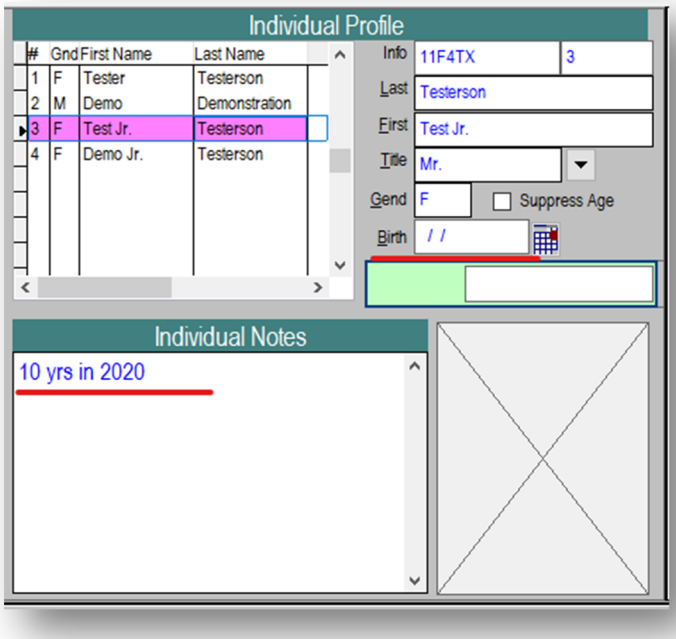


Whenever a profile is created for a child, we need to ask each child's age.

We gather this information to:

- Determine if they are old enough to participate in certain activities
- Determine when the child will become a legal adult and therefore need their own Guest Tile

Since we typically do not obtain the birth year, we do not use the **Birth** field of the Profile. Instead, we document each child's age in the **Notes** field.



Tip:
Refrain from asking parents the exact birth date of their child as this can seem imposing.
Instead, ask *"How old are each of your children?"*

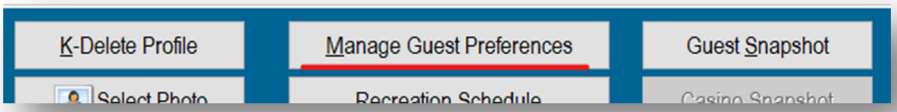
Preferences

In SMS, **Guest Preferences** are notes that employees add to Profiles with personalized information about that guest.

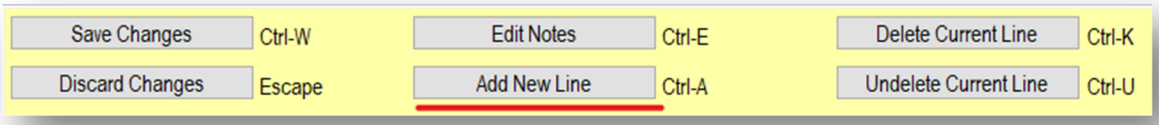
These notes are intended to assist various departments such as the Front Desk, Housekeeping, Guest Services, and yes, Reservations by providing as much information as possible about each guest so we can in turn provide exceptional and personalized guest service.

To Add A Guest Preference:

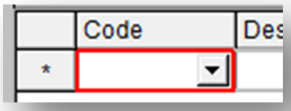
1. Access the Profile
2. Click the Manage Guest Preferences Button at the bottom of the window



3. Click Add New Line, or type CTRL+A



4. Select a Code for your note:

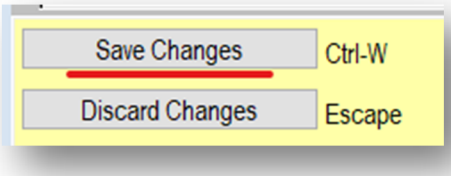


Reservation Preferences	Preferred bedding arrangements, room types, locations
Past Issues	Problems that have arisen during a guest's stay
Special Occasions	Birthdays, anniversaries
Health Restrictions	Allergies, alcohol preferences
Guest Notes	Information that does not fit into the above categories

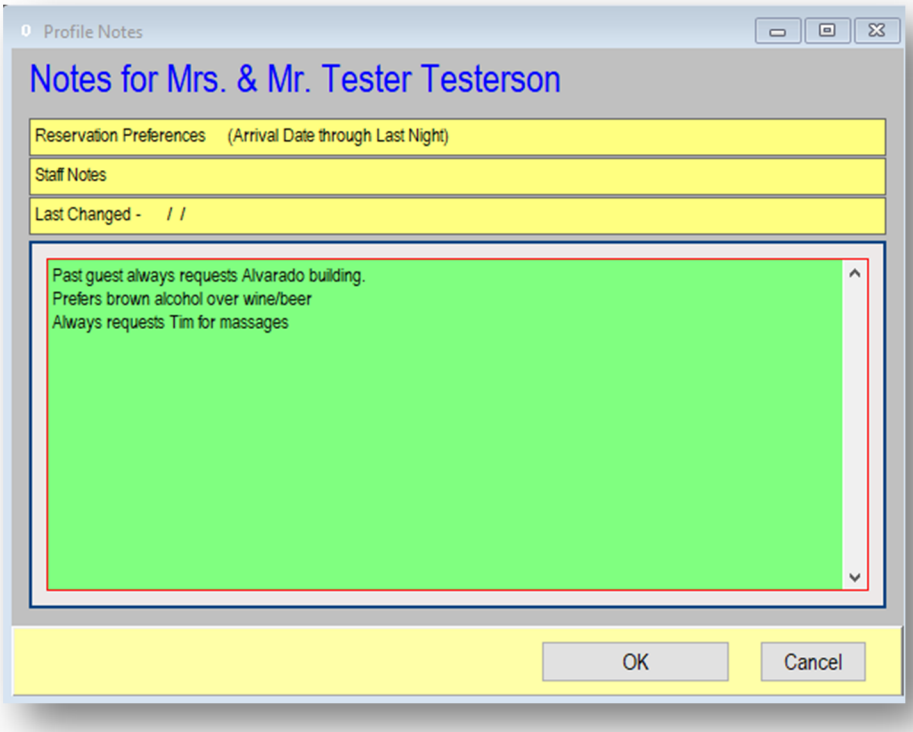
5. Your selection will populate into the Description field. You can leave this title as-is or you can type your own description to identify the subject of your note.



6. Click Save Changes

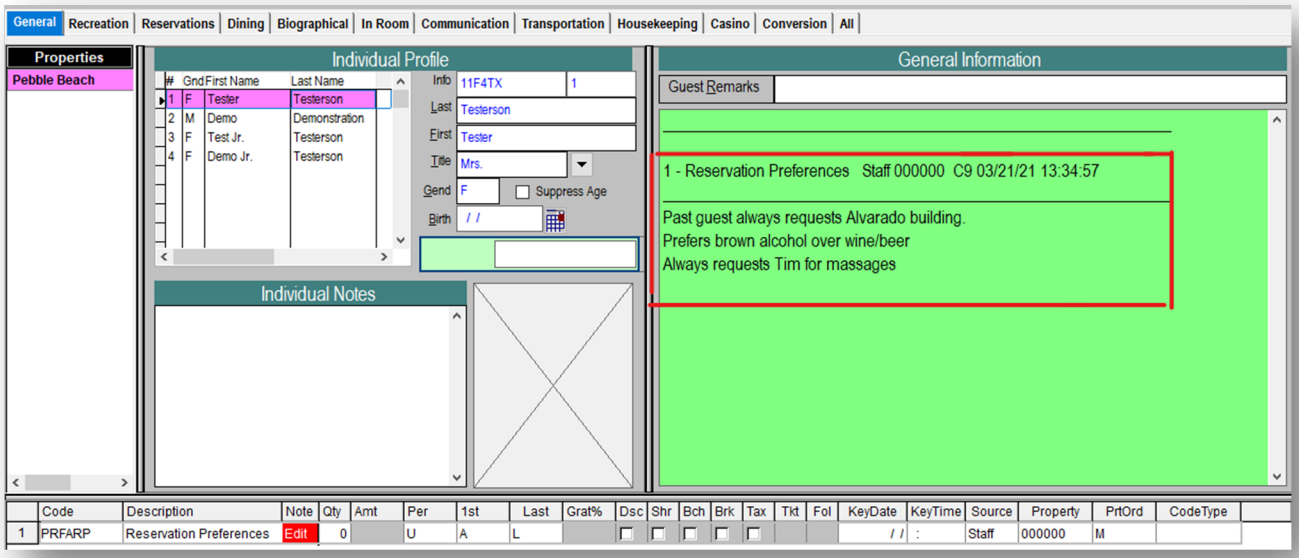


7. Now that your note line is saved, you can double click anywhere on the line to open up a Notes window. Type your note into the green box and click OK or type Page Down.



Now, the note is not only visible to anyone who double clicks on the note's line, but you can see the note in the green **General Information** section on the following **Profile Tabs**:

1. General Information
2. Transportation
3. Housekeeping

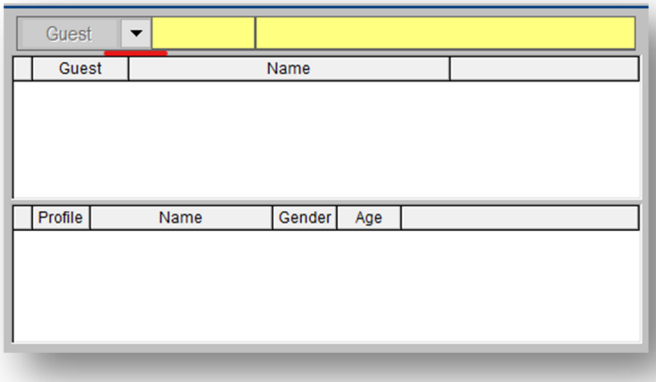


Search for Existing Guest Tiles

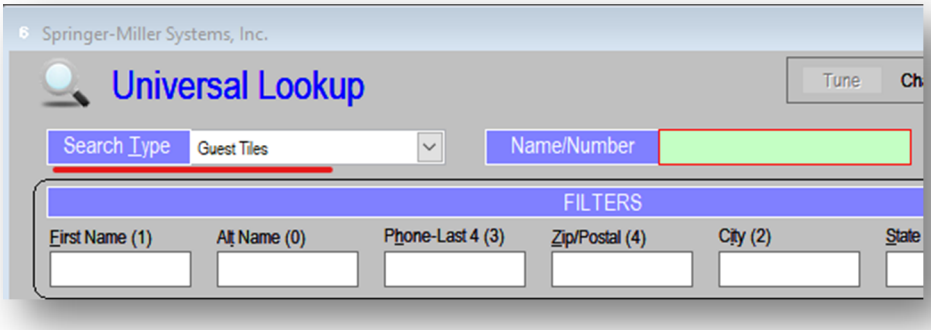
The most common situation in which you will need to create a Guest Tile is when you are booking a reservation with a guest who has never booked with Pebble Beach Resorts before.

To ensure that the Guest Tile is associated with the booking you are creating, follow this order of operations on your call:

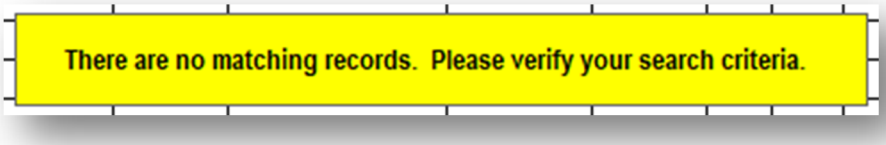
- Search for booking availability in the Booking Center
- Double click on your selected bookings to move them into your guest's Itinerary
- Click the down arrow next to the Guest button in the Booking Center



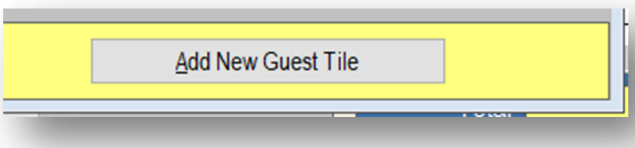
- This will open Universal Lookup and pre-set the Search Type to Guest Tiles



- Use the name fields to search the name of your guest to see if they have any existing Guest Tiles. This is a crucial step to avoid duplicate Guest Tiles in SMS.



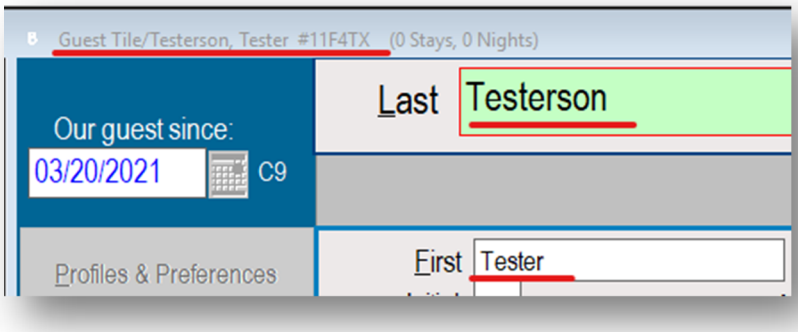
- Once you have exhausted your search criteria and determined that no Guest Tile exists, click the Add New Guest Tile button in the bottom right corner of the Universal Lookup window. You can also click the A key on your keyboard as a shortcut.



Create A New Guest Tile

Once you click the Add New Guest Tile Button in Universal Lookup, a blank **Guest Tile** will open and you will automatically be placed into Edit mode.

- An auto-generated identification number can be seen in the header of the window.
- The name you entered into Universal Lookup will pre-populate in the name fields.



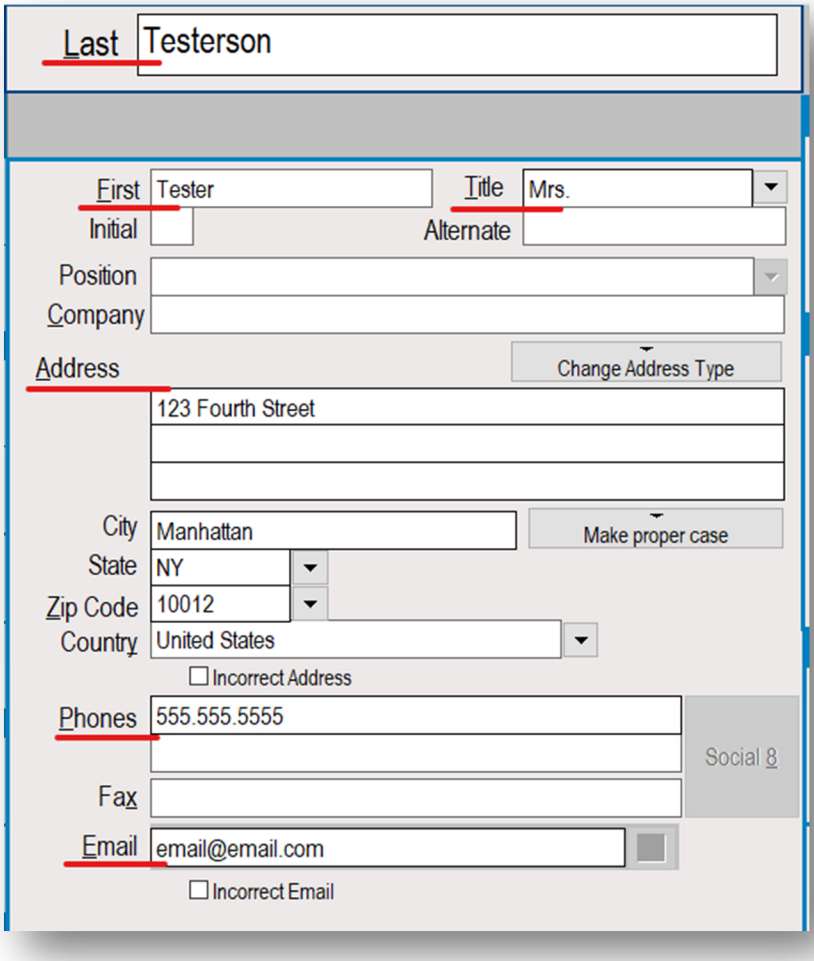
Once you begin a Guest Tile, you cannot exit the window until all required information is filled in.

The following fields are required to save the new Guest Tile

- Last Name
- First Name
- Title
- Address
- Phone Number
- Email
- Source
- # Dialed

The Source and # Dialed fields do not need to be manually entered.

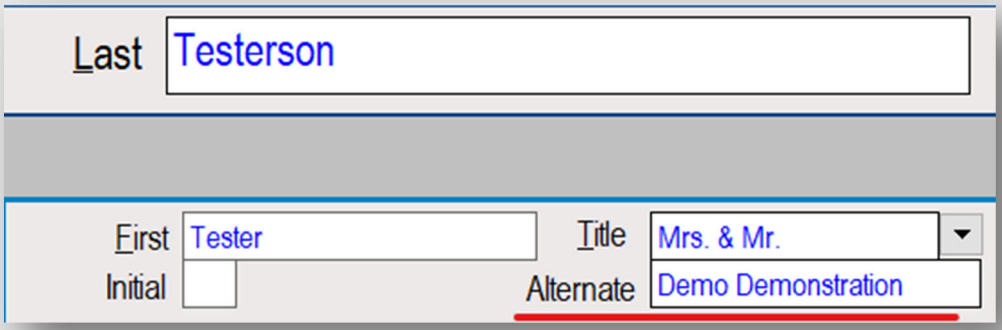
You will be prompted to select these when you click OK to save the Guest Tile.



Name

If the guest mentions a spouse, ask for the spouse's name and enter this into the Alternate field.

If their spouse has a different last name than the primary guest, enter the spouse's first and last name into the alternate field.

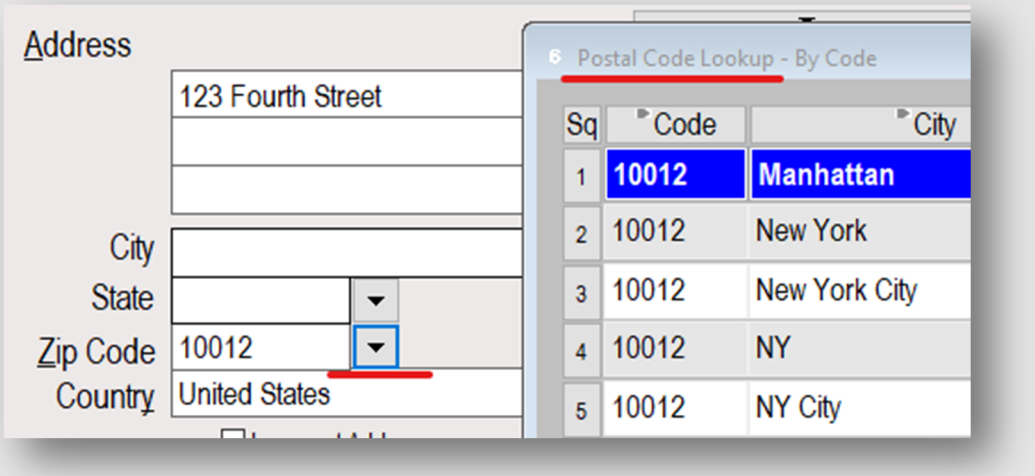


Address

Contact information on the Guest Tile will populate onto Confirmation Emails sent to the guest, so you should make sure all information is spelled correctly with proper capitalizations.

Guests tend to speak very quickly when stating their address. Luckily, we have a shortcut that only requires us to enter the Street line of the address and the Zip Code.

Skip the City and State fields, but enter the guest's zip code, then click the down arrow next to the Zip Code field. This will open the Postal Code Lookup window:

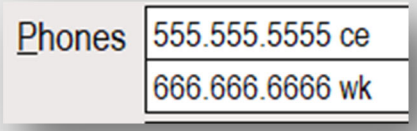


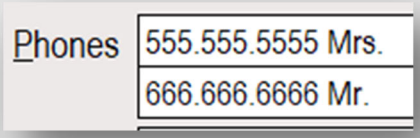
The city that the guest provides over the phone will usually be the very first selection on this list. Use your curser to click the number of the appropriate city, or type the number using your keyboard as a shortcut. (If the number only has one digit, put a zero before it, i.e. 01 instead of 1.)

Phone Number

To keep formatting universal across all Guest Tiles, the phone number should be entered in the following format: xxx.xxx.xxxx

1. If the phone number is a cell phone, type "CE" after the number.
2. If the guest has multiple numbers, type the cell phone onto the top line. SMS will send automated text alerts for certain bookings and will only pull the phone number from this top line.
3. If you are documenting a phone number for each spouse, indicate whose number is whose with a short abbreviation.



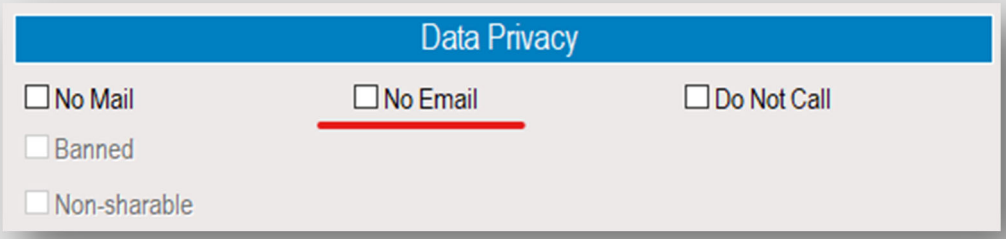


Email Address

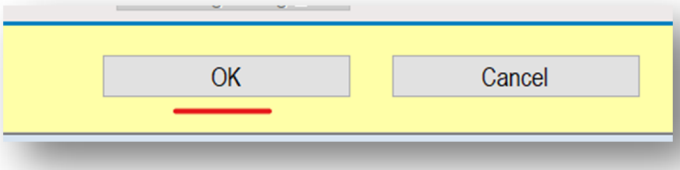
Always reconfirm the email address with the guest using the phonetic alphabet (Papa, Echo, Bravo, Bravo, Lima, Echo, One, Nine) This is crucial to ensure that the guest receives an email confirmation with all the details to their reservation.

Whenever we collect an email address, we need to ask (on the call recording) if the guest wishes to be added to our email list for future offers from Pebble Beach Resorts.

- If the guest says yes, we continue as normal.
- If the guest says no – or we neglect to ask this question, we need to check the No Email box in the Data Privacy section of the Guest Tile.

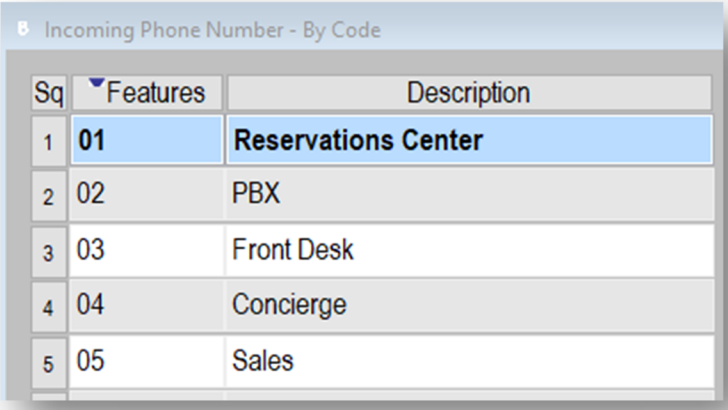


Once all contact information has been entered, click "OK" in the bottom right corner of the Guest Tile, or hit Page Down on your keyboard as a shortcut.



Pop Up #1: Incoming Phone Number
Select Reservations Center to indicate the department to which the guest dialed.

You can use your curser to click the one or type "01" as a shortcut.

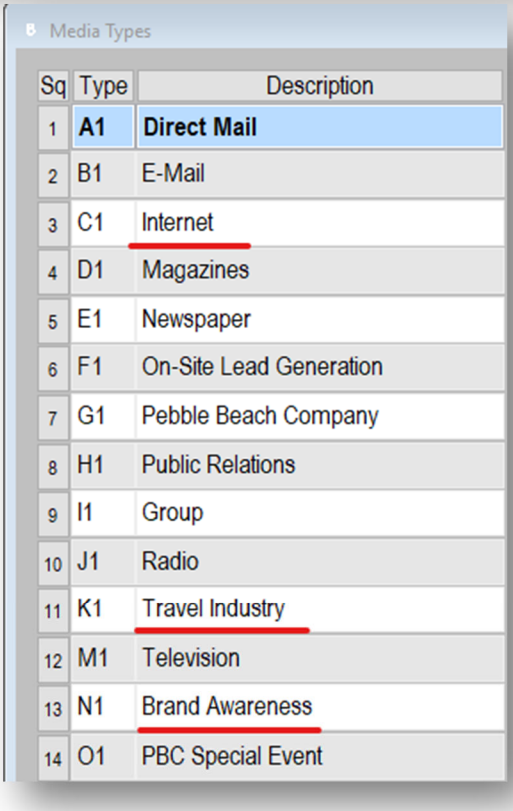


Pop Up #2: Media Types
This field should indicate what the guest saw/heard that prompted them to call.

The most common selections will be:

- Internet (pebblebeach.com or Vacation Planner)
- Travel Industry (Travel Agent)
- Brand Awareness (Common Knowledge or Customer Referral)

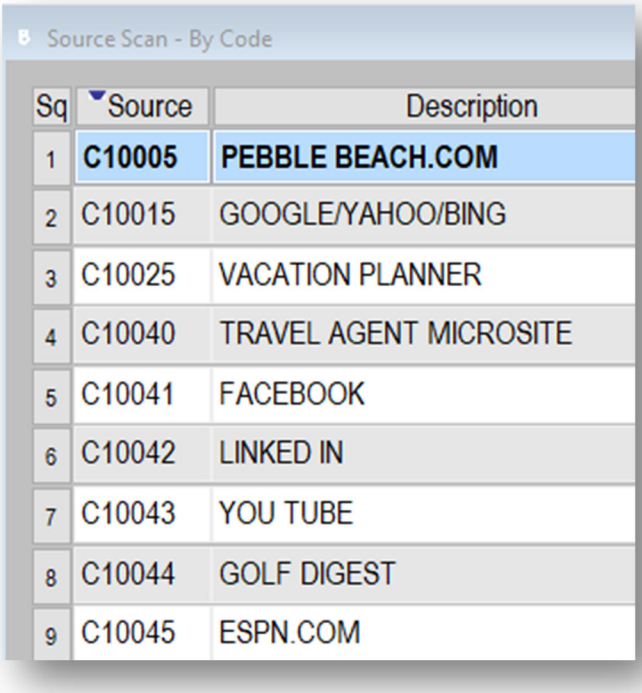
In this example, we will select Internet by typing 03 on our keyboard.



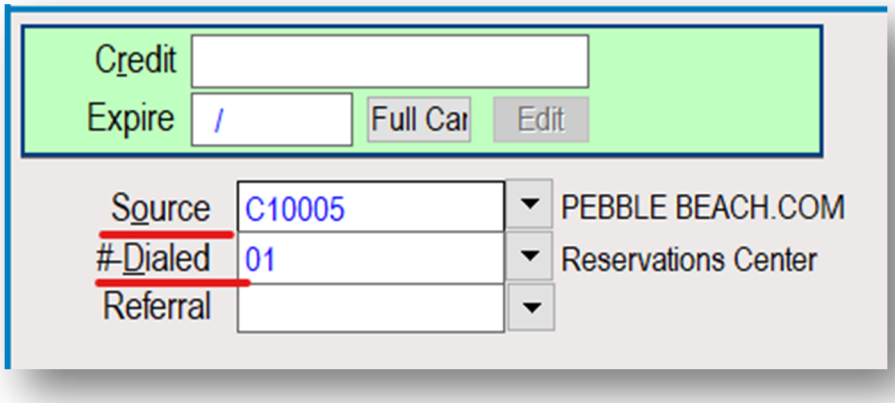
Pop Up #3: Source Scan – By Code
The selections in this window will be different depending on which Media Type you selected.

For our example, we will select Pebble Beach.com since our guest started planning their trip by visiting our website.

Type 01 to select the first option.

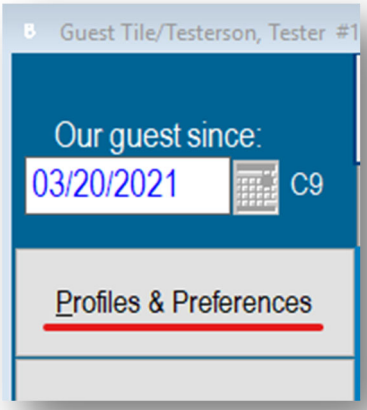


Now that you have selected options for all three prompts, you will be returned to your Guest Tile. You can now see that the Source and #-Dialed fields have been populated based on your selections.

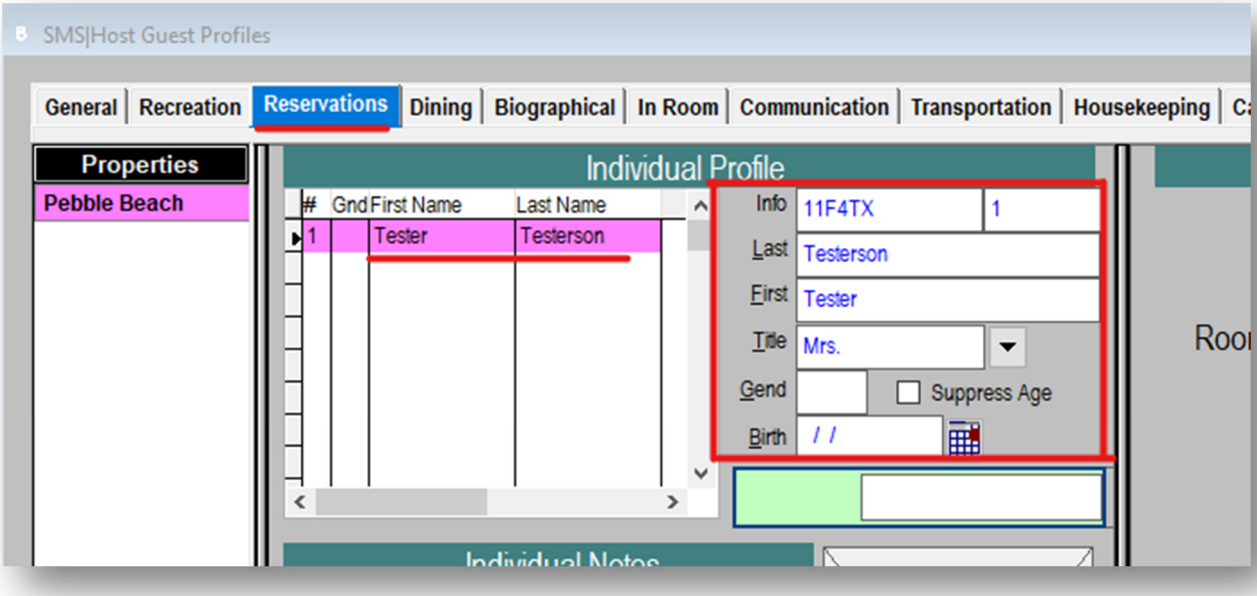


Your Guest Tile is now saved, but there is still one more area we need to update in order to complete our booking: **The Profile**.

To Access the **Profile** of the Guest Tile click the Profiles and Preferences button from the vertical button bar, or click P on your keyboard as a shortcut.

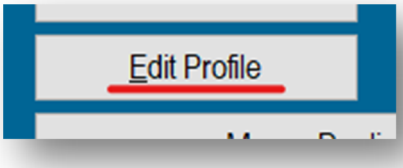


The Profile window will open on the **Reservations Tab**.
Several fields will be filled with the Guest Information you entered on the Guest Tile's main page.
There is just one field we need to manually enter: Gender



To edit the Profile:

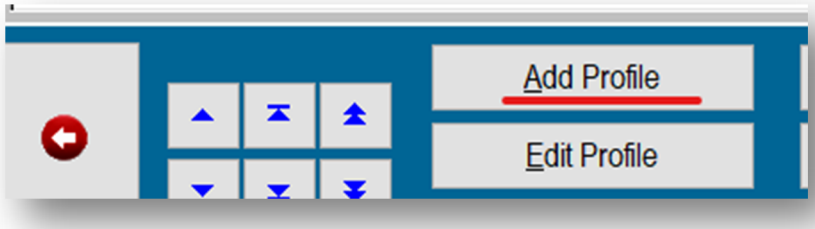
- click the Edit Profile button at the bottom of the window or click E on your keyboard as a shortcut.



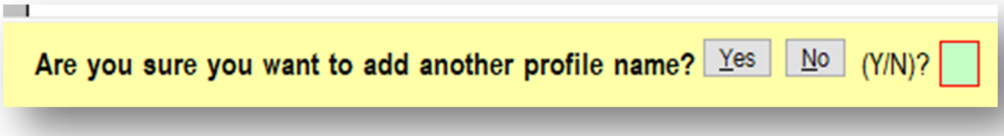
- Navigate to the Gender field and type either M for Male or F for Female.
- Click the Ok button to save or hit Page Down on your keyboard as a shortcut.

If you added a Spouse to the Guest Tile and/or if the Guest mentions that they are traveling with their children, you must **create a Profile** for all members of the guest's family.

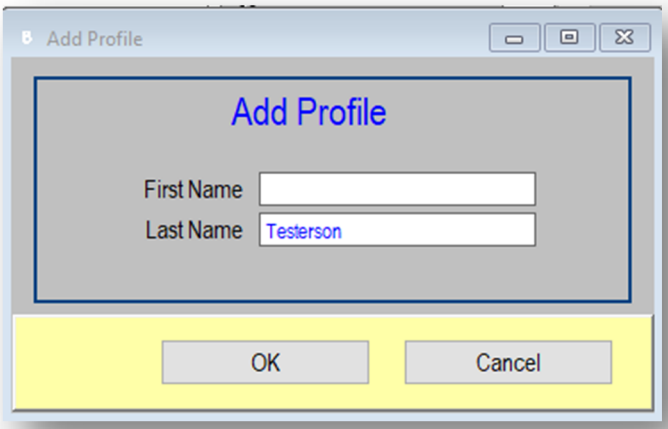
To add a Profile, click the Add Profile button at the bottom of the Profile window, or type A on your keyboard as a shortcut.



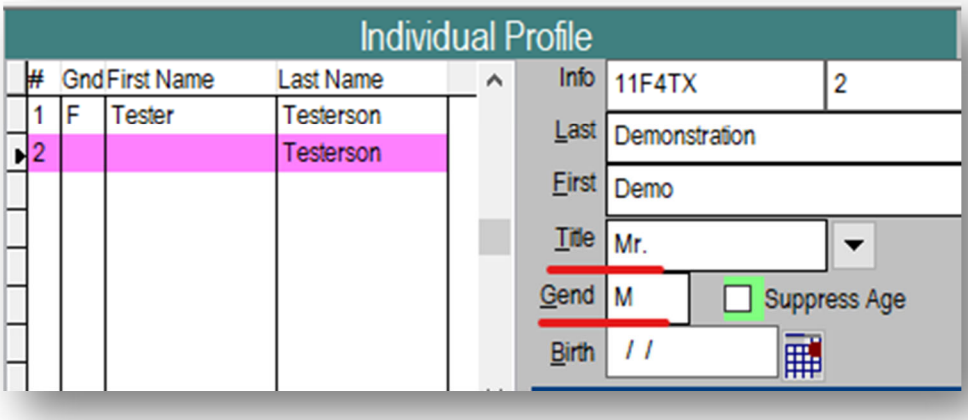
Click Yes or type Y to proceed.



Type the spouse or child's name into the fields. You can edit the last name as well if it is different than the primary guest's last name. Click Ok or hit Page Down on your keyboard.



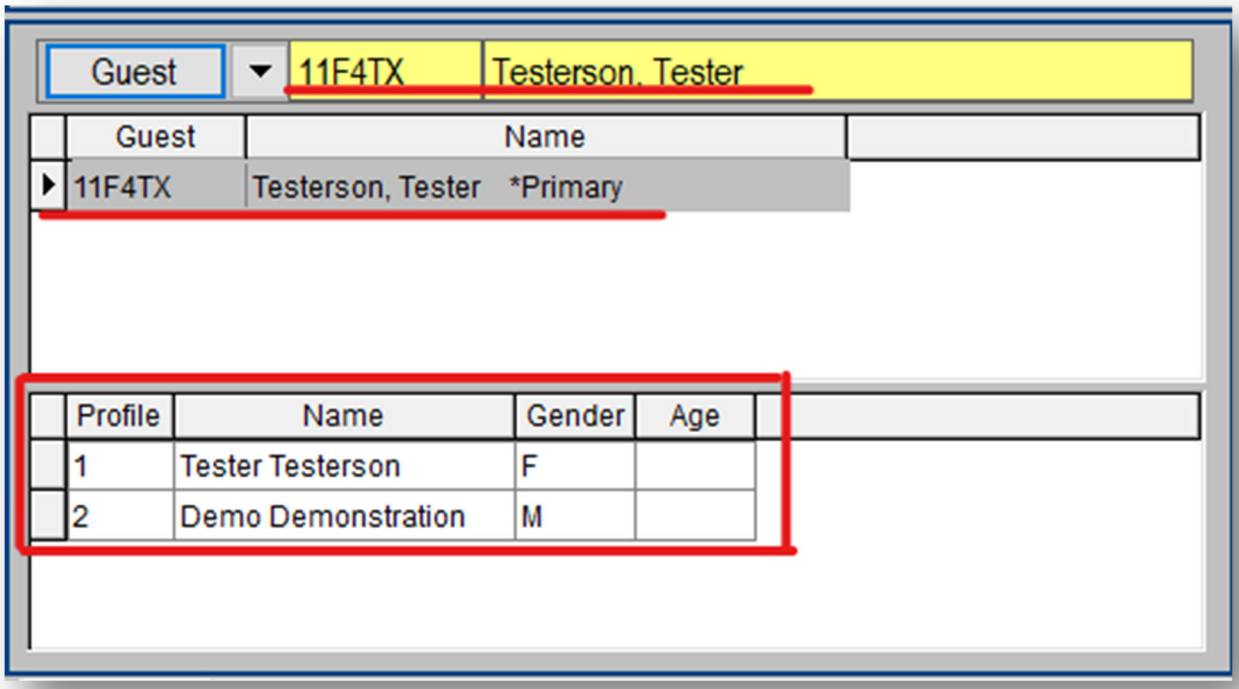
A new Profile will appear.
Enter both the Title and Gender fields, then click OK or hit Page Down to save.



Click Escape with your curser or click the Esc button on your keyboard to exit the Profile.
Escape again to exit the Guest Tile.

You should now be back in The **Booking Center.**

- Your Guest Tile is now associated with your Reservation.
- You can see the primary guest's name in the Guest section of the Booking Center. You can also see any and all Profiles on that Guest Tile in the Profiles section.



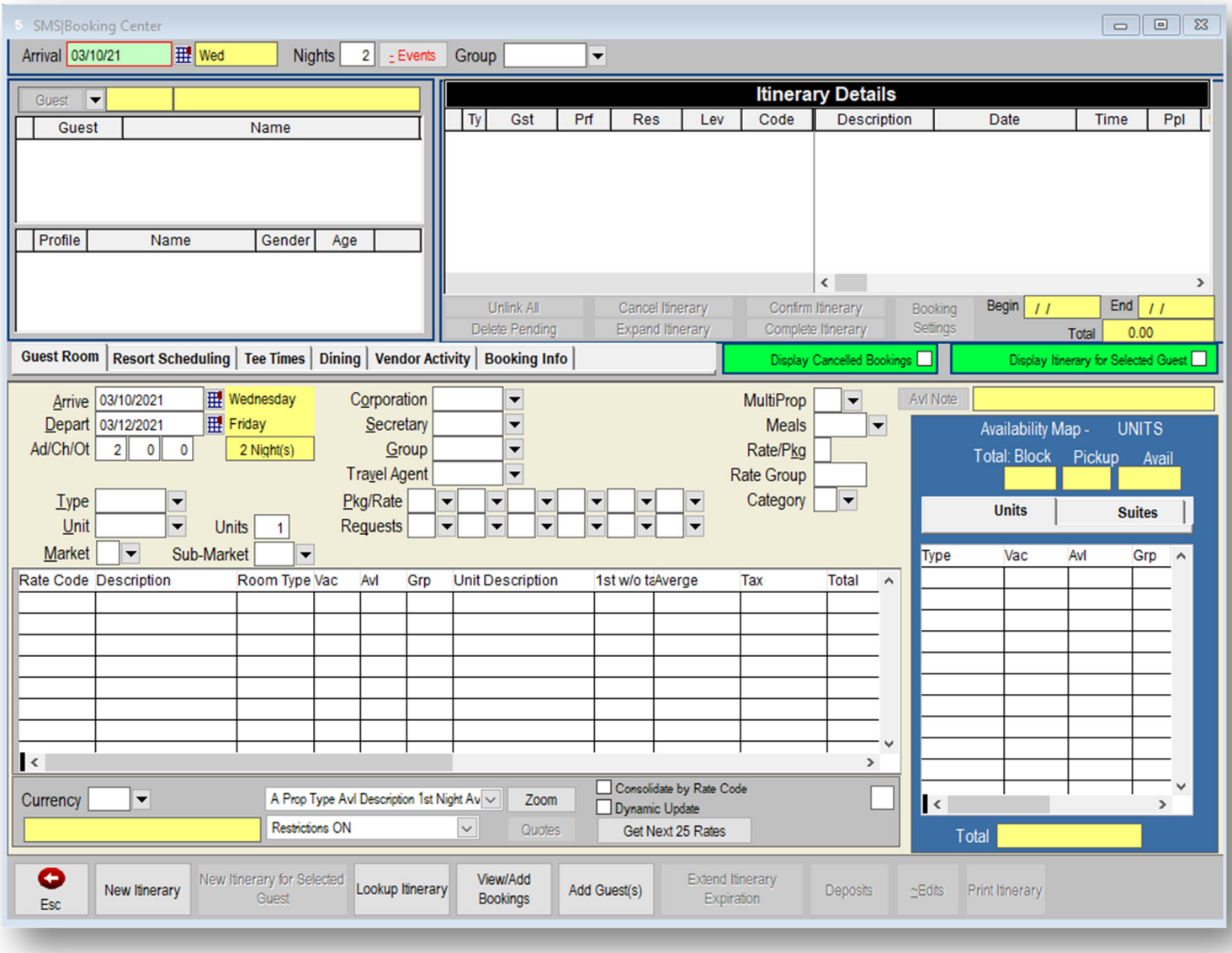
Booking Center

The **Booking Center** is the SMS screen in which you will build trips for each of your guests.

In the Booking Center, you can:

- Search for availability within our Resorts
- Select Rooms, Golf tee times, and Dining reservations for your guests
- Connect guest information to your Itineraries

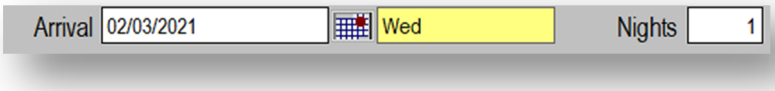
As a Reservations Agent, when you first log into SMS at the beginning of your workday, you should open a blank Itinerary in the Booking Center in preparation of your first call.



Booking Center Walkthrough

Master Data Range (Arrival Calendar)

The Arrival Calendar is where you will set the desired visit dates for your guests in order to search for available rooms and recreation.

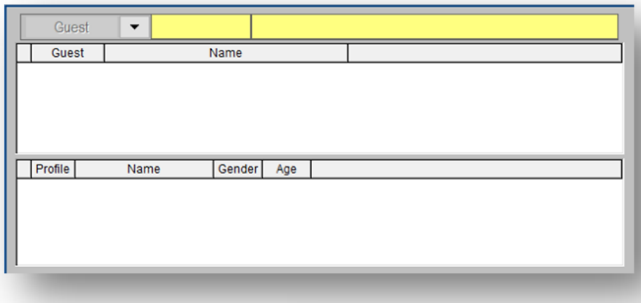


You can type in your date of arrival or click the Calendar icon to the right of the Arrival box; then type the number of nights the guest wants to visit into the "Nights" field and hit Page Down on your keyboard to update.

The date in the Master Arrival Calendar will be the default date default date on the calendars within each Booking Tab. This makes searching for availability easy since all calendars of the booking center can be set at once.

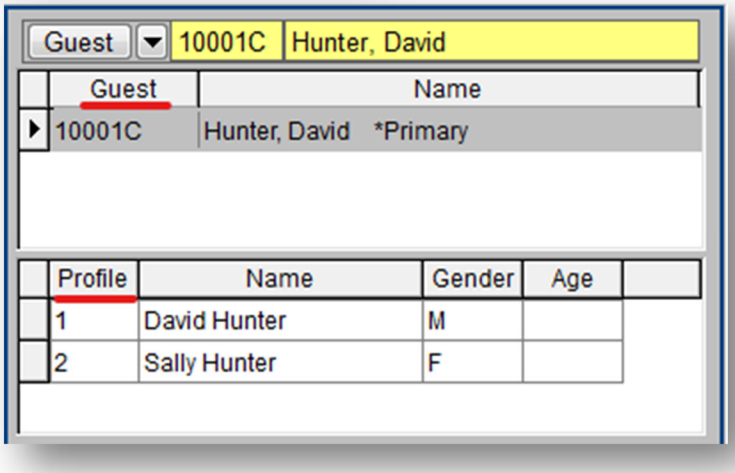
Guest Selection/Information

This section of the Booking Center displays the Guests and Profiles attached to that particular Itinerary



When you first open the Booking Center, this section will be blank as illustrated above.

Once your booking is finalized, the guest's information will appear like the example to the right.

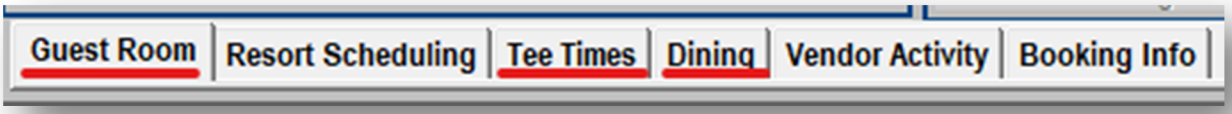


Booking Tabs

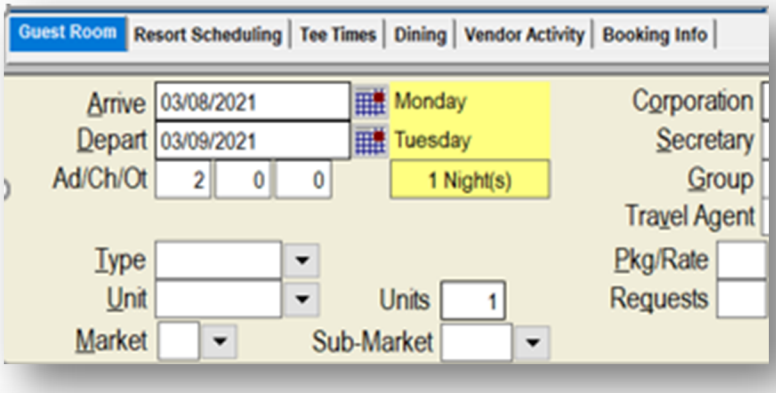
The Tabs of the Booking Center host the search screens for rooms and recreational activities.

To create a booking for a guest, you will need to start by clicking on the appropriate tab and conduct an availability search for each item the guest wishes to book.

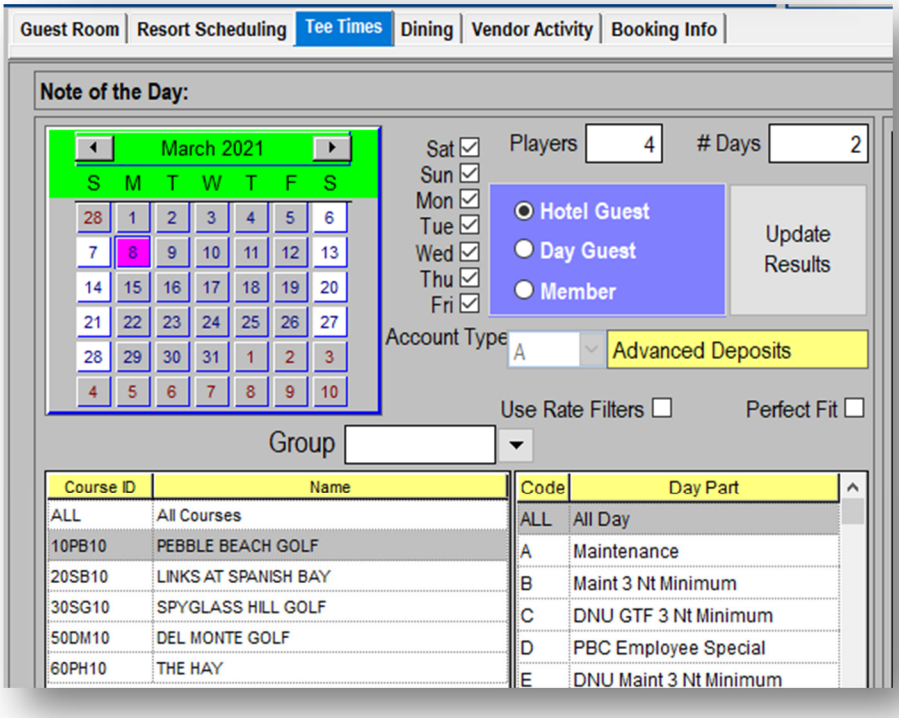
As a Reservations Agent, you will only utilize four of these tabs:



Guest Room Tab:
This is where you will search for available rooms at our three Resort Properties.

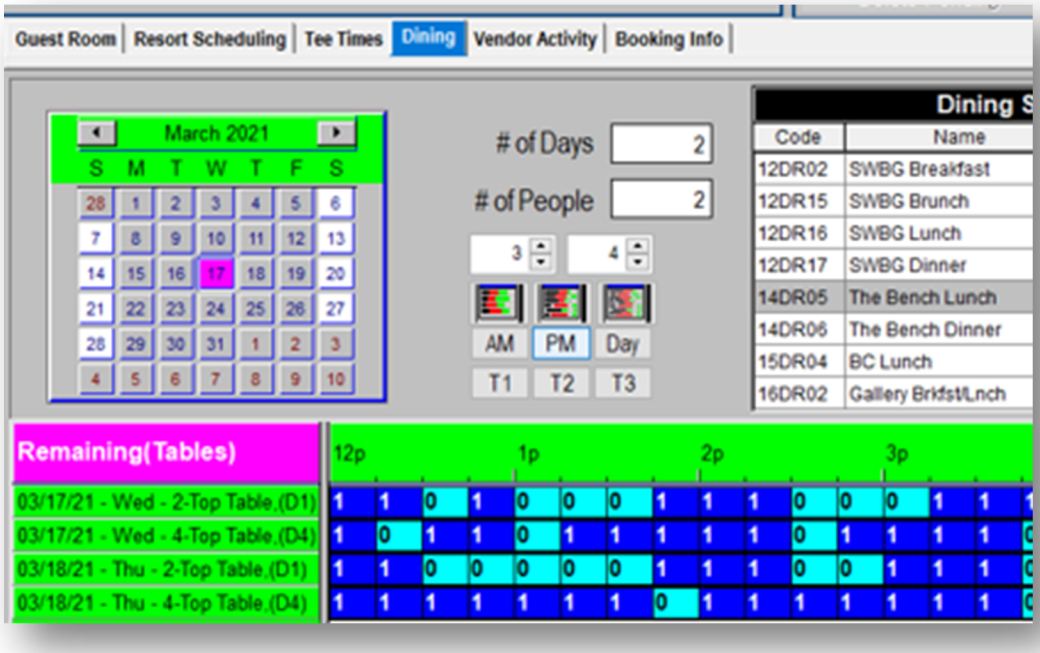


Tee Times Tab:
This is where you will search for available tee at our golf courses.



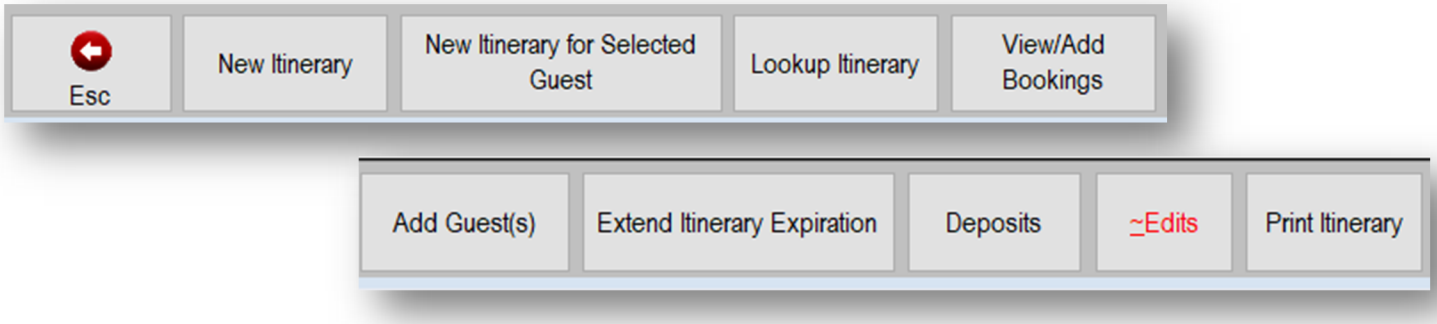
Dining Tab:

This is where you will book Restaurant reservations:



Button Bar

The Booking Center's **Button Bar** has several options for quick access to SMS functions.



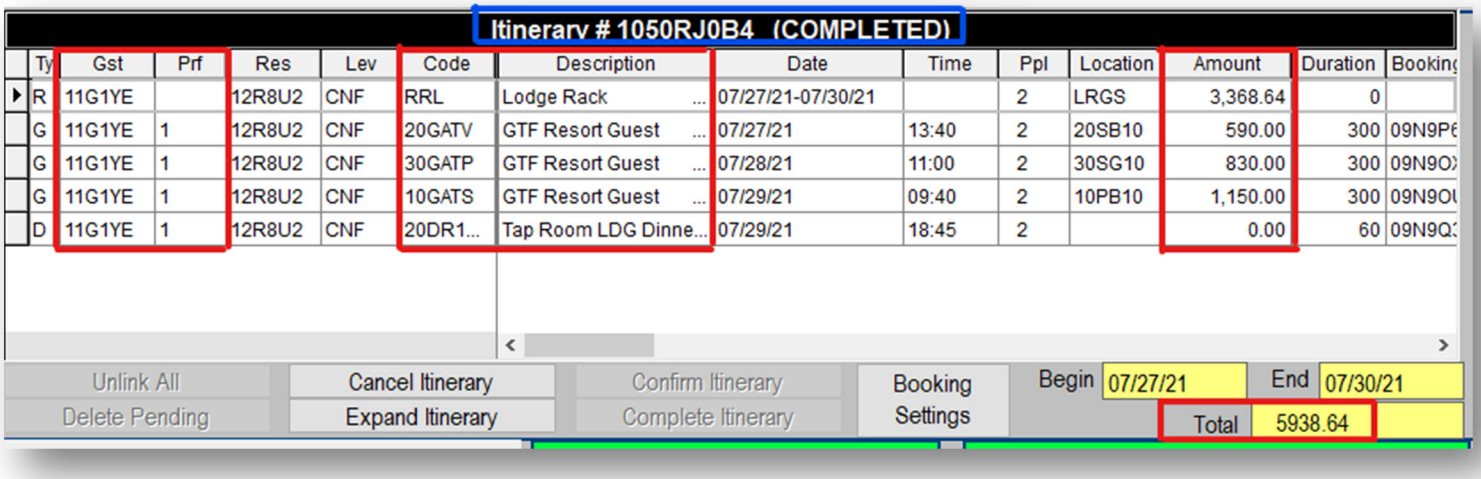
The most common buttons you will use throughout your day will be:

- **Escape** – To exit out of the Itinerary you are currently viewing
- **New Itinerary** – To open a new blank Itinerary to begin a booking
- **Lookup Itinerary** - To open the Itinerary search window to locate a booking
- **View/Add Bookings** – To add rooms and/or recreation to your current Itinerary that has previously been booked either on a different Itinerary or unattached to any Itinerary.

Button	Function
Escape	Exit the Booking Center. Any itineraries that have not been completed will be saved until the itinerary expires at which time all the bookings will be deleted.
New Itinerary	This will open a blank new Itinerary and reset all filters.
New Itinerary for Selected Guest	This will open a new blank Itinerary but will keep the same guest information as your current Itinerary.
Lookup Itinerary	Find an existing itinerary for any guest. This launches the Universal Lookup.
View / Add Bookings	This option will allow you to add bookings that are not associated with an itinerary or bookings that are associated with a different itinerary to the current itinerary.
Add Guest(s)	Add another guest to the current itinerary
Extend Itinerary Expiration	Add more time to any itineraries that have not yet been completed.
Deposits	Display or distribute advanced deposits. If any deposit has already been applied, the **Deposits** button will display in red.
Changes Log	View a running list of all changes that were made including the user, date and time and the specific change that was made
Print Itinerary	Print the currently selected itinerary

Itinerary Detail

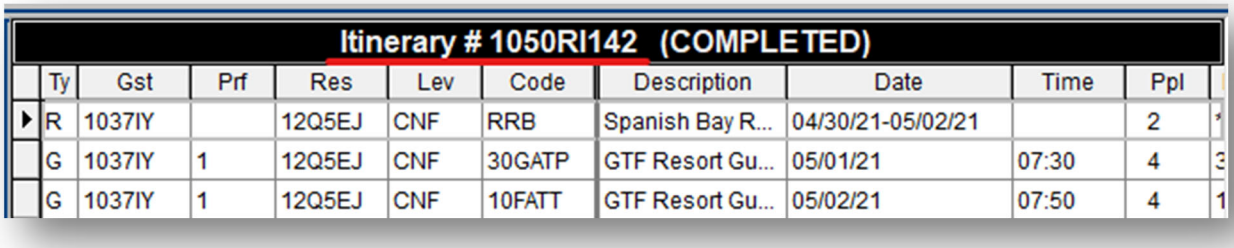
The information displayed in the **Itinerary Detail** area describes the booking line items of the itinerary.

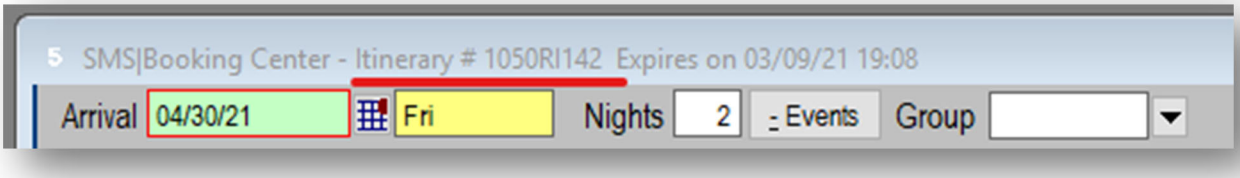


Itinerary Number

Every itinerary created in the Booking Center will be assigned a unique **Itinerary Number** that will be displayed at the top of the Itinerary Detail section of the Booking Center, as well as in the header of the overall Booking Center window.

The Itinerary Number can be used to locate an itinerary in the Universal Lookup. If a room reservation is linked to an itinerary, the Itinerary Number will be displayed on the Reservation Tile.

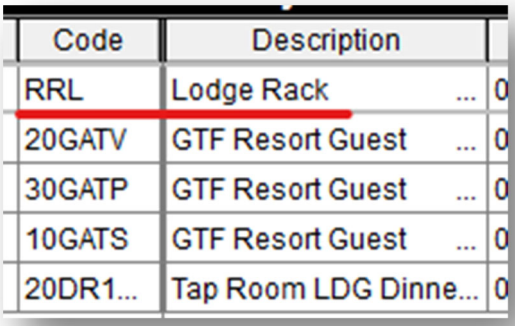




Code & Description

Everything that guests are able to book at Pebble Beach Resorts have special identifying codes assigned to them.

In the Itinerary Detail section, you will see these codes in a column adjacent to the Description column. It is not necessary to memorize codes, but it is important to recognize certain basic information.



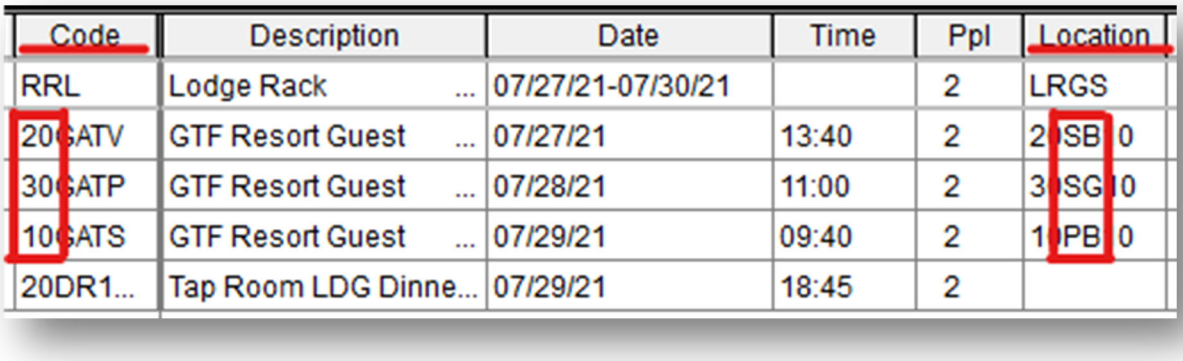
Code	Description	
RRL	Lodge Rack ...	0
20GATV	GTF Resort Guest ...	0
30GATP	GTF Resort Guest ...	0
10GATS	GTF Resort Guest ...	0
20DR1...	Tap Room LDG Dinne...	0

For example, **RRL** is the code for **Rack Rate Lodge**.

When reviewing your booking after a call, if you see something other than RRL in the Code column of your room booking, you have probably selected the wrong rate for that particular guest's room.

The Description Column of golf reservations will not state the name of the course. Instead, it states the type of rate that you have selected for that particular guest, such as GTF Resort Guest or GTF Outside Guest.

To understand which course has been booked on an Itinerary, you can look in either the **Code** or **Location** columns.



Code	Description	Date	Time	Ppl	Location
RRL	Lodge Rack ...	07/27/21-07/30/21		2	LRGS
20GATV	GTF Resort Guest ...	07/27/21	13:40	2	2 SB 0
30GATP	GTF Resort Guest ...	07/28/21	11:00	2	3 SG 0
10GATS	GTF Resort Guest ...	07/29/21	09:40	2	1 PB 0
20DR1...	Tap Room LDG Dinne...	07/29/21	18:45	2	

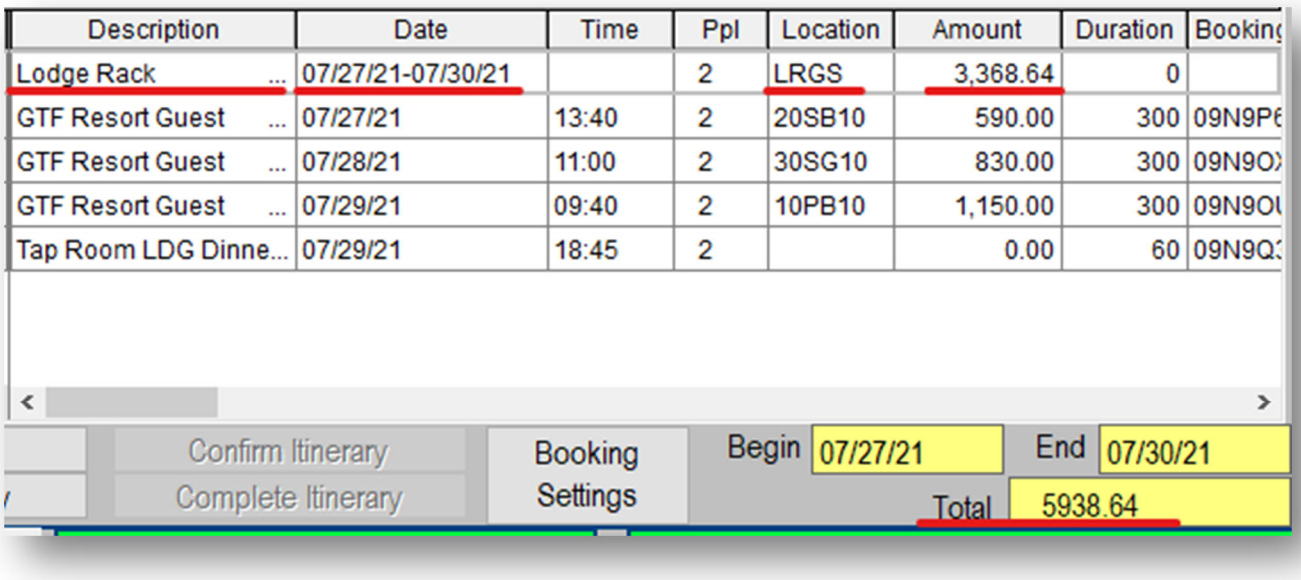
The number **20** is the code for The Links at Spanish Bay. In turn, **30** is the code for Spyglass Hill, and **10** is the code for Pebble Beach Golf Links

You do not need to memorize these numbers because the initials for each course are visible in the middle of the **Location** code: **SB, SG, and PB.**

Amount

The **Amount** column will display the rate that the guest is being charged for each item on the Itinerary.

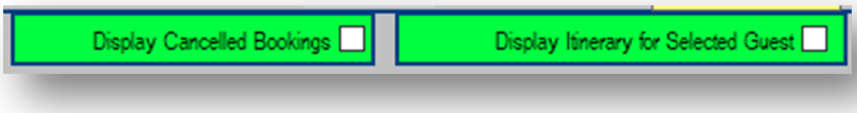
- For golf tee times, this number will be the total for all golfers combined.
- For rooms, it will be the total for all nights booked.
- Dining reservations will be listed as $0 because we do not yet know how much money the guest will spend.



Based on the above image, we can see:

- **Description** = A room was booked at rack rate
- **Date** = The guest is staying for 3 nights
- **Location** = The guest has booked a Garden View Room at The Lodge at Pebble Beach
- **Amount** = The total cost for all three nights is $3368.64
- **Total** = The Total cost of the trip = $5938.64

Display Filters



Filter	Function
Display Cancelled Bookings	Display or hide cancelled bookings within the displayed itinerary
Display Itinerary for Selected Guest	Display the itinerary for the guest selected in the Guest Selection / Information pane. This feature is used when there is more than one guest associated with the itinerary and you only wish to display their bookings.

Itinerary Status

There are 3 possible statuses of an itinerary:

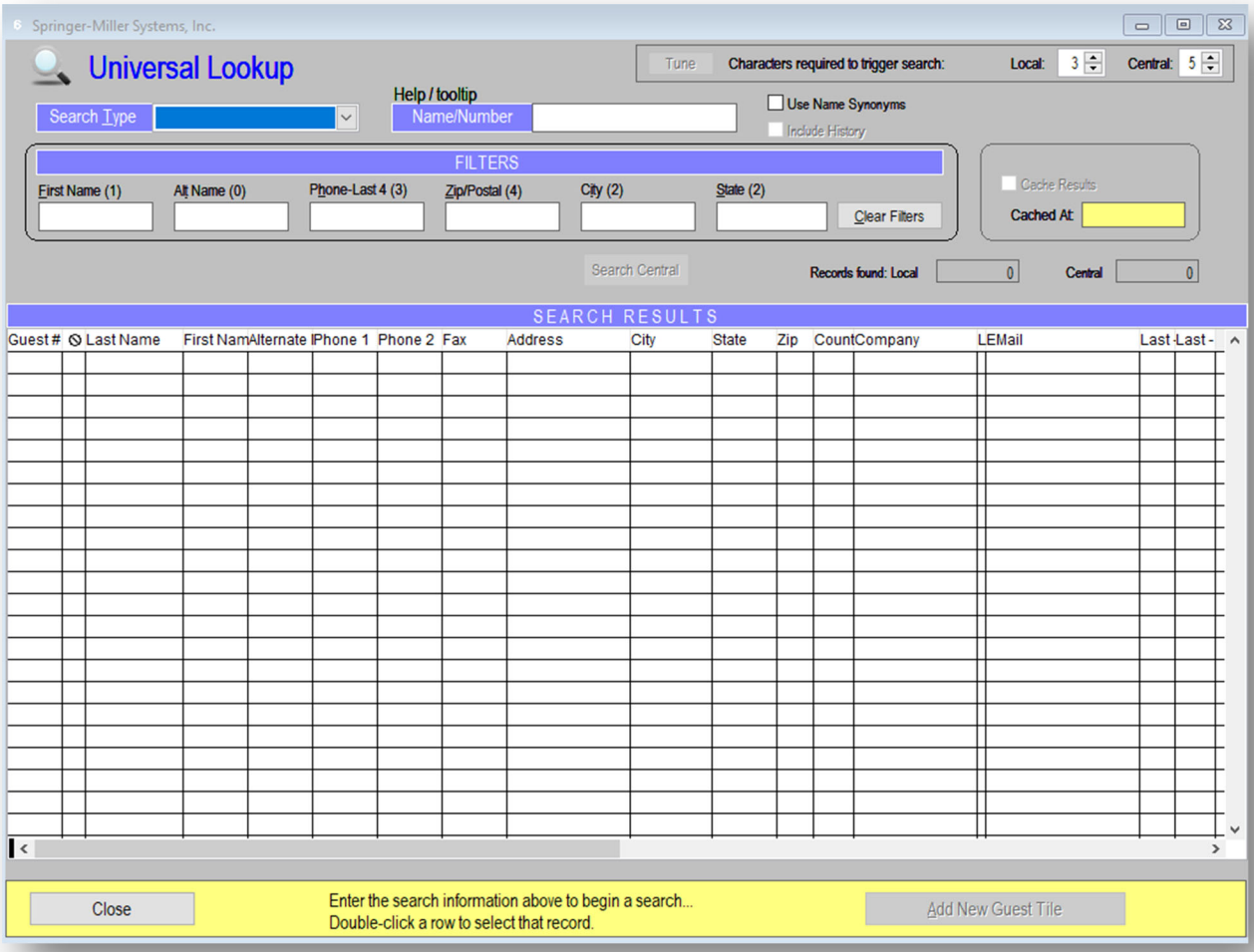
- Incomplete
- Completed
- Partially Completed.

Status	Description
Incomplete	Bookings are considered pending. When bookings are added to the itinerary, they are temporarily removed from inventory. However, if the bookings are not 'Completed' before the itinerary timer expires, the bookings will be returned to inventory. An 'Incomplete' itinerary has a blank status next to the itinerary number in the **Itinerary Detail.** Itinerary # 100009039
Completed	All bookings have been completed (none of the bookings are considered pending). At this time the bookings can no longer be lost (there is no time limit on the bookings). Once an itinerary is considered 'Completed', it can be confirmed and deposits can be applied. A 'Completed' itinerary states **Completed** next to the itinerary number in the **Itinerary Detail**. Itinerary # 10000903A (COMPLETED)
Partially Completed	This is an itinerary with both 'Complete' and 'Incomplete' bookings. The **Complete** button must be selected again otherwise the 'Incomplete' bookings will be lost. A 'Partially Completed' itinerary states **Partially Completed** next to the itinerary number in the **Itinerary Detail**. Itinerary # 100009049 (PARTIALLY COMPLETED)

Universal Lookup

Universal Lookup is the primary search tool within SMS.

Using Universal Lookup, you can search for existing itineraries, room reservations, golf reservations, spa appointments, dining reservations, city ledgers, guest tiles, and more!



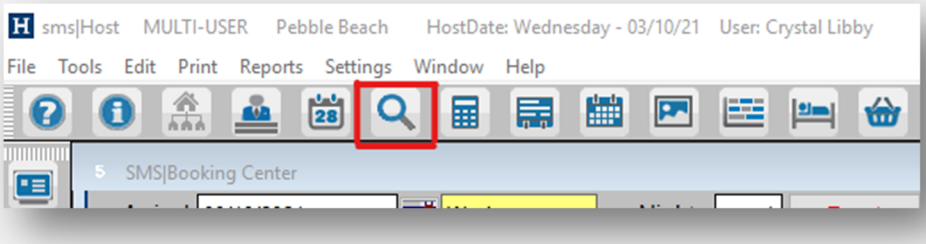
Accessing the Universal Lookup

There are several ways to access the **Universal Lookup** search screen:

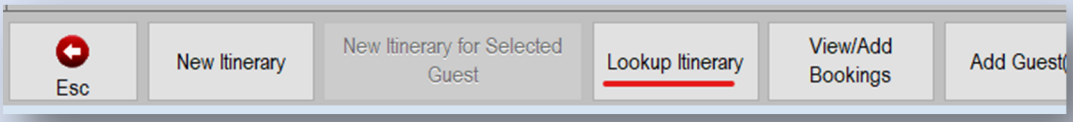
1. Press **F3** on your keyboard



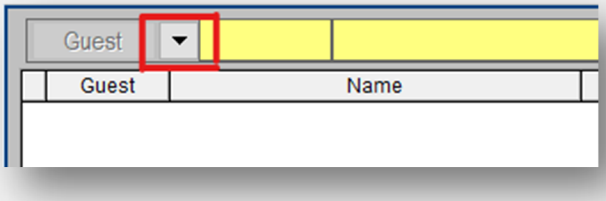
2. Click the **magnifying glass icon** from the toolbar at the top of the SMS window



3. Click the **Lookup Itinerary** button from the Booking Center's button bar.
This will default the **Search Type** field to **Itinerary Numbers**

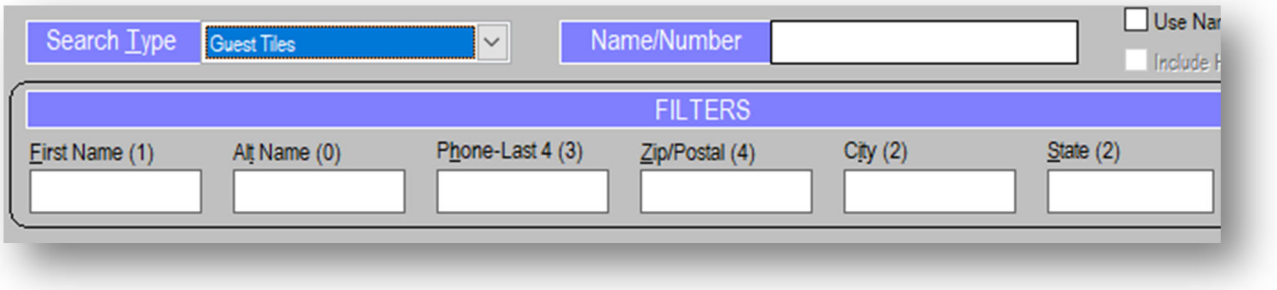


4. Click the **down arrow next to the Guest field** in the Booking Center
This will default the **Search Type** field to **Guest Tiles**.



Filters

The first area you want to focus upon in the Universal Lookup search screen is the **Filters** section.



Seaarch Types

If you click the down arrow to the right of the **Search Type** field, you will see a dropdown list with many options for possible searches.

The most common Search Types you will use are:

- Guest Tiles
- All Reservations (use this to look up room reservations by reservation number)
- Itineraries
- Gofl Tee Time Bookings
- Dining Bookings

In order to search using a reservation number, you need to make sure the search type is set to the correct type of reservation.

For example, if the Search Type is set on Itineraries and you type a Golf Reseravation Number, when you hit enter to search, your search will likely yield no results. You will need to set the Search Type to Golf Tee Time Bookings to find your reservation.

Name Search

If you are searching for a reservation by name, it is best practice to have the guest provide you with the exact spelling.

The First Name field will only search the name of the primary guest on a Guest Tile. If a primary guest's spouse is calling, you should type the spouse's name into the **Alt Name** field which will allow you to search the names of guests who have Profiles within a Guest Tile.

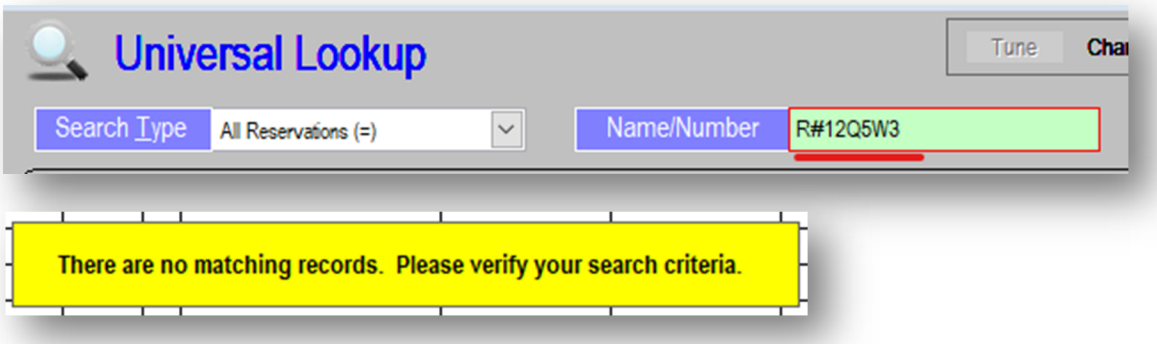
Number Search

If you are searching by an Itinerary number, Reservation number, City Ledger number, etc., **only include digits in the search field**; no letters or symbols.

For example, a Room Reservation Number will look like this on the Reservation Tile:



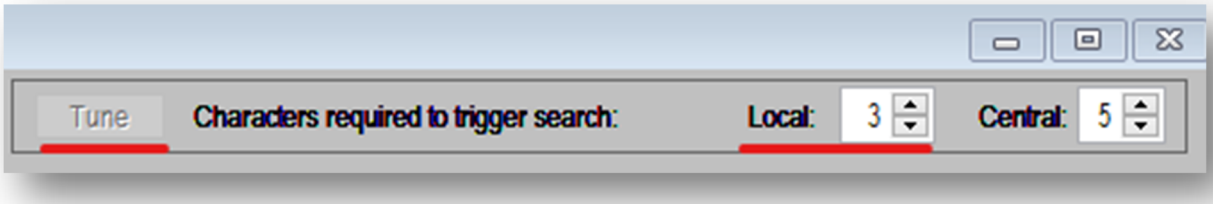
Tip: When you search for that room reservation number in Universal Lookup, you must omit the "R#" or your will end up with zero results:



Tuning

By default, Universal Lookup requires you to type at least three characters into the Name/Number field before it will begin searching for matching results. However, some guests have last names with only two letters. A common example of this is the name ***Li***.

In order to search for a guest with the last name "Li," we need to **tune** our search requirements to allow us to only type two letters into the Name/Number field.

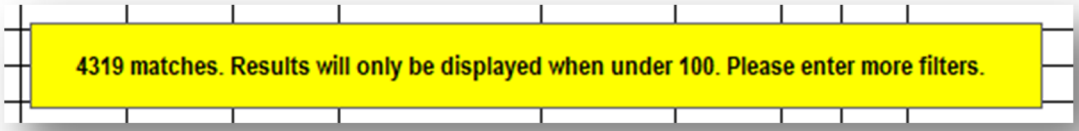


How to Tune Search Criteria:

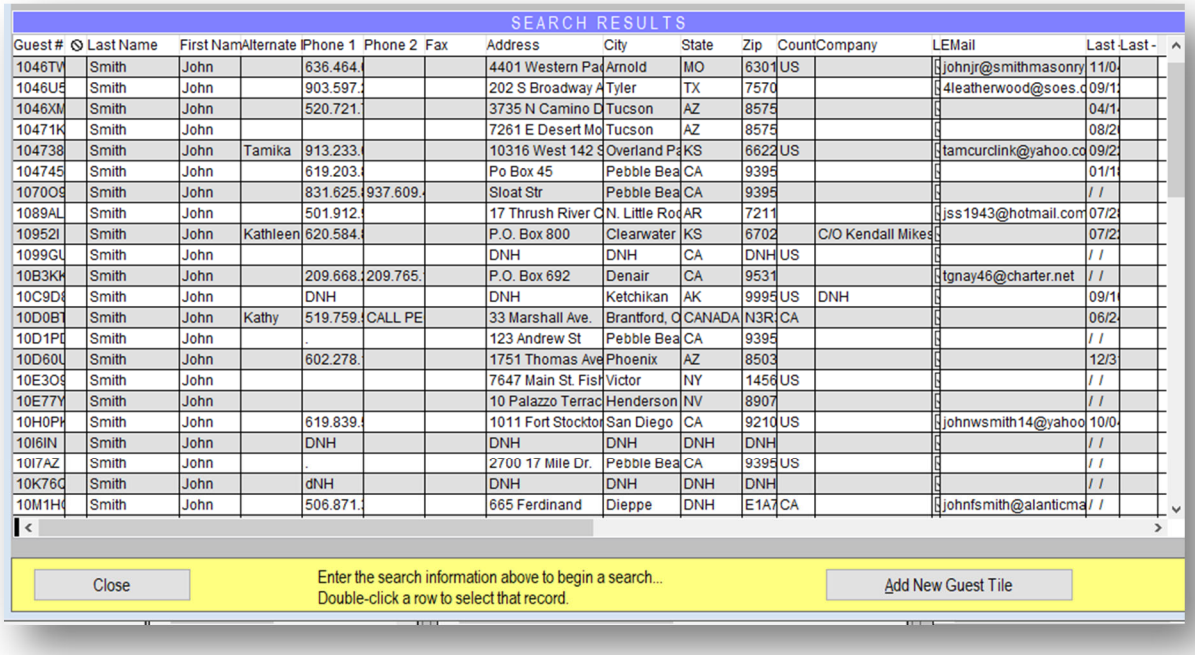
- In the top right corner of Universal Lookup, you will see the Tuning section.
- Click the down arrow to the right of the "Local" field until the 3 changes to a 2.
- Clear the name search field and re-enter it to refresh the search.
- Results for the two-letter name should now be available.

Best Searching Practices

When a common name, such as "Smith," is searched, results will be too high in number for Universal Lookup to display. You will receive the following message prompting you to enter more criteria into the search fields:



Once you have entered enough criteria to narrow your search down to 100 results or less, your options will populate.



To Narrow Search Results Quickly:

1. Ask who originally made the reservation
2. Ask if the guest has a confirmation number.
3. Verify the spelling of the guest's last name, then enter the only the first few letters of the first name in case an alternate spelling was used.
4. If the guest's name has common variations, such as Bill/William/Will, try searching by the alternative first name
5. Try inputting the first name into the Alt Name field in case the caller is not the primary name on the Guest Tile.
6. Search exclusively for the spouse's name in event that the agent who created their guest tile did not add both spouses to the Guest Tile.
7. Ask for information for additional fields such as their zip code or state

Work Slate

Don't teach this. This is only used if you need to look up a booking by date (with no name) or by phone number.

Notes & Traces

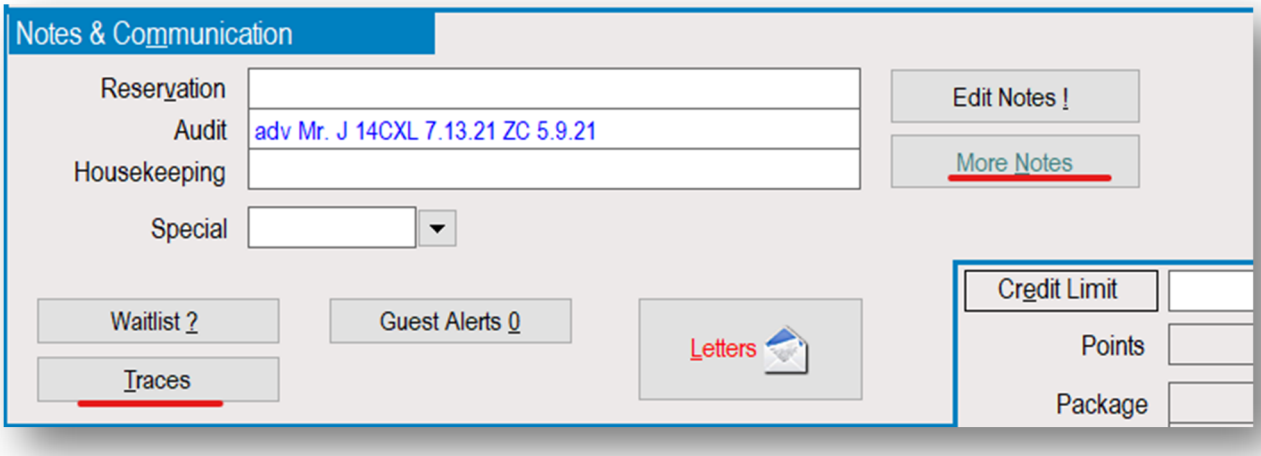
There are two primary ways that we communicate *internally* within SMS: **Notes and Traces.**

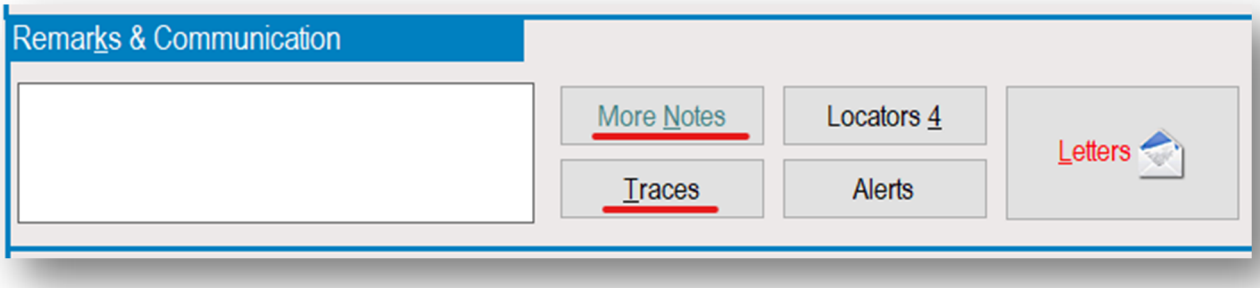
Notes:
Notes are for documentation of changes or conversations regarding a guest and their stay. All notes must be dated and initialed in the text box. *Continue a chain of entries on one note when there is a similar topic of documentation, keeping the most recent at the top of the text box.* Please begin a new note when applicable (i.e. different stay).

Traces:
Traces require a date and time. The action in the text must be specific and have your initials and date. Close all *relevant* traces when cancelling a reservation. *Move the trace dates on all applicable traces when changing dates.*

You can view Notes and Traces on many pages within SMS, such as:

- Reservation Tiles
- Guest Tiles
- City Ledgers
- Membership Accounts





Notes

R – Reservations

- Any change in date / # of nights / room category / # of players / # of people in room / rate conversions.
- Noting a surprise for the guest; indicate when they will be informed and what is the safest way to contact if needed.

D – Upgrade/Rate Variation Approval

- If upgrade or negotiated rate was approved to close the sale, indicate specifics and who approved it. Add to all mini-grouped rooms.

A – Accounting

- Any time the CC charged does not belong to the guest - note the 3rd party/TAG's name, phone number, and billing address.

K – Front Desk

- Advisement of a difficult or high maintenance guest; keep comments brief and use discretion.
- Decline to prepay all additional nights/recreation outside of our packages, 3rd & 4th adults, or pet fees

Y – Rooming List

- Advanced Rooming List/Share-with list. Can have bedding requests/special occasions when rooms are a multi-room block.

Traces

ADM – Adv. Deposit/Modify/CXL/Transfer

- Refund/Forfeit inside 14 days. Transfer of $$ from one folio/C/L account to another (clearly explain why) [Next Day]
- Transfer from C/L account to a folio [2 Weeks Prior to Arrival]

FDB – Front Desk Billing

- Prepayments: Including balance specifics (Refer to "FDB Billing Scenarios" [Arrival Date]
- Back to back Stay and Play Packages - Transfer 2nd PB/SG/SB to P folio [Departure Date]
- Advisement of balance ("credit") above deposit; indicate how much and if it is refundable or not. [Arrival Date]

LFD / SFD / CFD – Front Desk

- Request late check-out and advisement of fee after 2 pm [Departure Date]
- Room or hotel move with in the same stay [Departure/C Date]
- Specific room requests. Hard blocked rooms: families w/ small children & 2 bdm suites (Mark as "N" - Not Moveable). [3 Days Prior to Arrival]

LRS / SRS – Room Service

- Special Occasion – Include the *full name of the guest(s) being honored* and the occasion that is being celebrated – include the milestone year if possible [Arrival Date/ Day of Occasion]
  Comp Options *[DO NOT DISCLOSE TO THE GUEST]: House champ/chardonnay/cabernet/sauvignon blanc/pinot noir/sparkling cider; beers; assortment of cookies & milk (chocolate chip only if guest has allergies); chocolate strawberries; fruit & cheese plate; snack attack basket.*
- Remove alcohol and tobacco from room if minors occupying a second room [Arrival Date]
- Indication of Dog in room and amenities [Arrival Date] [Add "000PET" to SpBilling at the Lodge only]

LHK / SHK - Housekeeping

- Indication of Dog in room or Rollaway/Crib request (one per room) or children amenities (age 0-4 years) [Arrival Date]
- Add/move objects in hotel room (ex. microwave, furniture removal, etc.). Note any additional charge. [Arrival Date]

TAG – Travel Agent Application

- Indicate who was sent a commission application via Sertifi. [Arrival Day]

RBT – Reservations Billing Trace

- When a Reservation's deposit is due and who allowed the hold [Hold Date] Add any extension note at the top.

SPA – Spa Front Desk

- Pre-payment/charge-back note or billing instructions [Service Date]

Dining



Pebble Beach has some of the finest restaurants on the Peninsula.

Because of our expansive ocean views and gourmet cuisine, our restaurants can book up for reservations months in advance.

This is why it is important that all Reservations Agents are able to book dining for our guests.

When Reservations Cannot Book Dining

Before we get into how to book dining reservations, let's take a look at the situations in which you will NOT be able to book dining for guests:

- **Same Day Reservations**
  - The restaurants do not use the same booking system as the Reservation Center; therefore, they cannot see instant updates when we book guests for restaurants through SMS.
  - For this reason, all same day bookings must be handled by the restaurant Host Stands or by the specialized Dining Reservations Team.

- **Large Group Reservation**
  - Any party with 8 or more guests is considered a Large Group.
  - These parties need to be booked by the Host Stand via phone or, if the Host Stand is unavailable, you should send the guest's information to the Dining Team Via Email.

Dining Special Requests

It is common for guests to ask for special accommodations:

- *Can I sit by a window*
- *Can we get a table outside by the bagpiper?*
- *Can you make sure we get a good view?*

It is important to let guests know that, while we can document their requests on the reservation, we cannot guarantee any particular seating request.

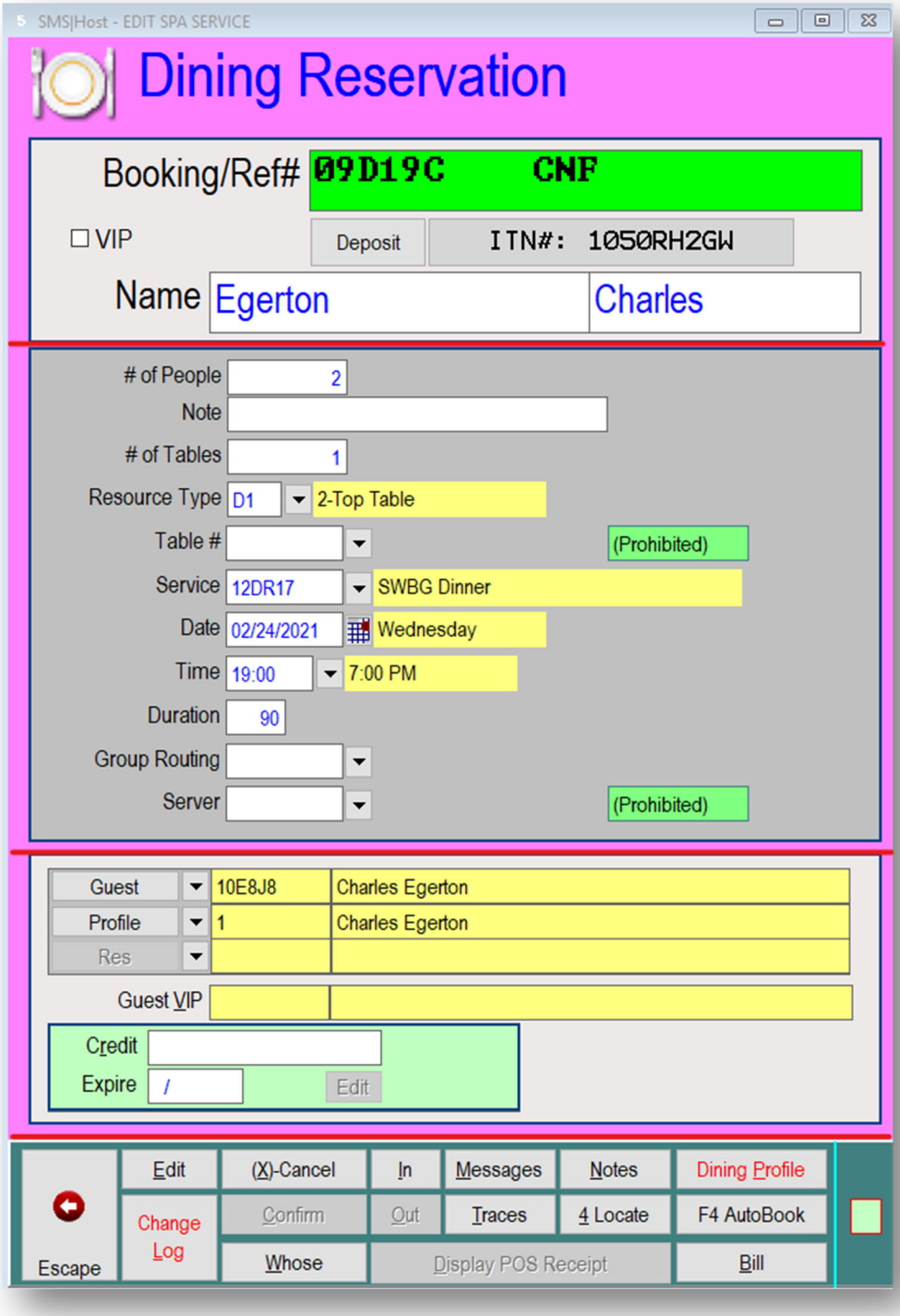
Pets at Restaurants

- Dogs are only allowed at outside dining tables, unless they are service animals. In that case, they can come into the dining room, but are not allowed on the furniture.
- If a guest tells you they will be bringing their dog, make sure you notate this on the booking, so the Host Stand knows to try to get them an outside table.

Dining Tile Walkthrough

A **Dining Reservation Tile** holds all information about a guest's Dining Reservation at our Pebble Beach Resorts Restaurants.

As you can see, the **Dining Tile** is broken up into four key boxes:



- Guest information
  Contains the guest's name, Itinerary Number, and Restaurant Booking Number which you can search in Universal Lookup under the Search Type "Dining Bookings"
- Restaurant Information
  Contains the number of guests, number of tables reserved, size of the table, restaurant name, date, time, approximate window of time for their dining experience.
- Payment Information
  Contains a link to the Guest Tile and Profile of the person who booked the reservation and a credit card field.
- Button Bar
  Buttons that allow you to edit and cancel the reservation, as well as buttons solely used by the restaurant staff.

Same Day Dining Reservations

The Reservations Team can book restaurant reservations for anyone as long as the date they want to dine is at least one day out. If a caller wants to book a restaurant reservation for today, you must transfer that guest directly to the restaurant's host stand, or, if unavailable, the Dining Team.

The **Dining Team** is a group of agents who solely book restaurant reservations. They have the ability to see the current day's schedule and are available in the morning before the restaurants open, as well as throughout the day for overflow calls to the **Host Stands**.

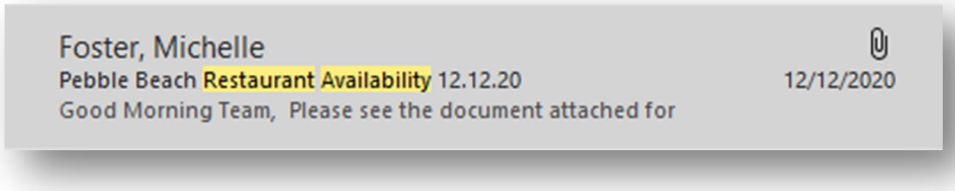


Each morning, the Dining Team will send an email to the Reservations Team to let us know the current status of each restaurant's schedule.

The purpose of this email is to let the Reservations Team know when the schedule is fully booked. This helps us to avoid transferring guests to the Host Stand or dining team unnecessarily

Each restaurant's availability changes throughout the day, so you may receive multiple updates from the Dining Team as the day continues.

The **Dining Team's Update** email will look like this:



The **Daily Availability Chart** will be attached in a Word Document:

Restaurant	Breakfast	Lunch	Dinner
Roy's	Open Availability	Open Availability	Fully Committed
STICKS	Closed	Closed	Closed
Peppoli	N/A	N/A	Fully Committed
The Bench	N/A	Limited Availability	Fully Committed
SWBG/Terrace Lounge Patio	Open Availability	Open Availability	Limited Availability
Taproom Patio @ FWY 1	N/A	Open Availability	Fully Committed
The Gallery Cafe	Accepting Walk-Ins	Accepting Walk-Ins	N/A

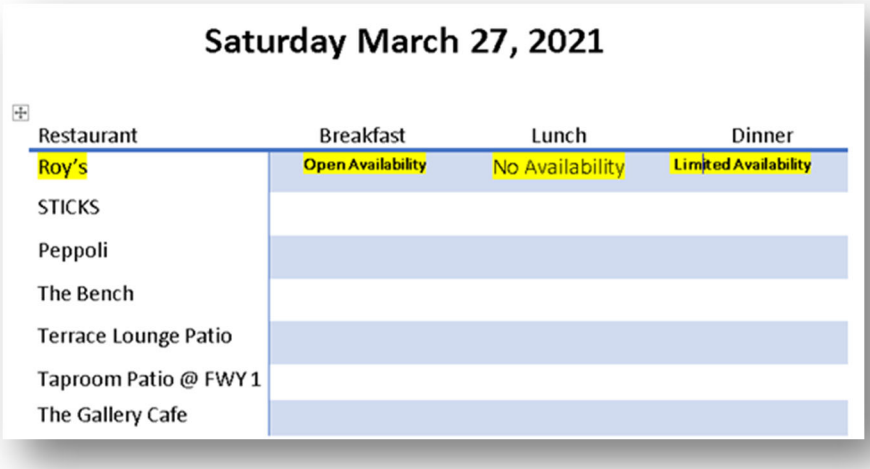
Below this Availability Chart will be a **KEY** to help you understand the chart's meaning:

Open Availability	Please forward to hostess first, if no answer forward to Restaurant Reservations team
Limited Availability	Please forward to hostess first, if no answer forward to Restaurant Reservations team
Fully Committed	All Reservations are booked, Restaurant will be taking walk-ins based on availability
No Availability	All Reservations are booked, Restaurant will not be accepting walk-ins

Before you begin your day answering calls, you should read this update and make note of any restaurants with timeframes that say **No Availability** or **Fully Committed**.

These are the only two situations for which you will not be transferring the guest to the Host Stand or Dining Team.

A **Second Update** from the dining team may look like this:



Saturday March 27, 2021

Restaurant	Breakfast	Lunch	Dinner
Roy's	Open Availability	No Availability	Limited Availability
STICKS			
Peppoli			
The Bench			
Terrace Lounge Patio			
Taproom Patio @ FWY 1			
The Gallery Cafe			

This email is letting us know that the availability for Roy's has been updated since the initial Dining Team Update email from that morning.

To Transfer to the Host Stand:
Use your Desk Phone to transfer to the extension of the specific restaurant the guest wants to book.

To transfer to the Dining Team:
Use the NAVIS Transfer to Skill button to place that guest into the Dining Skill queue.

Large Group Reservations

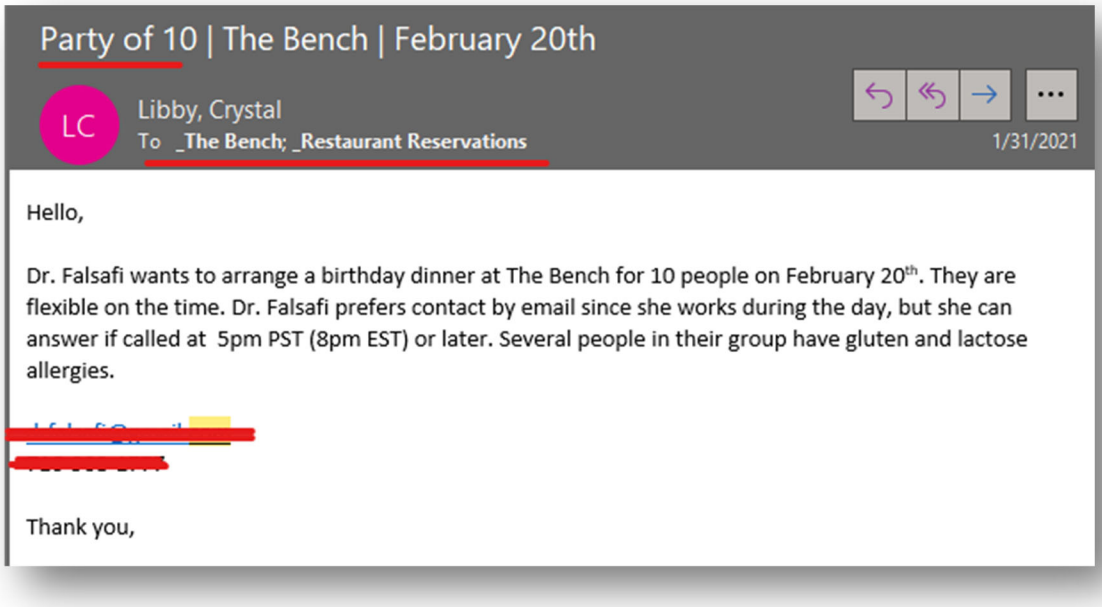
A **Large Group Dining Reservation** is any party with over 8 guests.

These parties need to be booked by the Host Stand via phone or, if the Host Stand is unavailable, you should send the guest's information to the Dining Team Via Email.

The Dining Team and Restaurant Managers will create a contract for these large groups as a guarantee since we are allocating extra space to their party. This may include a deposit, or a cancellation fee should they fail to show up.

How to Email the Dining Team:

- Gather the guest's contact name, phone number, and email address
- Gather details about the occasion and which restaurant they want to book
- Send an email to the Dining Team at restaurantreservations@pebblebeach.com.



Search for Dining Availability

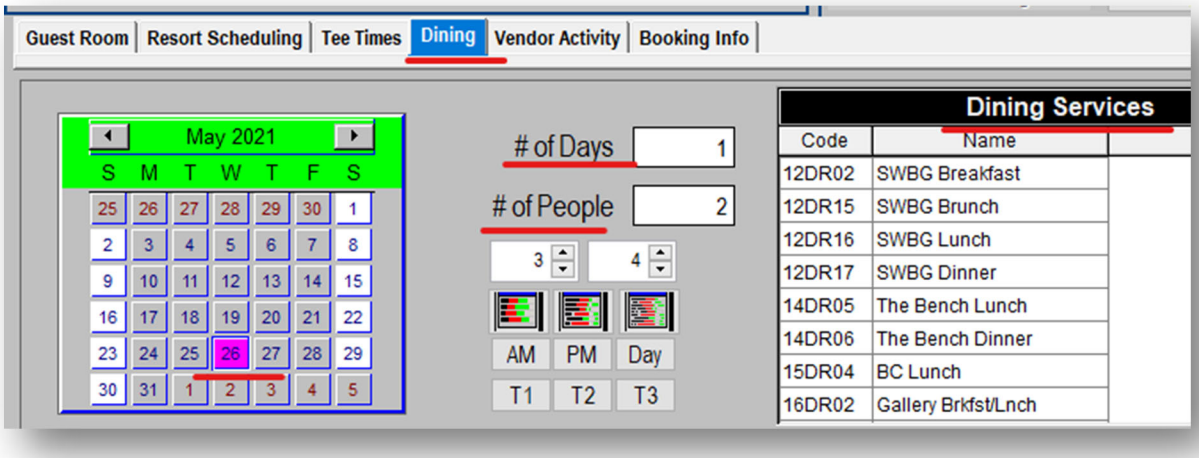


To search for restaurant availability, select the **Dining** tab in the Booking Center.



Once you are in this tab, there are several fields you will need to update:

Calendar	Select the date the guest wishes to dine
# of Days	Set this field to 1 since we only want to search one day at a time
# of People	Set this field to the number of guests who will be dining
Dining Service	Select the Restaurant AND the time of day the guest wishes to dine, i.e. Breakfast, Lunch, or Dinner.



Important Note - Despite these Dining Service options being visible in SMS, we do NOT book:

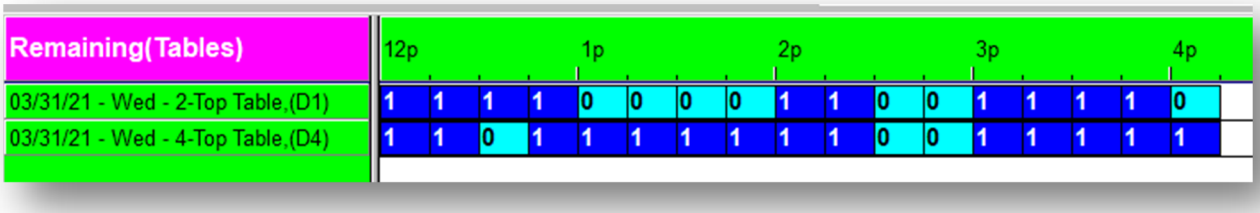
- Beach Club Lunch/Dinner
- Peppoli Lunch
- Teddy Bear Tea

As soon as you select the Dining Service, your search results will populate into the **Availability Grid** below the search fields.

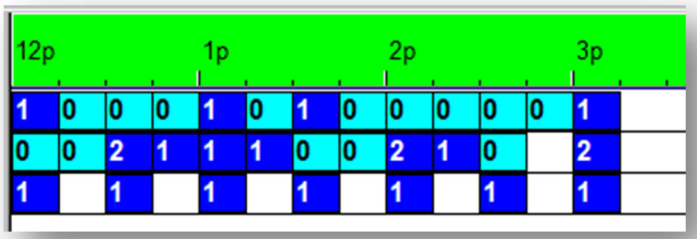
The Availability Grid

The Availability Grid is the chart that shows what restaurant reservations are available based on your search criteria. The time slots you see on the Availability Grid are referred to as "**waves**."

Waves are generally entered into SMS one year out for dining, meaning that you can book restaurant reservations up to approximately one year in advance. If you try to search for waves beyond one year out, you may end up with a blank Availability Chart that shows no open time slots.



The dark blue boxes with numbers indicate how many tables are available to be booked at that time that meet your selected criteria.

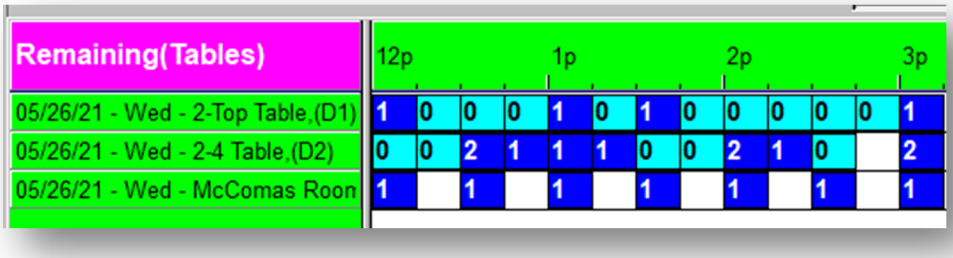


The light blue boxes indicate that no additional reservations are being accepted for that time. SMS will allow you to select the time slots with zero availability, but it is crucial that you do not do this. Only the restaurant Host Stand is authorized to overbook restaurant reservations.

The white spaces are blocked out and are unavailable to book. Roy's and The Bench have white space between their Lunch and Dinner hours to prep for dinner service.

The column on the left of the Availability Grid lists the Table Types that can accommodate the number of guests you entered into the search field.

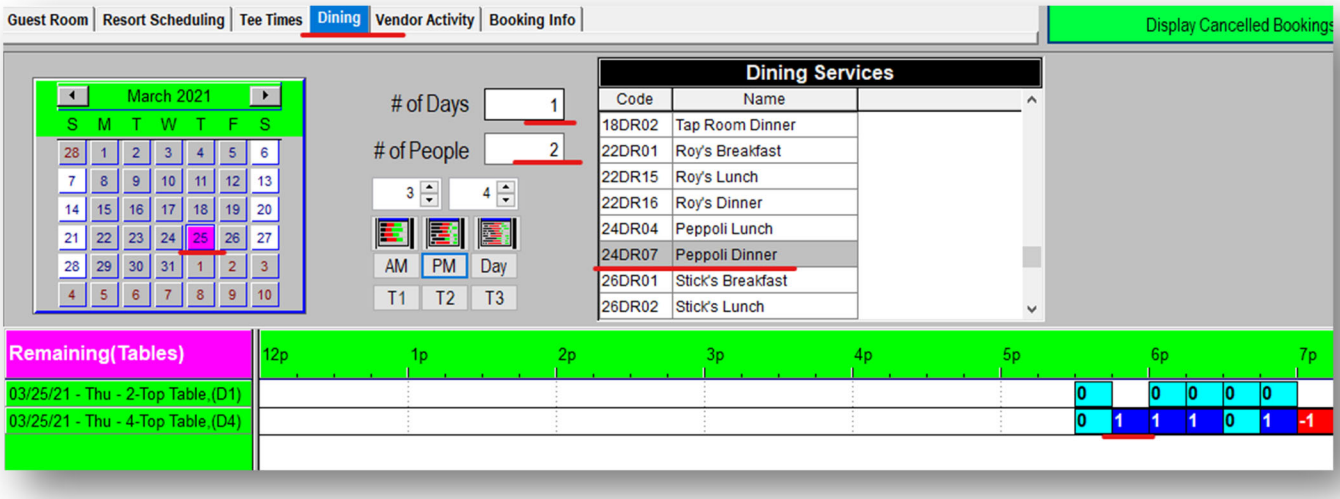
- 2-Top means that table can host up to 2 guests
- 2-4 Top means that table can be booked for any party between 2-4 guests
- The McComas Room is a private dining room meant for large parties. Only the Host Stand can seat guests in the private dining room. As a Reservations Agent, you will only book guests into tables in the main dining room tables with a maximum of 8 diners.



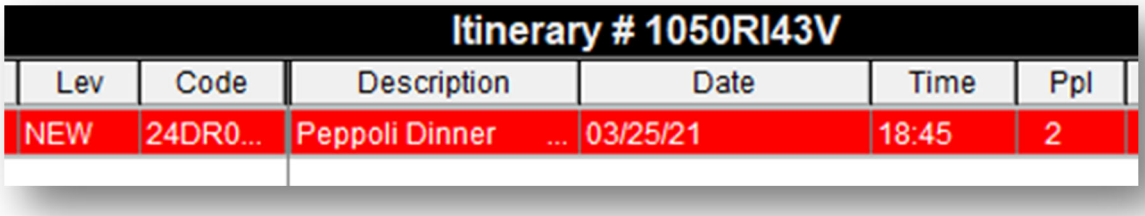
Complete a Dining Reservation

- Begin your conversation with the Guest and gather as much information as possible about what they would like to book.
  - Thank you for calling Pebble Beach Resort Reservations.
  - May I have your first and last name, please?
  - Is this your first time with us?
  - Celebrating any special occasions?
  - Which restaurant / How many people / Ideal time to dine

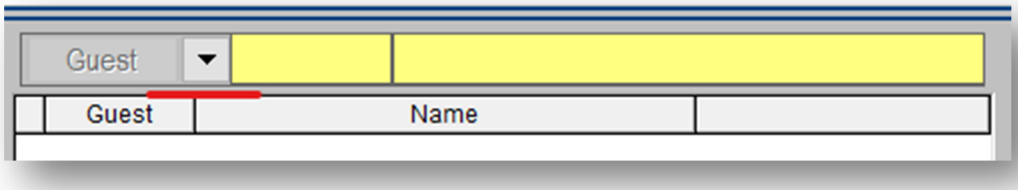
- Search for Dining Availability in the Dining Tab of the Booking Center
  - Re-iterate the date, time, restaurant, and number of people to the guest to avoid booking mistakes.



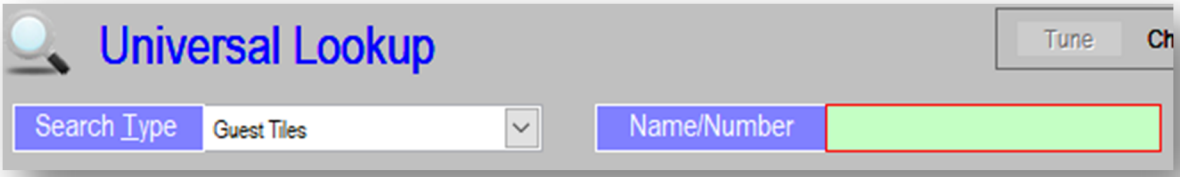
- Once you have found your time slot, double click on the blue box to add this reservation to your Itinerary Detail.
  - Your booking will appear in red because it is not yet complete
  - You will see an Itinerary Number generate at the time of the Itinerary Detail.



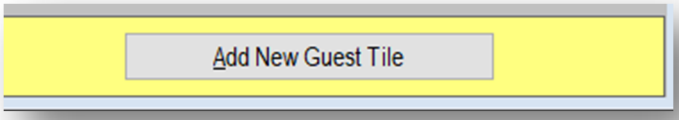
- Click the Down Arrow next to the Guest section of your Booking Center to open Universal Lookup.



- Use the Universal Lookup tool to search for an existing Guest Tile for your guest



If no Guest Tile exists, click the Add New Guest Tile Button at the bottom of the Universal Lookup window to create one.



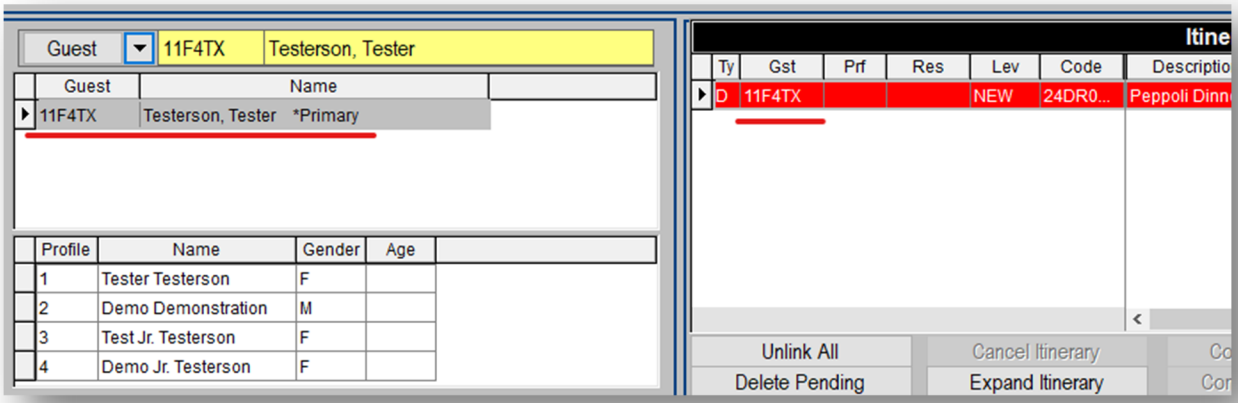
- When creating a Guest Tile for a dining reservation, you do not need to ask for the guest's full address. However, the City/State/Zip are still required to save the Guest Tile. It is best to find out this information conversationally by asking "*Where are you visiting us from?*"

  Required fields for Dining Guest Tile:
  - First and Last Name
  - Title
  - City/State/Zip
  - Phone Number
  - Email Address

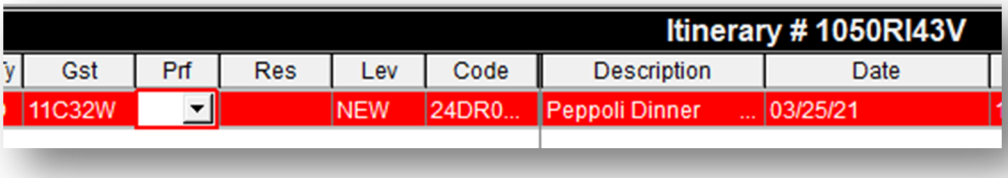
- All calls are recorded, and all Booked Calls require a pause in that recording during which the Reservation Agent can collect credit card information. We do not need to collect a credit card for Dining Bookings, but we still need to pause the recording so NAVIS does not automatically delete the call. Quickly pause and un-pause the recording by clicking the Payment button in NAVIS, then proceed with your call as normal.

- Now that you have saved your Guest Tile, you can click escape to get back to the Booking Center. You can see at this point that your new Guest Tile has automatically been attached to this Itinerary in the Guest Section.

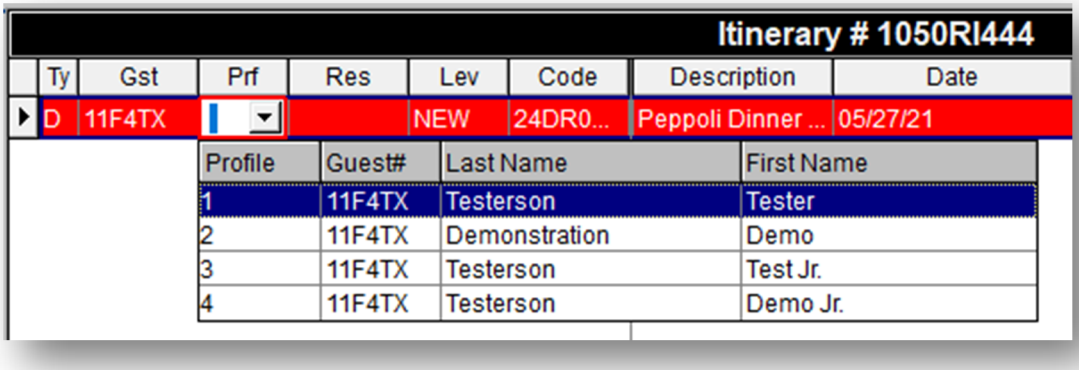
You will also see that your Guest Tile's Guest ID Number has populated on the Restaurant Reservation.



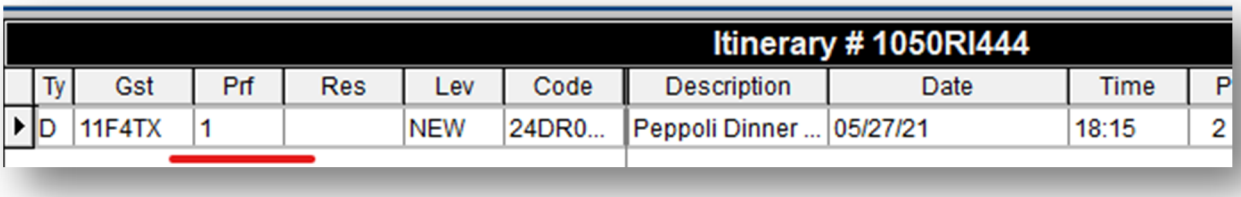
- You now need to assign the appropriate Profile from your Guest Tile to this Dining Reservation. Click into the red box under the Prf section of your Dining Reservation.



This will open a drop-down list of all Profiles in your Guest Tile. Select a Profile to associate to this restaurant booking.

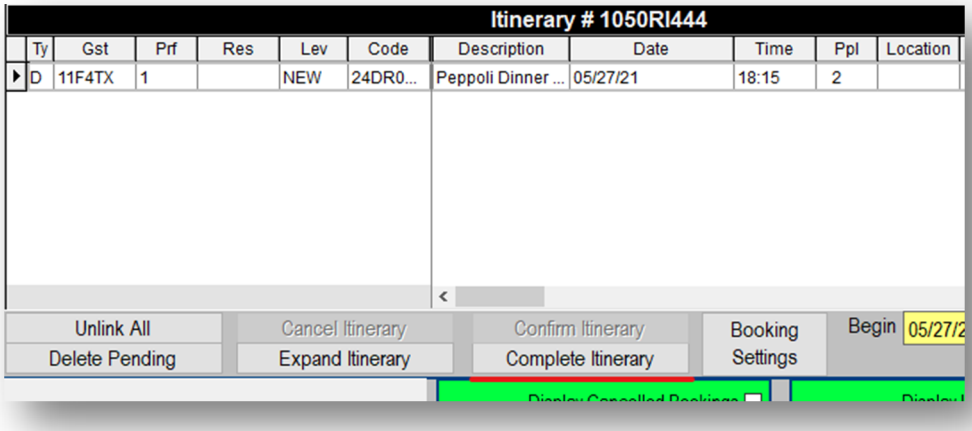


- Select the appropriate Profile. You will see the Profile number from the first column of the dropdown menu populate into the Prf field.

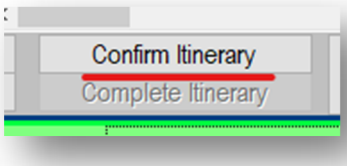


- You can also now see that your red Restaurant Reservation line item has now turned white.

Additionally, the Complete Itinerary button is now enabled for you to click.
Click this button.



- Now that you have Completed the Itinerary, the Confirm Itinerary button will become enabled. Click Confirm.



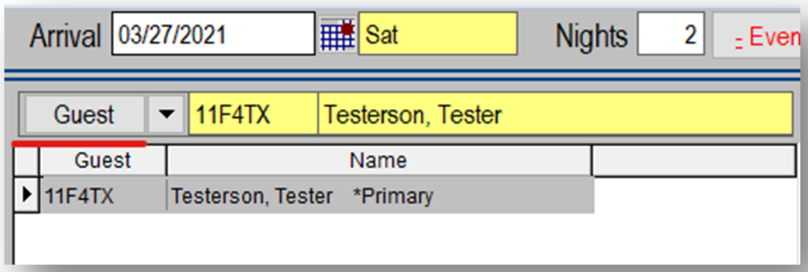
- You just completed Your Booking!

At this point, you can reconfirm the day, date, time, restaurant, and number of guests with your caller, then end your call.

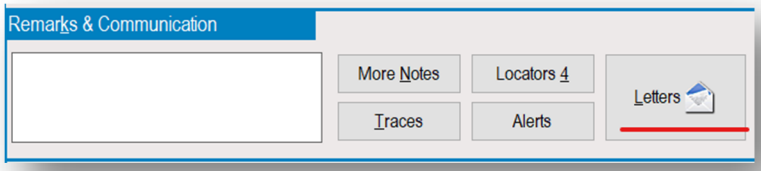
Move onto the next steps to **Clean Up** your reservation!

Clean Up a Dining Reservation

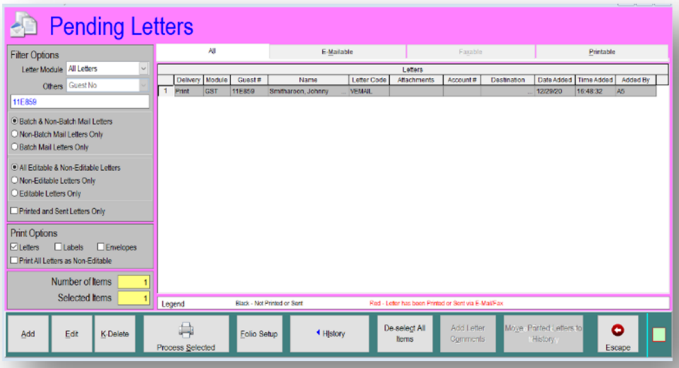
- Open the Guest Tile of your booking by clicking the now enabled Guest Button in your Booking Center.



- Click the Letters button to open the Confirmation Email tool



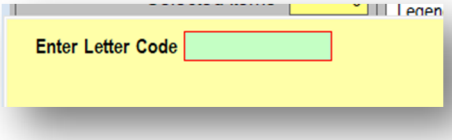
- This will open the Pending Letters window



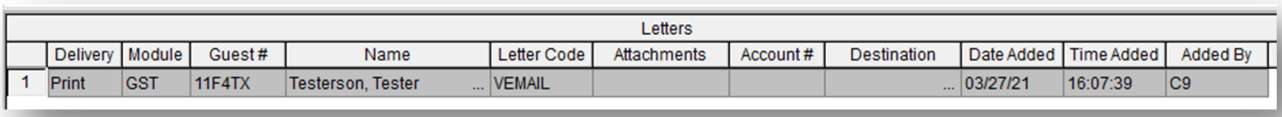
Click the Add button or press your A key on your keyboard to start a new confirmation email.



- Type VEMAIL into the Letter Code field to send a Recreation Confirmation Email.



- A line item will appear in the Letters section with the details of the confirmation email you sent.



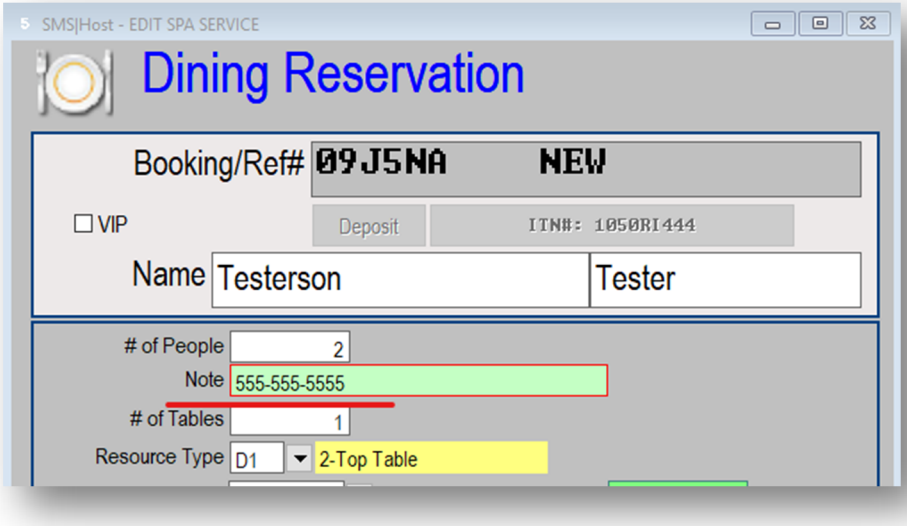
Letters

	Delivery	Module	Guest #	Name	Letter Code	Attachments	Account #	Destination	Date Added	Time Added	Added By
1	Print	GST	11F4TX	Testerson, Tester ...	VEMAIL			...	03/27/21	16:07:39	C9

- Exit the Letters window and exit the Guest Tile, copy the phone guest's cell phone number, and exit the Guest Tile to return to the Booking Center.

- Double click anywhere on your Restaurant Reservation line item in the Itinerary Detail to open the Dining Reservation Tile.

- Paste the guest's cell phone number into the Baby Note section of the Dining Reservation
  This will help the Restaurant Staff send out text notifications to the guest about this booking on the date of this reservation.



This Baby Notes field is also where you will enter:

- Any special requests such as "*requests outside seat*"
- Special Occasion notes such as "*Happy B-Day, Johnny!*" so the restaurant staff know to acknowledge the special occasion when the guest arrives.

  Tip: If you enter a special occasion, omit the phone number and use proper spelling because any notes in this field will appear in the text sent to guests about their reservation.

- If you have added a restaurant reservation to an existing booking AND the number of dining guests is different than the number of golfers or hotel guests, leave an R Note in the Guest Tile explaining that this was intentional.
  Otherwise, the Auditors may think that you chose the wrong number of guests for your dining booking by mistake.

Smart-Booking Dining



Smart-Booking is the very reason you are here as a Reservations Agent. There are certain things that must be considered when it comes to booking our guests that cannot be done by an automated system.

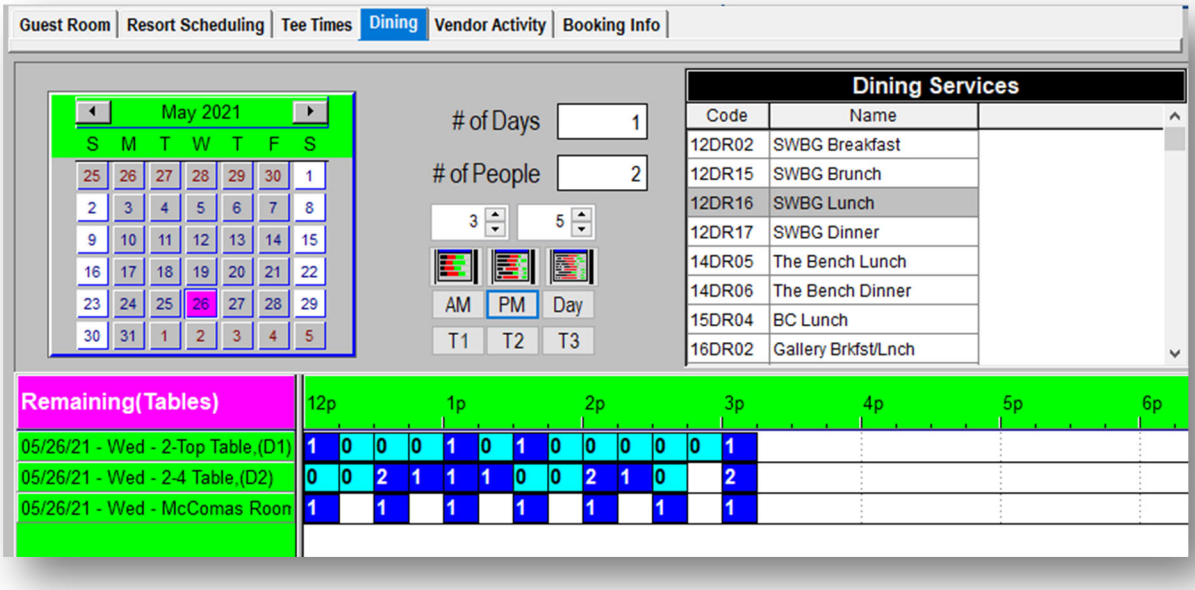
When planning a vacation for a guest, or even just planning a single night out, you are responsible for coordinating the logistics of each trip in a way that will work best for the both guests and best the Pebble Beach Company.

Smart-Booking Table Size

You should always try to book your guests into the smallest table that will fit their number of guests.

For example, in the image below, you can see search results for:

1. A Table for 2 people
2. On March 26th
3. At the Stillwater Bar and Grill for Lunch



To **Smart-Book** this reservation, you should quote the availability of only the 2-Top Tables. By booking your table of 2 into the smaller table, you are leaving the 2-4 Top tables open for potential parties of 4.

Smart-Booking Time

SMS allots a specific amount of time for every dining reservation which varies depending on the number of guests in that reservation, typically ranging between 60-120 minutes. A Table for 4, for example, will be allotted 90 minutes.

Since SMS has these timeframes programmed into the Booking Center, if you book a table for 4 at 11am, then try to book a tee time at 12pm, you will receive a red error message on your booking that prevents you from completing the reservation until this timing discrepancy is resolved.

The red error message will read "Unknown Error Code" While this is a vague message, this timing conflict is the only time you will see this message appear.

Smart-Booking Location

While it is useful that SMS points out when certain recreation is booked too closely together, it is important that you do not solely rely on the red error message to find out when you have arranged a schedule that will not work.

A big factor in planning appropriate timing is **location**. Use your knowledge of the Resort to create the most fluid itineraries for guests who have never been here before.

Example #1

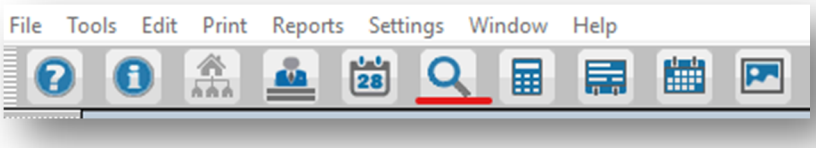
A guest wants to book dinner at 6pm, but you see that they have a Pebble Beach Tee Time at 2pm. Based on your Resort Knowledge, you know that a round at Pebble Beach takes approximately 4 ½ to 5 hours to complete, therefore they are very unlikely to be able to make that dinner reservation. Instead, you should recommend booking dinner a little bit later or moving them to an earlier tee time.

Example #2

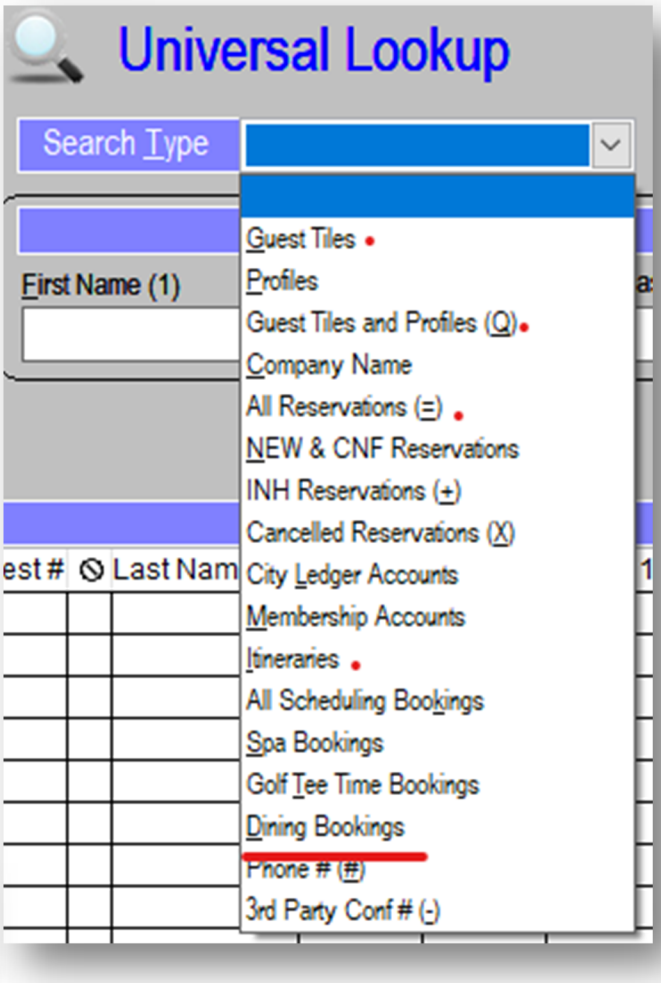
A guest wants to play all three courses and dine at The Bench, The Taproom, and Roy's. Your guest may not know that Roy's is located at The Inn at Spanish Bay right next to the Links at Spanish Bay. You can suggest to this guest that they dine at Roy's on the same day that they are playing The Links at Spanish Bay to cut down their travel time.

Search for Existing Dining Reservations

To locate an existing Dining Reservation, you should start by opening your Universal Lookup Tool located in the upper Toolbar of your SMS window.



You will need to select the **Search Type**.



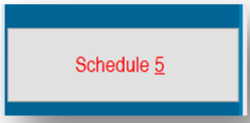
It is important to understand that not all departments book dining reservations the same way we do in the Reservations department.

Not every golf booking will be associated with an Itinerary Number, therefore, it is best to begin your search by setting the Search Type to **Golf Tee Time Bookings** instead of All Reservations or Itineraries. Ask the guest if the tee time was booked under their name by someone else. Doing so at the beginning of your conversation can cut down your search time.

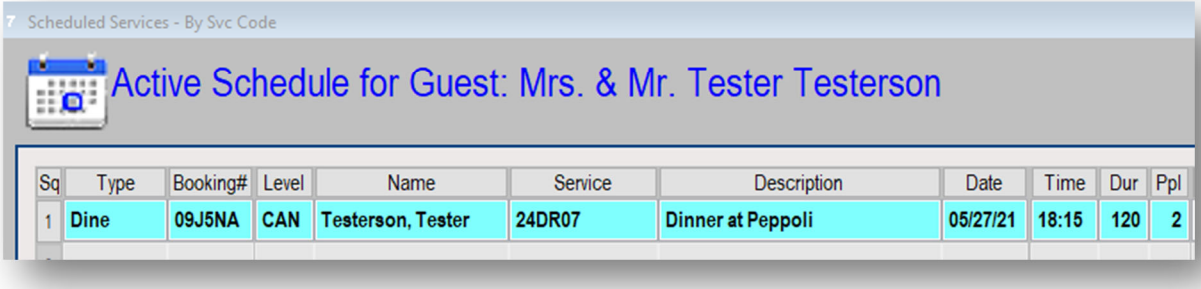
If you are having trouble finding the reservation by name, you can ask the guest for their **confirmation number**.

The email confirmation that we send to Dining Only Guests is a **VEMAIL**. The confirmation number that appears on their email is the number of their **Guest Tile**. To search using this number, set your search type to **Guest Tiles** or **Guest Tiles and Profiles**.

Once you locate their Guest Tile, hit the **5** key on your keyboard to open the guest's current **Active Schedule**.



This is where you will see all current recreation bookings:

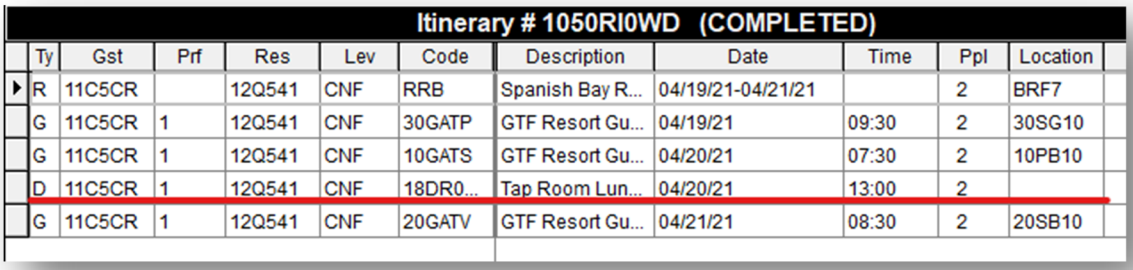


Dining Changes

If a guest wants to make changes to their Dining Reservation, but will be keeping the same restaurant, you should make all changes within the Dining Tile – as opposed to cancelling their current reservation and re-booking.

If the guest wants to change restaurants or change services (i.e. move from lunch to dinner), you will need to cancel the current reservation and re-book because those changes cannot be done within the **Dining Tile**.

To edit the Dining Tile, double anywhere on your dining booking in the **Itinerary Detail**.

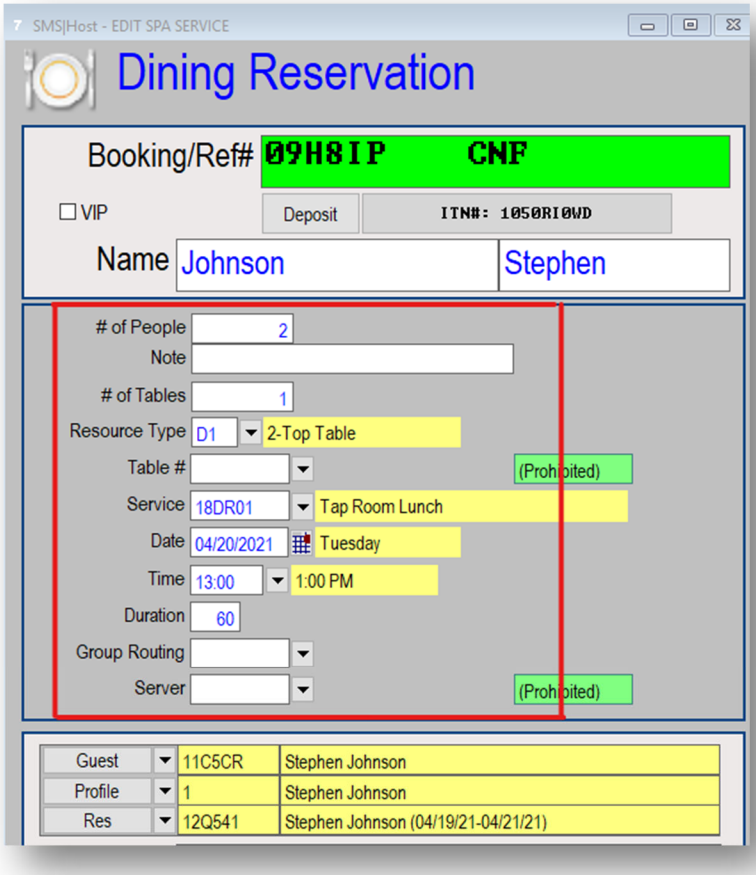


Itinerary # 1050RI0WD (COMPLETED)

Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location
R	11C5CR		12Q541	CNF	RRB	Spanish Bay R...	04/19/21-04/21/21		2	BRF7
G	11C5CR	1	12Q541	CNF	30GATP	GTF Resort Gu...	04/19/21	09:30	2	30SG10
G	11C5CR	1	12Q541	CNF	10GATS	GTF Resort Gu...	04/20/21	07:30	2	10PB10
D	11C5CR	1	12Q541	CNF	18DR0...	Tap Room Lun...	04/20/21	13:00	2	
G	11C5CR	1	12Q541	CNF	20GATV	GTF Resort Gu...	04/21/21	08:30	2	20SB10

Within the Dining Tile, you can edit:

- **The number of guests**
- **Size of the table**
- **Time**
- **Date**



When changing the number of guests, you may need to also change the table size (Resource Type) to reserve a table that best fits the new group.

When changing the time of a reservation, check availability in the Booking Center before updating the Dining Tile. When you make changes in the Dining Tile, you will not be able to tell when you are overbooking a time slot that is set to zero availability

Dining Cancellations

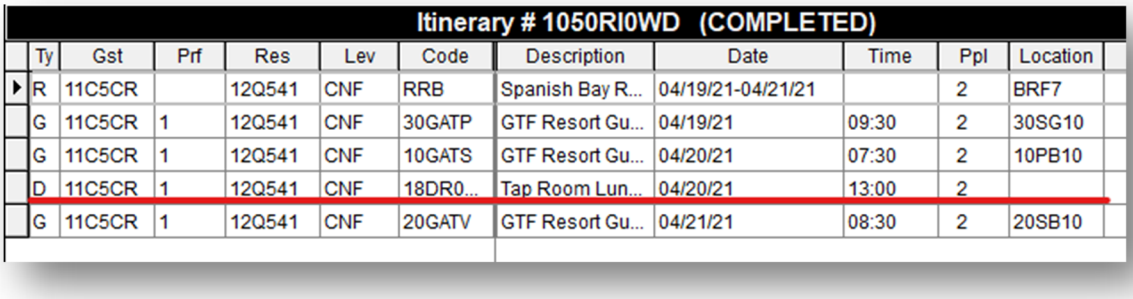
There is no penalty to our guests for cancelling a restaurant reservation.

However, we can advise guests at the time of booking that, if they need to cancel or think they will be late, we would greatly appreciate a phone call ahead.

If it is a matter of the guests running late or still wrapping up their golf game, the restaurant hosts are happy to hold tables.

How to Cancel a Dining Reservation

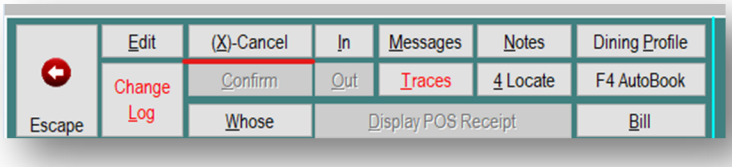
Double click anywhere on your dining booking in the **Itinerary Detail** to open the **Dining Tile**.



Itinerary # 1050RI0WD (COMPLETED)

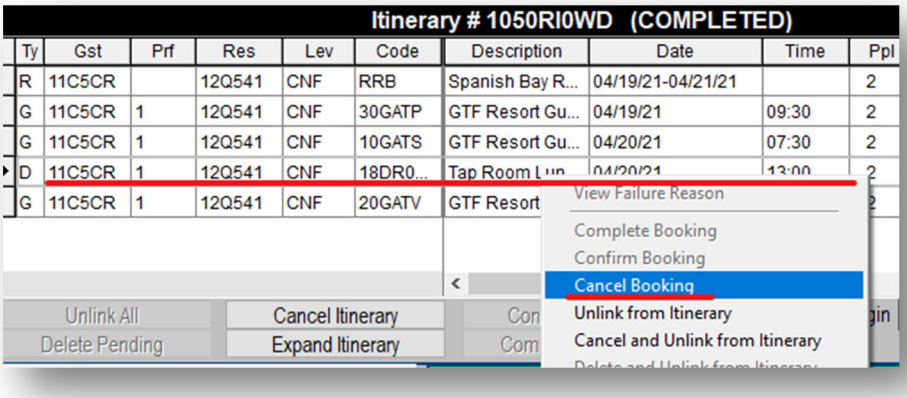
Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location
R	11C5CR		12Q541	CNF	RRB	Spanish Bay R...	04/19/21-04/21/21		2	BRF7
G	11C5CR	1	12Q541	CNF	30GATP	GTF Resort Gu...	04/19/21	09:30	2	30SG10
G	11C5CR	1	12Q541	CNF	10GATS	GTF Resort Gu...	04/20/21	07:30	2	10PB10
D	11C5CR	1	12Q541	CNF	18DR0...	Tap Room Lun...	04/20/21	13:00	2	
G	11C5CR	1	12Q541	CNF	20GATV	GTF Resort Gu...	04/21/21	08:30	2	20SB10

Click X on your keyboard or click the **Cancel** button at the bottom of the Dining Tile:



You will be prompted to select a **Cancellation Reason** from a Pick List and also type a more detailed **Cancellation Note** into a notes field.

An alternative way to cancel a dining reservation is to right click on the booking from the Itinerary field and select "**Cancel**" from menu that appears.



Just like cancelling from the Dining Tile, you will be prompted to select a cancellation reason and type a cancellation note.

Day-of Cancellations

Similar to booking same day dining reservations, if a guest wants to cancel a reservation the same day their reservation is set, we need to get that cancellation information to the Host Stand.

Instead of transferring this guest to the Host Stand to complete their cancellation, you should:

- Offer to reschedule
- Say "*Thank you for letting us know. I will pass this information onto the restaurant*."
- Cancel the dining reservation within SMS
- Place a call to the Host Stand yourself to inform them of what you have just cancelled so they can update their own schedule for the day

Large Group Cancellations

If the guest wants to cancel a restaurant reservation that is for more than eight guests, you must transfer that guest to the Host Stand or send an email to the Dining Team with:

1. The details of the booking
2. The reason for the cancellation
3. Any options the guest provided for rescheduling
4. The guest's contact information

It is important to make sure the guest understands that we are not confirming their cancellation on the phone now; they will be contacted by the Dining Team to confirm.

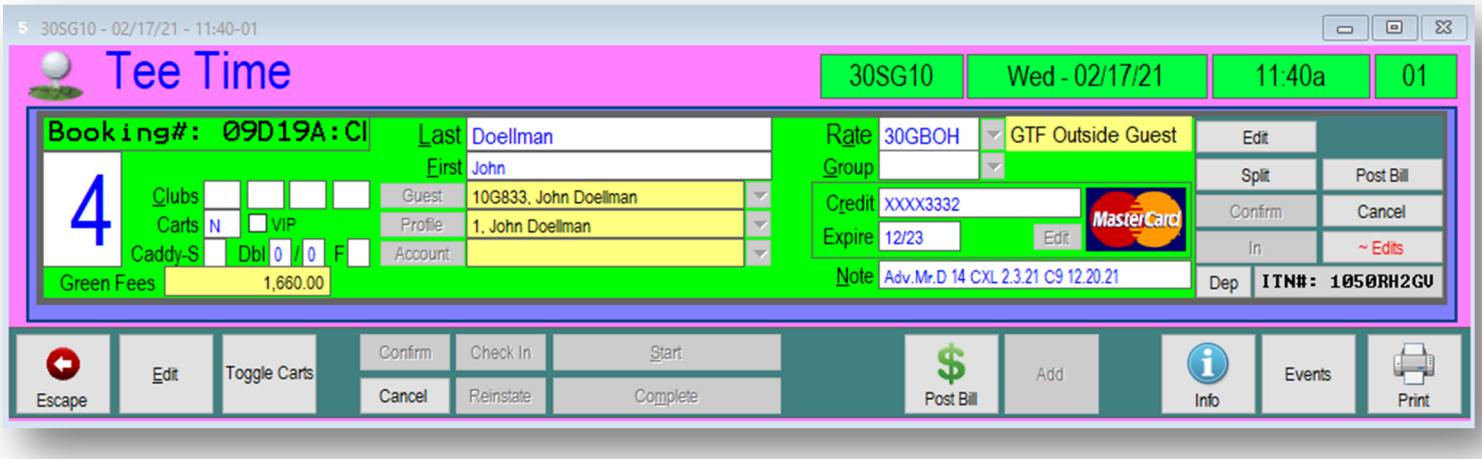
The reason we cannot cancel Large Groups in Reservations is because the group may have a contract with us that includes a penalty for cancelling within a certain timeframe or a forfeiture of a deposit.

Golf



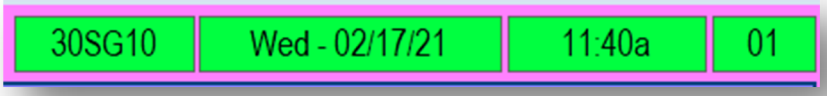
Golf Tile Walkthrough

A **Golf Reservation Tile** is where you can see all details about an existing golf booking.



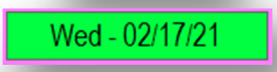
The **green boxes** along the top tell you:

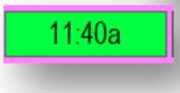
- Which **course** has been booked
1. The **date** of the golf round
2. The **time** the golfers tee off



In this case, this guest will be playing:

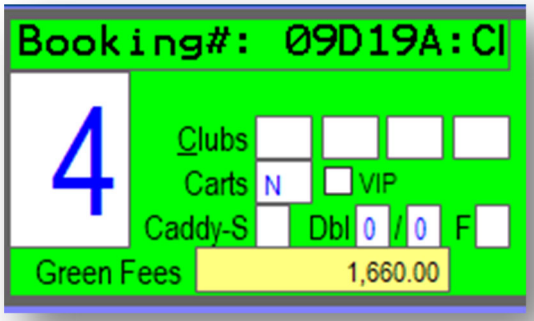
- The Spyglass Hill Golf Course 

- On Wednesday, 2/17/21 

- At 11:40am 

Golf Tile Left Section

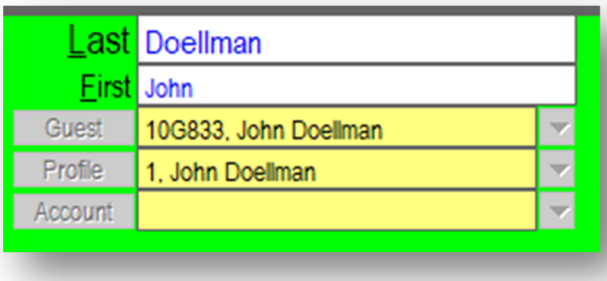
This is where you will see details about the number of golfers and all Add-Ons the guest has added to their golf round.



- The **big blue 4** indicates that four golfers have been booked for this tee time.
- The **Booking #** at the top (**09D19A**) is the identification number for this golf reservation. You can search this number in Universal Lookup under the Search Type "Golf Tee Times"
- The **Clubs / Carts / Caddy** sections are where you will see Add-Ons the guest has requested The yellow **Greens Fees** box is the total cost of the Greens Fees for all four golfers combined.

Golf Tile Middle Section

The middle section indicates who is playing, who has booked the round, and, if they are a Resort Guest, which Room Reservation the golf tee time is associated with.



1. The **First and Last Names** are defaulted to the primary name on the Guest Tile. This field is can be edited to anyone else's name if John Doellman will not actually be playing this round.
2. The yellow **Guest** field shows the Guest Tile number and name associated with this booking.

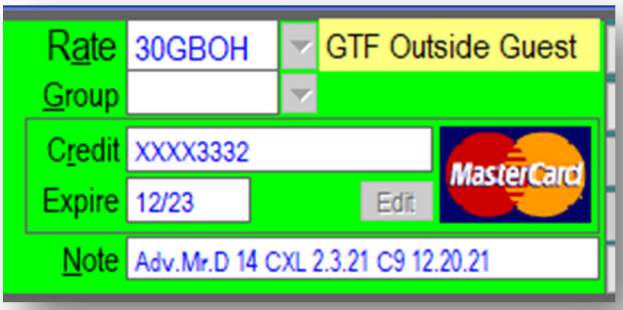
- The **Profile** is set to John Doellman because he is the family member who will be playing. If Mr. Doellman's spouse or child were playing instead, we could change the profile to that family member's name.

Golf Tile Right Section

This will reflect payment information and notes from the agent who booked the reservation.

- The **Rate** field indicates the price the guest is paying for each player in this round.

30GBOH is the Rate Code.
GTF Outside Guest is the Rate Description.
This guest is paying full price for their Greens Fees, which is $415 per player.



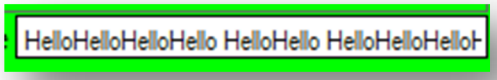
- The **Credit / Expire** fields hold the credit card information of the guest who booked the tee time. If the guest fails to show up for this reservation, the Pro Shop will charge the full Greens Fees to this credit card.

- The **Note** field is referred to as the **Baby Notes** section. This is a tiny notes field that only holds a finite number of characters, so all notes here must be succinct and abbreviated. The booking agent will write a Baby Note to document the cancellation timeframe that they quoted to the guest.

Baby Notes Character Limit

When typing into the Baby Notes field, you can write as many characters as you'd like, but only 40 characters will save.

For example, you see that this note extends beyond the edge of the Notes field:



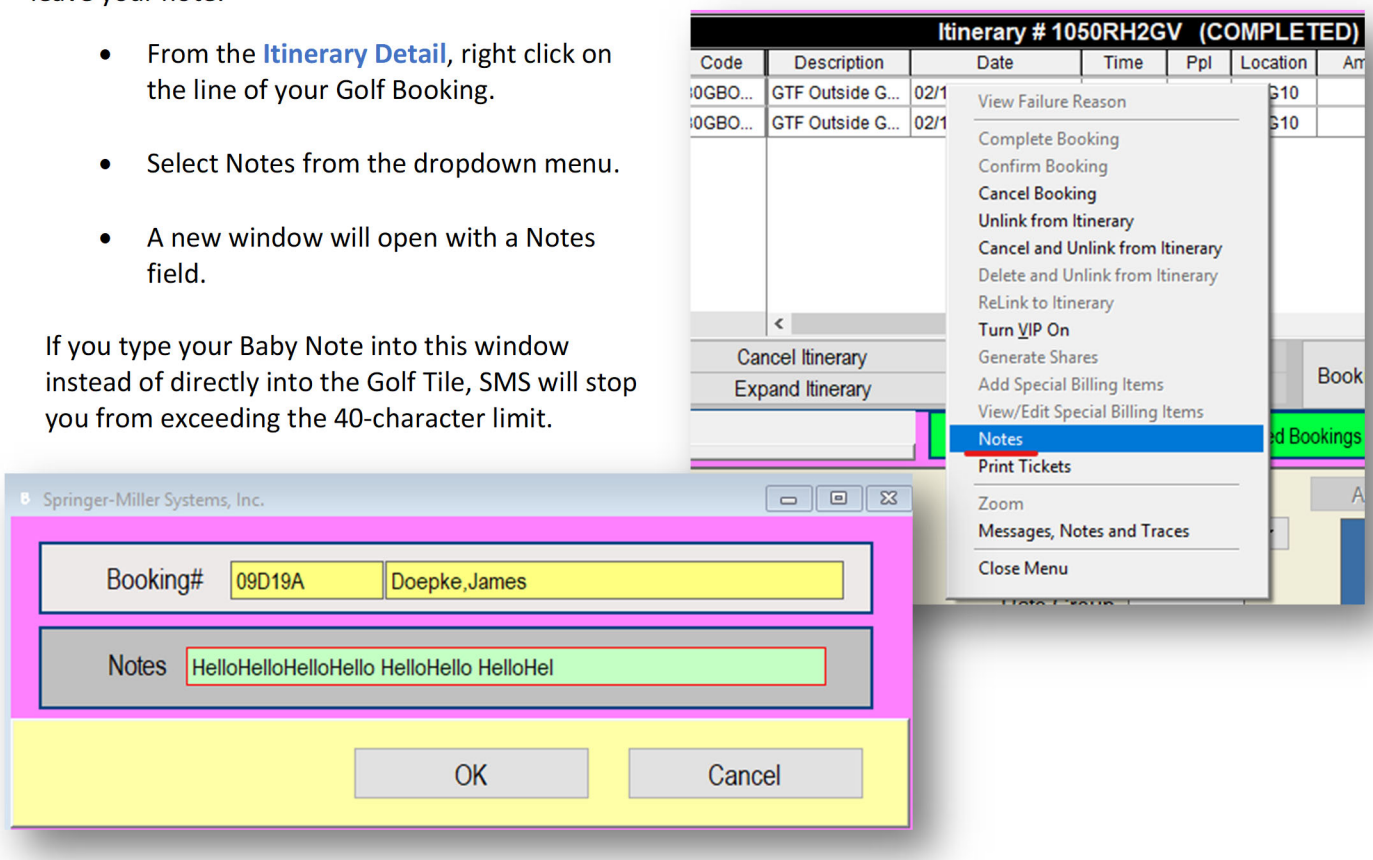
Once I save my change, if I close and re-open this Golf Tile, you can see that my note has been automatically shortened to 40 characters:



If you are concerned your note will be longer than 40 characters, you can use this alternative method to leave your note:

- From the **Itinerary Detail**, right click on the line of your Golf Booking.
- Select Notes from the dropdown menu.
- A new window will open with a Notes field.

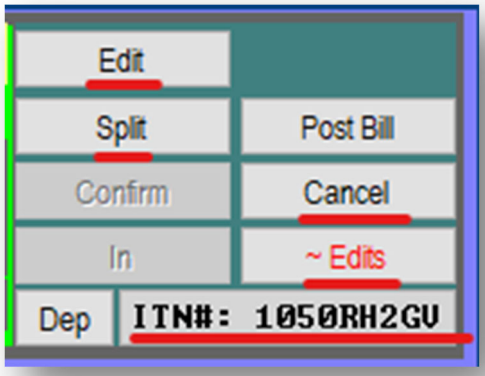
If you type your Baby Note into this window instead of directly into the Golf Tile, SMS will stop you from exceeding the 40-character limit.



If you must leave a note longer than 40 characters, you can create a **Tee Sheet Note** instead of Baby Note. We will discuss the Tee Sheet Note process in the Tee Sheets section of this manual.

As a Reservations Agent, you will only utilize a few of the buttons on the right side of the **Golf Tile**:

- **Edit** – This will allow you to make changes to all fields on this booking
- **Split** – This will allow you to break up a group of players into smaller groups, such as splitting up a foursome into four single tee times
- **Cancel** – This is one way to cancel a golf booking
- **Edits** – This will open a window that lists all changes made to this golf reservation and by whom
- **ITN# XXXXXXXXX** – This will open the guest's full Itinerary in a new window



The Button Bar



The ONLY BUTTON you should *ever* use in the Button Bar is **ESCAPE**.

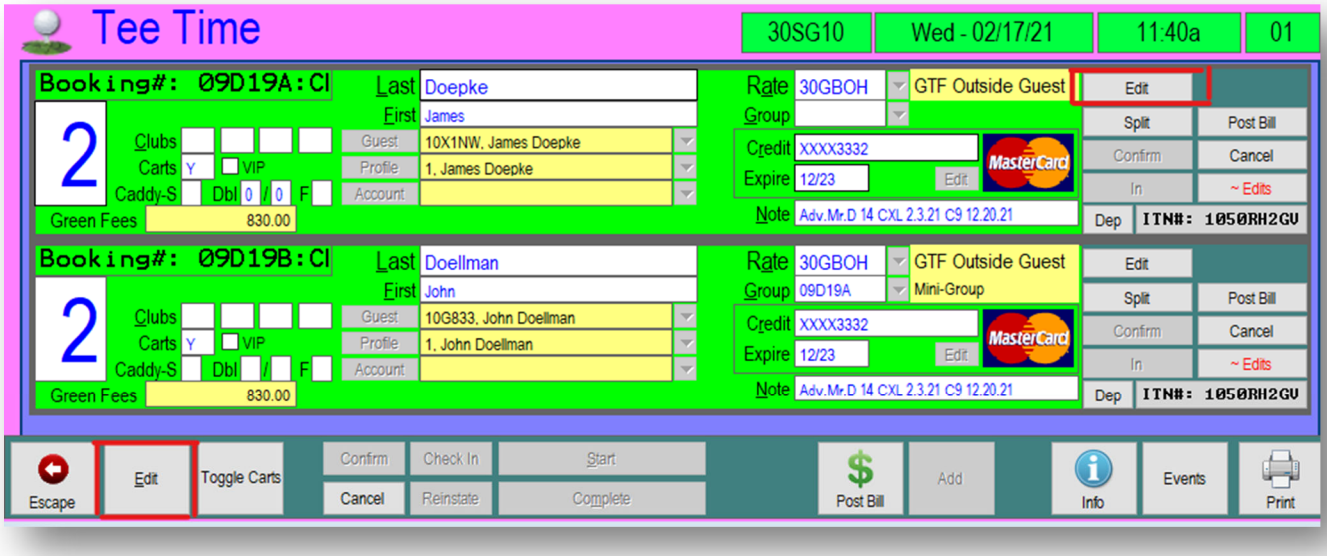


There are ***two*** **Edit buttons** on every Golf Tile.

- The first is on the right side of the Golf Tile
- The second is in the Button Bar.

You should only every use the Edit button to the right of the tee time you wish to change. The reason we do this is to avoid accidentally editing the wrong tee time.

For example, in the below reservation, you can see that there are two golf reservations booked into this 11:40am tee time. **Mr. Doepke** has booked two golfers and **Mr. Doellman** has booked two golfers.



Mr. Doepke wants to reduce his number of golfers from two players to one player, so we need to edit the reservation.

If you click the Edit button on the right, SMS will only allow you to edit Mr. Doepke's reservation.
If you click the Edit button in the Button Bar, SMS will allow you to edit all golf reservations in this tee time at once. We do not want this because that increases the odds that we will accidentally edit Mr. Doellman's reservation instead of Mr. Doepke's.

Mr. Doellman will not like showing up with two players to find that he only has a reservation for one, and **Mr. Doepke** will not be happy learning that he is responsible for paying the Greens Fees of the second golfer on his reservation who will appear to have no showed.

Day Guest Golf

A **Day Guest** is a guest who will not be staying at one of Pebble Beach's three Resort Properties on the day that they play their round of golf.

The **Golf-Only Booking Checklist** is a simplified version of every step that needs to be taken to successfully book a golf reservation. We will go into each of these steps in detail in the coming pages of this manual.

This manual will guide you through all of the technical steps of booking a reservation, but an equally important aspect of booking golf lies in how you conduct your conversation with each guest.

The following set of questions are designed to open up your conversation with the guest while simultaneously ensuring that you have all crucial information to create the guest's ideal golf experience.

Golf-Only Booking Checklist

- ✓ Golf Guidelines Met
- ✓ Smart Booked
- ✓ Correct Rate Code Selected
- ✓ Guest Tile & Profiles Complete
- ✓ Credit Card Guaranteed
- ✓ Membership Dates Verified
- ✓ Resident/Property Owners Verified
- ✓ Credit Card "Whosed"
- ✓ Cancellation Quoted & Notated
- ✓ Caddies / Rental Clubs / Carts Added
- ✓ Special Occasion Notated
- ✓ Disclosed & Notated Greens Aeration
- ✓ Reservation Completed & Confirmed
- ✓ VEMAIL sent

Investigatory Questions:

- On what date are you looking to visit?
- Which course would you like to play?
- How many golfers will be in your party?
- What is your ideal time to tee off?
- Have you played our courses before?
- Is this a special occasion?

Closing Questions:

- Would you like to add caddies or a forecaddie to your tee time?
- Will you need any rental clubs?
- Would you like to set up a lunch/dinner reservation after your round?
- Are you interested in speaking to our Spa about our pre/post-round golfer massages?

Outside Guest (Rack Rate) Golf

Pebble Beach	Spyglass Hill	Spanish Bay	Del Monte	The Hay
1 day Non CXL 12 player max $575 + cart	3 months 14 Day CXL 12 player max $415 + cart	6 months 14 Day CXL 12 player max $295 + cart	6 months 3 CXL 12 player max $110 + cart	6 Months $65 Adults/ 3 CXL $30 12-19yrs /30-day CXL

Pebble Beach Golf Links - $575 per player

- Our Resort Guests are given priority over Pebble Beach Tee Times. In order to ensure we have enough availability at this course for all hotel guests, we only allow Outside Guests to book Pebble Beach one day in advance.
- These guests can call into our Reservations Department the day prior to the day they want to play – ideally right when our office opens at 7am (8am weekends) – to book their tee time
- Since outside guests can only book one day in advance, they will already be within our standard 14-day cancellation window and therefore Outside Guest Pebble Beach reservations will be non-cancellable from the time of booking.
- Outside Guests can book up to 12 golfers per day. If they want to book more than 12 golfers in one day, they need to be transferred to our Group Golf department.
- Outside Guests are responsible for a $45 per rider cart fee in addition to the Greens Fees

> **Tip:** If a guest is concerned that there will be no availability at Pebble Beach booking one day prior, you can suggest that they book Spyglass Hill or The Links at Spanish Bay.
>
> The guest can hold their tee time at the alternate course, then still call one day prior to their day of play to upgrade to Pebble Beach Golf Links.
>
> We do not allow any changes to tee times once we are within the no-cancellation window, but we make an exception for upgrades.

Spyglass Hill Golf Course - $415 per player

- Like Pebble Beach, Resort Guests are given priority to book Spyglass Hill Golf Course tee times, but we offer Outside Guests a larger window to book if they are just visiting for the day. Spyglass Hill can be booked up to 3 months in advance for Outside Guests.
- Outside Guests have a 14-day cancellation window, meaning that guests have up until 14 days prior to the date of play to change or cancel their rounds. If they cancel within 14 days or no-show, the credit card we have on file will be charged by the pro shop for all Greens Fees.
- Outside Guests can book up to 12 golfers per day. If they want to book more than 12 golfers in one day, they need to be transferred to our Group Golf department.
- Outside Guests are responsible for a $45 per rider cart fee in addition to the Greens Fees

The Links at Spanish Bay - $295 per player

1. The Links at Spanish Bay has the largest window of time for Outside Guests to book. This course can be booked up to 6 months in advance.
2. Outside Guests have a 14-day cancellation window, meaning that guests have up until 14 days prior to the date of play to change or cancel their rounds. If they cancel within 14 days or no-show, the credit card we have on file will be charged by the pro shop for all Greens Fees.
3. Outside Guests can book up to 12 golfers per day. If they want to book more than 12 golfers in one day, they need to be transferred to our Group Golf department.
4. Outside Guests are responsible for a $45 per rider cart fee in addition to the Greens Fees

The Del Monte Golf Course - $110 per player

- The Del Monte Golf Course is located outside of Pebble Beach gates in Monterey.
- Like the Links at Spanish Bay, this course can be booked by Outside Guests up to 6 months in advance.
- All guests – Outside or Resort Guests – will be responsible for a $25 per rider cart fee if they wish to take a cart.
- Guests can change or cancel their tee times up to 3 days in advance.
- Like all Pebble Beach courses, Outside Guests can only book a maximum of 12 golfers per day. If a guest wants to exceed 12 golfers in one day, they should be connected directly to the Del Monte Pro Shop (as opposed to Group Golf).

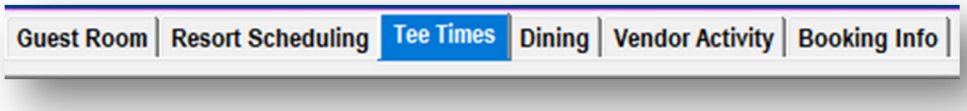
The Hay - $65 per player

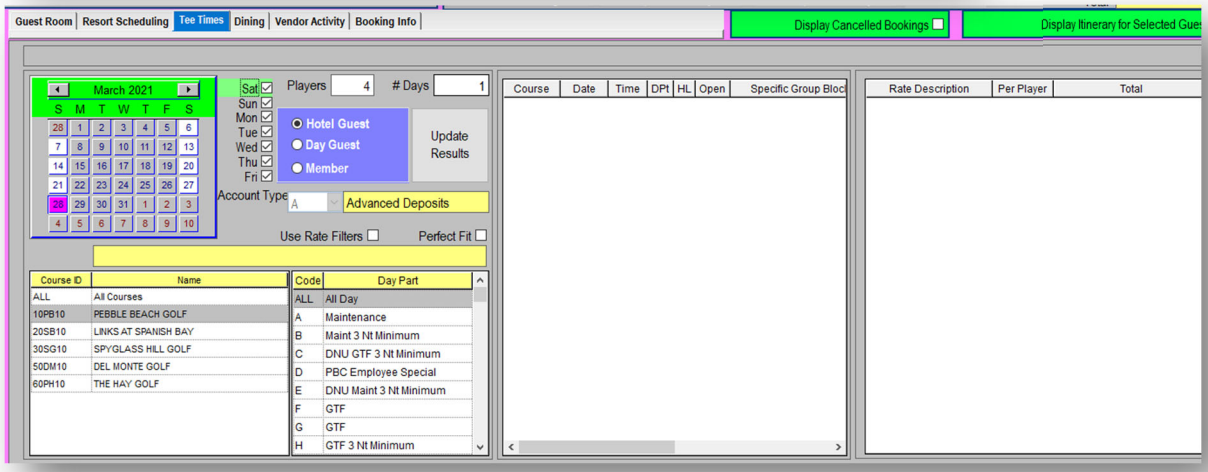
- The Hay is Pebble Beach's only 9-Hole Short Course.
- Outside Guests can book The Hay up to 6 months in advance.
- Like all Pebble Beach courses, Outside Guests can book up to 12 golfers per day. If they wish to exceed this, they should be connected with Group Golf.
- If they wish to take a cart, Outside Guests will be responsible for a $45 cart fee per rider.

Search for Day Guest Golf Availability



To search for Tee Time Availability, you will first want to navigate to the **Tee Times Tab** of the Booking Center.





You can see right away that several settings within this Tee Time Search Tool have already defaulted:

The calendar date is set to the current date.

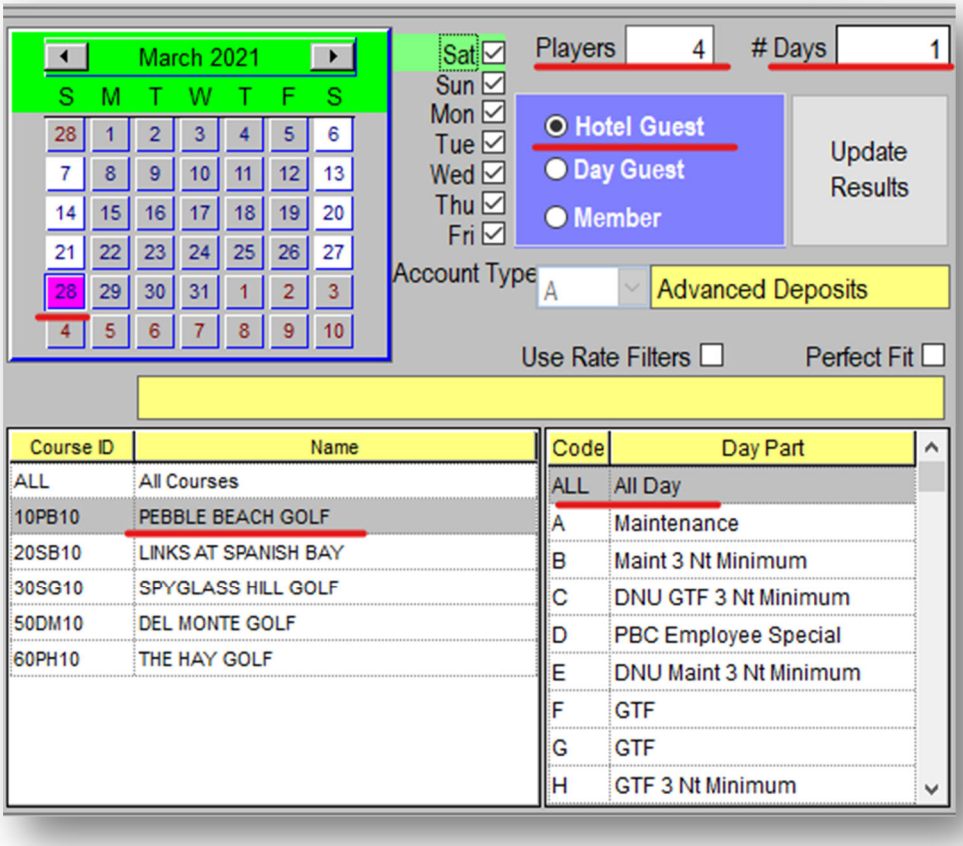
The Type of Guest has defaulted to Hotel Guest

The number of players is defaulted to 4

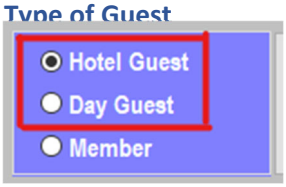
The number of days defaulted to 1

The course selection defaulted to Pebble Beach Golf Links

The Day Part Code defaulted to All Day



Type of Guest



There are three **Guest Types** to choose from when searching for tee times in SMS, however, the Reservations Department only uses two of those options: Hotel Guest and Day Guest.

A **Hotel Guest**, also referred to as a **Resort Guest**, is a guest who will be staying in a room at one of our three Resort Properties on the day they play their round.

A **Day Guest**, also referred to as an **Outside Guest**, is a guest who will not be staying at our Resorts on the day of their round.

The greens fees will be the same whether a guest stays with us or is only visiting for the day, but there are many distinctions in the Guidelines between these guest types such as:

1. How far in advance they can book their tee times
2. Whether or not they pay for their carts
3. How many golfers they can book on each course per day

Number of Days



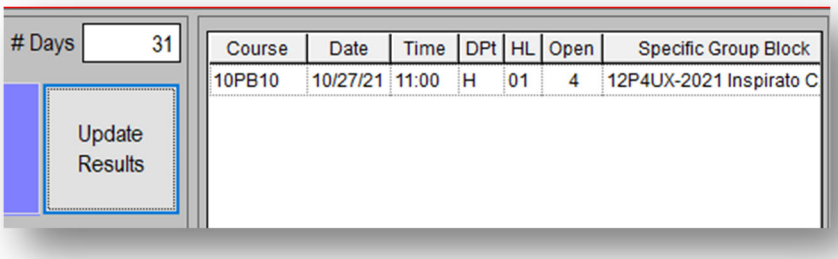
The **# Days** field should always be set to 1. This indicates to SMS that we only want to search for tee times one day at a time. Searching one day at a time will greatly reduce the risk of misquoting availability and booking the wrong day/time.

There is one situation for which it is useful to search by more than 1 day at once: When golf availability is extremely low.

For example, October is Pebble Beach Resort's most popular time of the year. Once we come within a few months of October, it is very rare to be able to find a Guaranteed to Finish time during that month. If a guest wants to stay overnight and play any time in October, we can do a sweeping search to find the remaining available tee times.

We set our search parameters to:

- Begin on October 1st
- 4 players
- 31 Days (to search the entire month of October)
- Hotel Guest
- Pebble Beach Golf
- H Day Part Code (Guaranteed to Finish with 3 Night Minimum)
- Hit Update Results

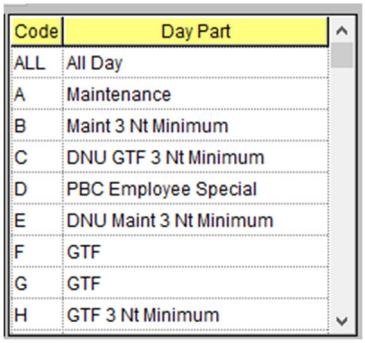


There is only *one* tee time available the *entire month of October* that we can book a group of 4 players in a Guaranteed to Finish tee time.

Day Part Code

A **Day Part** traditionally indicates what period of the day a golfer will be playing, i.e. morning, afternoon, dusk, twilight.

Pebble Beach Resorts uses these categories similarly, but the Day Parts are separated to indicate more specific information about what is happening in each "part" of the day.



Code	Day Part
ALL	All Day
A	Maintenance
B	Maint 3 Nt Minimum
C	DNU GTF 3 Nt Minimum
D	PBC Employee Special
E	DNU Maint 3 Nt Minimum
F	GTF
G	GTF
H	GTF 3 Nt Minimum

When searching for Golf Tee Times in SMS, it is best practice to keep your Day Part Code as **All Day** so you can see all possibilities for the day in your search results. It is still important, however, that we pay attention to the Day Part Code when quoting tee times to our guest.

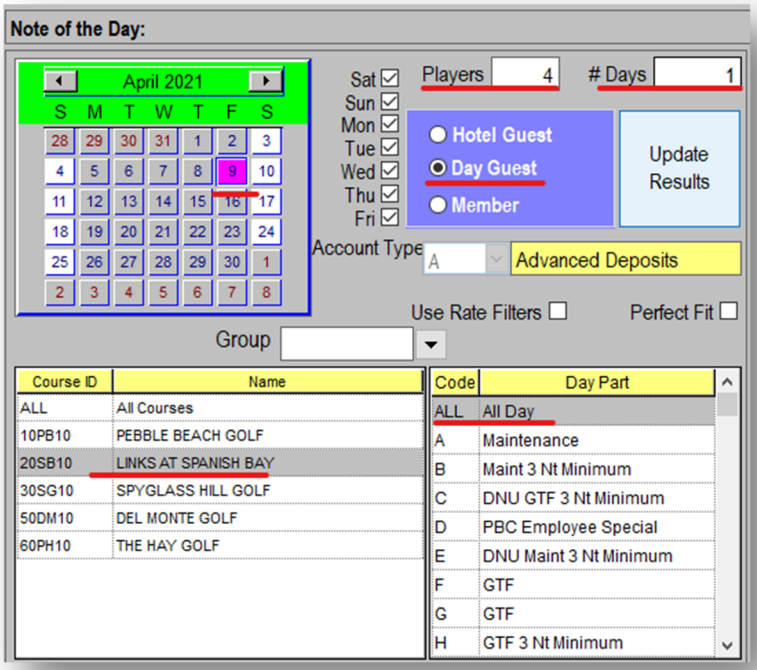
Most Commonly Used Day Part Codes:

Code	Day Part	Meaning
All	**All Day**	Your search results will show tee times for all available Day Parts
A or M	**Maintenance**	This will be the earliest tee times of the day. Maintenance crews will be out just ahead of these golfers performing routine care of the course such as mowing the greens, raking bunkers, repairing divots, spreading fertilizer, etc.
B	**Maintenance 3 Nt. Minimum**	This code is identical to the standard Maintenance Day Part, but occurs during Pebble Beach's Peak Season, which is August-November each year.
F or G	**GTF**	Any golfer booked into a GTF tee time is Guaranteed to Finish all 18 holes before sunset that day. *This is the Day Part you will want to book for nearly every guest.*
H	**GTF 3 Nt. Minimum**	This code is identical to the standard GTF Day Part, but occurs during Pebble Beach's Peak Season, which is August-November each year.
N	**NGTF**	Any golfer booked into a NGTF tee time *must be prefaced with a warning* from the Reservations Agent that they may not have time to complete all 18 holes before sunset that day.
P	**GFT Promo**	Pebble Beach will occasionally offer promotional discounts on tee times that can only be booked on certain dates or certain times of the day. The P Day Part Code indicates that the discounted rate is available for that tee time.
T	**Twilight**	Pebble Beach courses will sometimes offer discounted rates for golfers who wish to play late in the day knowing that they will not finish the course. Pebble Beach Golf Links never offers Twilight rates. Twilight tee times will be released on the 1st of the month for the following month. The most common course for Twilight rounds is Del Monte.

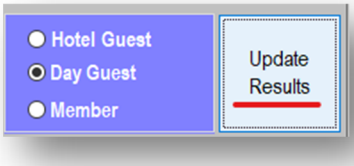
Let's try searching for Golf Tee Times!

For the following example, let's say our guest wants to play The Links at Spanish Bay on Friday, April 9th, 2021 as a group of 4 golfers. They will not be staying at our Resorts since they are visiting for the day.

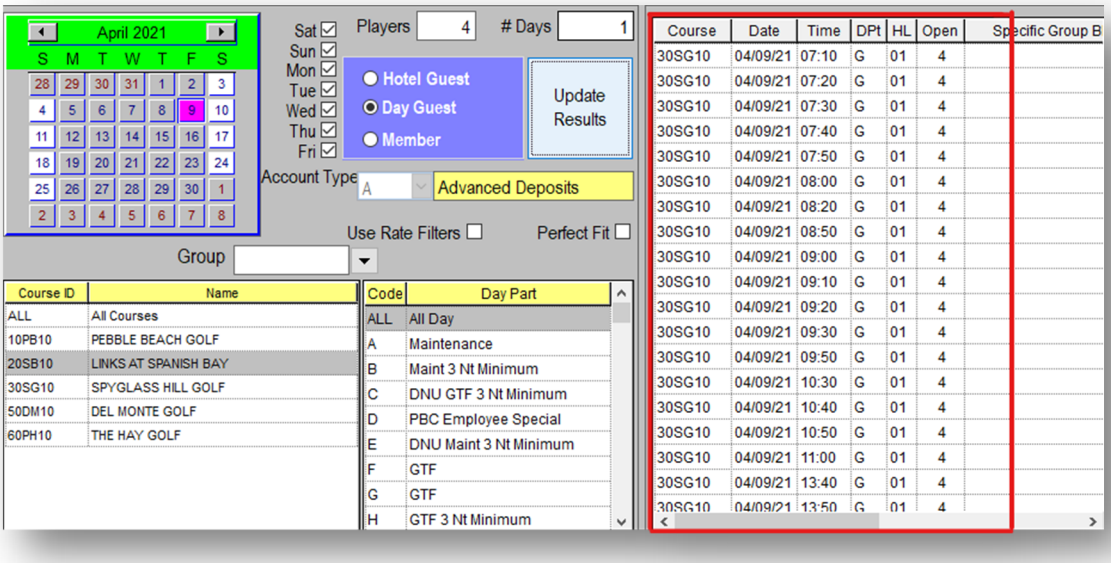
Calendar Date	April 1st, 2021
Type of Guest	Day Guest
Number of Players	4
Number of Days	1
Course Selection	Spanish Bay Golf
Day Part Code	All Day



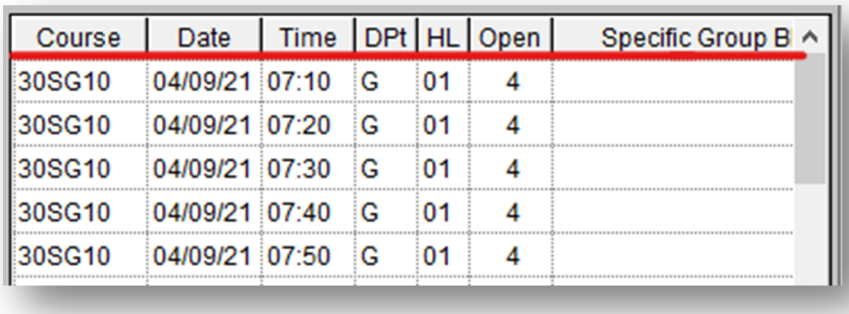
Now that you have set the appropriate Search Criteria, click Update Results:



The options that fit your criteria will appear in the white box to the right of the Search Criteria:



How to Read Tee Time Search Results



Course	Date	Time	DPt	HL	Open	Specific Group B
30SG10	04/09/21	07:10	G	01	4	
30SG10	04/09/21	07:20	G	01	4	
30SG10	04/09/21	07:30	G	01	4	
30SG10	04/09/21	07:40	G	01	4	
30SG10	04/09/21	07:50	G	01	4	

Course	The code that corresponds to the course you selected.
Date	The date of the available tee time.
Time	The start time of the round.
Day Part	The part of the day within which this tee times falls. Virtually all guests who play our courses want to finish all 18 holes, therefore, when searching for availability, look for the G Day Part Code which means that all guests who tee off at that time of day are Guaranteed to Finish the entire course before sunset. If your tee time has an N Day Part Code, you must inform the guest that the time begins at a point in the day wherein they are Not Guaranteed to Finish all 18 holes before sunset.
HL	This indicates the hole number from which the guest will tee off. For Reservations Agents, this will always be set as hole one. Group Sales and Tournaments may use this category when planning rounds such as Shotgun Tournament which will have players start their round on different holes.
Open	The number of players available to book into this time slot. You should always try to fill up foursomes. For example, if you are searching availability for 2 players, look for available tee times that already have 2 players booked so you can create a group of 4.
Specific Group Block	This field indicates if a specific group had priority over this tee time, but has since then released the tee time to be booked by transient guests. The only exception is "Inspirato". Do not book tee times with Inspirato in the Group Block column. Inspirato tee times that are exclusively reserved for the guests who book into our Casa Palmero Resort directly through Inspirato company

Let's get back to our example…

Right from the start, you can see that we have a lot of availability on this day.

Instead of rattling off all 25+ options to our guest - *which might make them think the course is undesirable if we have so much availability* - the best tactic is to ask the guest what their ideal time would be to tee off.

In this example, let's pretend your guest says they want a tee time **around 10am.**

Here's what you should say to this guest:

"I don't have 10am exactly, but on either side, I have a 9:50am and a 10:30. Should we book one of these options?"

Course	Date	Time	DPt	HL	Open
30SG10	04/09/21	08:00	G	01	4
30SG10	04/09/21	08:20	G	01	4
30SG10	04/09/21	08:50	G	01	4
30SG10	04/09/21	09:00	G	01	4
30SG10	04/09/21	09:10	G	01	4
30SG10	04/09/21	09:20	G	01	4
30SG10	04/09/21	09:30	G	01	4
30SG10	04/09/21	09:50	G	01	4
30SG10	04/09/21	10:30	G	01	4
30SG10	04/09/21	10:40	G	01	4
30SG10	04/09/21	10:50	G	01	4
30SG10	04/09/21	11:00	G	01	4
30SG10	04/09/21	13:40	G	01	4

To select the tee time, click anywhere on the line of your selected tee time:

20SB10	02/10/21	09:40	G	01	4
20SB10	02/10/21	09:50	G	01	4

This will populate **Rate Codes** into the white box to the right of the tee time options:

Course	Date	Time	DPt	HL	Open	Specific Group B
20SB10	02/10/21	08:40	G	01	4	
20SB10	02/10/21	08:50	G	01	4	
20SB10	02/10/21	09:00	G	01	4	
20SB10	02/10/21	09:10	G	01	4	
20SB10	02/10/21	09:20	G	01	4	
20SB10	02/10/21	09:30	G	01	4	
20SB10	02/10/21	09:40	G	01	4	
20SB10	02/10/21	09:50	G	01	4	

Rate Description	Per Player	Total
GTF Promotional/Donat...	295.00	1,180.00
GTF Golf VIP	295.00	1,180.00
GTF Outside Guest	295.00	1,180.00
GTF Beach Club Memb...	295.00	1,180.00
GTF Spanish Bay Club ...	295.00	1,180.00
GTF Re-Sale SB Townh...	160.00	640.00
GTF Original SB Townh...	115.00	460.00

Whenever you book a tee time, you must select the appropriate **Rate Code**.

The Rate Code indicates the time of guest that is booking this time (**Rate Description**) and it also indicates the (**Per Player** and **Total**) rate that their group will be paying.

Most Day Guest Golf tee times that you book with be booked at the **Outside Guest** rate, which means the guest will be paying full price.

For our example, you would double click the **GTF Outside Guest** line which will add this tee time to your Booking Center's **Itinerary Detail** at the rate of $295 per golfer.

Rate Description	Per Player	Total
GTF Promotional/Donat...	295.00	1,180.00
GTF Golf VIP	295.00	1,180.00
GTF Outside Guest	295.00	1,180.00
GTF Beach Club Memb...	295.00	1,180.00
GTF Spanish Bay Club ...	295.00	1,180.00
GTF Re-Sale SB Townh...	160.00	640.00
GTF Original SB Townh...	115.00	460.00

Itinerary # 1050RH2GT

Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location	Amount	Duration	Booking#
G				NEW	20GBT...	GTF Outside G...	02/10/21	09:50	4	20SB10	1,180.00	300	09D197

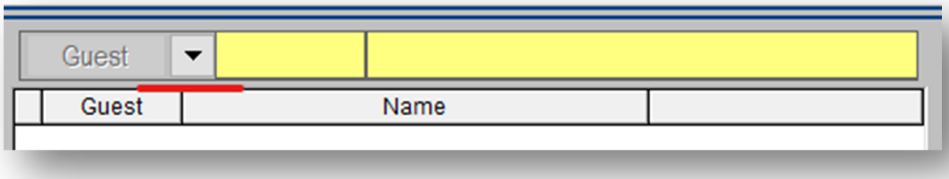
Unlink All | Cancel Itinerary | Confirm Itinerary | Booking Settings | Begin 02/10/21 | End 02/10/21

Delete Pending | Expand Itinerary | Complete Itinerary | Total 1180.00

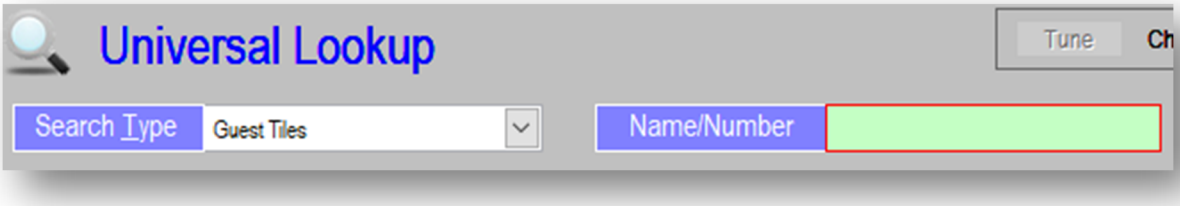
Complete A Day Guest Golf Booking

Now that you have selected your tee time and added it to your Itinerary Detail in the Booking Center, it is time to associate a Guest Tile with this booking!

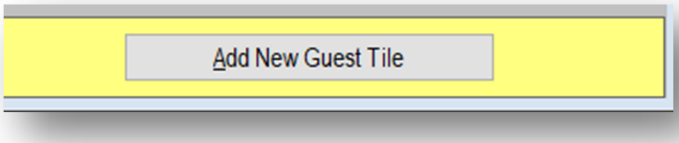
1. Click the Down Arrow next to the Guest section of your Booking Center to open Universal Lookup.



2. Use the Universal Lookup tool to search for an existing Guest Tile for your guest



If no Guest Tile exists, click the **Add New Guest Tile** button at the bottom of **the Universal Lookup** window to create one.

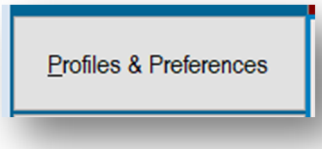


3. Edit and Save your new Guest Tile with information provided by your guest.

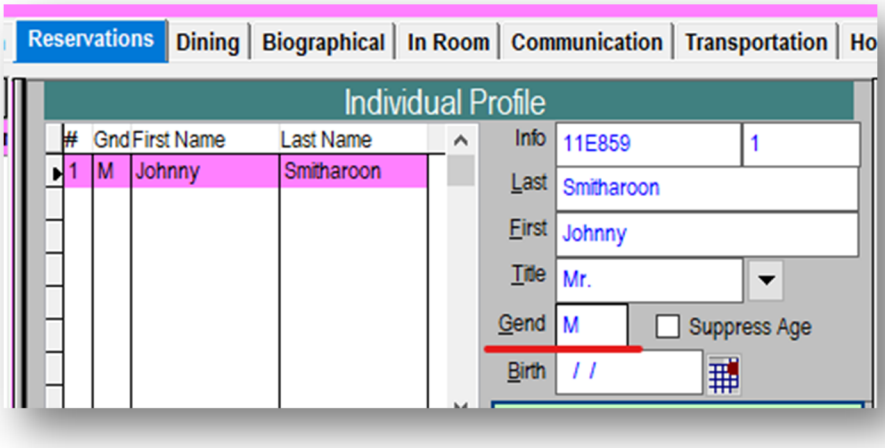
Required Guest Tile Information:

- First and Last Name
- Title
- Address
- Phone Number
- Email Address
  (check opt out box if they do not want to be added to our promotional email list)

4. Click on Profiles and Preferences in the Guest Tile to complete your guest's profile.



5. Click **E** on your keyboard to edit the profile, then enter the **Gender** of your guest (**M or F**) into the **Gend** field. Hit **Page Down** or click **OK** to save.



6. Click the escape button on your keyboard to exit the Profile and get back to your Guest Tile's main page.

7. In order to reserve a tee time for an Outside Guest, we need to collect a credit card to save on file to their Guest Tile as a guarantee that they will show up.

To Collect A Credit Card:

- Inform the caller:

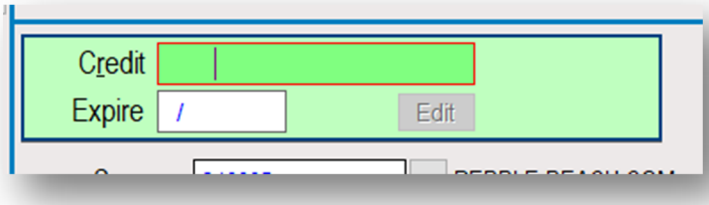
  "We have a 14-day cancellation policy for this tee time which means you have up until 14 days prior to your day of play to make any changes or cancel your booking.
  In order to confirm your reservation, I need to collect a credit card.
  Your card will not be today; you can still pay upon arrival.
  I am going to pause our call recording to protect your personal information.
  Would you like to confirm this tee time with a MasterCard?"

- To pause your recording, access the **NAVIS** program and click the "**Payment**" button in HUB.

- In the Guest Tile, click your E button on your keyboard to Edit the Guest Tile

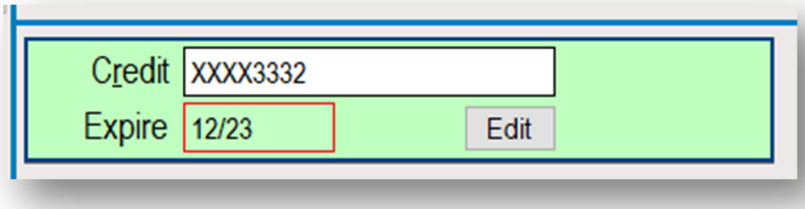
  This is a crucial step before entering the credit card

- Place your curser into the green Credit field. It does not need to be set at the very beginning of the line; it just needs to be within the box.

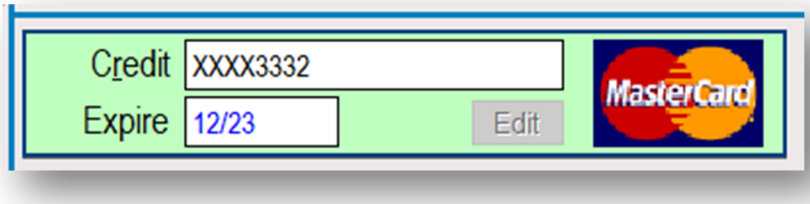


- Use your **IDTECH credit card machine** to enter the guest's:
  - Credit Card Number
  - Expiration Date
  - Security Code

- As soon as you hit Enter for the final time on your Credit Card Machine, the guest's credit card information will populate into the Guest Tile.

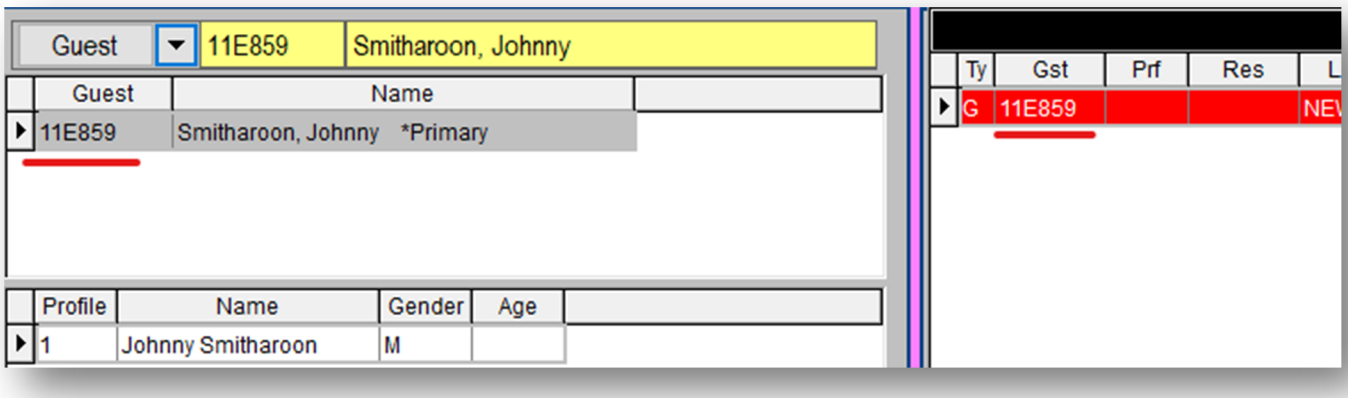


- Hit **Page Down** or click **OK** to save the card on file.
  Once saved, you should immediately see the logo for their credit card company appear next to the encrypted credit card information.



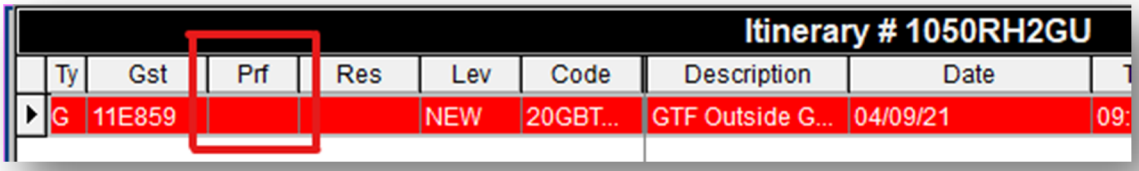
Tip: Even if there is already a credit card on file for a returning guest, you must collect the credit again at the time of booking.

8. Now that you have saved your Guest Tile and saved the credit card, you can click escape to get back to the Booking Center.
- You can see at this point that your new Guest Tile has automatically been attached to this Itinerary in the Guest Section.
- You will also see that your Guest Tile's Guest ID Number has populated on the Restaurant Reservation.

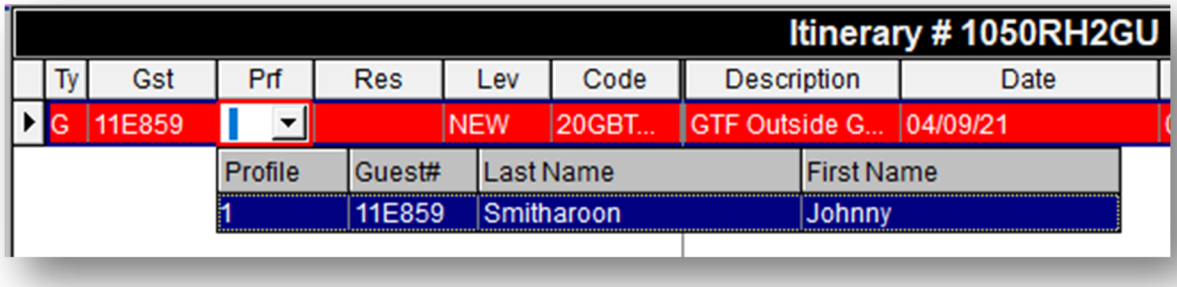


9. You now need to assign the appropriate **Profile** from your Guest Tile to your golf reservation to indicate which family member on the Guest Tile will be playing this round.

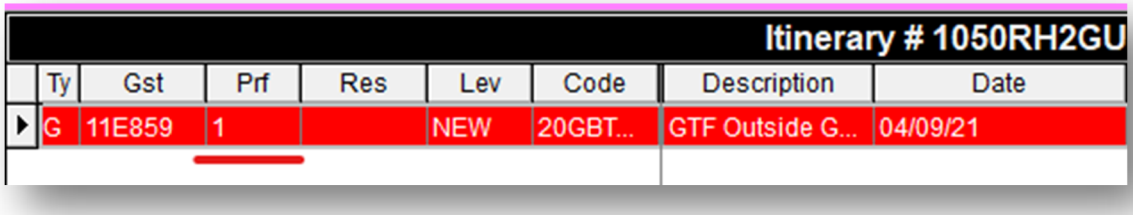
   Click into the red box under the Prf column of your golf reservation in the Itinerary Detail.



   This will open a drop-down list of all Profiles in your Guest Tile. Select a Profile to associate to this restaurant booking.

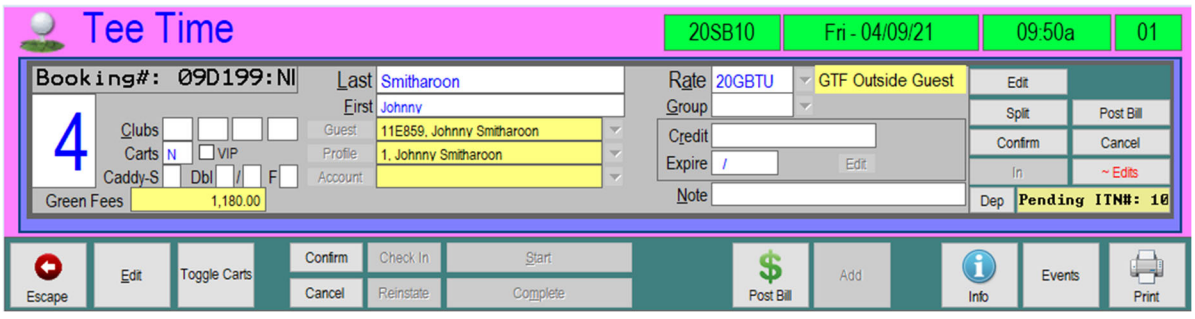


10. Select the appropriate Profile. You will see the Profile number from the first column of the dropdown menu populate into the Prf field.



   Tip: If SMS is not allowing you to assign a Profile, go back into your Guest Tile, click into Profiles and Preferences, and see if you did not enter the Gender of your guest into the Profile. Enter the gender, save the Profile, and come back to the Booking Center to try again. It should now work.

11. Double click anywhere on your golf reservation in the Itinerary Detail to open the **Golf Reservation Tile**

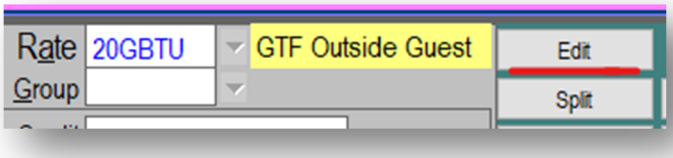


12. We saved the credit card to this guest's Guest Tile, but now we need to associate that credit card with this golf booking.

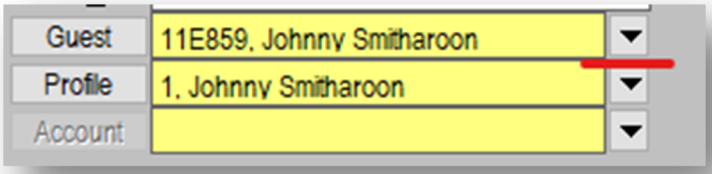
    The Starters at the Pro Shops are the ones who will eventually be charging the greens fees onto this guest's credit card, but the Starts only see their **Tee Sheets** and the Golf Reservation Tiles, therefore, we need move the credit card information onto the Golf Reservation.

    To Associate A Credit Card to a Golf Booking:

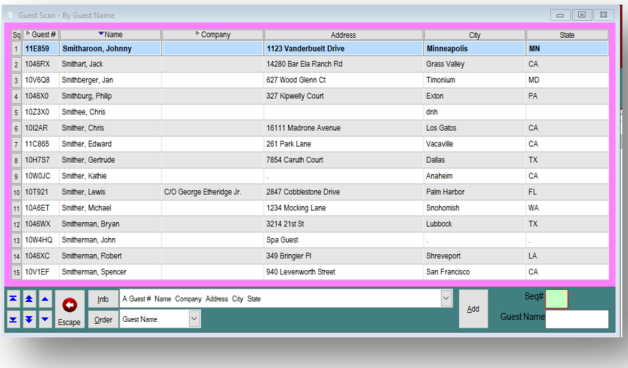
- Click the Edit Button in the top right corner of your tee time:



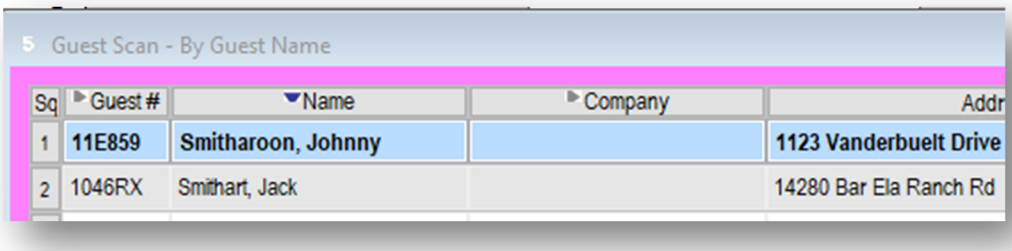
- Click the Down Arrow to the right of the Guest field:



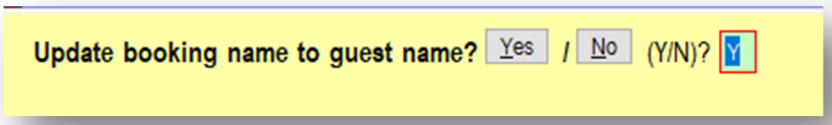
- This will open the Guest Scan window which is a search screen that allows you to find specific Guest Tiles.



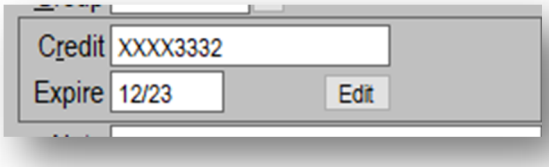
Since there is already a Guest Tile associated with this booking, that tile will be at the very top of this list. Select option 1 by clicking the 1 button or by typing 01 on your keyboard.



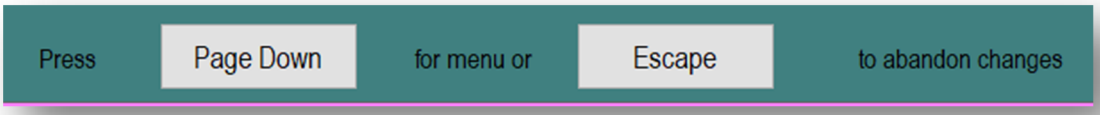
13. The following prompt will appear. Type Y for Yes to continue.



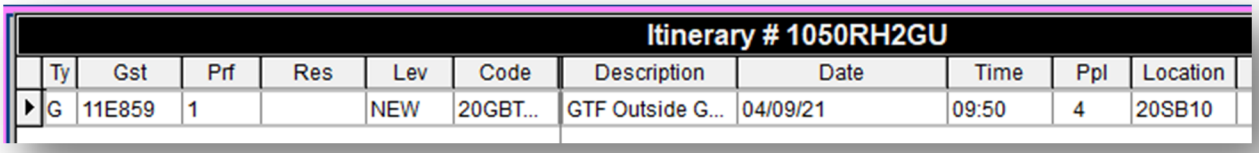
14. You can now see your guest's credit card information has been added into the Credit field of this Golf Reservation Tile.



15. Press Page Down or click the Page Down button to save your changes.



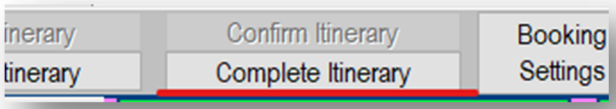
16. Now that your update has been saved, click Escape to return to the Booking Center.
You should now see that the Golf Reservation in your Itinerary Detail has changed from red to white. This means we are now clear to complete the booking!



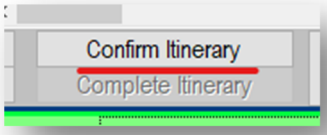
Itinerary # 1050RH2GU

Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location
G	11E859	1		NEW	20GBT...	GTF Outside G...	04/09/21	09:50	4	20SB10

17. You should also see that the **Complete Itinerary** button at the bottom of Itinerary Detail is now enabled. Click this button.



18. Now that you have Completed the Itinerary, the Confirm Itinerary button will become enabled. Click Confirm.

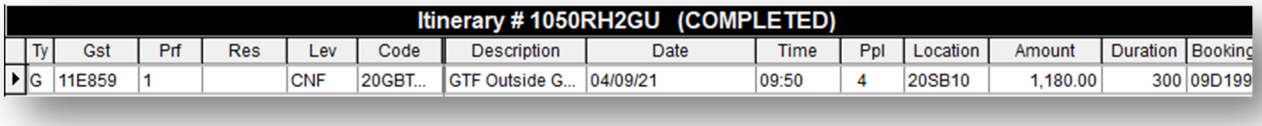


19. You just completed Your Booking!
At this point, you can reconfirm the day, date, time, restaurant, and number of guests with your caller, then end your call. Move onto the next steps to **Clean Up** your reservation!

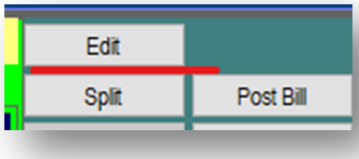
Clean Up A Day Guest Golf Booking

Now that the guest is off the phone, there are just a few more steps to wrap up our golf booking.

- Double click your golf booking in the Itinerary Detail to open the Golf Reservation Tile

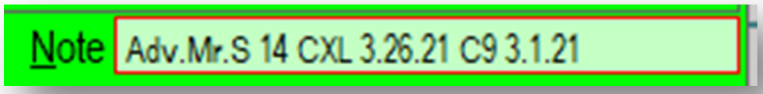


- Click E on your keyboard or click the Edit Button on your tee time.



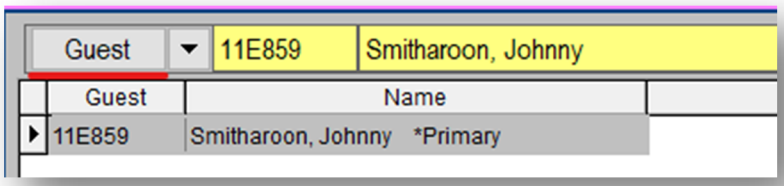
- In the Note field underneath the credit card information, notate the cancellation window you quoted to your guest and sign the note using your SMS User Code.

The format of this cancellation note should be:
Adv. Mr./Ms./Mrs. (Last Name Initial) (cancellation window) (final date they can cancel without penalty) (User Code) (Today's Date)

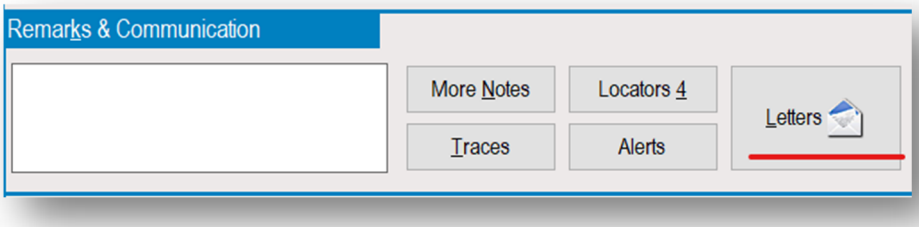


- Page Down to save, then Escape to return to the Booking Center

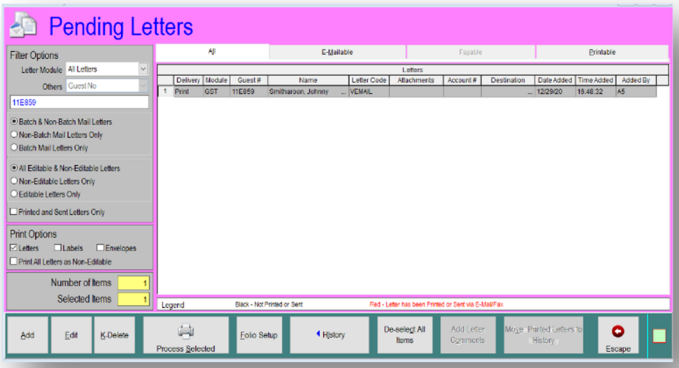
- Access the Guest Tile by clicking the Guest button in you Booking Center



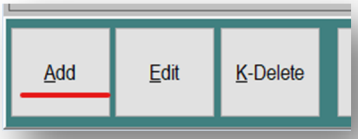
- Click the Letters button to open the Confirmation Email tool



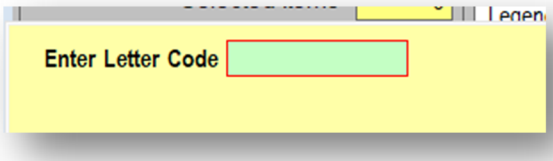
- This will open the Pending Letters window



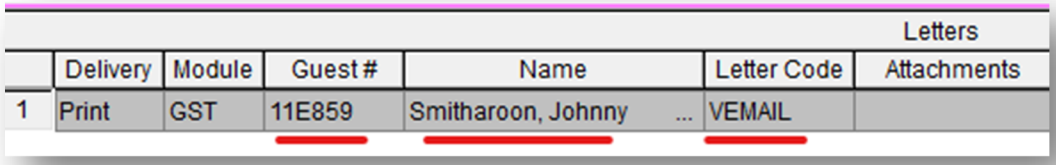
Click the Add button or press your A key on your keyboard to start a new confirmation email.



- Type VEMAIL into the Letter Code field to send a Recreation Confirmation Email.



- A record of your confirmation email will appear:



- Click Escape twice to return to the Booking Center.
- Create and save your Booked Lead in **NAVIS**, then move on to the next call!

Smart-Booking Golf



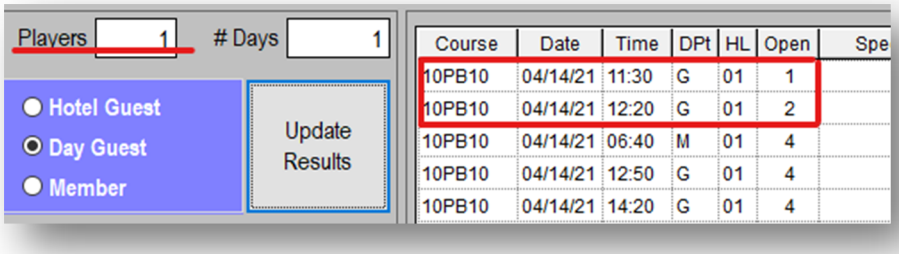
Smart-Booking Golf is very similar to Smart-Booking Dining Reservations. When booking tee times for guests, your goal should be to book tee times in a way that most efficiently fills out our tee sheets to maximum capacity.

Like in the game Tetris, you want to fill in every gap in the Tee Sheet with bookings in order to fit as many pieces (people) as possible.

Singles

If a guest wants to book a tee time as a single player, this is typically an opportunity to fill up some foursomes that do not yet have 4 players.

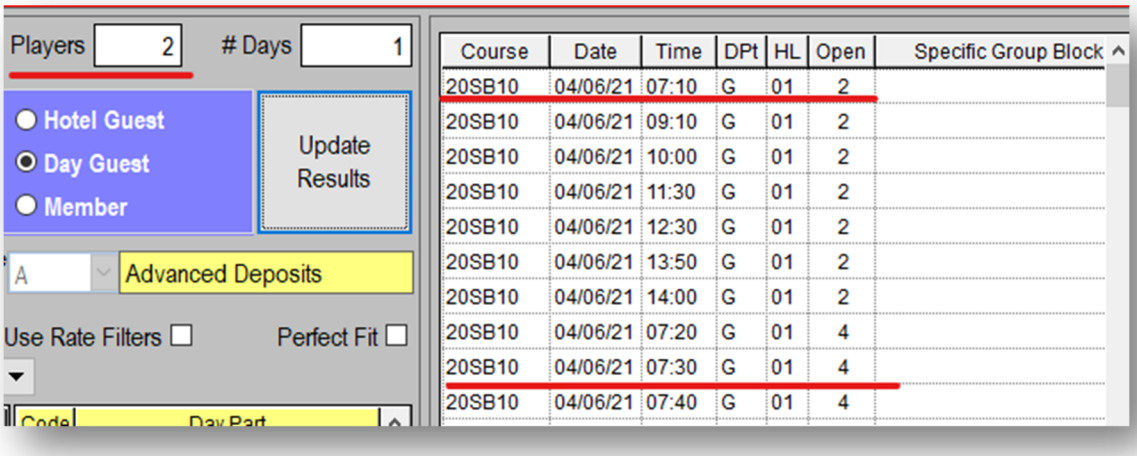
When you search for one player in SMS, you will see that the tee times with the smallest number of available players will filter to the top of the list.



Doubles

In the example below, you can see that we have a wide range of times available with only 2 players needed to fill out the foursome. In this case, you should try to exclusively quote tee times from the list of open twosomes.

For example, if your guest specifically asks for a 7:30am tee time, you can see that we do in fact have 7:30am available for four players, but since this guest only wants to book two players, the best practice is to offer them 7:10am.



Groups of Six

The official policy of Pebble Beach Resorts when booking groups of six golfers, we book them as one foursome and one twosome.

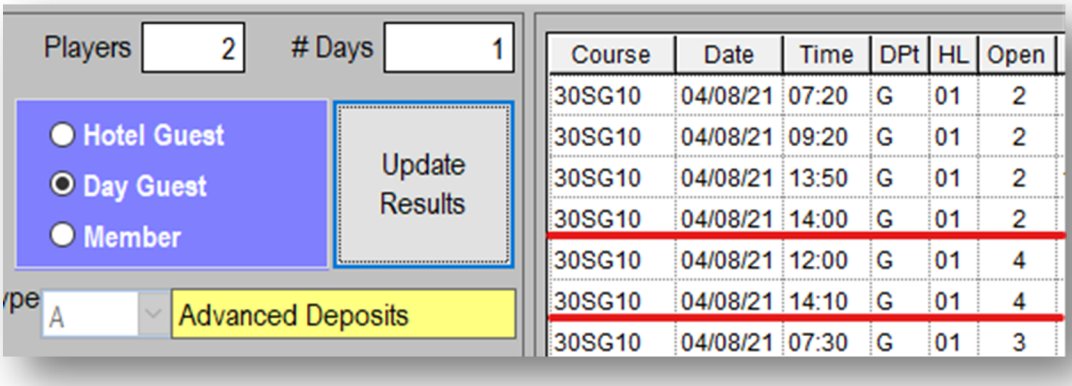
We do not book groups of six as two back to back threesomes because that only leaves one remaining spot in each of those tee times, and it is much less likely that we fill two singles than one twosome.

If you receive a call who is adamant about booking their group as two back to back threesomes, you should follow the following sales process:

1. Inform the guest that it is Pebble Beach policy to book groups of six as four and two in order to help the pro shops better manage their schedules for the day.
2. Advise the guest that, if they do book as two threesomes, they will very likely end up with a single who is a stranger booked with them in both tee times.
3. Advise the guest that we have a policy to fill out groups of fours, so if they want to book three and three while still playing solely with their group, they have the option to buy out all four spots in the tee time.
4. If none of the above options have changed your guest's mind, you can request approval from a supervisor to book the group as two threesomes – but be sure to obtain the guest's reason before speaking to your supervisor.

To book a group of six, you should begin by entering the smaller number of golfers, two, into your search first. You want to try to find an open twosome that is consecutive with an open foursome.

For example, below, you can see that there is a twosome available at 2pm and a foursome available at 2:10pm. By booking your group into these two consecutive tee times, you will be filling out two full foursomes.



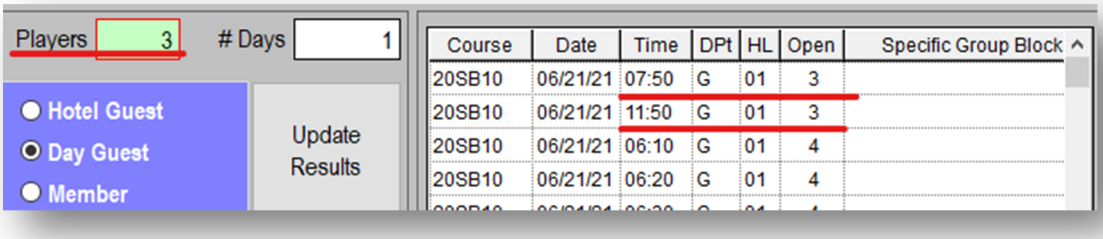
Course	Date	Time	DPt	HL	Open
30SG10	04/08/21	07:20	G	01	2
30SG10	04/08/21	09:20	G	01	2
30SG10	04/08/21	13:50	G	01	2
30SG10	04/08/21	14:00	G	01	2
30SG10	04/08/21	12:00	G	01	4
30SG10	04/08/21	14:10	G	01	4
30SG10	04/08/21	07:30	G	01	3

Groups of Five

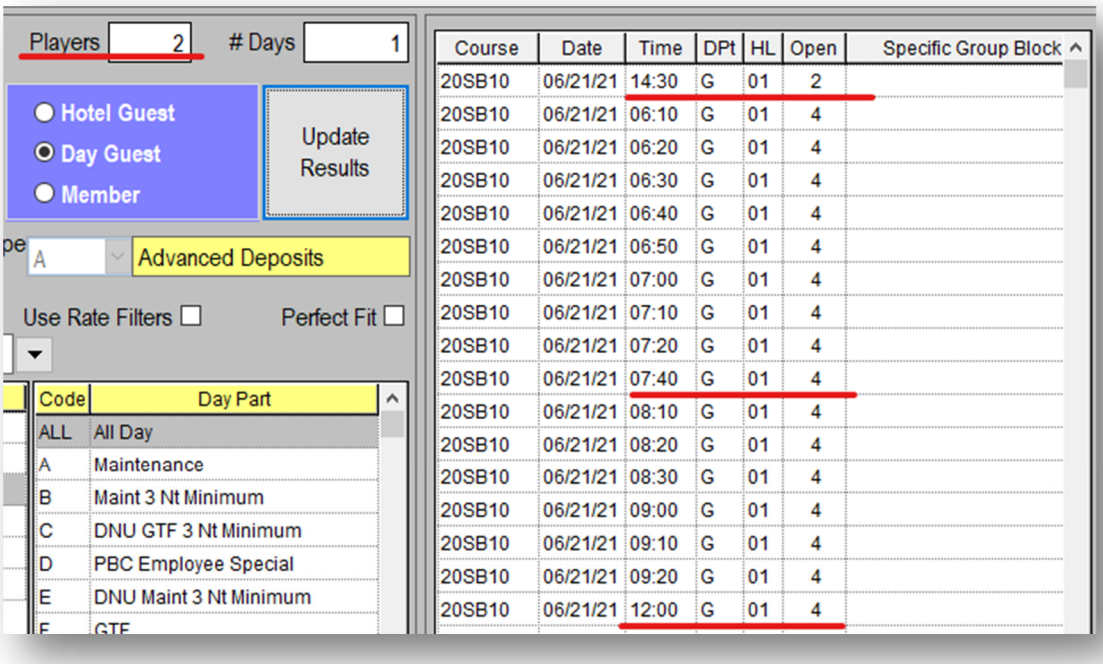
A group of five golfers should be booked as one threesome and one twosome. While we try to fill out foursomes as often as possible, we do not want to force one member of their group to play alone.

It is still important to smart book these players by searching for consecutive tee times that can fill out at least one, but ideally two foursomes.

Since it is easier for us to fill up a twosome than a single, you should start by searching for tee times with exactly three available spots.



In this example, we can see that there is an open threesome at 7:50am and 11:50am. Now, we need to search for available twosomes or foursomes that are consecutive to these two threesome options. Set your number of players to two and search once more.



There are no available twosomes consecutive with our open threesome options, 7:40am and 12pm are available to book four players, so this is what we should quote to the guest:

I am happy to book five players for you on these dates. In order to have consecutive tee times, we can book your group of five as one threesome and one twosome at either 7:40am and 7:50am or 11:50am and 12pm.

Order of the Courses

Guests will often have an agenda in their mind of the order in which they wish to play our golf courses. However, what they may not realize is that Pebble Beach is in such high demand, that we must build most reservations around the best tee times available on the Pebble Beach Golf Links course.

For example, many guests like to stay with us Friday-Sunday and play Pebble Beach Golf Links as the middle course. However, depending on how far in advance they book, it can be very rare to find a prime Pebble Beach tee time on a Saturday (our most popular day of the week). The guest may have a much better schedule if they are willing to play Pebble Beach Golf Links on Friday or Sunday instead.

It is best practice to begin by asking the guest their ideal tee time, then search for Pebble Beach availability first to see which date best fits that schedule.

36 Holes

Some guests will want to fit as much golf as possible into their trip to Pebble Beach, so they will book two rounds of golf in one day, sometimes multiple days in a row.

This situation is where your Resort Knowledge will greatly help your guest plan their day. You must make sure that the guest books their day with enough time between rounds factoring in travel time between courses and padding in time to get something to eat between rounds.

> Guests may only book Pebble Beach Golf Links and Spyglass Hill Golf Course on the same day if we are within three months of their visit.

We advise guests against booking Pebble Beach Golf Links and Spyglass Hill as 36 holes for several reasons. Both courses are very long and can be difficult for most golfers to complete in one day. Instead, we advise guests to book one round of their 36 holes on The Links at Spanish Bay which is an easier course and generally has more availability which makes their tight golf schedule easier to plan. More importantly, we want to keep availability at Spyglass Hill open for more Resort Guests rather than have a smaller number of guests book multiple rounds.

1. If the guest insists on booking Pebble Beach Golf Links and Spyglass Hill as 36 Holes, they can only do so once we are within three months of their stay.
2. Pebble Beach Golf Links cannot be booked twice in one day in advance. Guests must wait until they begin their round on the day of play to inquire with the pro shop about a re-round same day.

Golf Add-Ons

Carts

For **Resort Guests**, carts are complimentary our three primary courses:

- Pebble Beach Golf Links
- Spyglass Hill Golf Course
- The Links at Spanish Bay

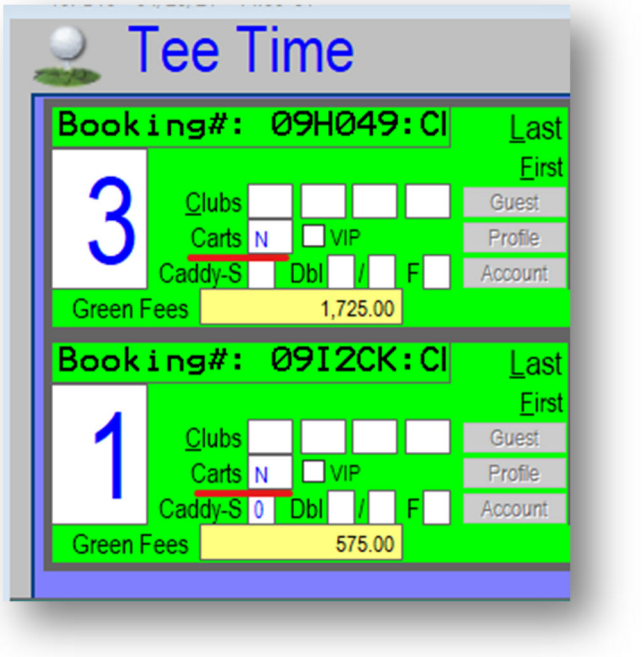
For **Outside Guests**, each guest who wishes to take a cart must pay a $45 per rider fee.

At the Del Monte Golf Course, regardless of whether the guest is Resort or Outside, if they wish to take a cart, each guest is responsible for a $25 per rider fee.

There is a field for Golf Carts on the **Golf Reservation Tile** that will automatically be set to N, as in No Cart. You should never update this default setting.

Our guests do not need to reserve golf carts in advance. They simply need to let the starter know when they check in for their round that they plan to ride.

If you mark this field as Y for Yes, the pro shop may automatically charge the guest for a cart even if they end up not taking one. To avoid that mistake, we leave this set as No until their day of play.



Spectators

Each golfer booked into a tee time at one of our courses is permitted to bring along one spectator, which is a non-golfer who will accompany the guest during their round.

- If the golfer and the spectator choose to walk the course, there is no fee involved for the spectator.
- If the golfer and spectator choose to take a cart, regardless of whether the spectator is a Resort Guest or an Outside Guest, the spectator will be responsible for the cart fee.
- A spectator may not have their own cart to themselves; they must share a cart with the golfer.

Caddies

Traditional Caddie	A Traditional Caddie, also referred to as a **Carrying Caddie**, will provide accurate yardages, assistance on the greens, rake bunkers, fix ball marks, replace divots, tend flagsticks, locate/find balls, and provide a line of play. If the guest decides to walk the course with a caddie, their bag might be changed out to a lighter one for the caddie's safety if the bag exceeds 25lbs. This will be determined at pro shop check-in. Pebble Beach has a **Double Caddie** policy meaning that each caddie will traditionally assist two golfers at one time, carrying both bags. If a guest does not want to share a caddie, they can book a single caddie instead, which is subject to a higher rate. Due to the number of caddies available, single caddies are never guaranteed and these requests may not be filled.
Forecaddie	A forecaddie will not carry bags or touch equipment. They will typically stay ahead of the group to call yardages, read greens, locate balls, etc. One forecaddie will typically serve the full foursome.

COVID 19 Caddie Guidelines

- Carrying Caddies are temporarily unavailable during the COVID-19 pandemic for the purpose of eliminating common touchpoints between the caddies and our guests.
- Guests are encouraged to book Forecaddies, who will still provide their expertise during the round, but will not touch the guest's equipment, carry their bags, or drive the guest's bags on their carts.
- Pebble Beach traditionally has a three-player minimum to book a forecaddie, but this rule has been placed on hold throughout the pandemic.

Caddie Rates

- $**145** - Single Bag Carrying Caddie (not currently available)
- $**190** - Double Bag Carrying Caddie (not currently available)
- $**190** - Forecaddie for four golfers
- $**142.50** - Forecaddie for up to three golfers

Recommended Average Gratuity:

1. Double Caddie – $35 to $60 per bag
2. Single Caddie – $55 to $80 per bag
3. Forecaddie – $25 to $40 per bag

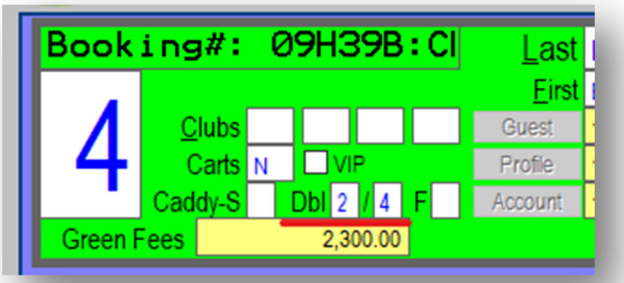
Gratuity may be higher or lower based on the level of service.

Reserve A Caddie

On the Golf Tile, you will see two boxes next to the **Double Caddie (Dbl)** field.

1. The first box is the number of caddies need
2. The second box is the number of golfers they will be assisting.

This box will only ever be filled in as **1 / 2** (one double caddie to service two golfers) or **2 / 4** (two double caddies to service a foursome.)



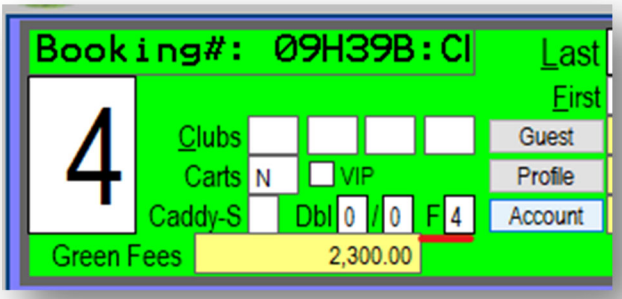
The **Single Caddie (Caddy-S)** field is where you will reserve a single caddie for guests who do not want to share their double caddie with another person.

The box should reflect the number of golfers who wish to have a single caddie.



The **Forecaddie (F)** field is directly next to the Double Caddie field. There is only one box since one forecaddie is capable of serving an entire foursome.

In this box, you should enter the number of golfers who will utilizing the forecaddie's services.

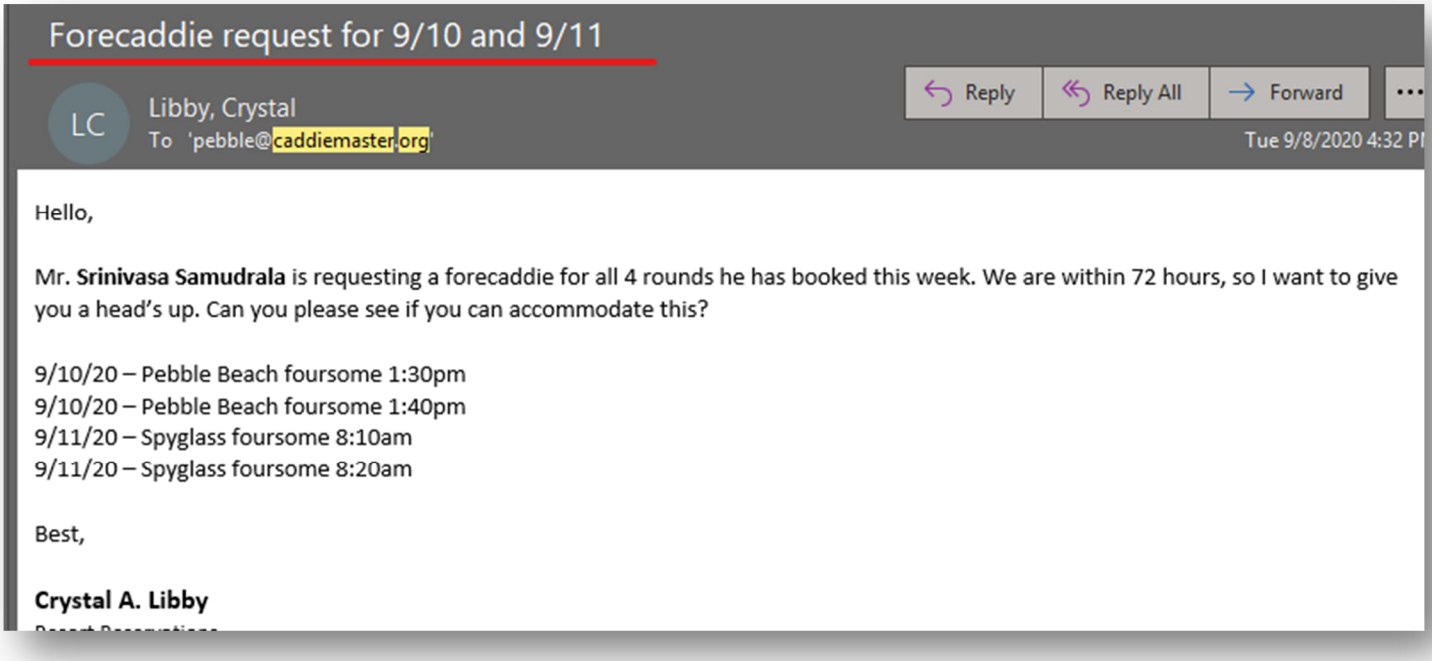


There is no cancellation policy for caddies or forecaddies. Guests may cancel at any point, including up to the time they check in with the starter on the day of their round.

To Guarantee A Caddie

To Guarantee availability, caddies must be reserved at least three days prior to the date of play.

- If a guest is already within three days of their day of play and wishes to reserve a caddie, they should be connected to Caddie Services – Extension 6162
- If Caddie Services is unavailable to connect the guest, send an email on the guest's behalf to pebblebeach@caddiemaster.org.

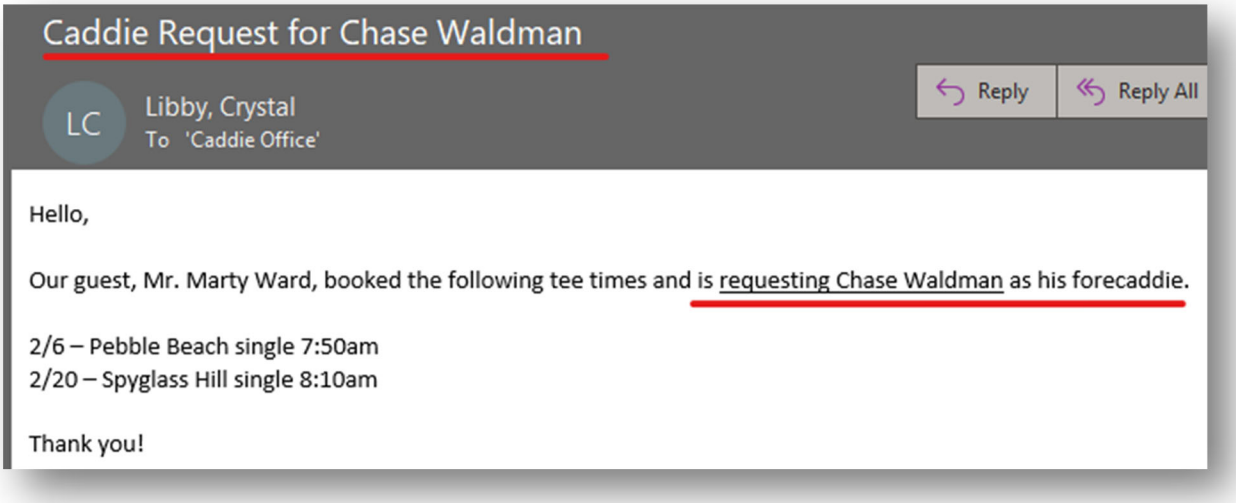


Note: When emailing Caddie Services, do not use the Itinerary Number to identify your tee times. The Pro Shops and Caddie Masters work with the Tee Sheets, not the Booking Center, so it is best to provide the golfer's name(s), course(s), and tee time(s).

Specific Caddie Requests

Important Note: To ensure the fair treatment and work for all caddies, we cannot recommend specific caddies to guests. *This is a union issue*

- If a guest already knows a specific caddie they wish to work with, you should either connect that guest to Caddie Services or send an email on the guest's behalf requesting that specific caddie.
- We do not guarantee the availability of specific caddies because the caddie themselves must accept the job.



Rental Clubs

There are four options for guests when it comes to golf clubs at our courses:

- **Bring their own clubs**

- **Ship their clubs to Pebble Beach**
  - Clubs may be shipped to Pebble Beach via FedEx or other shipping services
  - Day Guests may ship their clubs directly to the Pro Shops
  - Resort Guests may ship their clubs to the main address of their Resort.

- **Buy Clubs from Pebble Beach**
  - The Pebble Beach Golf Academy provides club fittings and have some clubs for sale at the shop.
  - Full sets can be ordered by the Golf Academy

- **Rent Clubs from Pebble Beach Pebble Beach**
  - Pebble Beach is brand partners with TaylorMade, therefore all rental clubs will be the TaylorMade brand.
  - Pebble Beach offers men's and women's right and left-handed clubs with flex or stiff shafts.

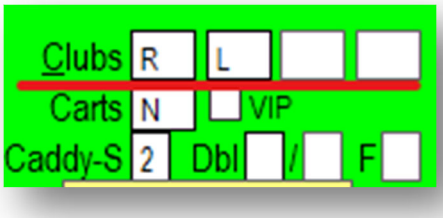
Reserve Rental Clubs

Ask the guest:

- *How many players will require rental clubs?*
- *Should the clubs be men's or women's?*
- *Are the players left or right-handed?*

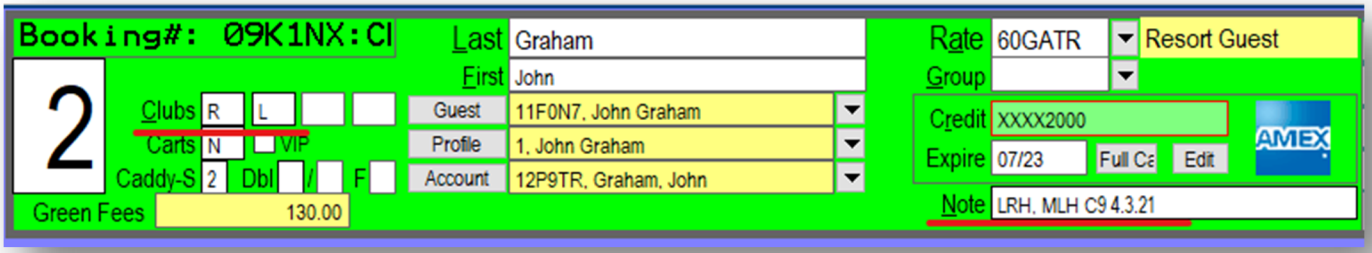
Access the Golf Tile and click Edit. Depending on if the clubs are right or left-handed, type R or L into the boxes in the **Clubs** field.

Each box is for a different player. For example, if four players need right-handed clubs, you would enter R, R, R, R.



In the **Baby Notes** field, for every golfer write:

- MRH (Men's Right Hand) or MLH (Men's Left Hand)
- LRH (Ladies Right Hand) or LLH (Ladies Left Hand)



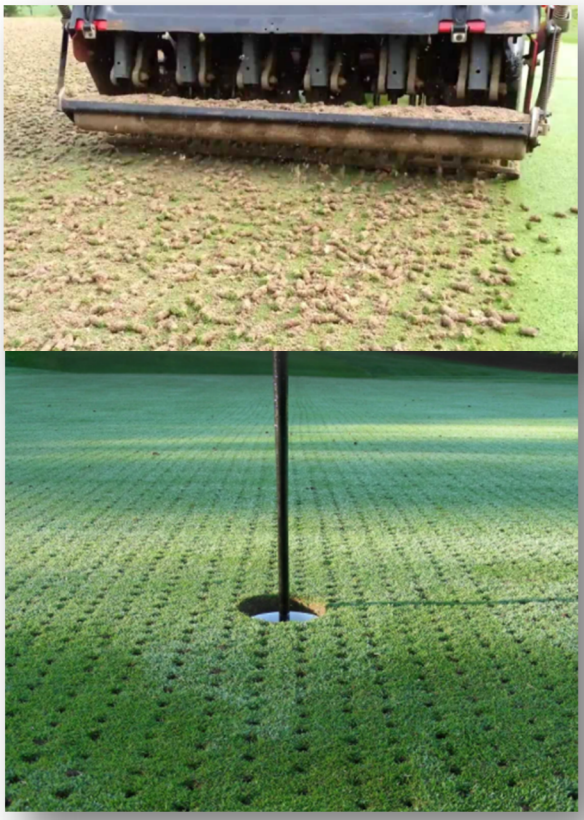
Aeration

Golf Course Aeration is a process of punching holes into the grass to open growing room for grass roots and allow nutrients and water to penetrate deep into the soil to keep the turf healthy.

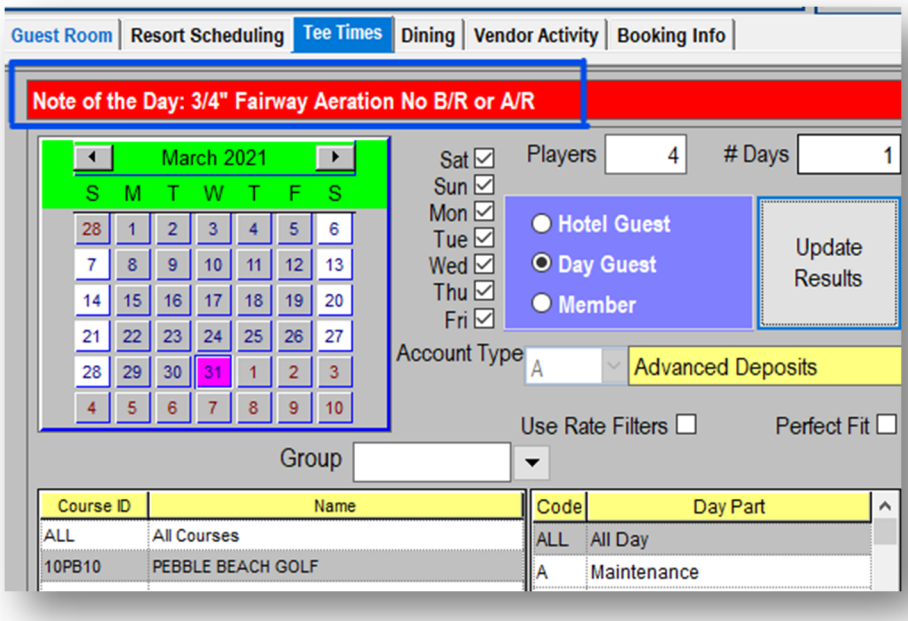
Minor Aerations are performed all year long in staggered schedules, but approximately twice a year, each course goes through a **Major Aeration** of the greens.

We are obligated to inform our guests if they plan to book a tee time over a period of major aeration because they will likely see the effects on the greens and the holes may affect their putting game.

Because our courses will temporarily be below the pristine Pebble Beach standards while the grass heals over, tee times during Major Aeration may be booked at a discounted rate, *and* Pebble Beach golf links may be booked without the required room stay.



When searching for Golf Availability in SMS, if the date you select is over a period of aeration (minor or major), you will see a red bar above the search area that informs you of the aeration details:



In this example, on March 31st, the Pebble Beach Golf Links course will be going through the ¾" aeration on each Fairway.

¾" is the size of the tine used to punch the holes, meaning that each hole in the fairway will be 3/4" in diameter.

This is a minor aeration because the size of the hole is not of significant impact. We do not need to inform the guest of minor aeration unless they specifically ask.

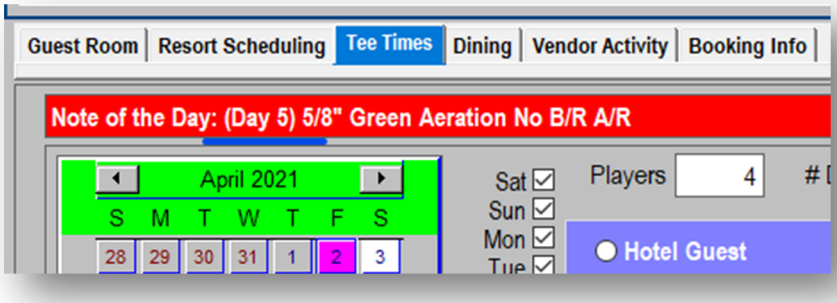
Identify Major Aeration

To easily identify Major Aeration – of which we are obligated to inform the guest – you simply need to look for the Day Number in parentheses in the red note.

For example, the following note has "(Day 5)" in parentheses. The greens require approximately 10 days to heal over after a major aeration.

This note is stating that the greens will be punched (aerated) with 5/8" tines 5 days prior to April 2nd.

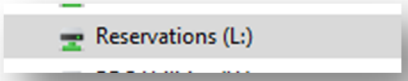
You will only ever see the number of days in parentheses when it is a major aeration.



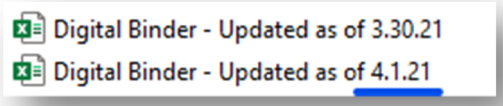
Another way to see when aeration will be occurring on our Golf Courses is to consult the **Aeration Calendar**. Whenever this calendar is updated, an email with the new calendar will be emailed to all Reservations Agents. You can also access the current calendar any time by opening the **Digital Binder**.

To access the Aeration Calendar in the Digital Binder:

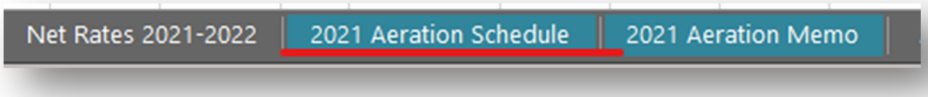
- Open File Explorer on your computer 
- Access the L Drive



- Open the RESORT RESERVATIONS FOLDER
- Open the Resort Knowledge Folder
- Click on the Digital Binder with the most recent Update Date:



- An excel spreadsheet will open with many tabs along the bottom. Locate the tab labeled Aeration Calendar.



This **Aeration Calendar** does not explicitly mark which dates are Major Aeration, but you can identify Major vs. Minor Aeration by the size of the tines.

The Tine Sizes used for Major Aeration are:

- Five Eighths Inch
- Double Quarter Inch– This means the tines are only ¼" wide, but twice as many holes are punched in this size than during minor aeration.
- Three Eighths Inch



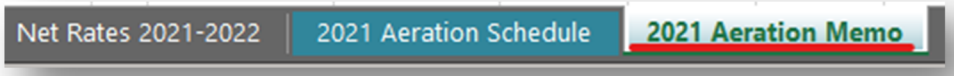
2021 AERATION SCHEDULE (First Day thru Last Day of guest impact)

GOLF DIVISION PEBBLE BEACH	GOLF DIVISION SPYGLASS HILL	GOLF DIVISION SPANISH BAY
GREENS	**GREENS**	**GREENS**
March 23 thru March 29 (1/4"x 2)	March 29 thru April 7 (5/8")	March 29 thru April 4 (3/8")
May 17 thru May 19 (1/4")	May 24 thru May 26 (1/4")	May 10 thru May 12 (1/4")
June 28 thru June 30 (1/4")	July 22 thru July 24 (1/4")	July 5 thru July 7 (1/4")
August 11 thru August 20 (5/8")	August 14 thru August 16 (1/4")	August 9 thru August 18 (5/8")
September 27 thru September 29 (1/4")	September 27 thru October 6 (5/8")	September 20 thru September 22 (1/4")
November 22 (1/4" Solid)	November 24 (1/4" Solid)	November 22 (1/4" Solid)
TEES	**TEES**	**TEES**
~~February 23 (1/2")~~	~~March 8 (1/2")~~	~~March 1 (1/2')~~
April 13 (1/2")	April 5 (1/2")	April 19 (1/2")
June 23 (1/2")	June 9 (1/2")	August 2 (1/2")
October 4 (1/2")	August 23 (1/2")	October 11 (1/2")
	October 25 (1/2")	
FAIRWAYS	**FAIRWAYS**	**FAIRWAYS**
March 30 (3/4")	May 17 (3/4")	March 29 (3/4")
August 23 (Slice/Verticut)	July 23 (3/4")	September 6 (3/4")
October 14 (3/4")	September 1 (3/4")	October 18 (3/4")
FAIRWAY TOPDRESS	**FAIRWAY TOPDRESS**	**FAIRWAY TOPDRESS**
April 9 thru April 15	May 20 thru May 26	April 5 thru April 11
August 26 thru September 1	August 2 thru August 8	Sept 9 thru September 15
October 20 thru October 26	September 7 thru September 13	Oct 21 thru October 27

Guests will periodically ask when we are performing aeration on the course. In those instances, they are typically only referring to Major Aeration, so you can consult this calendar to let them know the approximate timeframe. The calendar is still subject to change throughout the year.

If they do not need specific dates, you can let guests know that our Major Aeration is typically performed on the greens twice per year: once in March and once in August.

Another tab within the Digital Binder is the **Aeration Memo**:



This memo solely reflects the dates of Major Aeration on each course:

2021 AERATION NOTIFICATION

Any guest booking golf tee times in 2021 over the below aeration dates will be notified and receive special rates as outlined below. Choose the appropriate "Aeration" golf rate based on type of booking (e.g. Aeration Stay & Play for a package or Aeration for non package golf).

Spring - 2021

PEBBLE BEACH		
2 x 1/4 inch - 7 Days		
DAY	DATE	RATE
Tuesday	3/23/2021	$385
Wednesday	3/24/2021	$385
Thursday	3/25/2021	$385
Friday	3/26/2021	$385
Saturday	3/27/2021	$385
Sunday	3/28/2021	$385
Monday	3/29/2021	$385

SPYGLASS HILL		
5/8 inch - 10 Days		
DAY	DATE	RATE
Monday	3/29/2021	$250
Tuesday	3/30/2021	$250
Wednesday	3/31/2021	$250
Thursday	4/1/2021	$250
Friday	4/2/2021	$250
Saturday	4/3/2021	$250
Sunday	4/4/2021	$250
Monday	4/5/2021	$250
Tuesday	4/6/2021	$250
Wednesday	4/7/2021	$250

SPANISH BAY		
3/8 inch - 7 Days		
DAY	DATE	RATE
Monday	3/29/2021	$175
Tuesday	3/30/2021	$175
Wednesday	3/31/2021	$175
Thursday	4/1/2021	$175
Friday	4/2/2021	$175
Saturday	4/3/2021	$175
Sunday	4/4/2021	$175

Fall - 2021

PEBBLE BEACH		
5/8 inch - 10 Days		
DAY	DATE	RATE
Wednesday	8/11/2021	$385
Thursday	8/12/2021	$385
Friday	8/13/2021	$385
Saturday	8/14/2021	$385
Sunday	8/15/2021	$385
Monday	8/16/2021	$385
Tuesday	8/17/2021	$385
Wednesday	8/18/2021	$385
Thursday	8/19/2021	$385
Friday	8/20/2021	$385

SPYGLASS HILL		
5/8 inch - 10 Days		
DAY	DATE	RATE
Monday	9/27/2021	$250
Tuesday	9/28/2021	$250
Wednesday	9/29/2021	$250
Thursday	9/30/2021	$250
Friday	10/1/2021	$250
Saturday	10/2/2021	$250
Sunday	10/3/2021	$250
Monday	10/4/2021	$250
Tuesday	10/5/2021	$250
Wednesday	10/6/2021	$250

SPANISH BAY		
5/8 inch - 10 Days		
DAY	DATE	RATE
Monday	8/9/2021	$175
Tuesday	8/10/2021	$175
Wednesday	8/11/2021	$175
Thursday	8/12/2021	$175
Friday	8/13/2021	$175
Saturday	8/14/2021	$175
Sunday	8/15/2021	$175
Monday	8/16/2021	$175
Tuesday	8/17/2021	$175
Wednesday	8/18/2021	$175

Note: Whenever an updated Aeration Schedule or Aeration Memo is emailed to the Reservations Staff, all changes that have been made since the previous version of the document will be highlighted in yellow. This is why the Fall Spyglass Hill column is highlighted in the image above; those aeration dates were updated since the previous memo release. .

Aeration Rate Code Change Near Dates

When we are close to the dates of aeration, the rates will be changed back to rack rate price, but still under aeration rate code. This is so the pro shop can hit the "aeration discount" button in their system when they charge the guest's credit cart upon arrival.

(need more info on this)

Complete an Aeration Golf Booking

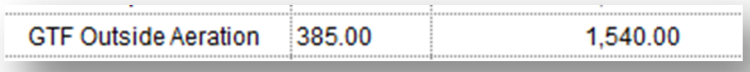
When a guest wishes to book a tee time and you see an aeration note with the Day Number in parentheses, follow these steps to complete the booking.



- Inform the guest:
  Yes, I do have tee times available on this date, however, I want to let you know that I see we are performing aeration on greens nine days prior to your date of play, so you may see visible impact during your round.

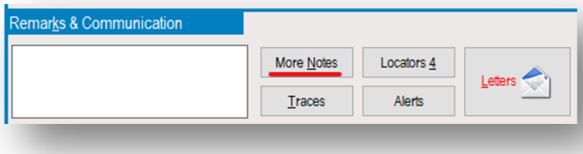
  We allow 10 days for our greens to heal over after aeration and I see that your date falls on day 9 of that process, so you impact should be minimal. If you still wish to book this tee time, I can offer you a discounted rate of $385 instead of $575 per player.

- If the guest wishes to proceed, instead of selecting the Outside Guest Rate Codes, you must select Outside Aeration:

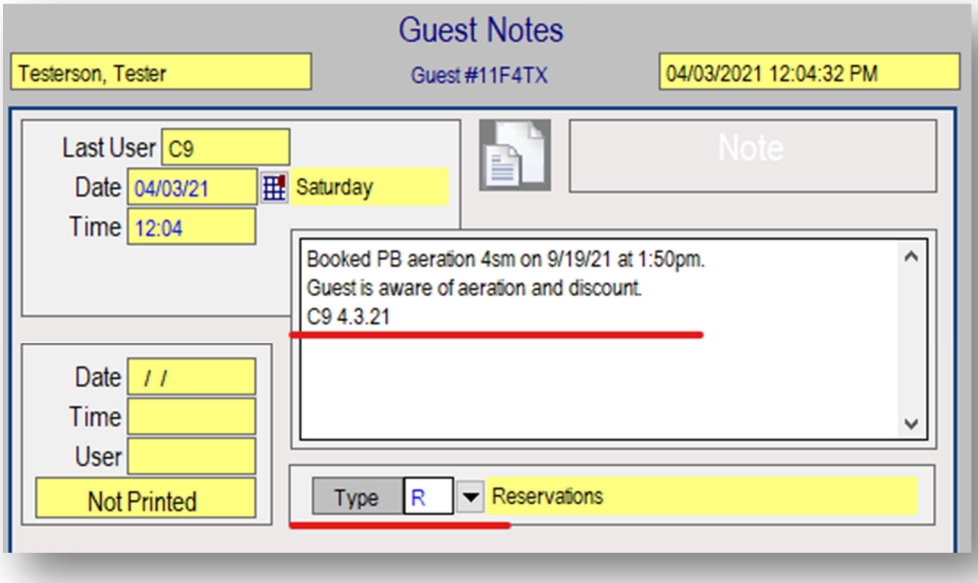


- Prepare the Guest Tile and complete the tee time booking as normal.

- Access the Guest Tile and click More Notes to leave an R Note.



- Create and Save a Reservations Note like the following and mark the note "Closed".

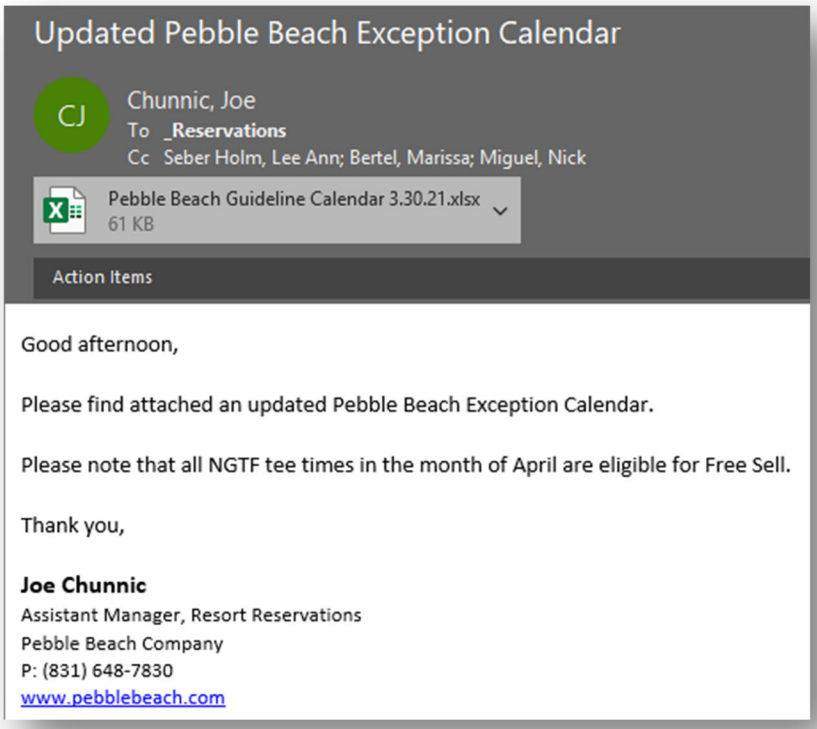


The Exception Calendar for Golf

The **Exception Calendar**, also referred to as the Free Sell Calendar, is an excel sheet on which pre-approved exceptions to our standard booking guidelines are written.

The list is updated periodically by management and emailed to the Reservations staff as an attachment.

The purpose of the exception calendar is to maximize our bookings. For example, if there is a large block of tee times at Pebble Beach available on a particular date, but no rooms left for Resort Guests to book, you may see those dates on the next Exception Calendar update. These decisions are determined by the **Revenue Management** team.



Updated Pebble Beach Exception Calendar

CJ

Chunnic, Joe
To _Reservations
Cc Seber Holm, Lee Ann; Bertel, Marissa; Miguel, Nick

Pebble Beach Guideline Calendar 3.30.21.xlsx
61 KB

Action Items

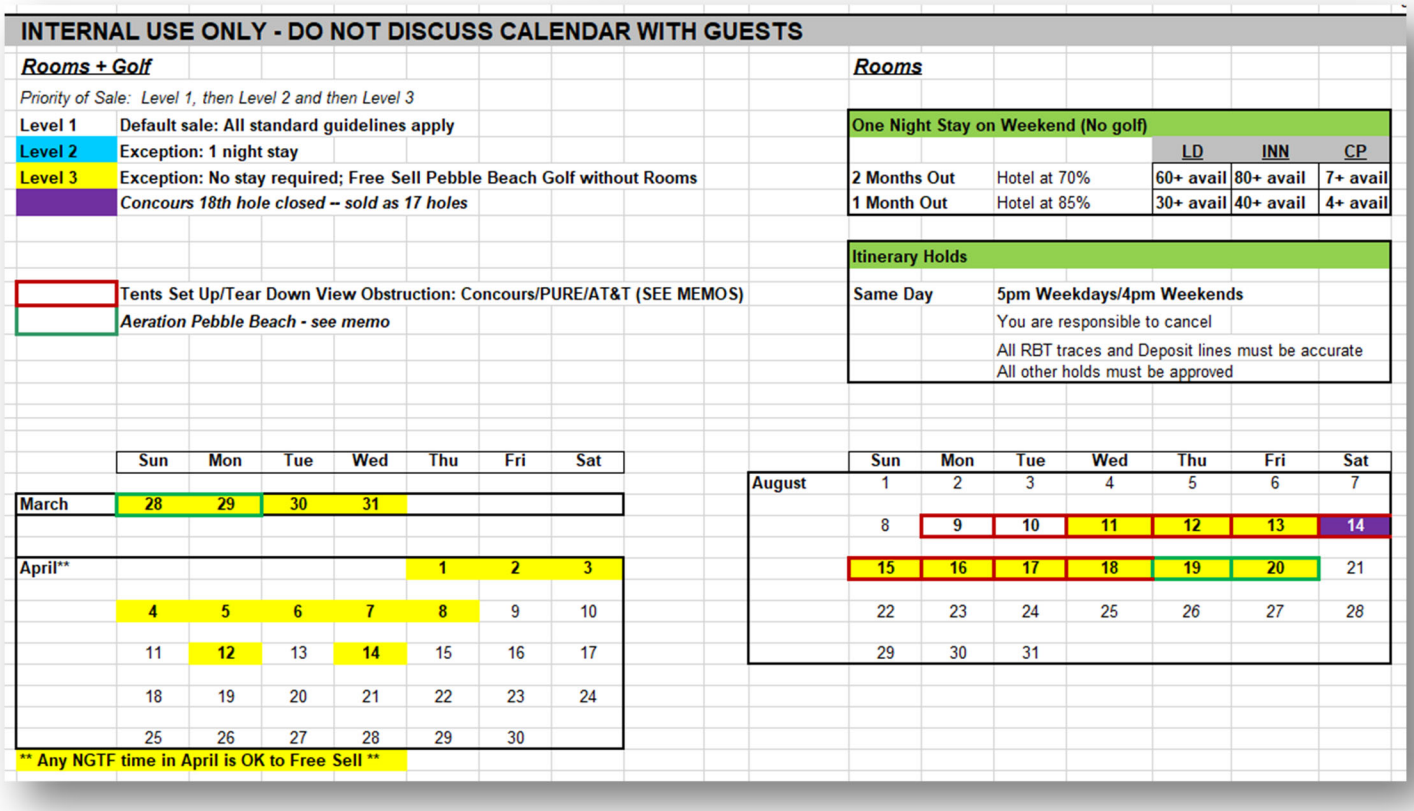
Good afternoon,

Please find attached an updated Pebble Beach Exception Calendar.

Please note that all NGTF tee times in the month of April are eligible for Free Sell.

Thank you,

Joe Chunnic
Assistant Manager, Resort Reservations
Pebble Beach Company
P: (831) 648-7830
www.pebblebeach.com



INTERNAL USE ONLY - DO NOT DISCUSS CALENDAR WITH GUESTS

Rooms + Golf

Priority of Sale: Level 1, then Level 2 and then Level 3

Level 1	Default sale: All standard guidelines apply
Level 2	Exception: 1 night stay
Level 3	Exception: No stay required; Free Sell Pebble Beach Golf without Rooms
	Concours 18th hole closed -- sold as 17 holes
	Tents Set Up/Tear Down View Obstruction: Concours/PURE/AT&T (SEE MEMOS)
	Aeration Pebble Beach - see memo

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
March	28	29	30	31			
April**					1	2	3
	4	5	6	7	8	9	10
	11	12	13	14	15	16	17
	18	19	20	21	22	23	24
	25	26	27	28	29	30	

** Any NGTF time in April is OK to Free Sell **

Rooms

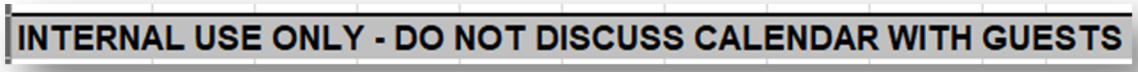
One Night Stay on Weekend (No golf)		LD	INN	CP
2 Months Out	Hotel at 70%	60+ avail	80+ avail	7+ avail
1 Month Out	Hotel at 85%	30+ avail	40+ avail	4+ avail

Itinerary Holds	
Same Day	5pm Weekdays/4pm Weekends
	You are responsible to cancel
	All RBT traces and Deposit lines must be accurate
	All other holds must be approved

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
August	1	2	3	4	5	6	7
	8	9	10	11	12	13	14
	15	16	17	18	19	20	21
	22	23	24	25	26	27	28
	29	30	31				

Priority of Sale

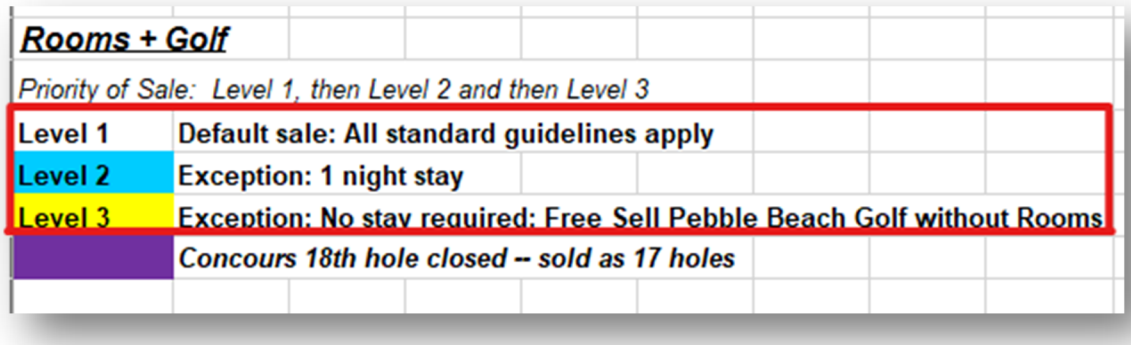
At the top of the **Exception Calendar**, you will see a very important message:



In other words, guests should never know that the Exception Calendar exists.

The exception calendar is intended to be a method of negotiation. Just because we *can* book a Pebble Beach tee time without a Resort Stay does not mean we should immediately jump to this option.

In the top left corner of the **Exception Calendar**, you will see a Key that explains the color coding of the calendar dates. At the top of this Key is "**Priority of Sale: Level 1, then Level 2, and then Level 3**."



Priority of Sale means that, when you are discussing a booking with a guest over dates that you know overlap with our exception calendar, instead of jumping to offering Pebble Beach Golf Links without a Resort Stay up front, you should work your way from Level 1 through Level 3 like this:

- Start by quoting our standard guidelines for booking rooms.
  I am happy to look into availability at Pebble Beach Golf Links. Just so you are aware, during these dates, we require a minimum two-night stay at our Resorts in order to book Pebble Beach more than one day in advance.
- If your guest simply cannot make the 2-Night stay work, negotiate down from 2 nights.
  I might be able to get approval to book you at Pebble Beach on this date with a one-night stay. Do you think you could make that work?

1. If they still cannot do this, you should tell your guest, "*Let me see if there is anything else, I can do*," then place them on hold. Come back from your hold with the good news that you are able to make an exception to book Pebble Beach Resorts without the minimum resort stay this one time.

Negotiating in this manner will increase your favor with the guest because they will feel that you are you are the one who has single-handedly found a way to make their trip work.

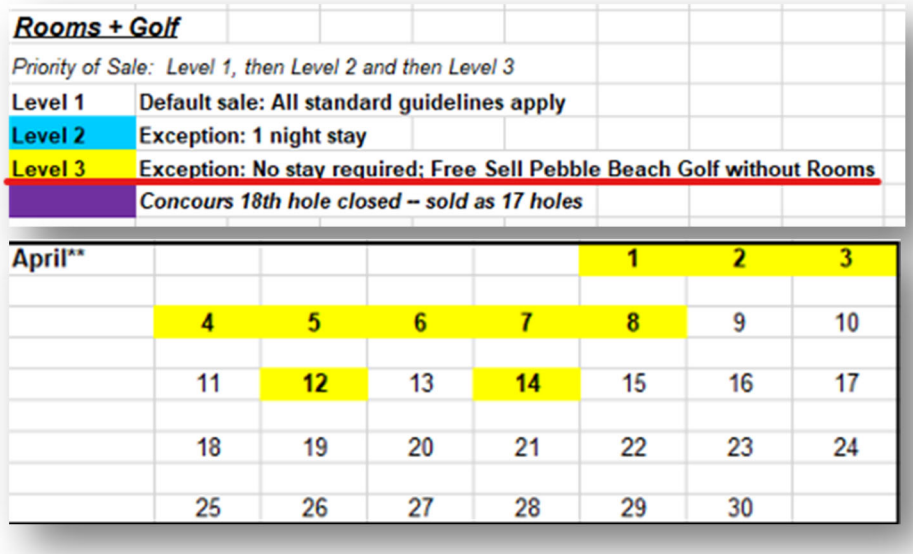
You may also be surprised how often you will not need to negotiate beyond the offer of booking with a one-night stay.

Complete an Exception Calendar Booking

Per the exception calendar, all dates on the calendar that are yellow are designated as "**Free Sell**" dates.

This gives us the authorization to sell Pebble Beach Golf Links without the required Resort Stay.

For this example, we will book a tee time at Pebble Beach on April 12th.



Rooms + Golf	
Priority of Sale: Level 1, then Level 2 and then Level 3	
Level 1	Default sale: All standard guidelines apply
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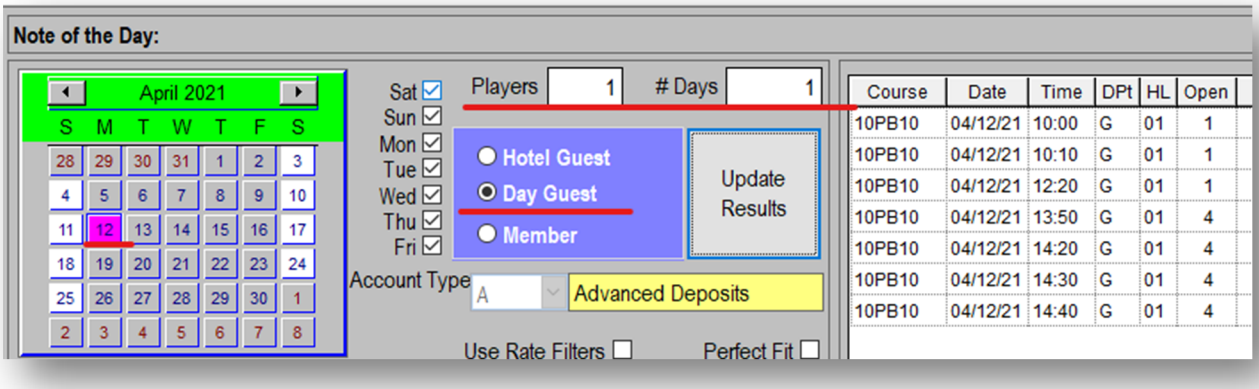
	Concours 18th hole closed -- sold as 17 holes

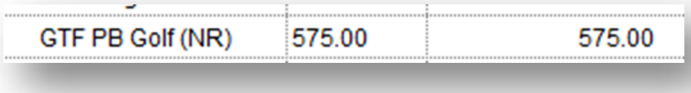
April**					1	2	3
	4	5	6	7	8	9	10
	11	12	13	14	15	16	17
	18	19	20	21	22	23	24
	25	26	27	28	29	30	

- Inform the guest that this is an exception to our typical booking policy, reinforcing the idea that they will likely be unable to book Pebble Beach without the Resort Stay Requirement in the future.

- In your tee time search, set your Guest Type to **Day Guest**.



- Once you select the best time for your guest, the rate code you will need to select say **PB Golf (NR)** The **(NR)** stands for No Room because this tee time is being booked without the room stay requirement.

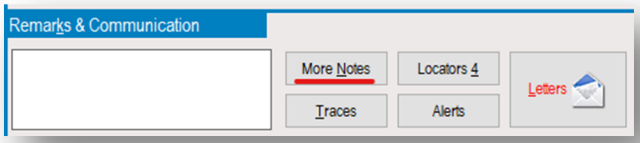


GTF PB Golf (NR)	575.00	575.00

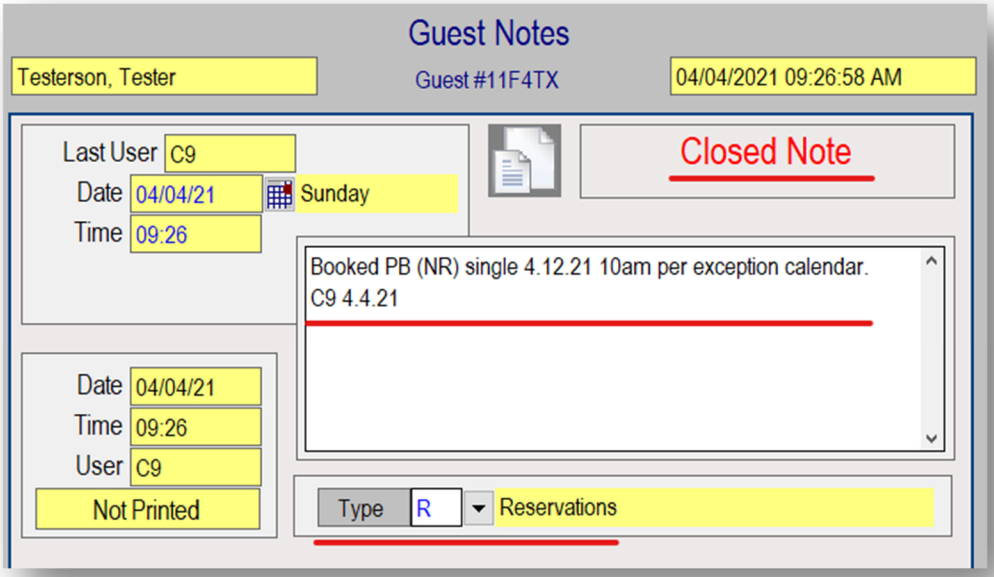
- Prepare the Guest Tile and complete the tee time booking as normal

- Document the 14-day cancellation policy in the Baby Note field.

- Access the Guest Tile and click More Notes to leave an R Note.



- Create and Save a Reservations Note like the following and mark the note as "Closed."



Club Member Golf Guidelines

	Pebble Non-Peak Season	Pebble Peak Season	Spyglass Hill	Spanish Bay	Del Monte
BC/SB Members	Rolling 90 Day Member must play 14 Day CXL 4 player per day 3 tee times per 90d $575	1 day Non CXL 12 players $575	Rolling 90 Day Member must play 14 Day CXL 4 player per day 3 tee times per 90d $415	Rolling 90 Day Member must play 14 Day CXL 4 player per day 3 tee times per 90d $295	Rolling 90 Day Member must play **3 Day CXL** 4 player per day 3 tee times per 90d $110 + Cart
Duke Members	1 day Non CXL 12 players $575 + Cart	1 day Non CXL 12 players $575 + Cart	30 days/member must play **7 Day CXL** 4 players/1 per day $240 + Cart	30 days/member must play **7 Day CXL** 4 players/1 per day $170 + Cart	30 days/M-F Member must play **3 Day CXL** 1 player per day @ Dk rate + 3 @ DK guest rate M-F: $48 + $25 cart Sat-Sun: $62 + $50 cart

There are three types of **Memberships** associated with Pebble Beach Resorts:

- **Beach and Club Membership** – This is a membership to our Beach and Tennis Club located at The Lodge at Pebble Beach club that gives members access to the Beach Club Restaurant, Fitness Facilities, Swimming Pools, Tennis Courts, as well as allowing them special privileges for booking Golf Tee Times and Spa Appointments.

- **Spanish Bay Club Membership** – This is a membership to our Spanish Bay Club located at The Inn at Spanish Bay that gives members access to the Fitness Facilities, Swimming Pools, Tennis Courts, as well as allowing them special privileges for booking Golf Tee Times and Spa Appointments.

- **Dukes Club Membership** – This is a golf membership run by the Del Monte Pro Shop that allows members special rates on tee times at The Del Monte Golf Course, The Links at Spanish Bay, and Spyglass Hill Golf Course.

Rolling 90 Days Meaning

Certain guests, such as Forest Residents and Club Members are subject to a **Rolling 90 Days** limitation. These guests may hold a maximum of 3 tee times at each course within the upcoming 90 days.

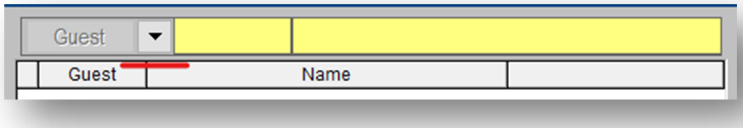
If, for example, a Forest Resident calls today and books three Pebble Beach tee times scheduled within the next 90 days, they will not be allowed to book any more Pebble Beach Tee Times until they finish playing the first of their upcoming rounds.

Verify a Club Member

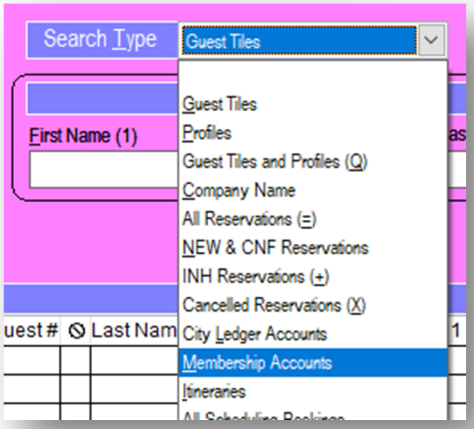
When Club Members call to book tee times, they will nearly always identify themselves as members right away, already knowing that their membership allows them special rates and earlier access to tee times.

Instead of immediately beginning your search for available tee times, for members, we want to locate their Guest Tiles right away and make sure that their memberships are valid during the dates they want to play golf.

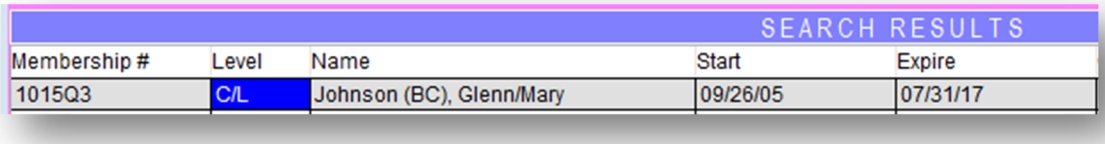
- Begin by clicking the Down Arrow next to the Guest button in your Booking Center to open **Universal Lookup**:



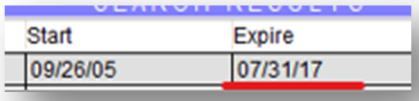
- All information about Memberships are stored within the member's Guest Tile. Therefore, you can set your Universal Lookup **Search Type** to either **Guest Tiles** or **Membership Accounts**.



- The following is an example of a search result for a **Membership Account**.

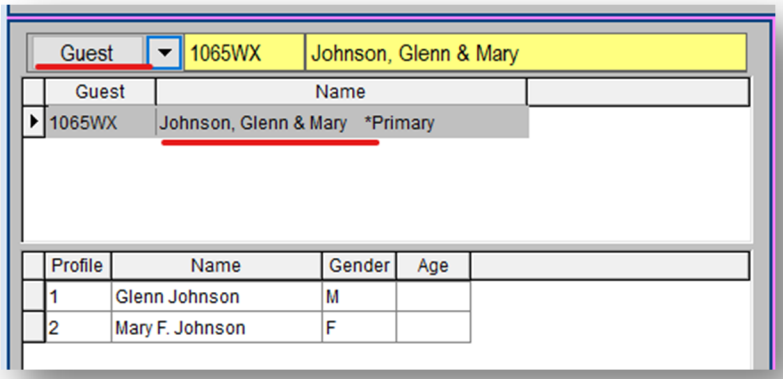


- The **C/L** inside the blue box stands **for City Ledger**. A City Ledger is a type of account that can hold money for a guest and is attached to their guest tiles.
- Memberships are one type of City Ledger Account. Beach Club Members, for example, can charge things like dinners and recreation to their account and pay for everything in a lump sum at the end of the month.
- You can see right away that this membership is not valid anymore because it has an expiration date of 7/31/17.



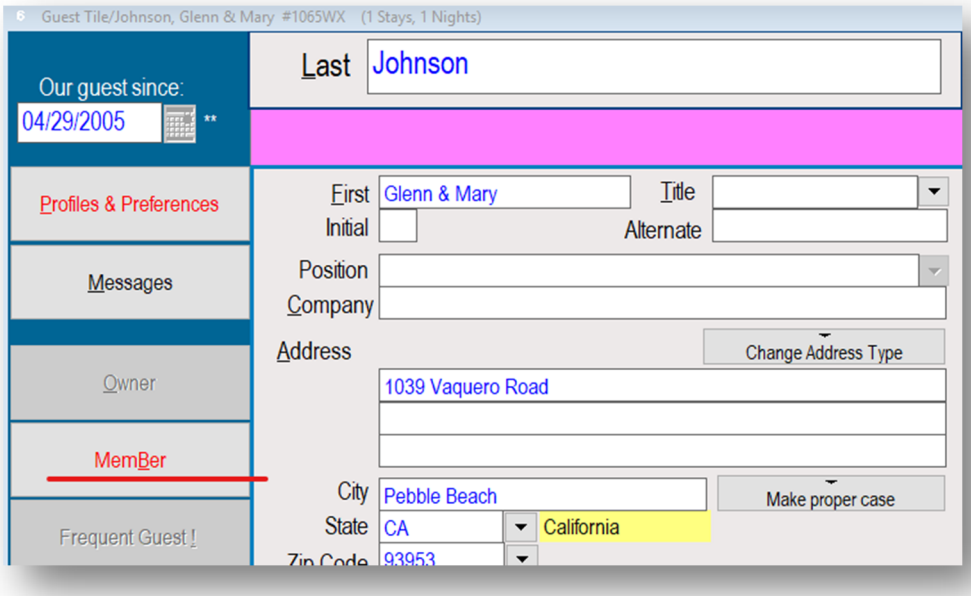
- Let's proceed as if this membership were valid. To attach the Guest Tile to your Booking Center, double click this Membership Account line.

- The Member's Guest Tile should now be visible in the Guest Section of your Booking Center. Double Click the Guest button to open up their Guest Tile.

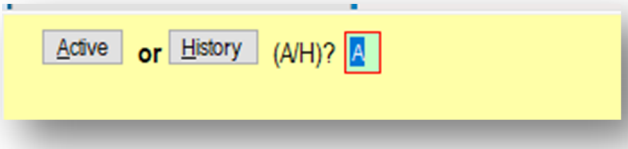


- When the Guest Tile opens, you will see that the **Member** button on the **Vertical Button Bar** is written in red. Red letters let us know that there is important information stored here. If this guest was not a Beach Club Member, this Member button would be written in black.

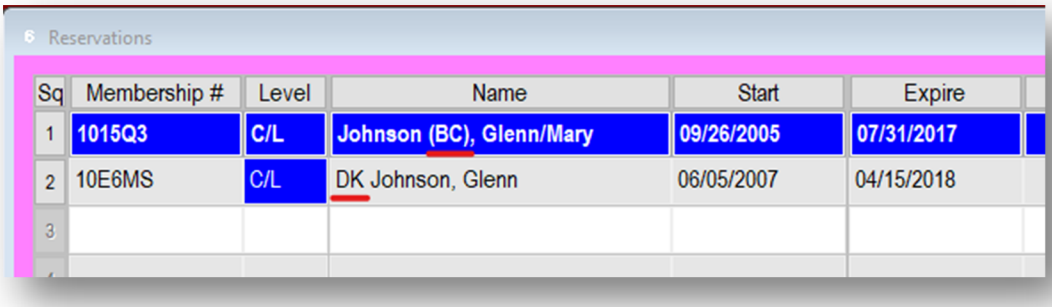
  Click the **Member** Button.



- You will be prompted to select between viewing Active memberships or Historical memberships that have been archived. Type the letter **A** on your keyboard to select **Active**.



- A new window will open that lists all memberships that are currently or have been previously associated with this Guest Tile.

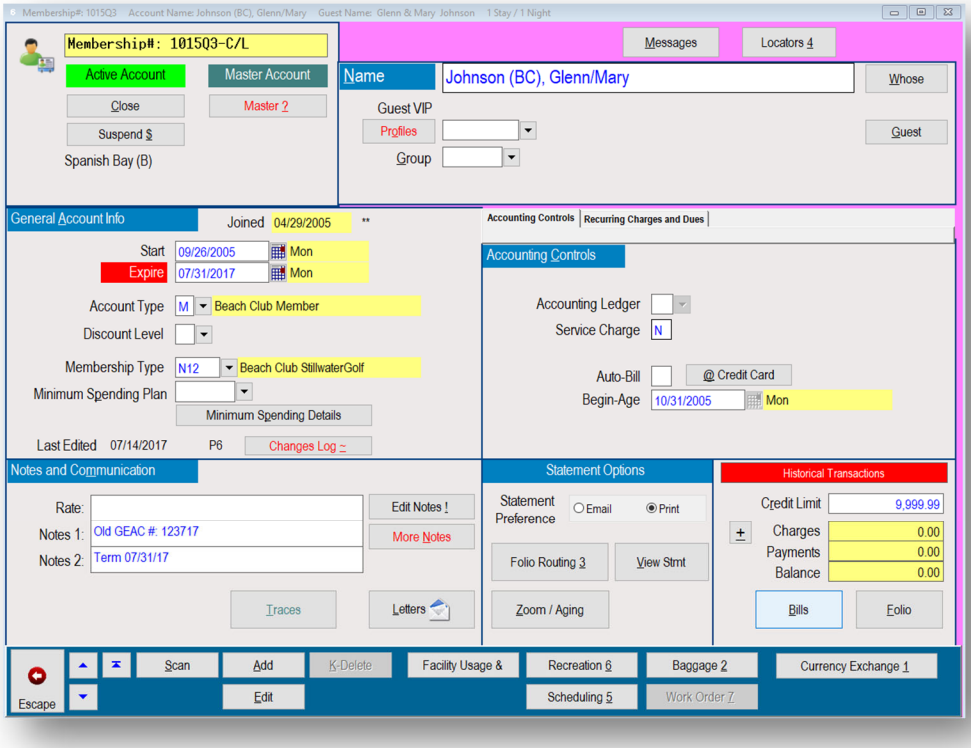


This guest has 2 memberships in their history.

- A joint **Beach Club (BC) Membership** under Glenn & Mary Johnson, valid from 9/26-2005-7/31-2017 – Membership # 1015Q3
- A single **Dukes (DK) Membership** under Glen Johnson, valid 6/5/2007-4/15/2018 – Membership # 10E6MS

The **Membership Numbers** can also be searched in Universal Lookup under the Search Type Membership Accounts. Beach Club and Spanish Bay Club members will commonly provide their membership number to you since they regularly charge activities to their House Account. It is rare for Duke's Club Member to have this number handy.

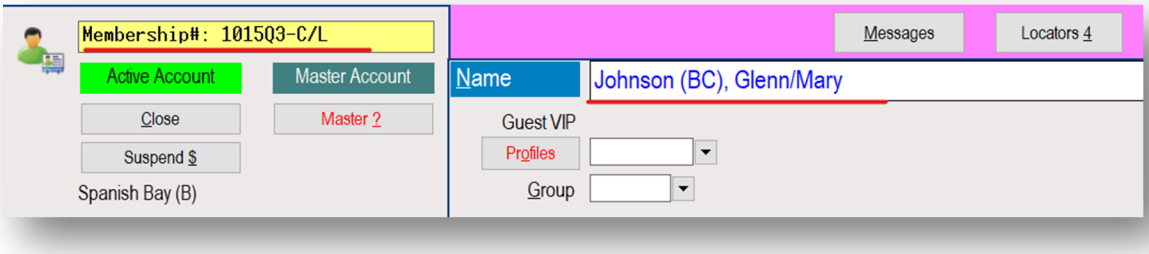
- Select line 1 or 2 to open either the Beach Club or Duke's Club account page.
For our example, we will open the Beach Club Membership.



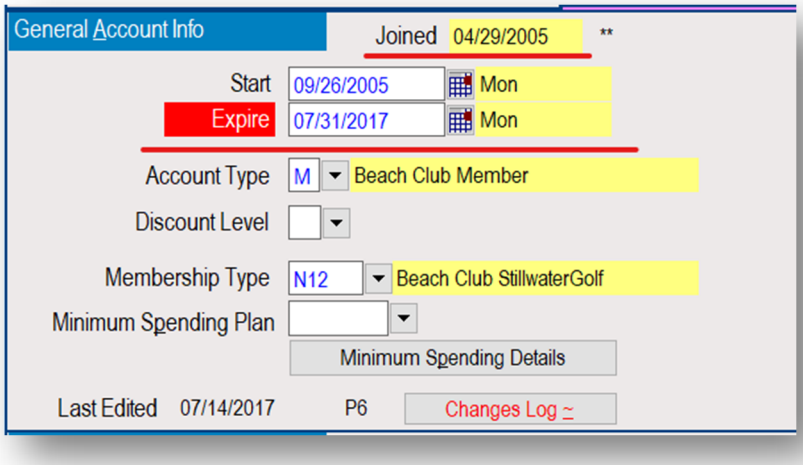
- You should never edit anything within a Membership Account. If a guest needs to make updates to their account, connect them directly with the club.

  There is, however, valuable information for you to ***view*** within this window.

  The **Membership Number, Member Names, and the type of club** (BC) can be seen at the top of the account page:



  The membership **Start and End Dates** are visible in the **General Account** Info section.
  If the membership is expired, like our example, you will see the word "Expire" highlighted in red.



  Important Notes will be written in the Notes and Communications section, but these notes will most often pertain to the club itself.

  Again, as a Reservations Agent, your main purpose for viewing the Membership Account is to ensure that the membership is valid so the members can book tee times.

- Escape to exit the Membership Account, then Escape again to exit the Guest Tile.
  For the purpose of this instruction, let's proceed as if this were a valid membership.

- Once you have verified that the membership is valid, navigate to the Tee Times Tab of the **Booking Center**



Complete a Beach Club or Spanish Bay Club Golf Booking

For a **Beach Club or Spanish Bay Club Members**, their golf privileges do not grant them discount rates.

- Club Members pay rack rate pricing for golf, but have complimentary use of golf carts (except when playing Del Monte Golf Course)

- Club Members can book all four of our 18-Hole courses within 3 months **AS LONG AS:**
  - The member is one of the golfers in the group
  - Their group does not exceed 4 golfers per day
  - The member must have 3 or fewer tee times reserved per course between today and 90 days in the future. (This is the Rolling 90 Days rule)

- Beach and Spanish Bay Club Members can only book Pebble Beach Golf Links during Non-Peak season: December-July. Club Member privileges for Pebble Beach Golf Links tee times are suspended during Peak Season (August-November). .

- Only the **Primary Member** on a Beach Club or Spanish Bay Club's Membership has golf privileges. Their children or other dependents cannot book golf for themselves and their guests.

Joint Memberships

Some couples will have a separate Beach Club Membership for each spouse. If each spouse has their own membership, then both will have their own golf privileges, meaning, they could each book up to 4 golfers per course, totaling to 8 in one day as long as both members played.

Alternatively, couples have the option to share one joint Beach Club Membership between the two of them:

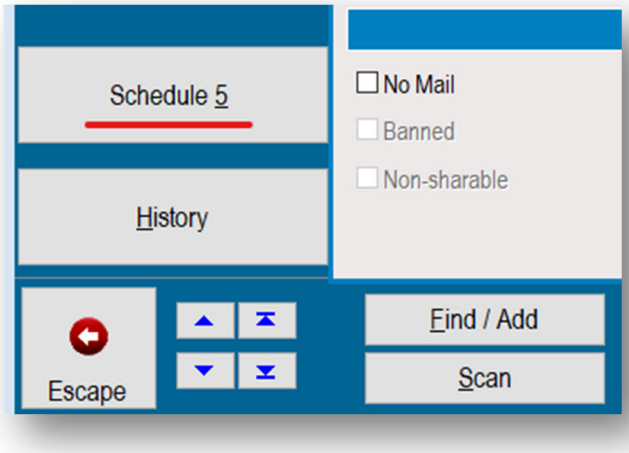


If a couple is sharing a Beach Club membership, then they must also share the golf privileges, meaning, for example, they could only book 4 golfers per course per day.

Rolling 90 Days Verification

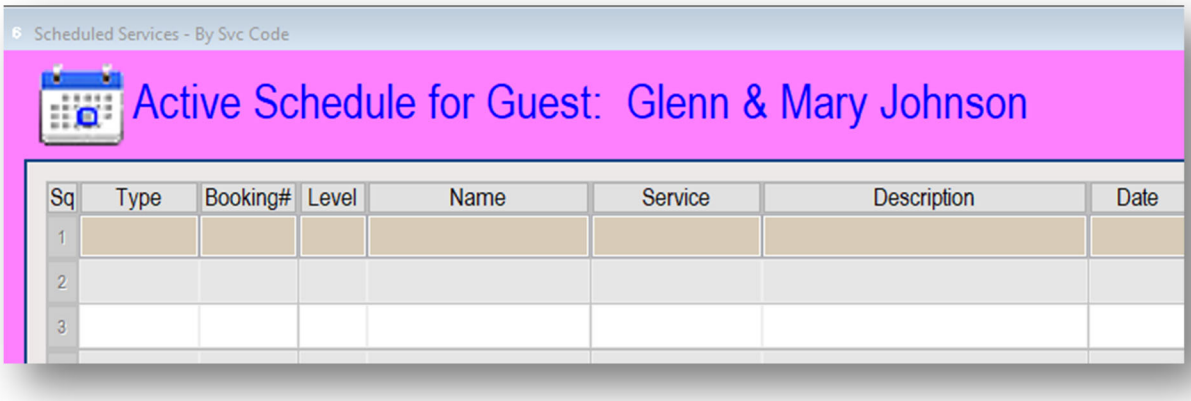
To determine if a Forest Resident has exceeded their allotted 3 tee times per course within 90 days, you must access the **Guest Tile** and open their **Schedule**.

Before even bothering to open this Schedule, you can see that there are no golf reservations because the words "**Schedule 5**" are written in black. If current or past reservations were present, this button would be written in red lettering letting us know that important information is stored here.



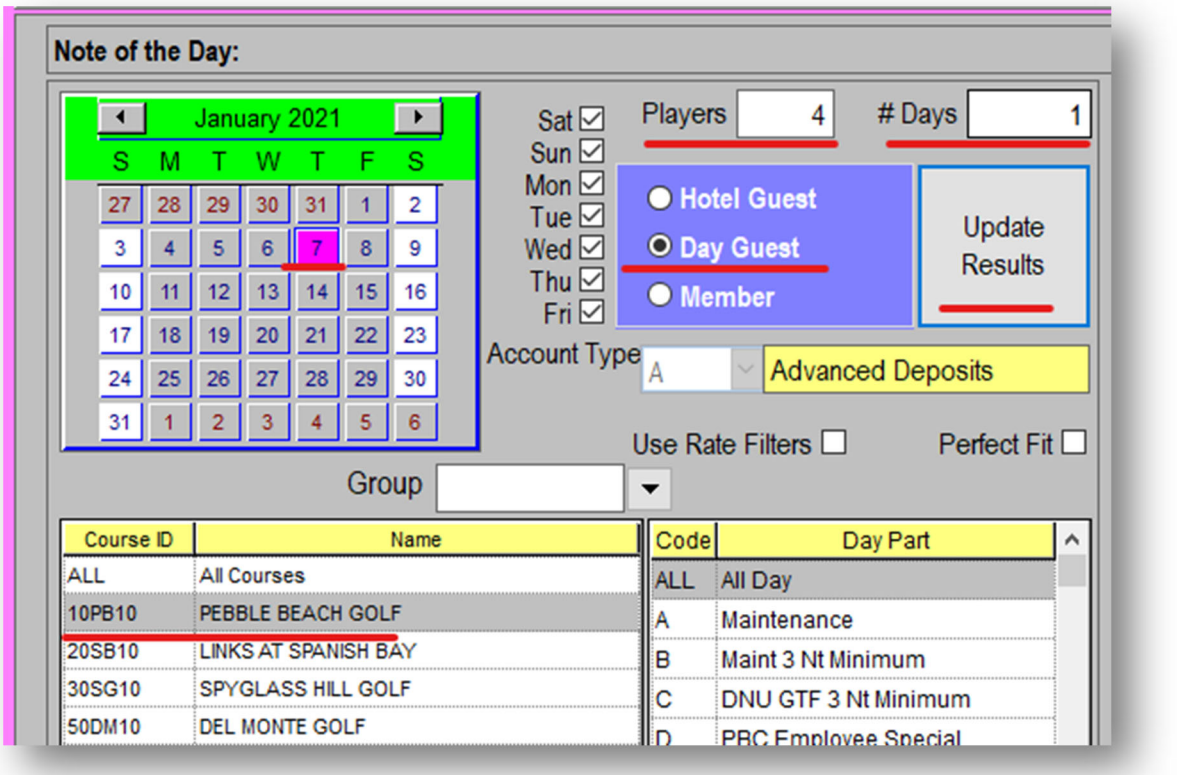
If you did find that they have upcoming tee times in their schedule, make sure that there are no more than two current Forest Resident tee times booked within the upcoming 90-day period.

As you can see, this guest does not have any current golf reservations, so we can proceed to book their tee times for the upcoming 90 days.

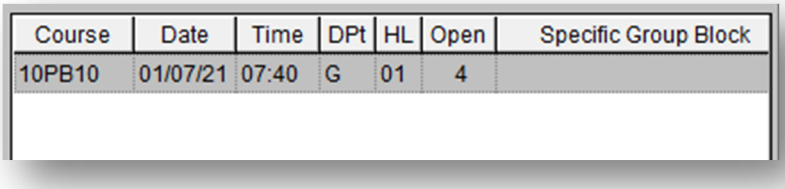


To proceed with booking a tee time for our Beach Club member, return to the **Tee Times Tab** of the **Booking Center**:

1. Select the date the guest wants to play on the calendar (must be within the next 90 days)
2. Select the Day Guest radio button
3. Select the golf course the guest wants to play
4. Set the #1 Days to 1 to search just one day at a time
5. Set the Players to the number of golfers the member wants to book (cannot exceed 4)
6. Click Update Results



Only one result has pulled up for this set of criteria. Assuming the member is ok with a 7:40am tee time, click this tee time to see the available **Rate Codes**.



Course	Date	Time	DPt	HL	Open	Specific Group Block
10PB10	01/07/21	07:40	G	01	4	

Amongst your **Rate Code** options, you can see:

- GFT Beach Club Membership
- GFT Spanish Bay Club Membership

Rate Description	Per Player	Total
GTF Promotional/Donat...	575.00	2,300.00
GTF Beach Club Memb...	575.00	2,300.00
GTF Spanish Bay Club ...	575.00	2,300.00
GTF Forest Resident	575.00	2,300.00

To book the tee time for a Beach Club Member, double click the **Beach Club Membership Rate Code** for $575 per player to add this tee time to our **Booking Center Itinerary Detail**.

The remainder of this reservation is processed exactly as an **Outside Guest booking**.

1. Pause your recording in NAVIS to collect a credit card from the guest to hold on file (We require the credit card to be entered even if they want to charge the tee time to your membership on the day of play)
2. Move the credit card from the Guest Tile to the Golf Tile
3. Quote the 14-day cancellation policy
4. Write your baby note in the tee time stating that you quoted the correct cancellation policy
5. Ask the guest if they want caddies or rental clubs
6. Offer to book dining on their day of play
7. Click Complete and Confirm on the Itinerary
8. Send the guest a VEMAIL confirmation
9. Complete and save your NAVIS Booked Lead Form

Complete a Duke's Club Golf Booking

Dukes Club Members receive discounted rates for:

- Spyglass Hill Golf Course - $240 per player + $45 per rider cart fee
- The Links at Spanish Bay - $170 per player + $45 per rider cart fee
- Del Monte Golf Course - $48 weekdays / $62 weekends per player + $25 cart fee
- Del Monte Golf Course Twilight - $35 weekdays / $40 weekends + $25 cart fee

They do not receive any special benefits for Pebble Beach Golf Links; they must wait until 1 day prior to the date of play to book at $575 per player just like Outside Guests.

In exchange for these discounted rates, Duke's Club Members:

- Pay an annual membership fee
- Can only book their tee times once we are within 30 days of their date of play
- They cannot exceed 4 golfers per day
- The member must play

The **Primary Member** on a Duke's Member's Guest Tile is the only person to have golf privileges. Their children or other dependents cannot book golf for themselves and their guests.

Duke's Cancellation Policy

- When booking Spyglass Hill Golf Course or The Links at Spanish Bay, Duke's members can change or cancel their reservations up until 7 days prior to their date of play.

- When booking Del Monte Golf Course, Duke's members can change or cancel their reservation up until 3 days prior to their date of play.

Important Note: Duke's Members commonly receive free round vouchers and have special Guest Rates when they bring friends to play with them.

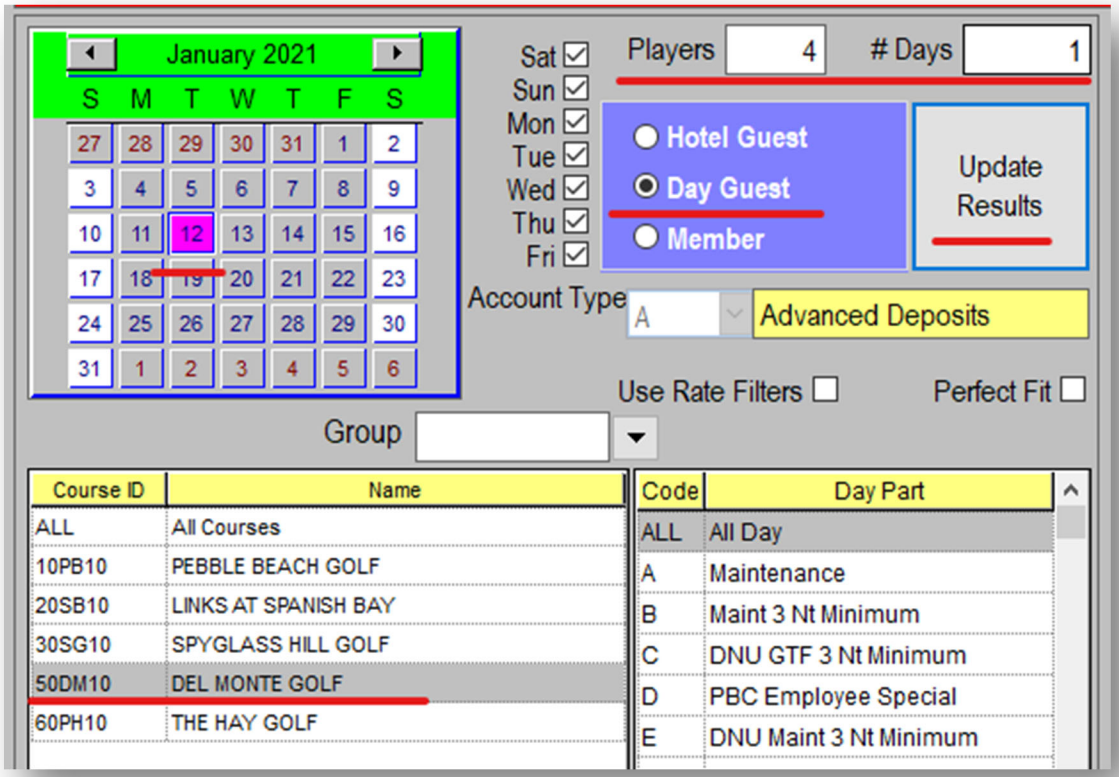
Aside from the Twilight Rate, as a Reservations Agent, you will always select the standard Duke's Members rate for all golfers in the group.

The Del Monte Pro Shop will adjust the pricing for vouchers and guest rates on the date of play. Simply advise the Duke's member to bring any vouchers with them when they check in at the course.

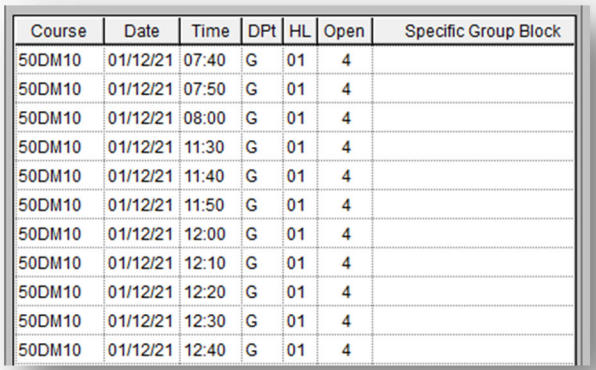
Like all Club Members, you must start your booking by locating the member's Guest Tile and verifying that their membership is valid for the dates the guest wants to play.

Once your Duke's Member's membership is verified, return to the **Tee Times Tab** of the **Booking Center**:

7. Select the date the guest wants to play on the calendar (must be within the next 30 days)
8. Select the Day Guest radio button
9. Select the golf course the guest wants to play
10. Set the #1 Days to 1 to search just one day at a time
11. Set the Players to the number of golfers the member wants to book (cannot exceed 4)
12. Click Update Results



Once your results appear, discuss the tee time options with the guest and click their desired tee time to see the available **Rate Codes**.



Course	Date	Time	DPt	HL	Open	Specific Group Block
50DM10	01/12/21	07:40	G	01	4	
50DM10	01/12/21	07:50	G	01	4	
50DM10	01/12/21	08:00	G	01	4	
50DM10	01/12/21	11:30	G	01	4	
50DM10	01/12/21	11:40	G	01	4	
50DM10	01/12/21	11:50	G	01	4	
50DM10	01/12/21	12:00	G	01	4	
50DM10	01/12/21	12:10	G	01	4	
50DM10	01/12/21	12:20	G	01	4	
50DM10	01/12/21	12:30	G	01	4	
50DM10	01/12/21	12:40	G	01	4	

Since we are within 30 days of this tee time, there are quite a few Rate Codes available to choose from.

We selected an 11:30am Guaranteed to Finish tee time, so the appropriate Rate Code is **GTF Dukes Member** for $48 per player.

There are three other Rate Codes that reference Duke's Memberships, but remember, the pro shop can adjust the rates on the day of play to give guests their Guest Rates.

We did not book a Twilight tee time – which would have had a T Day Part Code, so we do not need to worry about selecting a Twilight Rate Code.

Rate Description	Per Player	Total
Disc. Hyatt Group	80.00	320.00
GTF Hyatt Resort Guest	110.00	440.00
Golf Moose	69.50	278.00
GTF Outside Guest	110.00	440.00
Golf Now $49	49.00	196.00
Golf Now $59	59.00	236.00
GTF Duke's Member	48.00	192.00
GTF Duke's Guest	63.00	252.00
GTF Junior Duke Memb...	15.00	60.00
GTF Duke's Twilight	35.00	140.00
Duke's Guest Twiligh	45.00	180.00
GTF Hyatt ETW 2:00	85.00	340.00
GTF Early Twilight 2:00	85.00	340.00
GTF Resort Group	110.00	440.00
GTF NCGA	110.00	440.00
GTF Promotional/Donat...	110.00	440.00
GTF Golf VIP1	110.00	440.00
GTF Junior Rate	60.00	240.00

The remainder of this reservation is processed very similarly to an **Outside Guest booking**.

10. Pause your recording in NAVIS to collect a credit card from the guest to hold on file (We require the credit card to be entered even if they want to charge the tee time to your membership on the day of play)
11. Move the guest's credit card form the Guest Tile into the Golf Tile
12. Quote the appropriate cancellation policy (For the Del Monte Golf Course, this is three days)
13. Write your baby note in the tee time stating that you quoted the correct cancellation policy
14. Ask the guest if they want caddies or rental clubs
15. Offer to book dining on their day of play
16. Click Complete and Confirm on the Itinerary
17. Send the guest a VEMAIL confirmation
18. Complete and save your NAVIS Booked Lead Form

Forest Resident / Condo Owner Golf Guidelines

	Pebble Non-Peak	Pebble Peak	Spyglass Hill	Spanish Bay	Del Monte
Residents	Rolling 90 Day Res must play 14 Day CXL 4 player per day 3 tee times per 90d $575	1 day Non CXL 12 players $575	Rolling 90 Day Res must play 14 Day CXL 4 player per day 3 tee times per 90d $415	Rolling 90 Day Res must play 14 Day CXL 4 player per day 3 tee times per 90d $295	Rolling 90 Day Res must play **3 Day CXL** 4 player per day 3 tee times per 90d $110 + Cart
Original Condo Owner	Rolling 90 Day Res must play GT Time on PBC Course **3 Day CXL** 4 player per day 3 tee times per 90d $575	Rolling 90 Day Res must play GT Time on PBC Course **3 Day CXL** 4 player per day 3 tee times per 90d $575	Rolling 90 Day Res must play GT Time on PBC Course **3 Day CXL** 4 player per day 3 tee times per 90d $415	Rolling 90 Day Res must play GT Time on PBC Course **3 Day CXL** 4 player per day/2 per week $115	Res must play GT Time on PBC Course **3 Day CXL** 12 players per day/unlimited $110 + Cart
2nd Condo Owner	Rolling 90 Day Res must play 14 Day CXL 4 player per day 3 tee times per 90d $575	1 day Non CXL 12 players $575	Rolling 90 Day Res must play 14 Day CXL 4 player per day 3 tee times per 90d $415	Rolling 90 Day Res must play 14 Day CXL 4 player per day 3 tee times per 90d $160	Rolling 90 Day Res must play **3 Day CXL** 4 player per day 3 tee times per 90d $110 + Cart

A **Forest Resident** is someone who owns a house within the Del Monte Forest.
These residences must be the legal owners of the properties and must be listed on the mortgage.
They will then receive a special Resident emblem for their car from the Road Fees department.
New home owners must register themselves with Pebble Beach by providing the deed to Legal/Accounting.
If a new home owner needs to register, refer them to Wendy Ruiz at 831.649.2761 (Operations Cash Manager) or Dawn Mathes at 831.625.8402 (Director of Environmental and Government Affairs)

An **Original Condo Owner** is someone who owns a condo within a specific area of the Del Monte Forest adjacent to the Inn at Spanish Bay, referred to as the Spanish Bay Residences.
You may see or hear these Spanish Bay Residences referred to as Condos or Townhomes.
The original owners of these condos have a contract with the Pebble Beach Company that allows them special access and rates to book tee times at Pebble Beach Resorts golf courses.

A **Second Condo Owner** is someone who has purchased a condo from an original owner or subsequent owners. If a Spanish Bay Residence has been resold by the original owner, original owner's golf privileges are VOID.

Forest Residents

- Residents pay rack rate pricing for golf, but have complimentary use of golf carts (except when playing Del Monte Golf Course)

- Residents can book all four of our 18-Hole courses within 3 months **AS LONG AS:**
  - The Resident is one of the golfers in the group
  - Their group does not exceed 4 golfers per day
  - The member must have 3 or fewer tee times reserved per course between today and 90 days in the future. (This is the Rolling 90 Days rule)

- Residents can only book Pebble Beach Golf Links during Non-Peak season: December-July. Resident Golf privileges for Pebble Beach Golf Links tee times are suspended during Peak Season (August-November).

Original Condo Owners

- Receive a discounted rate on tee times at The Links at Spanish Bay
- Can book all 18-Hole courses within 3 months.
- Their golf privileges at Pebble Beach Golf Links extend throughout Peak Season.
- They have complimentary use of golf carts (except when playing Del Monte Golf Course)
- Can change or cancel their tee times on any course up until 3 days prior to date of play.
- Are guaranteed tee times on all courses. As long as we offer them *something* on one of our courses, we are upholding the contract, even if they choose not to accept what we have to offer. However, we are not obligated to confirm tee times within 72 hours of play.

The following restrictions apply:

- Only one tee time per week may be on a weekend day—the second tee time within 7 days must be Monday-Friday.
- Pebble Beach / Spyglass Hill
  - The Original Condo Owner must play
  - Must limit their group to 4 players
  - Can only hold 3 reservations within a rolling 90 days.
- The Links at Spanish Bay
  - The Original Condo Owner must play
  - Must limit their group to 4 players
  - Can book up to two tee times per week
- Del Monte Golf Course
  - The Original Condo Owner must play
  - Can book up to 12 players per day
  - Unlimited tee times

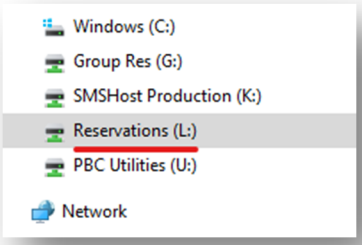
Second Condo Owners

The Golf Guidelines for Second Condo Owners are nearly identical to **Forest Resident** Guidelines, with one exception: Second Condo Owners receive a discounted rate of $160 (or the current Twilight Rate) per player on The Links at Spanish Bay.

Verify A Resident or Condo Owners

Begin by opening File Explorer: 

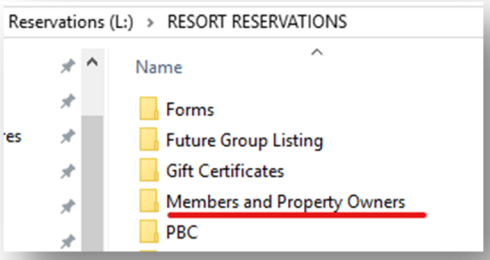
Navigate to the L Drive:



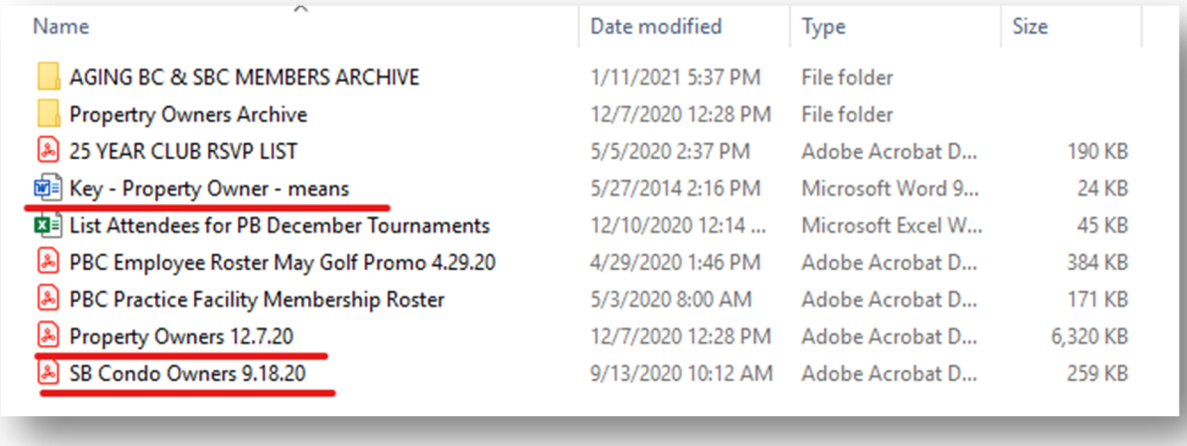
Open the RESORT RESERVATIONS folder:



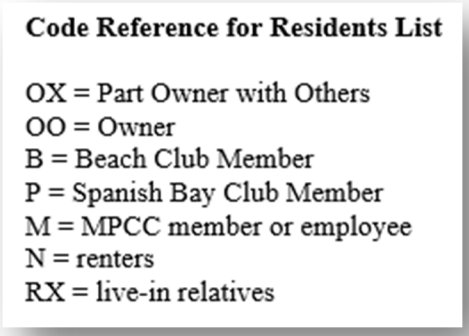
Open the Member and Property Owners folder:



In this folder are two documents used to verify Residents:



Key - Property Owner – Means contains a short Key that defines the codes you will see on the Property Owners list:



Code Reference for Residents List

OX = Part Owner with Others
OO = Owner
B = Beach Club Member
P = Spanish Bay Club Member
M = MPCC member or employee
N = renters
RX = live-in relatives

SB Condo Owners contains a list of all Condo Owners, both original and resale owners.

Property Owners contains a full list of all Forest Residents, including the condo owners living within the Spanish Bay Residences.



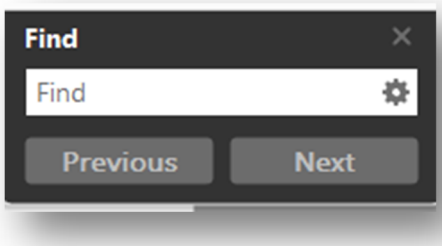
Club Members

Property Owner
Property Co-owner

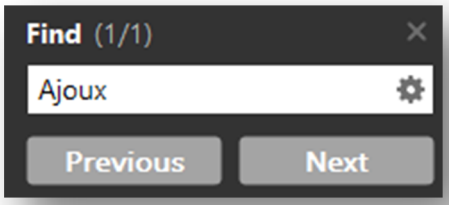
Name	Address	Street/Category	Phone	Code	Club Acct#
Ahmad, Amal	2858 Congress Road Pebble Beach, CA	2858 Congress Road	831-233-4810	OO	
Ahmed, Iftikhar	858 Harrison Avenue Campbell, CA	4024 Ronda Road	408-421-1296	OO	
Ahmed, Osman	6315 Via Cabrera La Jolla, CA	24 Shepherds Knoll	619-840-6710	OO	
Ajoux, Pierre	4102 Sunridge Road Pebble Beach, CA	4102 Sunridge Road	831-624-7824	OO	
Akana, CK	78 Ocean Pines Lane Pebble Beach, CA	78 Ocean Pines Lane	831-620-0496	OO	
Akchurin, Marat	3106 Flavin Lane Pebble Beach, CA	3106 Flavin Lane	301-641-5093	88OO	
Akers, Susan	1 Sturges Highway Westport, CT	1564 Sonado Road	831-625-2692	OO	
Alagheband, Ken	1147 Arrowhead Road Pebble Beach, CA	1147 Arrowhead Road	831-375-1091	OO	
Albanese, Robert	1432 Viscaino Road Pebble Beach, CA	1432 Viscaino Road	831-624-8343	OO	
Aldinger, William	330 Primrose Road, Suite 202	3225 17 Mile Drive	831-624-3334	OO	

The best practice to verify a Resident or Condo Owner is to:

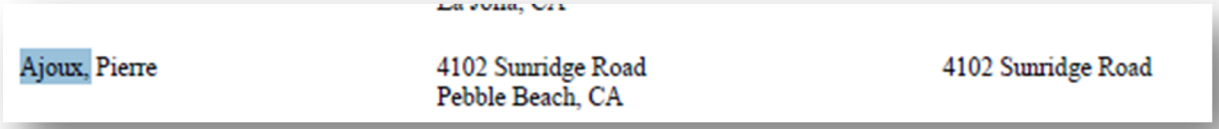
- Access and open the Property Owners document with the most recent update date.
- Use CTRL+F to open a search window on the document



- Search for the address or guest's *name* or address and click Next:



- You should be taken straight to your first result in the document:



- If they are listed on this document under the address, they provide to you, proceed to SMS to locate their Guest Tile and book their golf reservation!

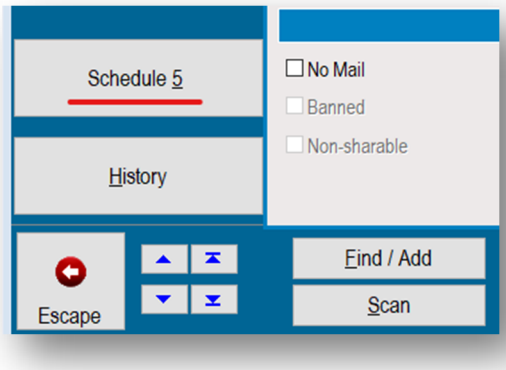
If a new home owner needs to register with Pebble Beach Resorts, refer them to Wendy Ruiz at 831.649.2761 (Operations Cash Manager) or Dawn Mathes at 831.625.8402 (Director of Environmental and Government Affairs)

Complete A Forest Resident Booking

Once you have verified that your guest is a Resident or Condo Owner, click the down arrow next to the Guest button in your booking center to open Universal Lookup.

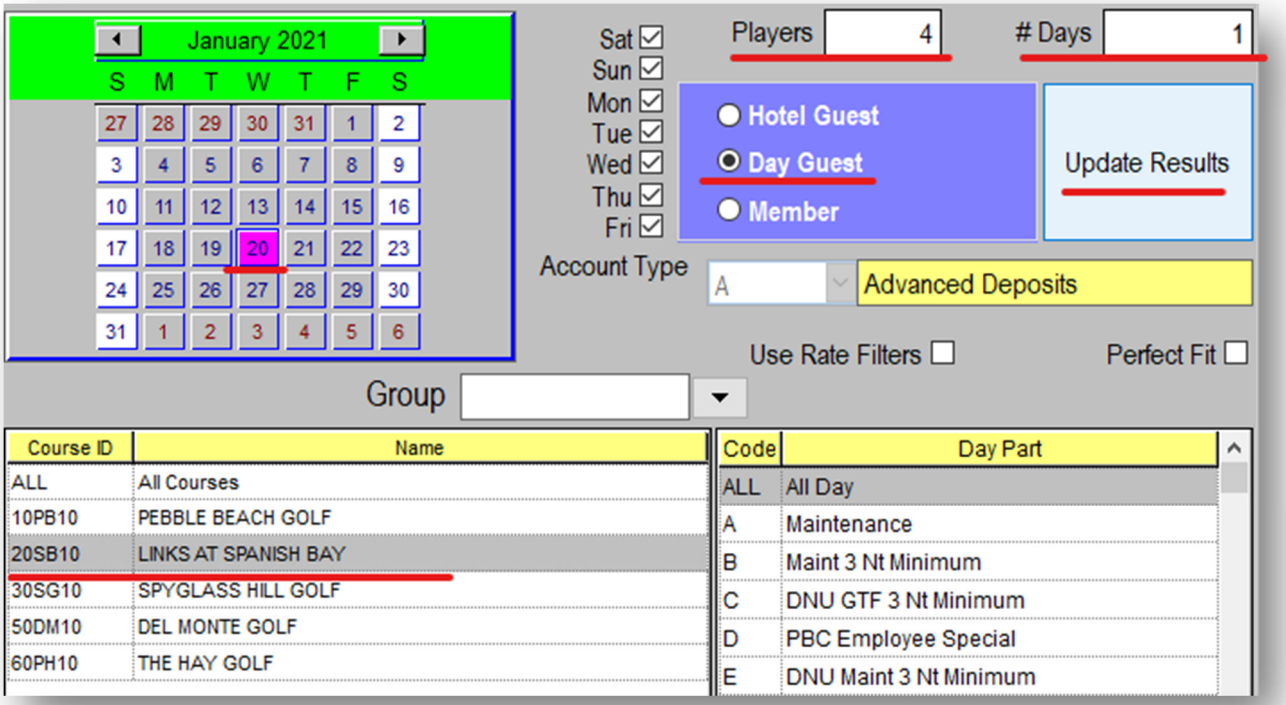
Locate and select their existing Guest Tile to add the guest to your Itinerary.

If the golf course they wish to book is subject to the Rolling 90 Days rule, access the **Guest Tile** and open their **Schedule**. And open their Schedule to make sure they have not reached their maximum 3 tee times.



Exit the Guest Tile and proceed to the **Tee Times Tab** of the **Booking Center**:

13. Select the date the guest wants to play on the calendar
14. Select the Day Guest radio button
15. Select the golf course the guest wants to play
16. Set the #1 Days to 1 to search just one day at a time
17. Set the Players to the number of golfers the member wants to book
18. Click Update Results



Click the resident's preferred tee time to see the available **Rate Codes**.

Course	Date	Time	DPt	HL	Open	Specific Group Block
20SB10	01/20/21	08:00	G	01	4	
20SB10	01/20/21	08:10	G	01	4	
20SB10	01/20/21	08:20	G	01	4	
20SB10	01/20/21	08:30	G	01	4	
20SB10	01/20/21	08:40	G	01	4	
20SB10	01/20/21	08:50	G	01	4	
20SB10	01/20/21	09:00	G	01	4	

For the Links at Spanish Bay, as long as you are searching for tee times within 90 days, you will see three different **Rate Codes** relevant to Residents:

- GTF Forest Resident
- GTF Re-Sale SB Townhome
- GTF Original SB Townhome

Rate Description	Per Player	Total
GTF Promotional/Donation	295.00	1,180.00
GTF Golf VIP	295.00	1,180.00
GTF Outside Guest	295.00	1,180.00
GTF Beach Club Member	295.00	1,180.00
GTF Spanish Bay Club Mem	295.00	1,180.00
GTF Duke's Member	170.00	680.00
GTF Forest Resident	295.00	1,180.00
GTF Re-Sale SB Townhome	160.00	640.00
GTF Original SB Townhome	115.00	460.00

An important note to remember with Condo Owners is that **all Condo Owners are also Forest Residents.**

The only course for which you will see a special Condo Owner Rate Code ("SB Townhome") is The Links at Spanish Bay because that is the only course for which owners (original and resale) receive a discounted rate that is different from the Forest Resident rate.

For all other courses, Condo Owners and Forest Residents pay rack rate and therefore you will book all types of Residents under the Forest Resident Rate Code.

Rate Description	Per Player
GTF Promotional/Donation	415.00
GTF Outside Guest	415.00
GTF Beach Club Member	415.00
GTF Spanish Bay Club Mem	415.00
GTF Duke's Member	240.00
Duke Flash Free SH Round	0.00
NCGA Flash Free SH Round	0.00
GTF Forest Resident	415.00

Double click the appropriate rate code for your Resident to add this tee time to our **Booking Center Itinerary Detail**.

The remainder of this reservation is processed exactly as an **Outside Guest booking**.

19. Pause your recording in NAVIS to collect a credit card from the guest to hold on file (We require the credit card to be entered even if they want to charge the tee time to your membership on the day of play)
20. Move the guest's credit card from the Guest Tile into the Golf Tile
21. Quote the 14-day cancellation policy
22. Write your baby note in the tee time stating that you quoted the correct cancellation policy
23. Ask the guest if they want caddies or rental clubs
24. Offer to book dining on their day of play
25. Click Complete and Confirm on the Itinerary
26. Send the guest a VEMAIL confirmation
27. Complete and save your NAVIS Booked Lead Form

Lariat Lane

There is one home in the Del Monte Forest that is owned by several parties. This home is commonly referred to by the street name on which the home resides: **Lariat Lane.**

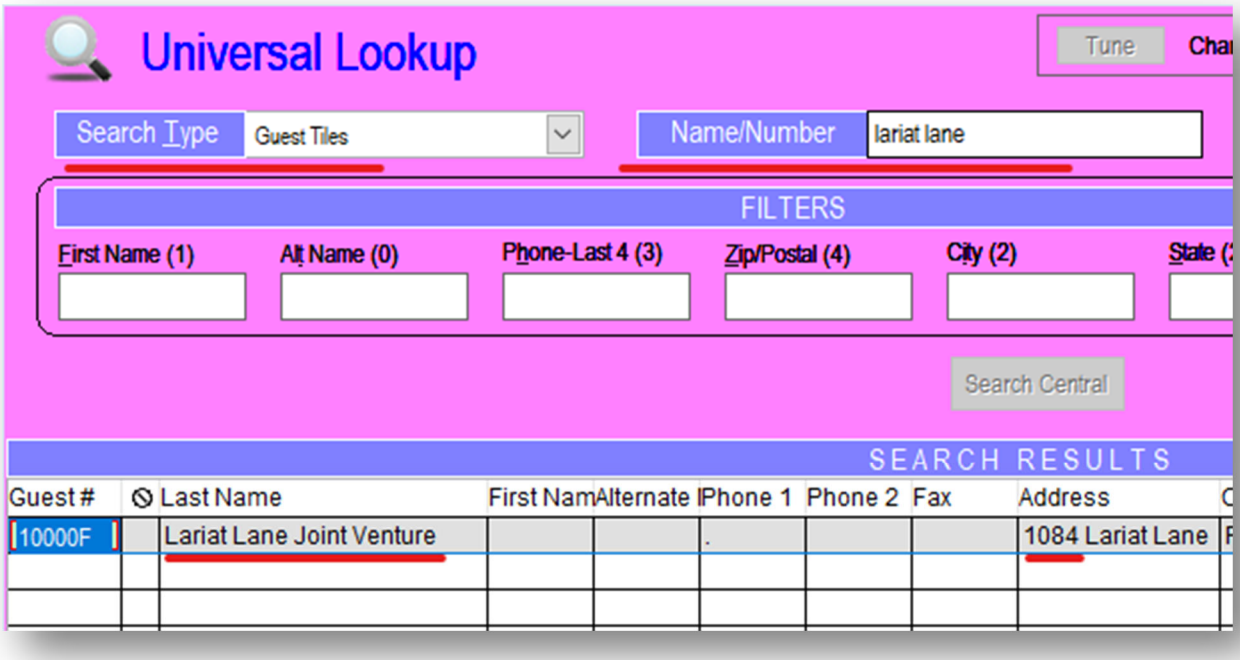
The Forest Resident Golf Privileges are per property, so because this home has joint ownership, all owners of the Lariat Lane house must share these privileges as a group.

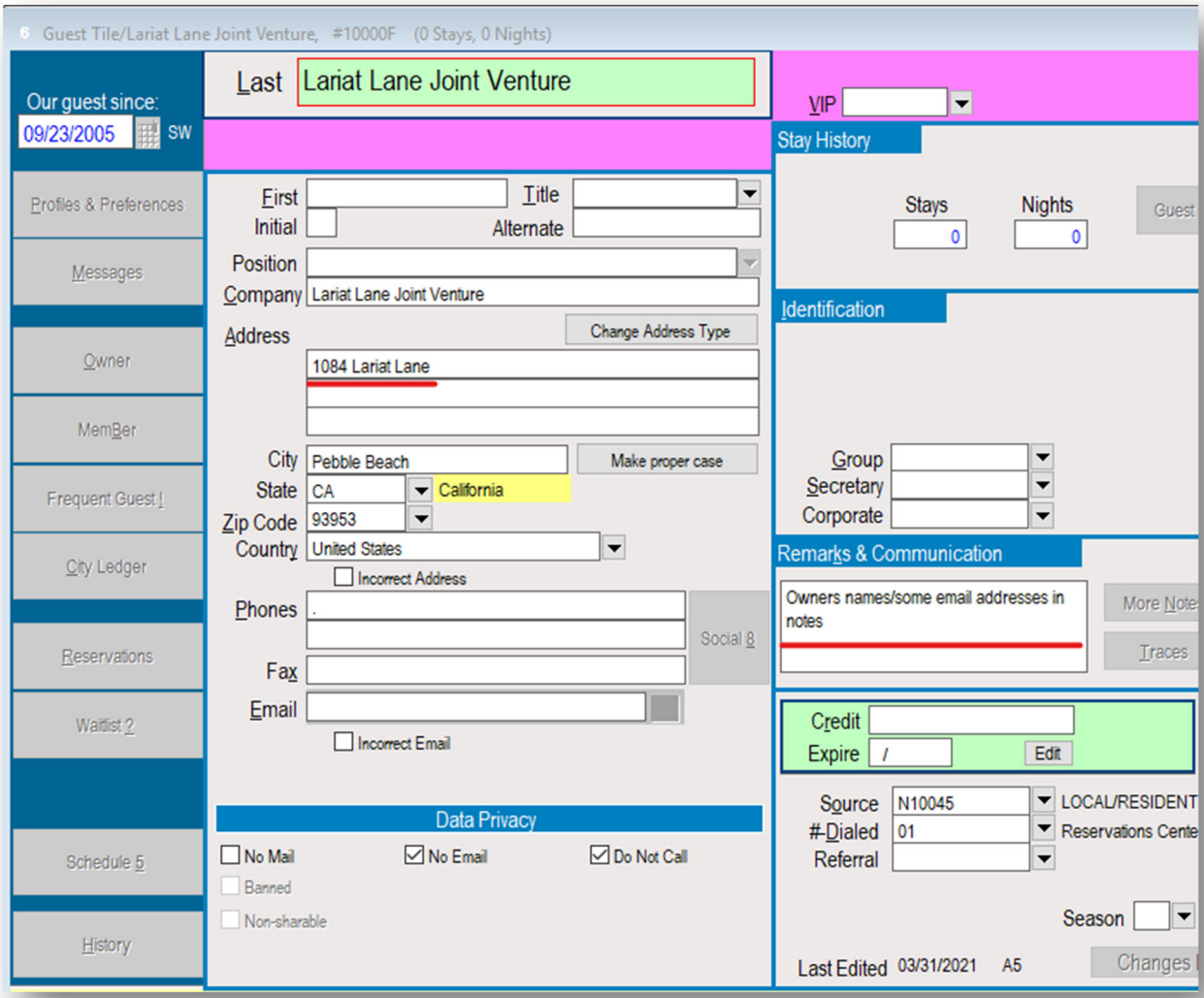
Most Forest Residents will have one Guest Tile under the name of the owner of the property.
When residents decide to book, we can open that one Guest Tile to make sure they have not exceeded their 3 allotted tee times at each course per the Rolling 90 Day Rule.

Similarly, all owners of the Lariat Lane home share one Guest Tile under the title **Lariat Lane Joint Venture**, which allows us to easily keep track of how many tee times are being booked by the entire group.

To find this joint Guest Tile:

- Open Universal Lookup
- Set the Search Type to Guest Tiles
- Type Lariat Lane in the Last Name field
- The only result you should see will be the Joint Venture Guest Tile.
- Double click this line to open





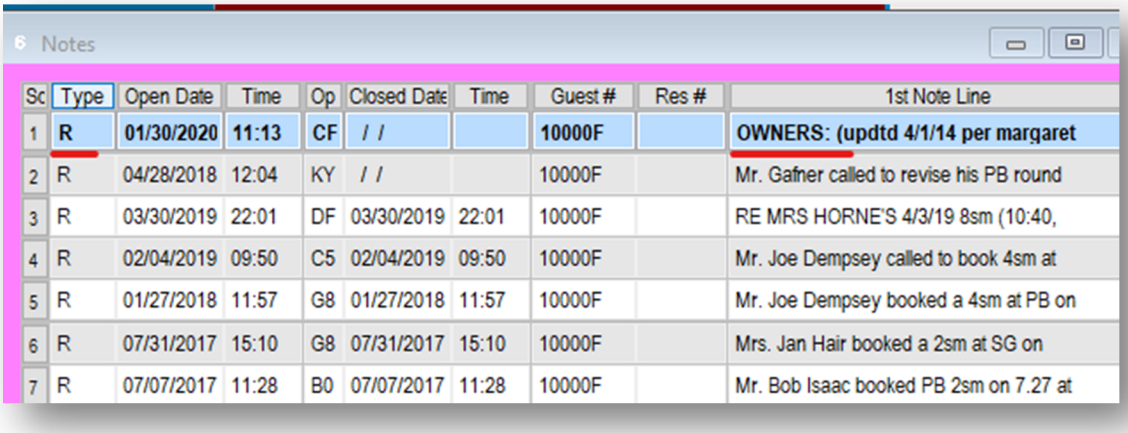
If you open the **Property Owners** document in the L Drive, you will see several listings under the **address 1084 Lariat Lane**, all of whom are part-owners.

However, to verify that your guest is one of these part owners, you only need to access the Lariat Lane Joint Venture Guest Tile and search click into **More Notes** to search for your guest's name.

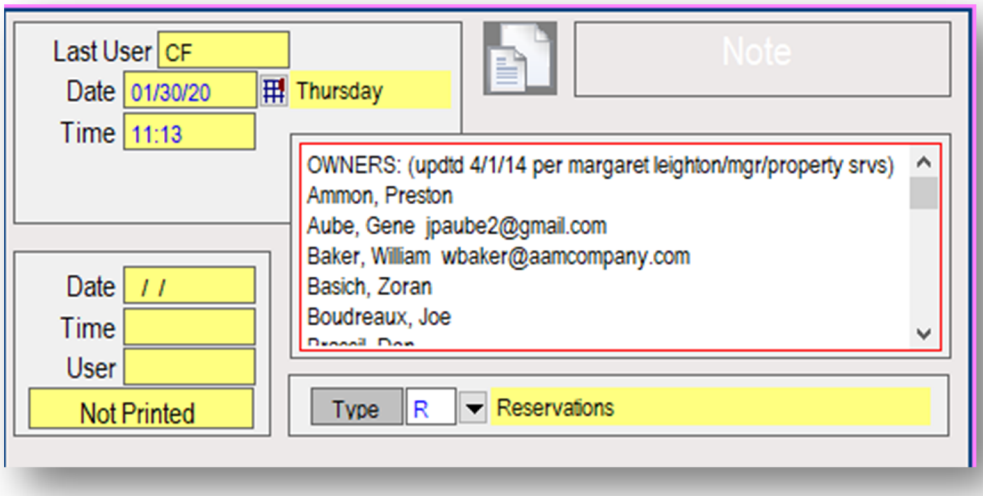


When you click the More Notes button, a window will open that includes all notes that have ever been left on this Guest Tile.

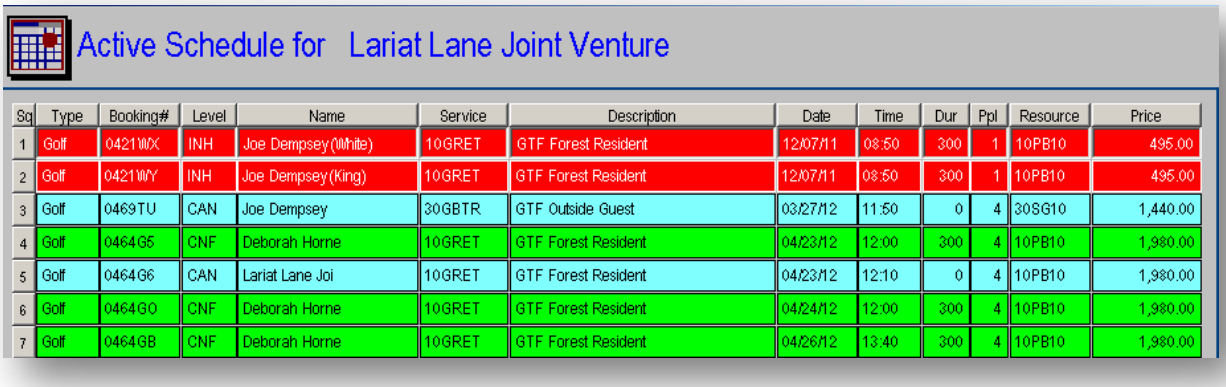
Look for the **R Note** that begins with "**OWNERS**" in all capital letters.



Scroll through the names to locate your guest. If your guest's name is not on this list, they are not a part owner and should be booked as an Outside Guest.

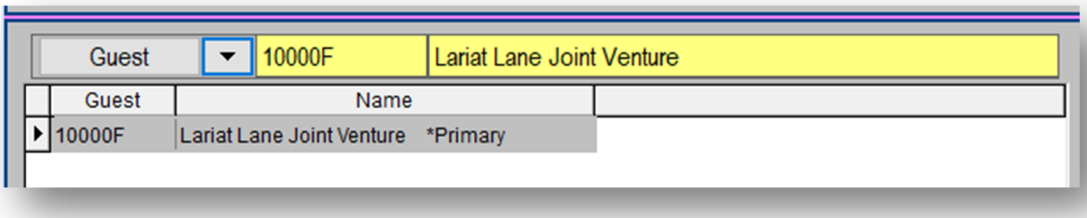


If you find the name of your guest on this list, you should exit the Notes and open the Schedule to make sure they have not exceeded their 3 allotted tee times at each course per the Rolling 90 Day Rule.

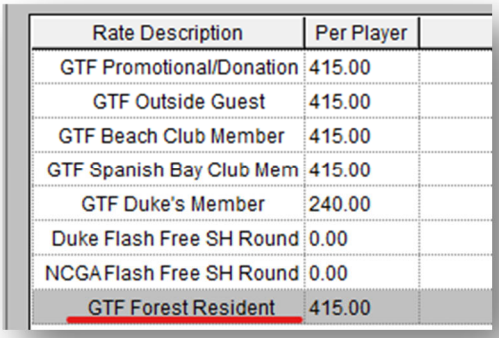


Once you have verified the Lariat Lane Resident's eligibility, you can proceed to search for and book the Forest Resident tee time(s).

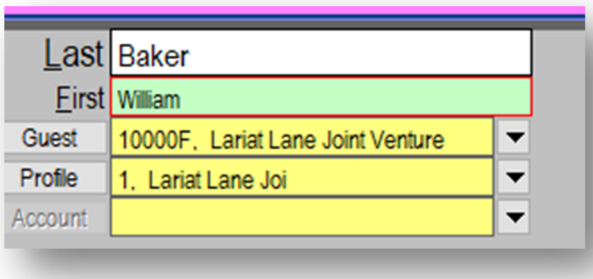
- Add the Lariat Lane Joint Venture Guest Tile to your Booking Center.
  All tee times must be secured to the Lariat Lane Joint Venture Guest Tile - not the golfer's Guest Tile, even if one exists.



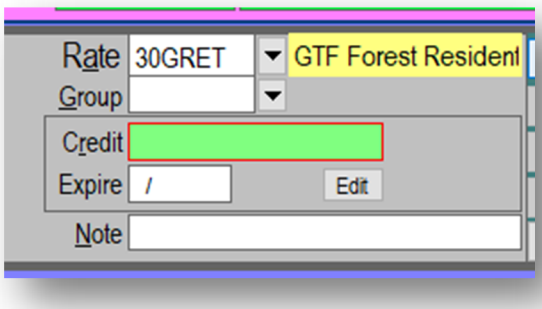
- Book your guest's tee time using the Forest Resident Rate Code

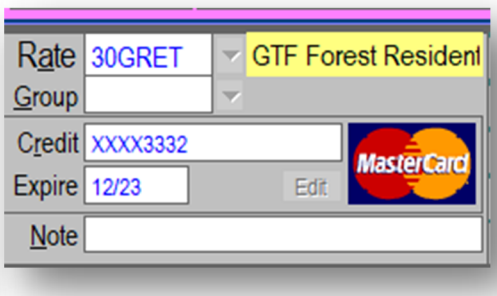


- Open the Golf Tile and edit the First and Last name to the name of the owner who will be golfing. (Do not edit the name on the Guest Tile)

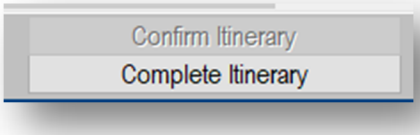


- Add the guest's credit card to the Golf Tile only – not the guest tile. Do so by clicking Edit on the Golf Tile, place your curse into the green Credit Field, and use your IDTECH card reader to collect and save the guest's credit card information.





- Page Down to save the Golf Tile, then Exit to return to the booking center.
- Click Complete and Confirm to finalize your booking.



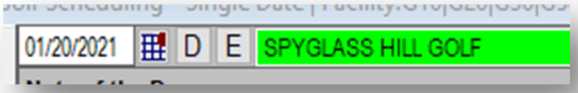
- Collect the guest's phone number for your notes. This must be a phone number through which they can personally be reached – not the Lariat Lane home phone number.
- Reconfirm you booking and quote the appropriate cancellation window with the resident, then end your call.
- Save a Baby Note on the Golf Tile that says SEE TEE SHEET NOTE



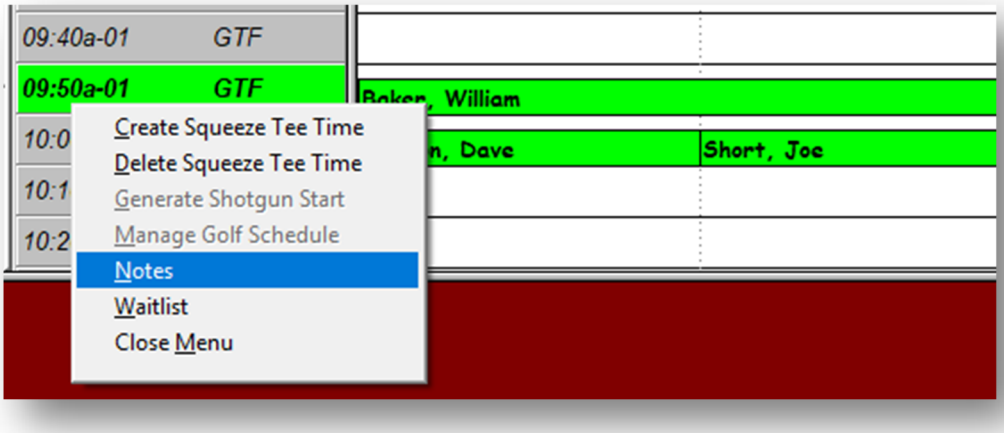
- Create a Tee Sheet Note:
  - Click the Tee Sheet Icon from the SMS Toolbar



  - Set the date and golf course to match your booking

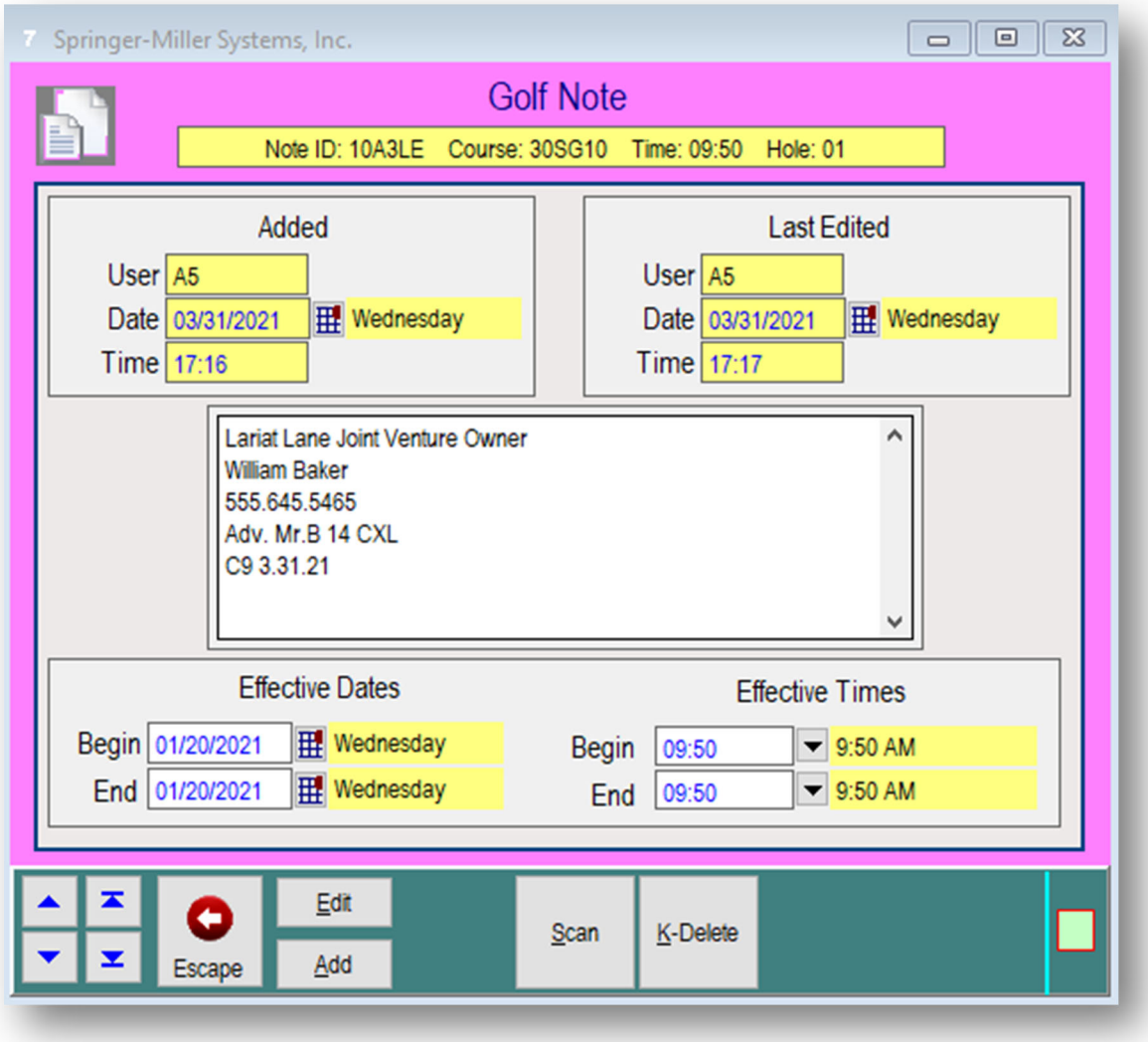


  - Double click on the time of your resident's golf booking and select Notes from the menu



Your Tee Sheet Note should include:

- The Cancellation window you quoted
- The name of the golf
- The phone number of the golfer



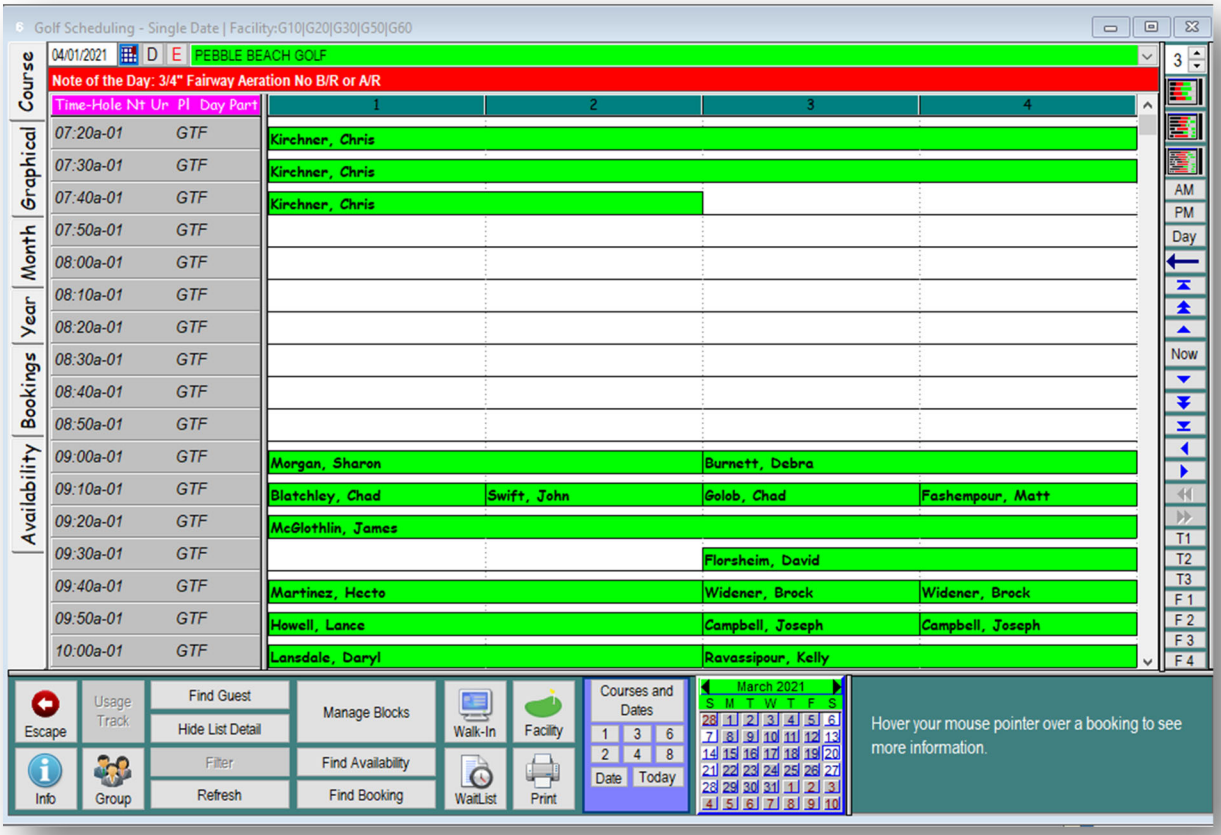
- Save your Booked Lead in NAVIS
- Do not send an automated confirmation email

Tee Sheets



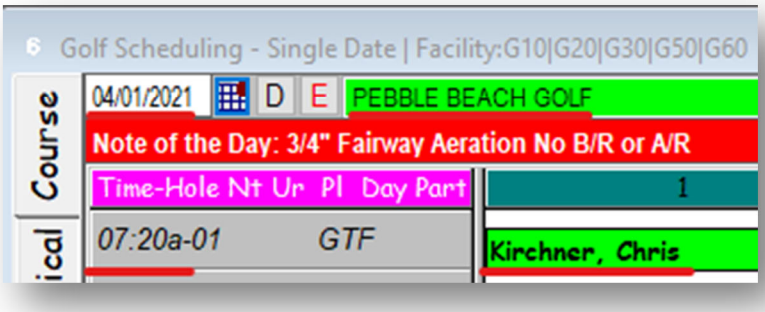
A **Tee Sheet** is the daily schedule for a golf course.

In SMS, you can view the **Tee Sheets** for all Pebble Beach Golf Courses by clicking the icon with an image of a golf ball sitting on a tee from the **Booking Center Toolbar**.

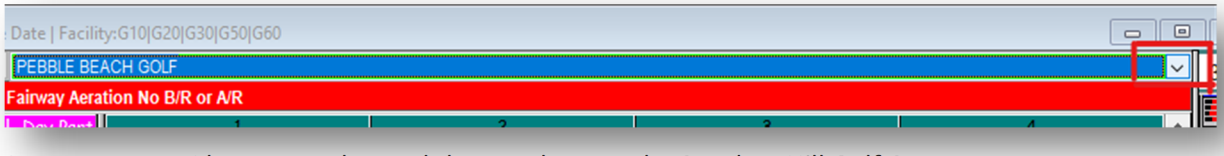


As you can see, this is the schedule for Pebble Beach Golf Links on April 1st, 2021 and the first tee time of the day is at 7:20am for Chris Kirchner.

You can also see a note in red stating that Fairway Aeration is occurring on this day.



You can change the selected golf course by clicking the down arrow in the top right corner of the window.

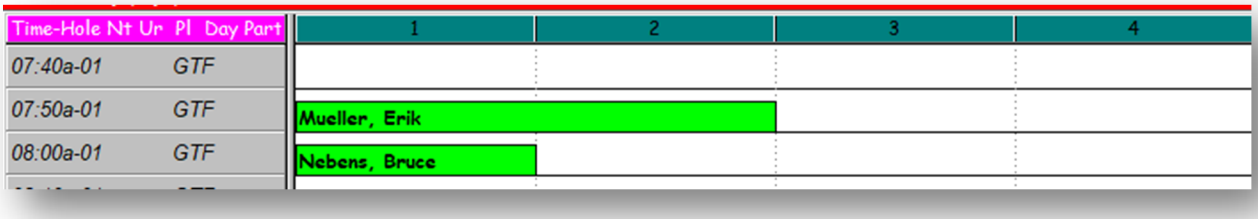


As you can see, I have now changed the tee sheet to the Spyglass Hill Golf Course.

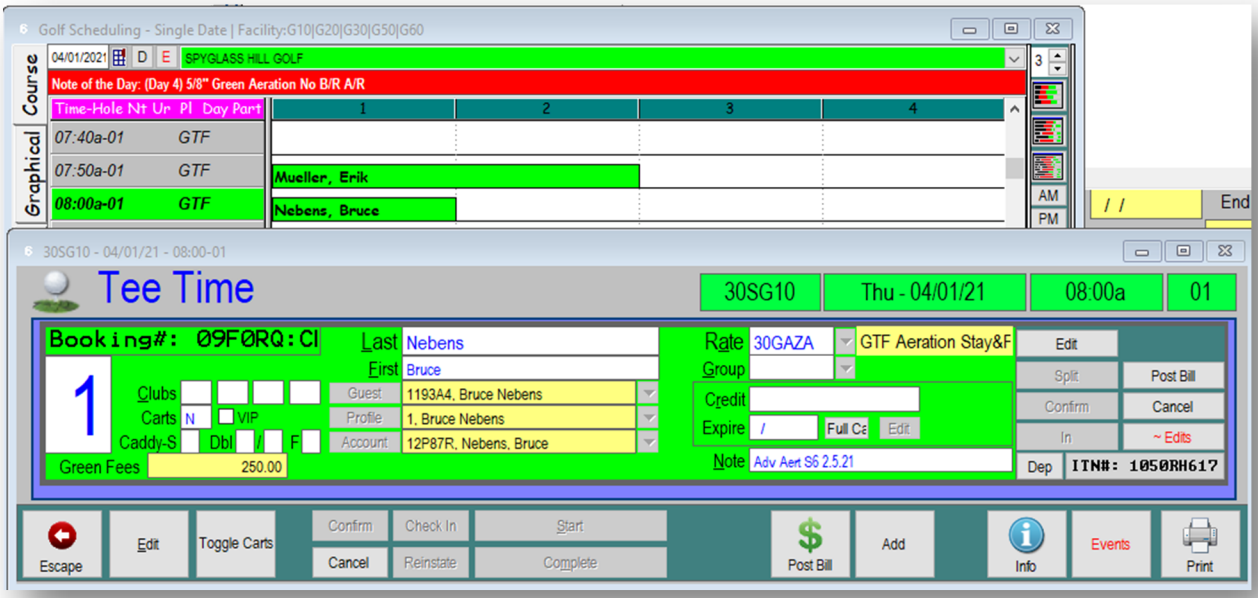


There are four columns on each tee sheet that indicate the number of golfers that can be booked into each time slot.

In this example, there are two golfers booked under Erik Mueller's name at 7:50am and one golfer booked under Bruce Nebens name at 8am. The 7:40am time slot is still fully available.



You can double click any names on the tee sheet to open that guest's Golf Booking details.

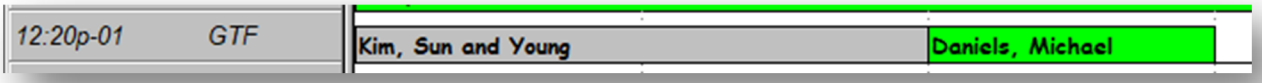


Tee Sheet Color Codes

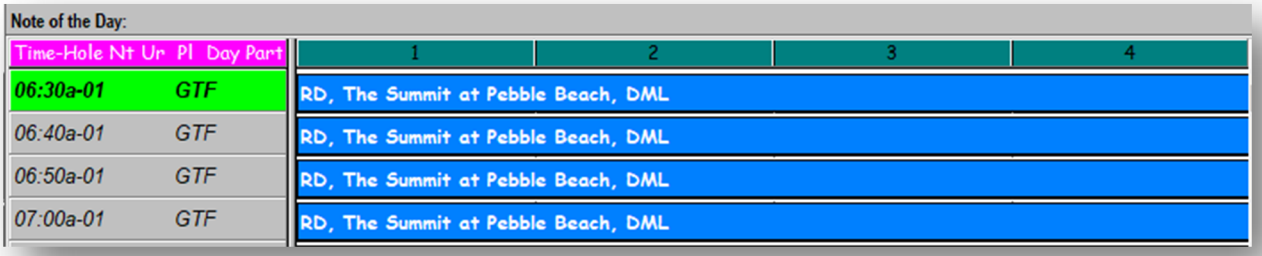
Green – The booking is for a transient guest and is fully confirmed



Gray – The booking has not yet been confirmed



Blue – The booking is part of a large group booked by Tournaments or Group Sales



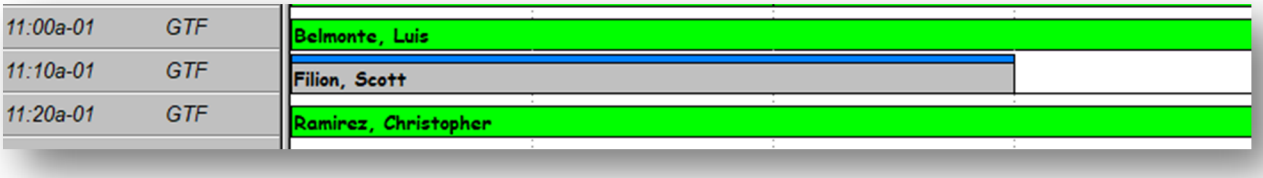
Pink – Means this time slot is not yet booked, but the times are saved for a particular group.



Black – Means the tee time has already passed.

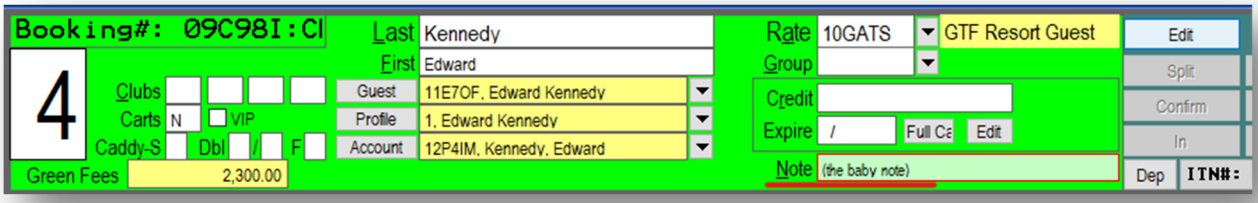


If a golf booking falls into multiple categories, you will see the colors overlap.
For example, below is a Group Sales booking that is not yet confirmed:



Tee Sheet Notes

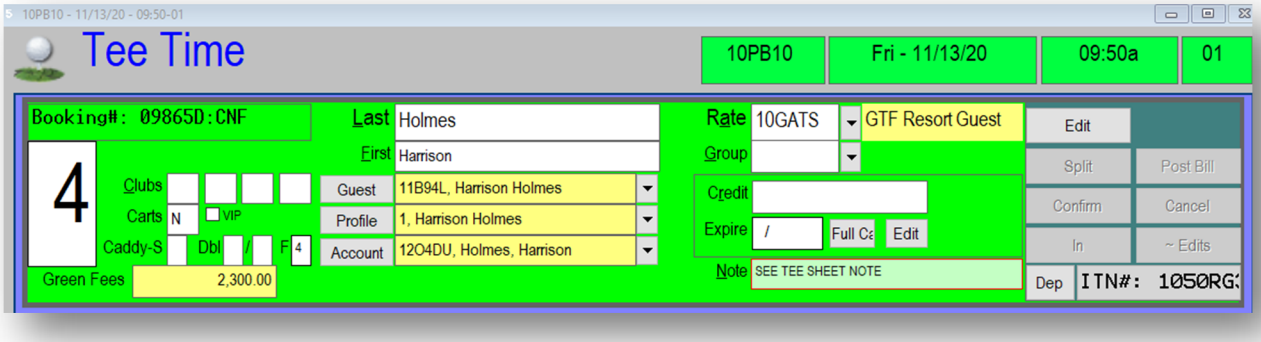
There is Notes section on each golf reservation that we refer to as the **Baby Note** which is a reference to the fact that this note only holds a small number of characters.



In most cases, the baby note field will solely be used to enter the cancellation window that we quoted to the guest – *however* – some situations will require us to document too much information to enter into this Baby Note field.

In those cases, we must create a **Tee Sheet Note**.

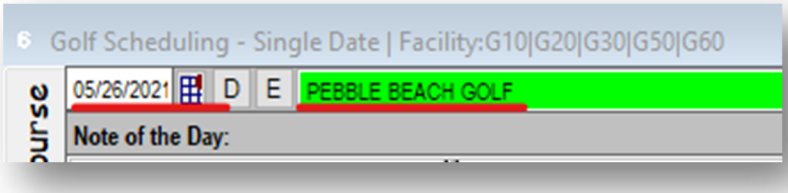
The first step to creating a Tee Sheet Note is to write "SEE TEE SHEET NOTE" in the baby notes field. This will let anyone who views this booking know that there is important information that they need to read on the Tee Sheets.





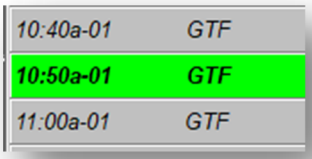
Now, you must navigate to the Tee Sheets by clicking the **Tee Sheet Icon** from the **Booking Center Toolbar**.

Once the Tee Sheet is open, select the appropriate golf course and date from fields at the top of the sheet.



Use the scroll bar on the right side of the tee sheet, or use the arrow keys on your keyboard, to find the time slot into which your guest is booked.

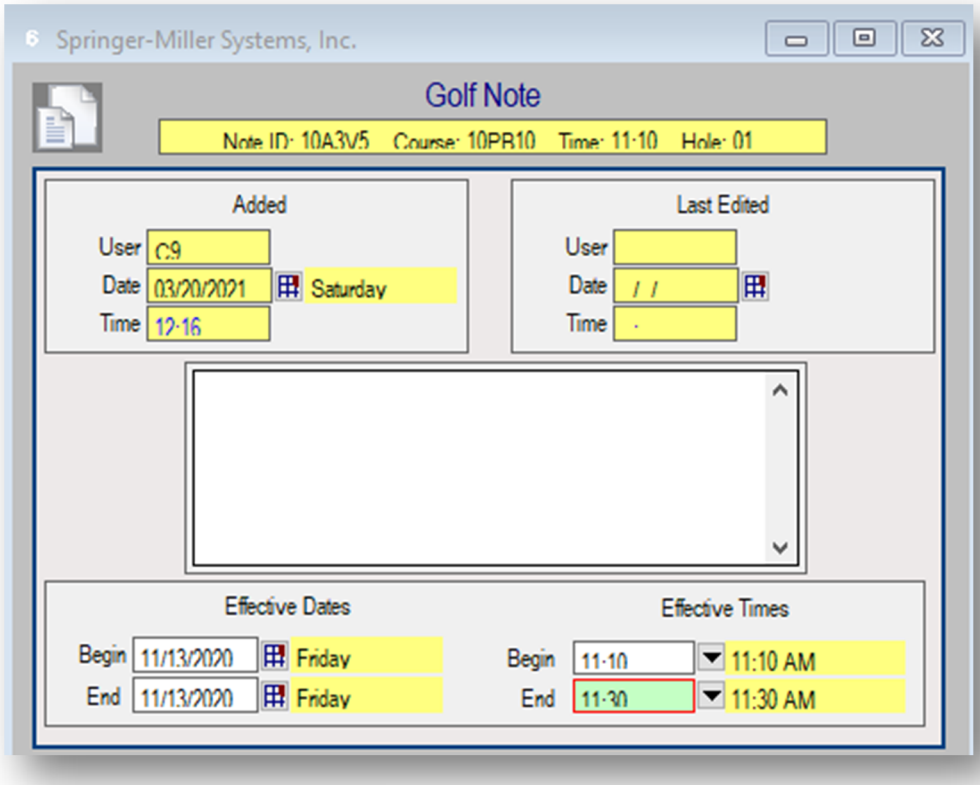
Use your curser to double click on the time slot for which you want to leave a note.



A menu will appear. One of the choices on this menu will be **Notes**. You can select this option by clicking with your curser or by typing **N** with your keyboard.

A blank Golf Note will open.

Type your message into the center box and click ok or hit Page Down to save.





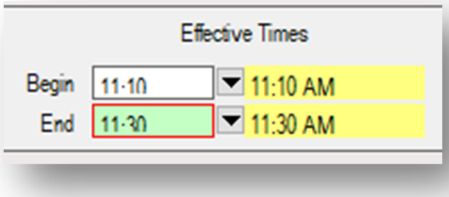
Once your note is saved, you will see an **N** next to that tee time. This N is how anyone looking at the Tee Sheet will know that there is important information to read about that time slot.

Tee Sheet Note Tips

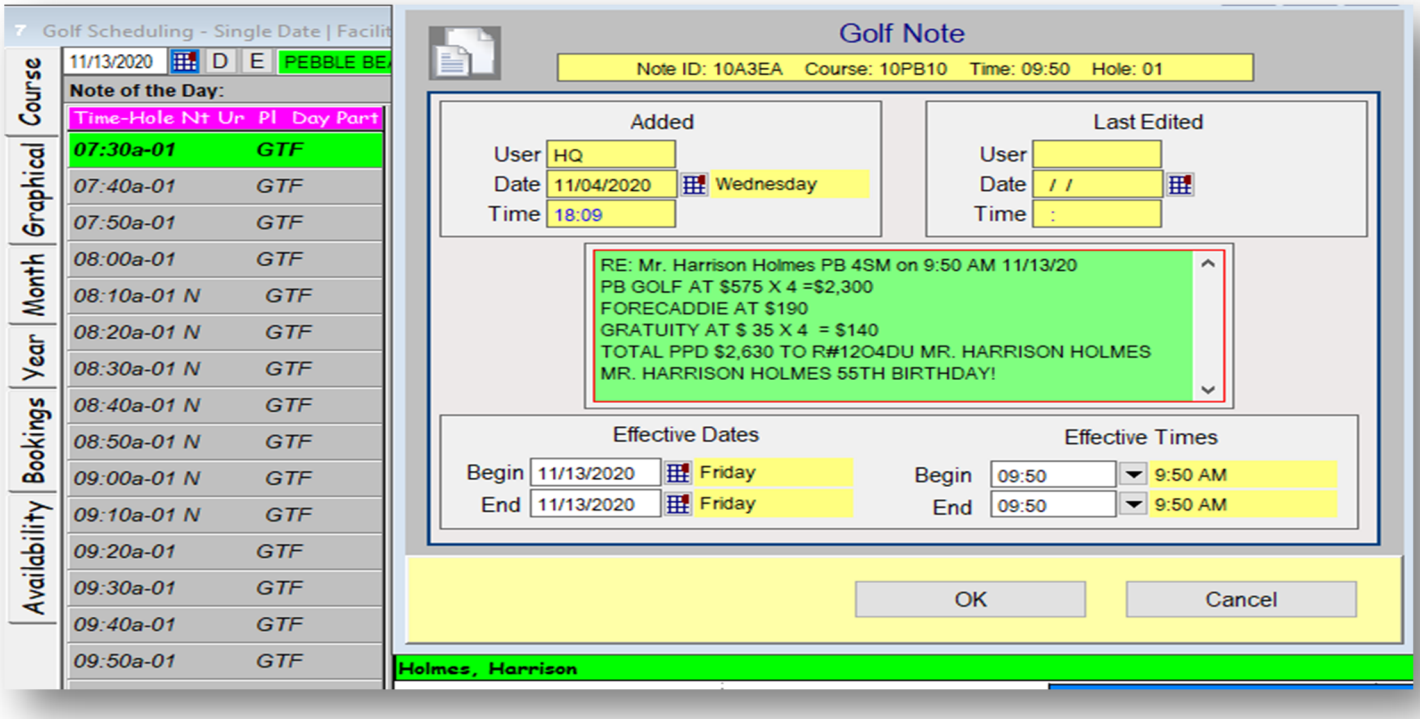
- Tee Sheet Notes are not tied to the booking itself; they are tied to the time slot.
  If you post a note for at guest at 8am, but that guest reschedules to 9am, the agent who reschedules that guest will need to manually move the Tee Sheet Note to 9am as well.
  The same applies if a guest cancels a booking. The agent who cancels the tee times should see the "SEE TEE SHEET" message in the Baby Notes and therefore know that the note needs to be deleted from the tee sheet.

- Because the notes are not tied to the booking, it is important to write the name of the guest you are referring to in the note itself. This will prevent confusion if that guest's booking is accidentally moved or cancelled, but the Tee Sheet note is not.

- If a note needs to apply to multiple time slots, such as a group of 8 golfers who are booked into consecutive foursomes, you can edit the Effective Times to span over both times slots.
  In the example below, a copy of this note will be applied to 11:10am, 11:20am, and 11:30am.



The example below is a properly formatted Tee Sheet Note:

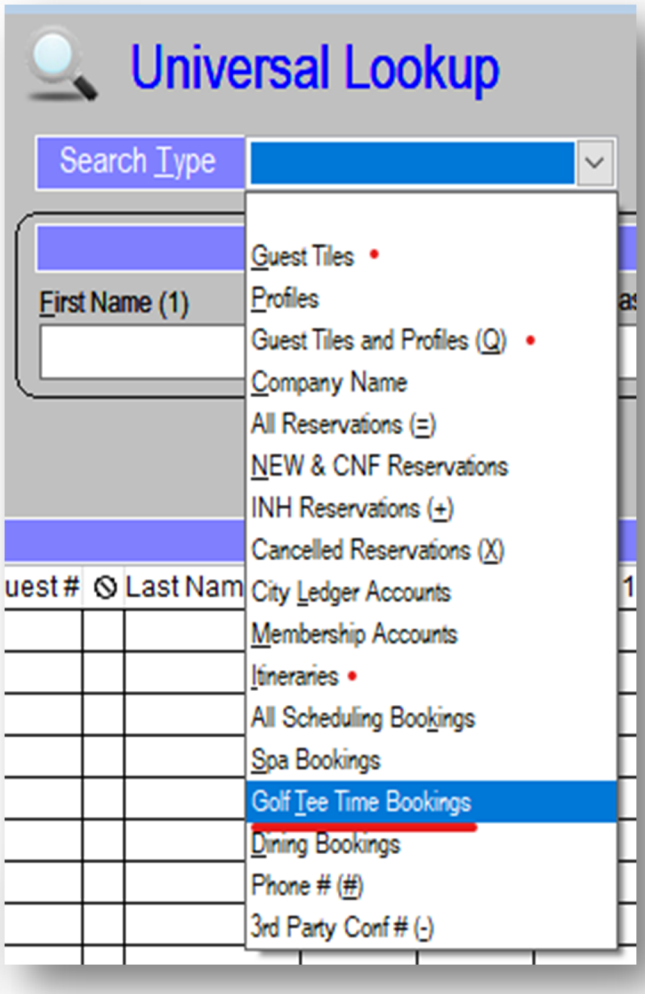


Locate an Existing Golf Reservation

To locate an existing Golf Reservation, you should start by opening your **Universal Lookup Tool** located in the upper Toolbar of your SMS window.



You will need to select the **Search Type**.



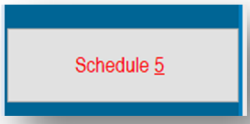
It is important to understand that not all departments book dining reservations the same way we do in the Reservations department.

Not every golf booking will be associated with an Itinerary Number, therefore, it is best to begin your search by setting the Search Type to **Golf Tee Time Bookings** instead of All Reservations or Itineraries. Ask the guest if the tee time was booked under their name by someone else. Doing so at the beginning of your conversation can cut down your search time.

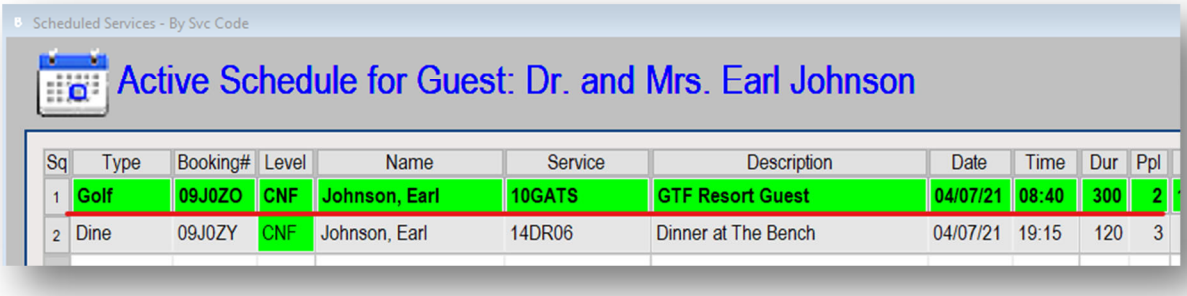
If you are having trouble finding the reservation by name, you can ask the guest for their **confirmation number**.

The email confirmation that we send to Dining Only Guests is a **VEMAIL**. The confirmation number that appears on their email is the number of their **Guest Tile**. To search using this number, set your search type to **Guest Tiles** or **Guest Tiles and Profiles**.

Once you locate their Guest Tile, hit the **5** key on your keyboard to open the guest's current **Active Schedule**.



This is where you will see all current recreation bookings:



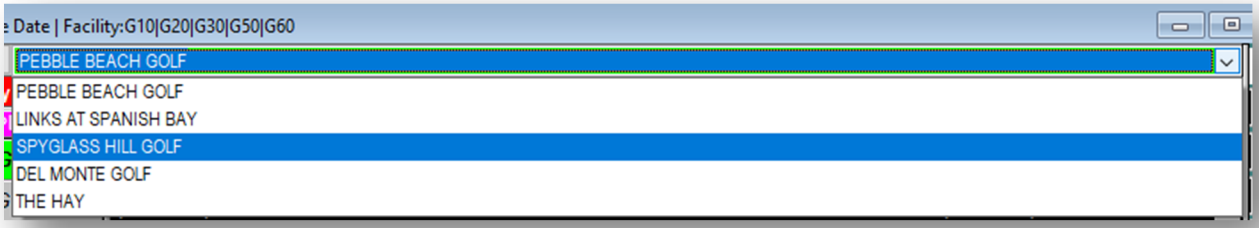
If you still do not have success locating your golf reservation in Universal Lookup, there is still hope.

If the guest knows which course they booked, the date, and (ideally) the tee time, you can find their reservation by looking directly on the **Tee Sheets**.

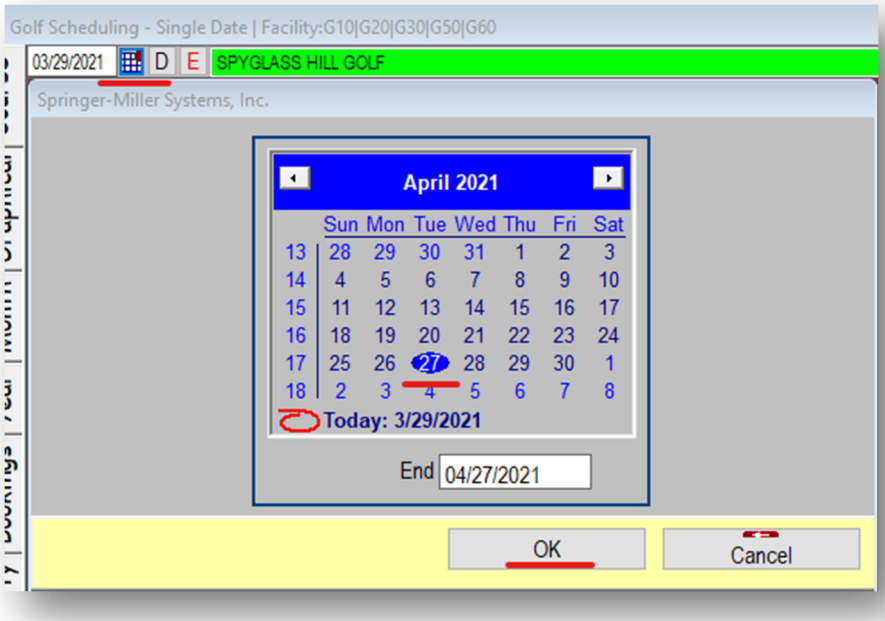
For example, let's say a guest wants to add a forecaddie to his tee time. He knows he and his friends are booked on Spyglass Hill Golf Course at 9:40am on Saturday, April 17th, but he has no idea which name is on the reservation.

- Click the **Tee Sheet icon** from the vertical toolbar of SMS. 

- When the Tee Sheet opens, change the selected golf course from Pebble Beach Golf Links to **SPYGLASS HILL GOLF**

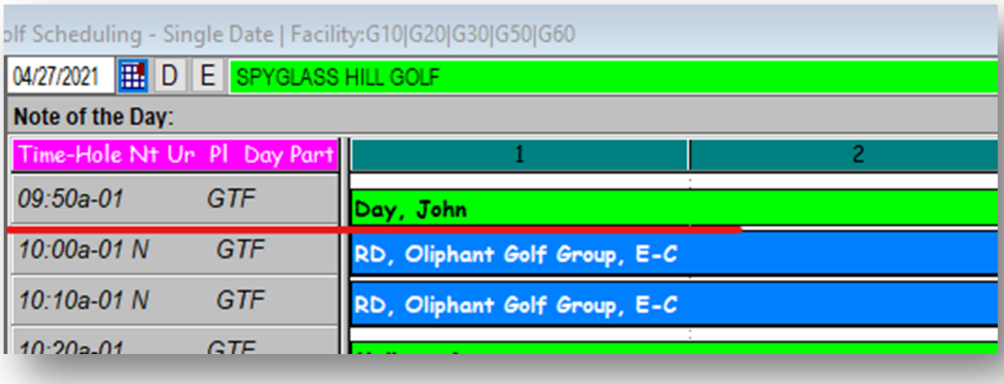


- Click the **calendar** icon in the top left corner, then select April 27th as your search date, then press OK

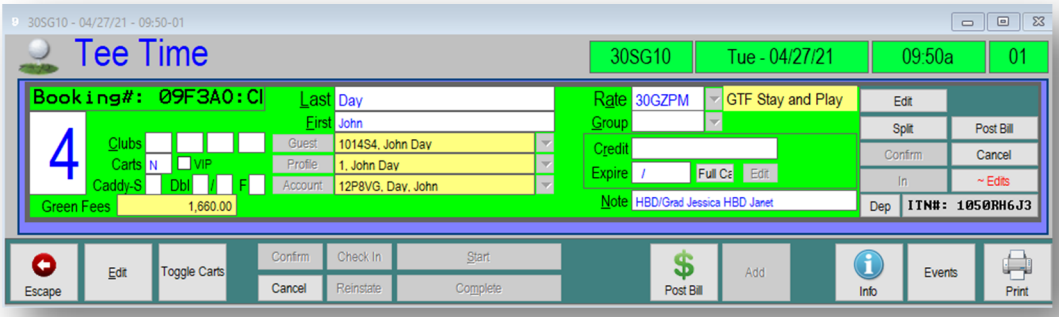


- Use the scrollbar along the right side of the Tee Sheet to move up and down to locate the reservation that is booked at **9:50AM.**

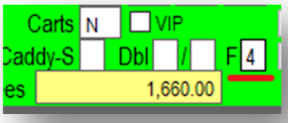
- Now that you've found the correct time slot, you can see that the name of the guest who booked a tee time at Spyglass Hill on April 27th at 9:50am is John Day!



Double click the green reservation to open the Golf Tile:



From here, you can add the requested forecaddie.



Important Note:
You should never information about a reservation to a caller that is not listed on that reservation. However, if the guest can provide all information about the booking to you, you can discuss that basic information with them.

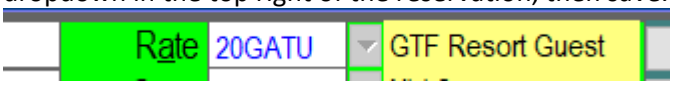
In this example, the caller would not have the power to make any changes to the reservation such as moving the tee time, reducing or adding golfers, or cancelling because that can only be done by the person who booked the tee time. If the caller wanted to make such changes, we would tell them that Mr. John Day himself needs to give us a call.

The reason we are able to add a forecaddie to this tee time despite Mr. John Day not being on the phone is because guests are not 'locked in' when a forecaddie is added, which gives Mr. Day the option to say no to the forecaddie on the day of play if he so chooses.

Golf Changes

Rate Code Change

- If you need to change the rate code, you can open the reservation and change this via the dropdown in the top right of the reservation, then save.



- To see the history of changes made on golf reservations, click the "Change Log" button
- If you need to cancel golf, do so through the 5 schedule only which gives you a clear view and prevents you from accidentally unlinking from the itinerary.

Changing Tee Times within the Same Day

- If you are moving tee times within the same day, the easiest way to do this is to open the tee sheet for that day and simply drag your tee time to the new time they want.
- Be sure to move any tee sheet notes because those will stay assigned to the time slot, not the people on the booking.

Changing Tee Times to Different Days

- If you are changing the tee time to a different day, you need to cancel and rebook the entire reservation, making sure to move over all caddies/carts/notes/credit cards/names.

Golf Upgrade:

Example: If a guest is booked at Spanish Bay, but wants to Upgrade to Spyglass, and is within the 3-month booking timeframe:

- Locate the SG tee time they want, add it to the Itinerary, and hit complete right away.
  - Be sure to move over caddies/rentals/carts and type in the CXL advisement
- Open the old golf reservation and hit "cancel" on the right side
- Select the reason code: rebooked other tee time
- Type the CXL reason: "changed to SG"
- Once cancelled, you cannot re-open this reservation, but you can see the details by checking the "view cancelled bookings box," going to the Booking Center tab, and hovering over the reservation line.
- Go to the guest tile and leave an R Note:
  "Mr. ___ changed from SB to SG on xx.xx.xx. Reconfirmed caddies/etc."
- Paste this same note into NAVIS

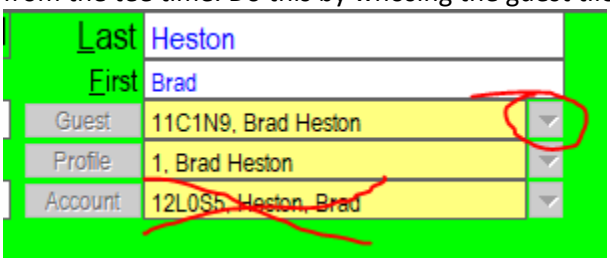
Change Number of Players

- If guests are outside 14 days, they can reduce numbers. Do this by clicking into the tee time, click edit, and update the number on the left side to whatever their new number of golfers will be.

- You can add golfers this same way at any time if the space is available. If it is not, check to see if other tee times that same day have available space. If we are adding more golfers, we can change times within the CXL period

Changing Between Resort Guest and Day Guest Golf

- A Resort Guest will have their room whosed to their tee time to guarantee the booking whereas a Day Guest will have only their guest tile whosed. If you change tee times between Resort and Day Guest, you must update the Whosing as well as the rate code.
- Change Example: A guest has a 4-night stay, but decides to change it to 3 nights. They still want to play golf on the day they cancelled the room, so we need to change that golf tee time from "Resort Guest" to "Day Guest"
- In addition to changing the rate code per instructions above, you need to disassociate the room from the tee time. Do this by whosing the guest tile to the tee time.



- When you click the arrow next to "Guest" to attach the guest tile, a message will appear letting you know that doing this will disassociate the room. Once this is done, you can change the rate code to "Outside Guest."

- Golf Changes
  - Change number of golfers within tee time
  - Moving times within the same day can be done on the tee sheet
    - Any tee sheet notes must be moved as well, which can be done by changing the "effective times" on the note

Golf Cancellations

Golf Special Situations

Child Golfers / Ride Along

Age 10 – 16 years old must be accompanied by an adult. Children, as with all golfers, need to be able to maintain resort pace of play expectations and be able to play at a skill level that will not negatively impact other golfers in and around the group. Pebble Beach Resorts reserves the right to make other arrangements for minors (and all golfers) that hinder the experience of other guests.

Any child under the age of 10 years would need to have a golfing ability at an advanced skill level. This exception would need to be cleared by the head pro of the course via e-mail; the starters should be aware to expect a very young player with their adult guardian on the day of the tee time.

Preferred age for a child that will ride along in the cart is 8 years or older.

ADA / Fairway Access

For those who are requesting Fairway Access via golf carts (this will typically be those with disabilities), gather their tee time and contact information and email it to the Head Pro of the course.
They will then reach out to the guest to talk things through and potentially approve them.

Maintenance Tee Times

- Maintenance tee times should be used for resort guests – must book a minimum of 3-golfers
- Outside guests (including Duke members) may be booked into maintenance times 48-hours prior to play (any # of golfers)
- Only Forest Residents is able to book PB 92 days out in Maintenance tee times.

Re-rounds

- Re-rounds are only eligible if they played rack rate round.
- If they got a discount, their second round of the day can have that same discount (not comp, obviously)

one player is a minor baby note

Club Pro Program

Youth on Course	Spanish Bay and Del Monte (and formerly Peter Hay) are part of this program. Tee times are $5 and can only be booked 1 day in advance directly by the Pro Shop. They must bring their membership card. This will not cover balls or carts. The Youth players can bring 1 parent to play with them, but no spectators. ***This program is available only at certain times of the year that are set by

	DM and SB. *During COVID, the program is not running. It will begin again late October 2020.**** *Youth on Course has resumed at Spanish Bay July 2020. They need to call the pro shop day before they want to play. Same day, transfer to pro shop.*

Rain Checks	Guests cannot change/cancel within CXL period due to weather, but they do not have to play if it is raining when they start their round. Once we get to their day of play, they can ask the pro shop to reschedule or cancel, but we don't do this based on forecasts in advance. ---- If they push, we can potentially charge a city ledger for their greens fees in advance and move them to a new date that is No-CXL/CHG with supervisor approval.
Mailing Scorecards	We can mail score cards to guests free of charge (as long as the amount is not excessive. We have them in the cabinet at Reservations, we write the Reservations department number in the corner where the stamp will go, then drop it in an interoffice envelope. We write the date and "Outgoing" on the envelope and drop it in the "Out" bin.
Bag tag engraving	This is done at the Lone Cypress Shop - Ext 8544 - or Heritage Shop. The bag tags are different than the giveaways. The engraved tags are one sided and purchased from the shop.
Golf Rater calling to get our policy	Connect with Margo Daniels, the Assistant Tournament Director. She will need the front and back of their golf rater card and their requested visit dates. We typically need 60-day notice minimum.

Driving Ranges are only public at SG.

SB is encouraged to go to PB's range

Any resort guests can play PB anytime during their stay.

Room Reservation Basics

ACCOMMODATIONS
The Lodge at Pebble Beach
The Inn at Spanish Bay
Casa Palmero

This will be your introduction into the room-booking process with Pebble Beach Resorts.

In the following pages, you will learn how to book a single room reservation at Pebble Beach Resorts. From there, we will expand into adding golf tee times, restaurant reservations, and get into more complicated trips such as guests who want multiple rooms, packages, specific billing arrangements, etc.



To be successful as a Reservations Agent, you will need to practice active listening.

Before you even begin to search for availability, you must ask open ended questions and listen for conversational queues to not only fully understand what the guest is asking to book – but also to anticipate what the guest would enjoy most during their stay.

This is why the Pebble Beach mantra is to ***exceed the expectations of every guest, by providing a once in a lifetime experience…every time.***

How can you use your expertise to exceed a guest's expectations?

"Just book me into your cheapest rooms. We're just a group of guys; we don't care about the view."

This guest may not know that our Ocean View rooms at The Lodge at Pebble Beach are right on the 18th hold of our legendary Pebble Beach Golf Links which would be much appreciated by true golf enthusiasts.
Or, they may not know that our Fairway One rooms have a larger square footage that would give them much desired extra space for each golfer sharing a room with a friend.

"We're playing Pebble Beach at one, so let's book a dinner for 4 at Peppoli at six."

This guest may not know that Peppoli is located at the Inn at Spanish Bay and they will therefore need to pad in an additional half an hour so they can take our resort shuttle.
They may be better off booking that restaurant after their Links at Spanish Bay round since they will already be at the Inn at Spanish Bay.

Room Reservation Guidelines

Property-Wide Guidelines:

- Maximum of 2 golfers per room
- Maximum of 4 adults per room
- Minimum age for an unaccompanied guest is 21 years old
- A 2-night minimum stay is required on Friday
- For Same-Day Reservations, contact the front desk before booking to ensure availability
- Transfer to Group Sales if:
  - A guest requires a meeting space
  - A guest wants to book more than 12 rooms,
  - A guest wants to book more than 36 room nights

How Far in Advance May Rooms and Suites Be Booked:

The Inn at Spanish Bay	The Lodge at Pebble Beach	Casa Palmero
18 months	18 months	12 months

**If a guest wants to book a Suite at the Inn at Spanish Bay between 1 and 17 months out, a supervisor must check Delphi to ensure availability.*

The Following Room Types Must Be Pre-Blocked:

Property-Wide:

- Suites (Non-Moveable)
- 2nd room of 2-Bedroom Suites (Non-Moveable)
- Connecting Rooms for Families and small children (Non-Moveable)
- ADA rooms

The Inn at Spanish Bay:

- Scenic View Rooms with QQ beds

The Lodge:

- Ocean View Studios
- Garden Spa Rooms
- Fairway Rooms
- Fairway One Rooms
- Deluxe Ocean View Rooms with QQ beds

Delphi

Delphi is the NAVIS of Pebble Beach Group Sales. Group Sales will often hold Suites at The Inn at Spanish Bay for large groups even when the group has not finalized their contract. These tentative holds are documented within the program Delphi.

If we are within between one and seventeen months out of a visit date for a guest who wants to book a Spanish Bay Suite, we must contact a Reservations Supervisor so they can log into Delphi and see if Group Sales has that particular suite on hold.

If the guest wants to book any of "the big three" suites (i.e. President's, Governor's, Hospitality), this requires an even higher clearance before we can book. (You will still go to your direct Supervisor to initiate this approval.)

Once approved, leave a Closed R Note that states that a Supervisor (include the supervisor's SMS initials) checked Delphi for your suite.

Room Rate Breakdown

Base Rate		Rack Room Rate
Occupancy Tax		10.5% per night
California Tourism Assessment	This assessment is levied on all hotels in the state to assist with tourism marketing campaigns	0.195% per night
Monterey County Assessment	This assessment is levied on all hotels in the county to assist with tourism marketing campaigns	$2 per room night
Service Charge	This charge covers gratuities for: • Front Desk • Porter/Valet • Concierge • Housekeeping • Resort Shuttle	$25 for The Lodge and Casa Palmero $28 for The Inn at Spanish Bay

Reservation Tile Walkthrough



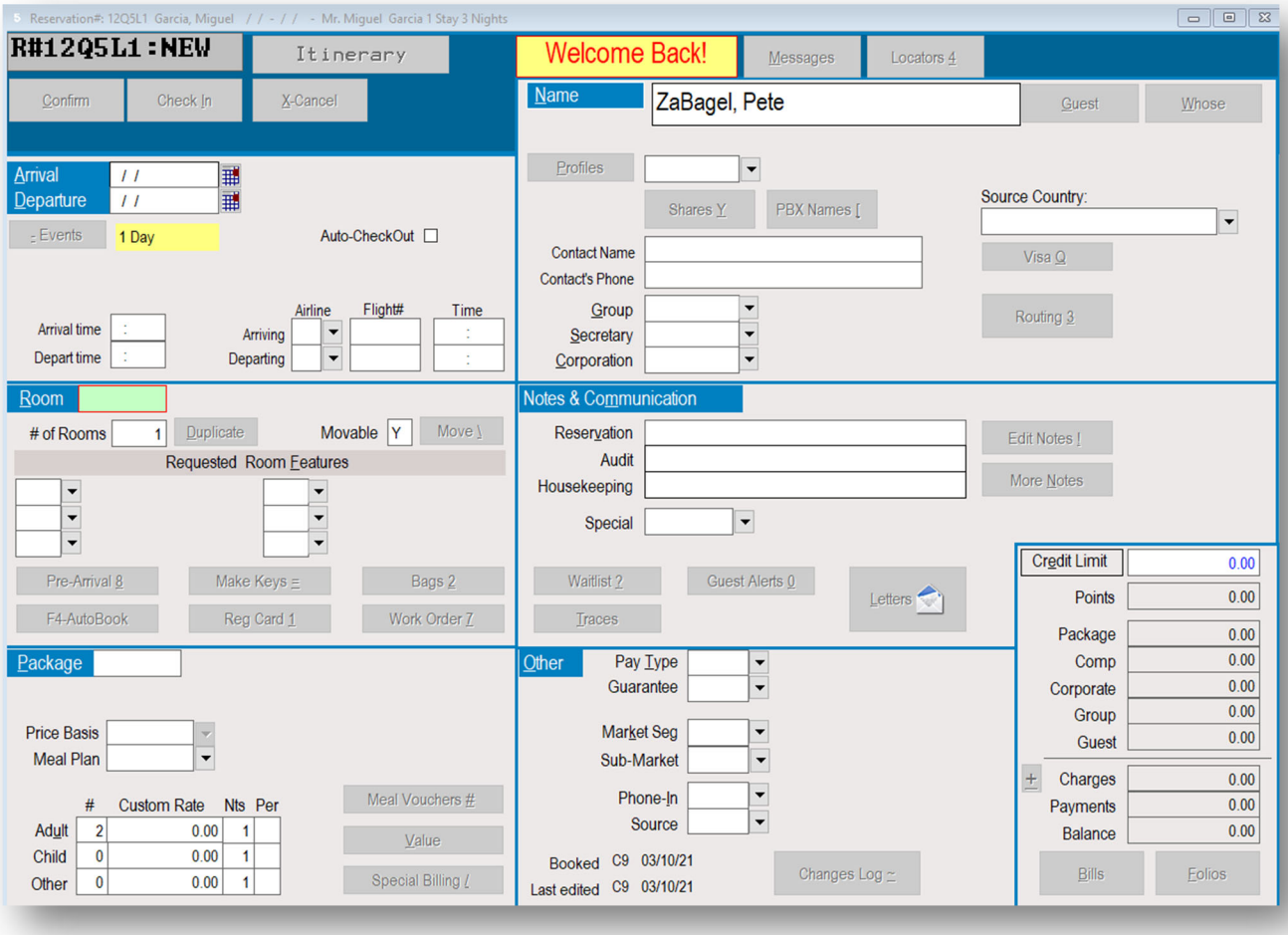
Before we get into the booking process, let's take a look at what **a Room Reservation** looks like.

When you book a room for a guest, you will create a **Reservation Tile**. Like a Guest Tile, the Reservation Tile is a page within SMS that holds all information about a guest's stay.

The information that can be found on each Reservation Tile includes:

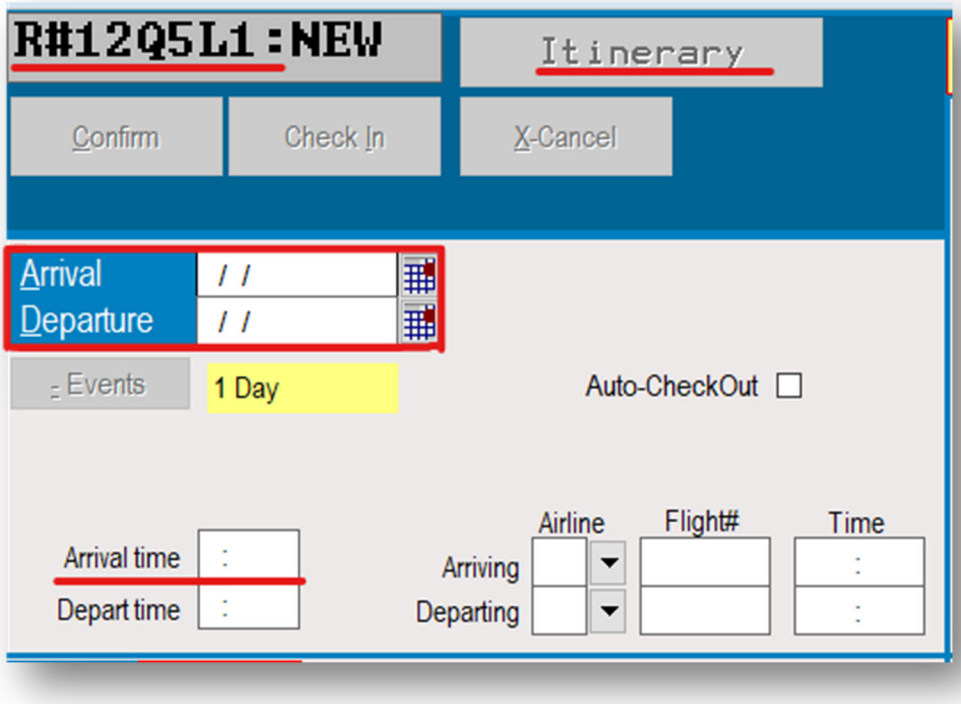
1. Who the guest is and their contact information
2. Where they are staying and in what room type
3. How much they paid and how much they still owe
4. What recreation they have booked during their stay

As you can see in the image below, the Reservation Tile is divided into several sections via thick blue lines. We will walk through each of these sections to examine what information each section holds.



Arrival / Departure

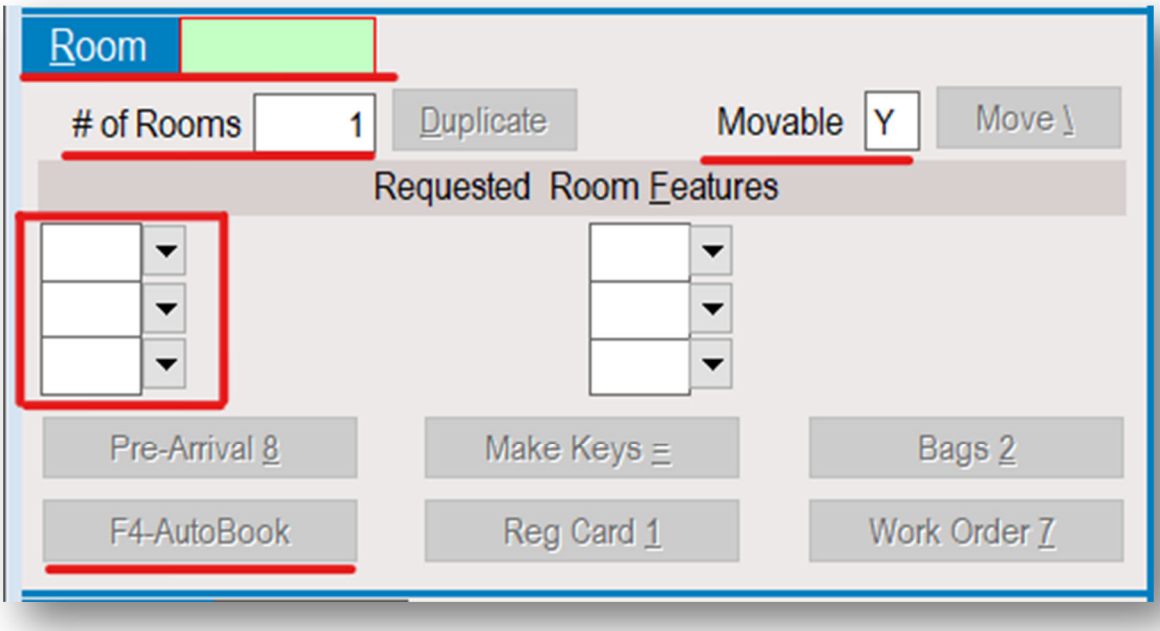
The Arrival/Departure section of the Reservation Tile is all about **timing**.



Reservation Number	The R# in the top left corner is the Reservation Number for the room.
Itinerary Number	The grayed out Itinerary box will auto-populate the Itinerary number from your Booking Center
Arrival and Departure	The Arrival and Departure dates will auto-populate to the dates you set
Arrival Time	The Arrival Time field will usually be blank, but you can fill in this field if the guest lets you know they will be arriving earlier than our check-in time. You will only ever do this for early arrivals; you should never set the Depart Time. We have a process to let the front desk know if a guest requests a late checkout. When that request is approved, the front desk will set the depart time themselves.

Room

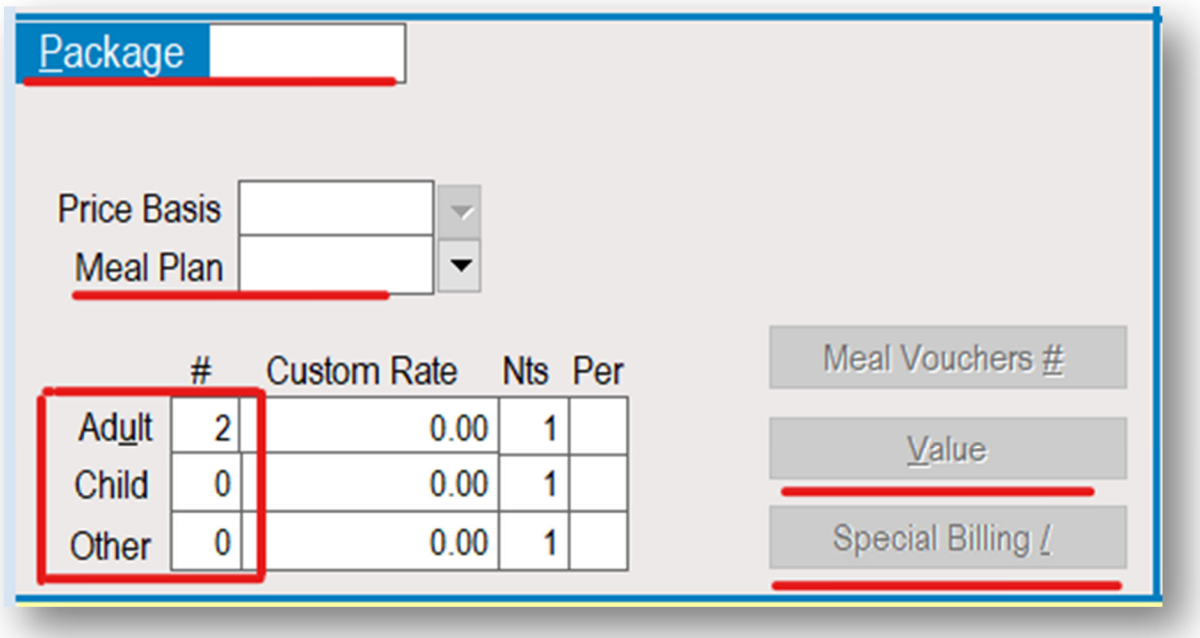
The Room section or the Reservation Tile is all about the guest's **room**.



Room	The Room box will auto-populate with a code indicating what type of room you are booking. A Soft-Blocked reservation will only display a room type, as in the example below, a Deluxe Ocean View room at The Lodge at Pebble Beach. A Hard-Blocked reservation will display both the room number and room type.
Moveable	A Y in the Moveable field tells the front desk that – if needed, this guest can be moved to a different room number. There are some rare circumstances in which we need to mark this field with an "N", so the guest is not moved.
AutoBook	F4-AutoBook is how you will "Pre-Block" rooms. As a Reservations Agent, you will simply book guests into a "Room Types" such as Ocean View or Scenic View. The Front Desk will later assign – or "*block*" - that guest to a specific room number. However, there are some circumstances in which you will need to assign the room number yourself.
Room Features	The red box surrounding the three blank dropdown fields indicates where you will enter Requested Room Features. As a Reservations Agent, the only aspect of a room that you can *guarantee* to a guest is the view that they have purchased, i.e. Ocean View, Fairway View. Other aspects such as balcony vs. patio, two queen beds vs. one king bed, which building they are placed in, etc. are entered as requests into this field.

Package

The Package section of the Reservation Tile is primarily about **money**.

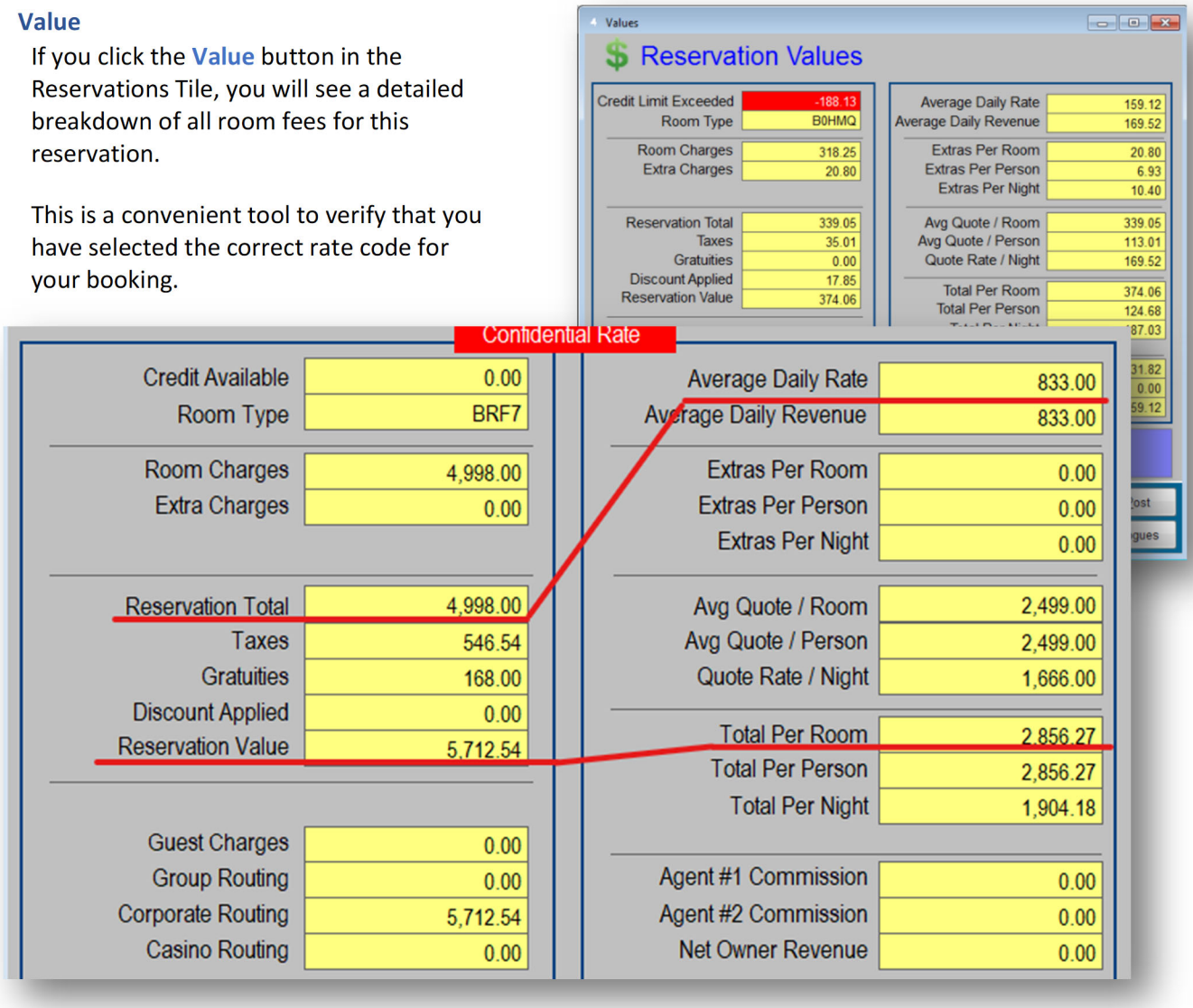


Package	The Package field indicates the type of rate the guest is booking. Most often, this field will say RRL or RRB which is the code for Rack Rates. Guests who pay the "rack" rate are booking at full price without any discounts. If the guest is booking a discounted rate such as a Golf Package, there will be a special rate code in this box.
Meal Plan	The Meal Plan field is a good example of how Pebble Beach has customized the SMS system to our specific business needs. Instead of using this field to indicate meal plans, we actually use this field to indicate if a guest is celebrating a special occasion during their visit. For instance, if a guest is celebrating their birthday, you will click the arrow next to the Meal Plan field and select "Birthday" from the menu. This field interfaces with the Pebble Beach phone system so that when the guest calls the front desk from their room phone, the caller ID will say "Birthday." Now the Front Desk knows to wish that caller a happy birthday during their conversation.
Numbers	The red box in the image above is the section that indicates how many adults, children, and pets (other) will be staying in this specific room. We need to notate this information because there are fees that apply when a guest has more than two adults in the room and a nightly cleaning fee if a guest is bringing a dog.

Value

If you click the **Value** button in the Reservations Tile, you will see a detailed breakdown of all room fees for this reservation.

This is a convenient tool to verify that you have selected the correct rate code for your booking.



The top red line underlines two key fields that do NOT include taxes, service fees, and assessment:

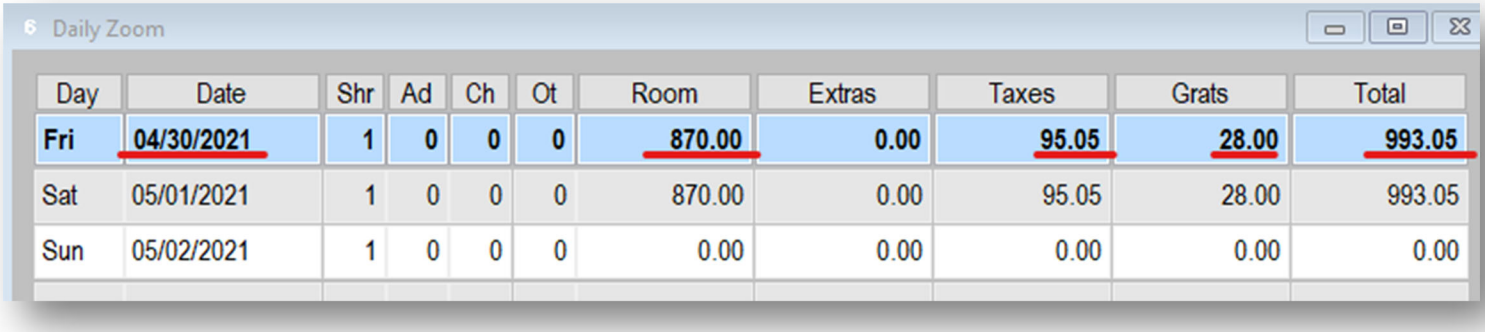
- The **Average Daily Rate** is the rate per room without taxes, fees, and assessment. By checking this field, you can easily see if the Rack Rate for your booking is running correctly.
- The **Reservation Total** field is a total for all rooms and all nights before taxes, fees, and assessment.
  In the example above, this guest booked 2 rooms at $833 per night for 3 nights which totals to $4998.00

The bottom red line underlines to key fields that DO include taxes, service fees, and assessment:

- The **Total Per Room** is the total nightly rate x the number of nights booked. To find the total nightly rate with taxes, fees, and assessment, you could take this number and divide it by 3 nights which equals $953.09 per room per night.
- The **Reservation Value** field is the total rate for the all rooms x all nights booked.
  Since this guest booked two rooms, you can take the Total Per Room ($2859.27) and multiply it by 2 rooms to get the Reservation Value of $5712.54

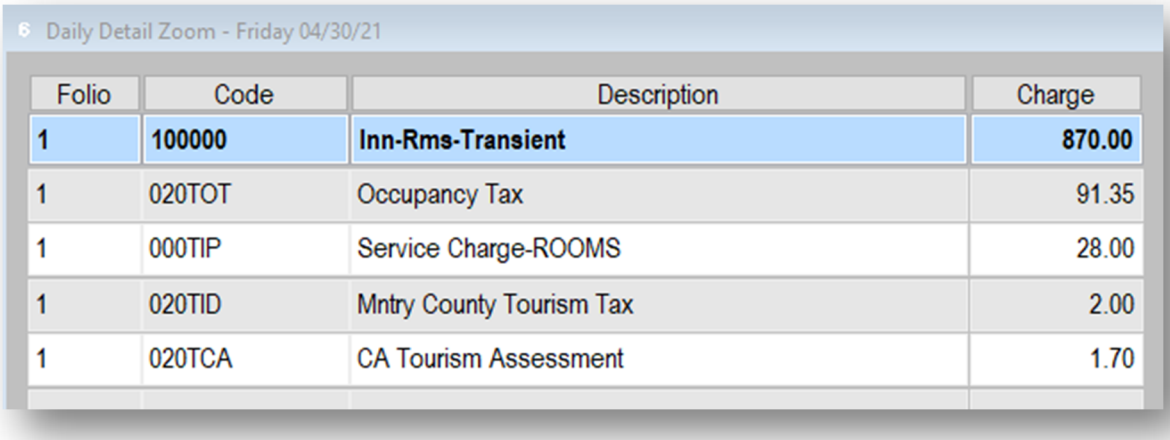
Value + Zoom + Zoom

By hitting the Zoom button (Z on your keyboard) while in the Value screen, you will open a new window labeled Daily Zoom which has a detailed breakdown of the rates that are being billed for each night of the reservation.


Daily Zoom

Day	Date	Shr	Ad	Ch	Ot	Room	Extras	Taxes	Grats	Total
Fri	**04/30/2021**	**1**	**0**	**0**	**0**	**870.00**	**0.00**	**95.05**	**28.00**	**993.05**
Sat	05/01/2021	1	0	0	0	870.00	0.00	95.05	28.00	993.05
Sun	05/02/2021	1	0	0	0	0.00	0.00	0.00	0.00	0.00

If you hit Zoom again, you will open a window labeled Detail Zoom which will break down the nightly rates even further to show you an itemized list of what is included in "taxes, service fee, assessment."


Daily Detail Zoom - Friday 04/30/21

Folio	Code	Description	Charge
1	**100000**	**Inn-Rms-Transient**	**870.00**
1	020TOT	Occupancy Tax	91.35
1	000TIP	Service Charge-ROOMS	28.00
1	020TID	Mntry County Tourism Tax	2.00
1	020TCA	CA Tourism Assessment	1.70

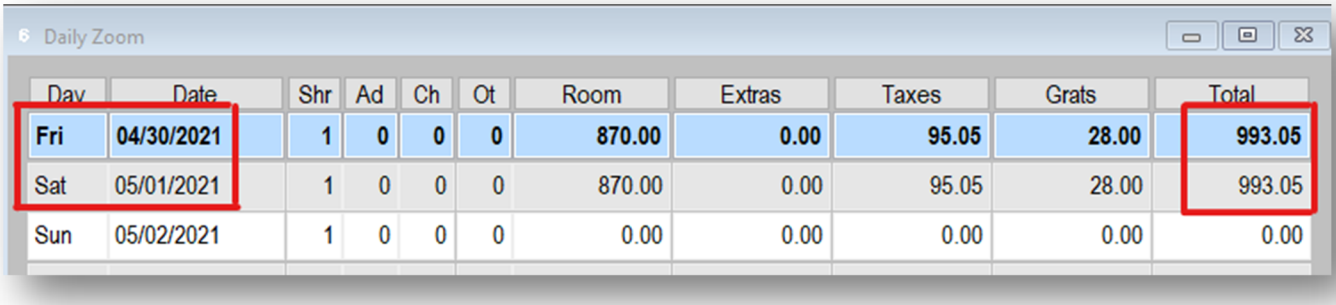


Every booking made by Reservations Agents will be reviewed for accuracy by a **Reservations Auditor**

The very first step an Auditor will take when reviewing a booking is enter the Reservation Tile and hit **Value + Zoom**. .

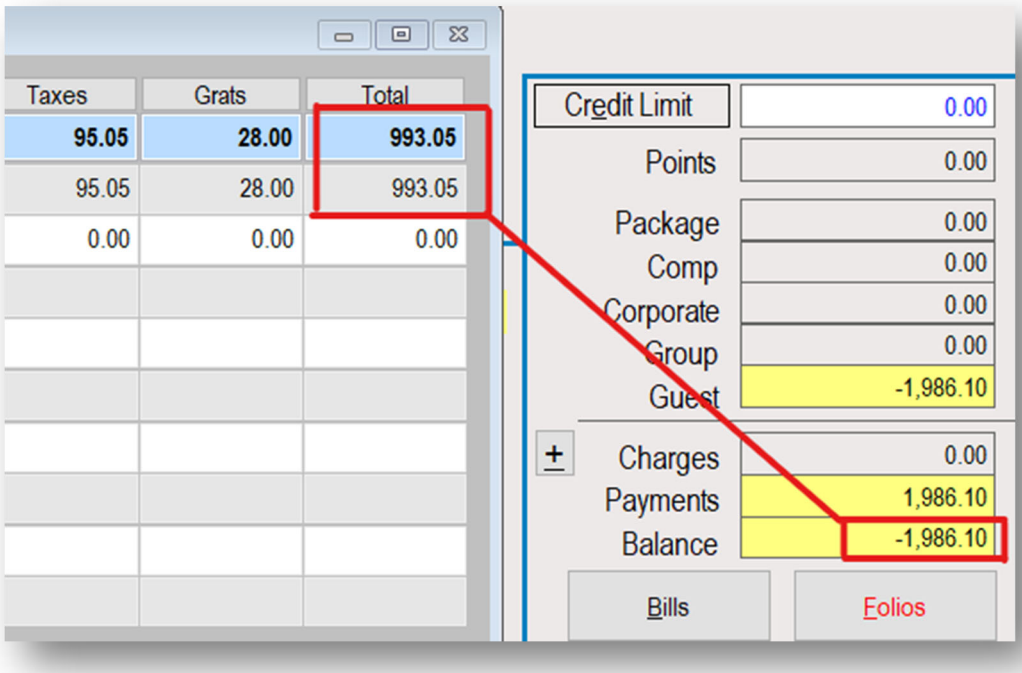
The reason they view this screen is to make sure that the Reservations Agent has charged the correct two-night deposit based on the selected room rate

If the deposit has been collected correctly, the first two nightly totals on the Daily Zoom screen should equal the balance on the Reservation.



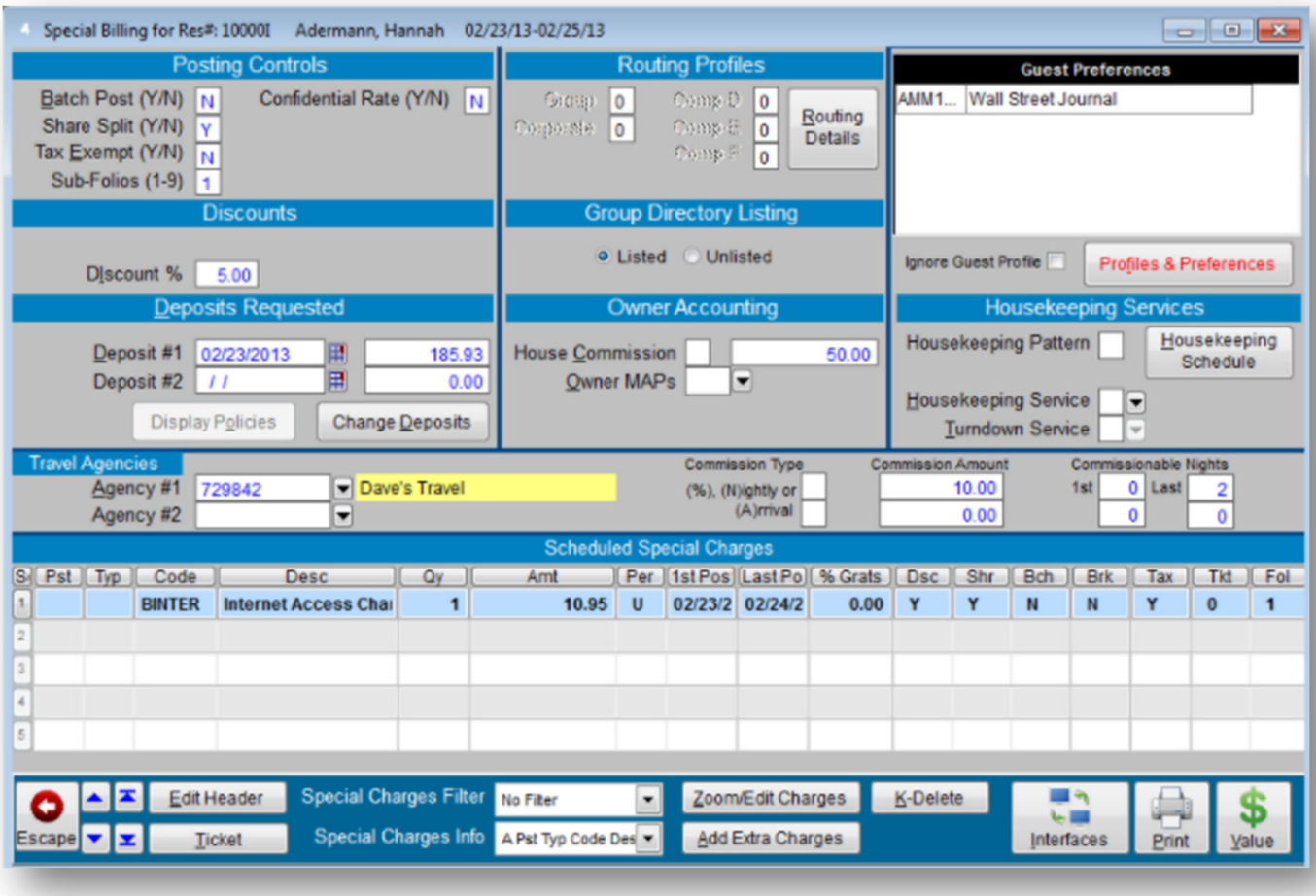
Day	Date	Shr	Ad	Ch	Ot	Room	Extras	Taxes	Grats	Total
Fri	**04/30/2021**	**1**	**0**	**0**	**0**	**870.00**	**0.00**	**95.05**	**28.00**	**993.05**
Sat	05/01/2021	1	0	0	0	870.00	0.00	95.05	28.00	993.05
Sun	05/02/2021	1	0	0	0	0.00	0.00	0.00	0.00	0.00

In other words, **Nightly Total #1 + Nightly Total #2 = 2 Night Deposit**



Special Billing

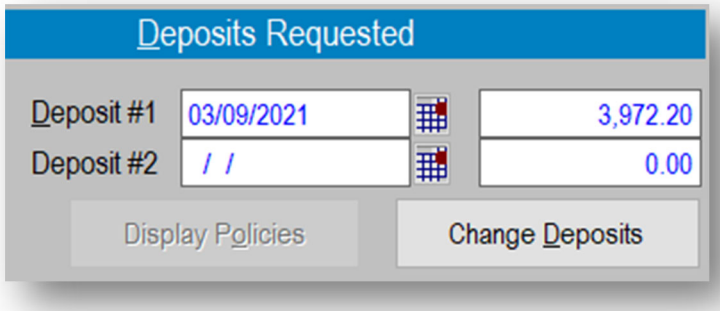
The Special Billing screen is used is used for advanced reservation and billing instructions.



The primary reason you will visit **Special Billing** is to view or edit the Deposit field.

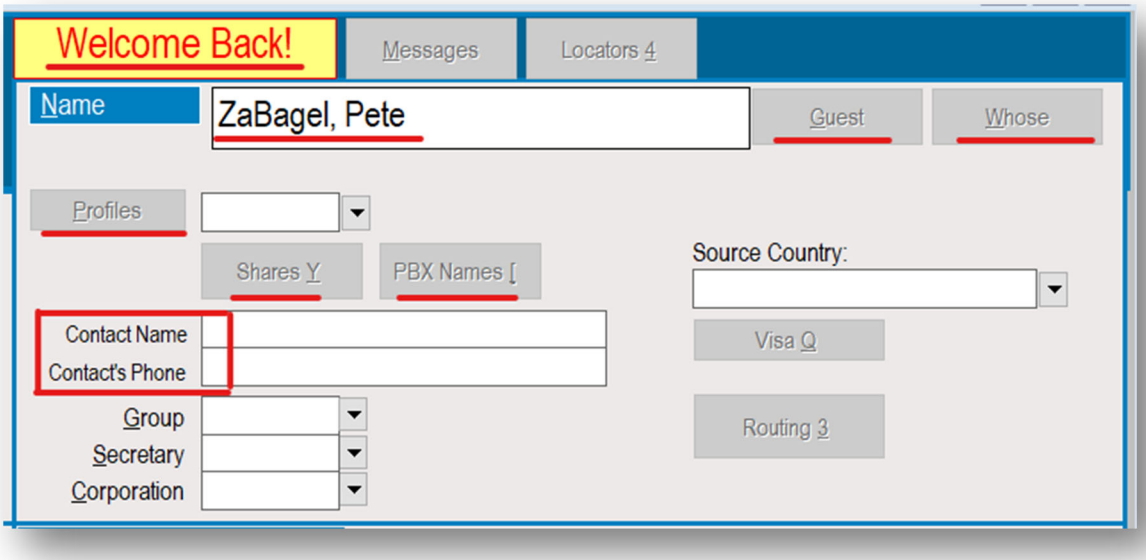
Deposit #1 will be set to the date that you booked the reservation and collected the guest's deposit.

The dollar amount next to this field will be set to the amount of the required two-night deposit for the guest's room stay. .



Name

The Name section, as you would expect, contains all information about exactly **who has booked and/or is staying in the room**.



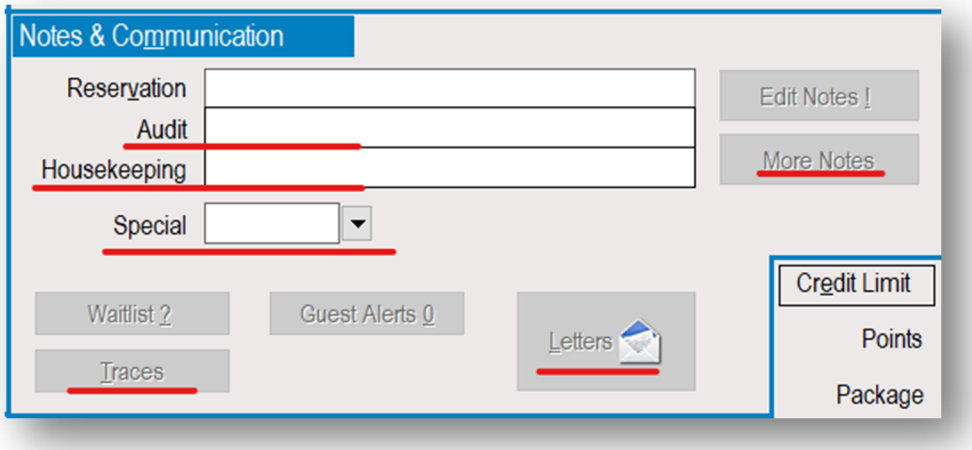
New or Past Guest	The section highlighted in yellow with either say "Welcome back!" or "First stay!" depending on whether or not the guest for this reservation has stayed in a room at Pebble Beach Resorts before. This is determined by the associated Guest Tile. If you create a brand-new guest tile for your booking or you connect a guest tile that does not have any reservations in their booking history, that tells the system that the guest has never stayed with us before. The reason we have this section prominently highlighted is so the front desk can greet past guests at check in by saying "Welcome back!" This is one of many touches that make our customer service at Pebble Beach Resorts so spectacular. Past guests may also be offered special rates at certain times of year to encourage them to return to our resorts.
Guest	By clicking the Guest button, you will open the Guest Tile for the person who has booked this reservation.

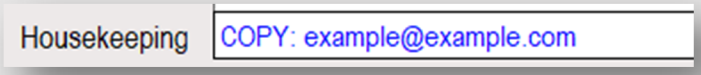
Whose	If you want to change the Guest Tile associated with this reservation, you can click the Whose button which will allow you to search for and select an alternative Guest Tile.
Profile	The Profile button will open the profiles of the associated Guest Tile for quick access.
Share	The Share Y button is used when two (or more) guests are sharing a room and want to split the charges between them. By "generating a share," you are essentially splitting the room in half, creating two Reservation Tiles, each for half of one room.
PBX	The PBX Names button is where you can see or enter the name of additional adults who will be in this room, who are not a member of the primary guest's family (and therefore not on their Guest Tile), and will not be paying for anything. PBX Names have authorization to charge purchases and recreation to the Reservation Tile to be paid for by the Primary Guest. For example, Mary Jane could be booking a room for herself and her boyfriend for his birthday. Since they are not married, her boyfriend's name would not be entered on her Guest Tile as a legal family member. We would instead enter him as a PBX name. This will allow him to check in without his girlfriend if needed and the Front Desk will also be allowed to give him a room key despite the room being in Mary Jane's name.
Contact	The Contact Name and Contact Phone fields on the Reservation Tile are for when the person who calls into the Reservation Center to book the room is not the same person as the guest who will be staying in the room. Common examples of this are Travel Agents and Assistants. A Guest Tile should only ever contain the contact information of the Guest; therefore, the caller's contact information needs to be inputted directly onto the Reservation Tile.

Notes & Communications

The Notes & Communications Section is the **ultimate source of information** about each booking.

Most information entered into this section is done manually. That is why it is very clear to be clear, concise, and consistent across the department about how we word these notes.



Audit	The Audit line is where the booking agent will write the cancellation window that they quoted to the guest during their call. The following message format must be used for every reservation: Adv. [Mr./Mrs./Ms./TAG] [last initial] 14 CXL [the final date the guest can change/cancel] [Agent's SMS User Code] [Today's Date] 
Housekeeping	This line has been customized by Pebble Beach to act as a CC line for email confirmations. • If a guest wants a confirmation email to go to two different email addresses, the first email will be documented in the Email field of the Guest Tile • The 2nd email address will be written in the Housekeeping line after "COPY:"  If you do not include "COPY:" before the email address, the confirmation email will ONLY go to the email in the Housekeeping line. For example, a Travel Agent may only a confirmation email sent to their agency's email address. In that case, the Guest Tile will contain solely the Guest's information, but the Travel Agent's email address should be written in Housekeeping.

Special

The Special field is used to indicate a special occasion. By clicking the down arrow next to this field, you will open the Special Codes window. From here, you can select the occasion appropriate to your guest.



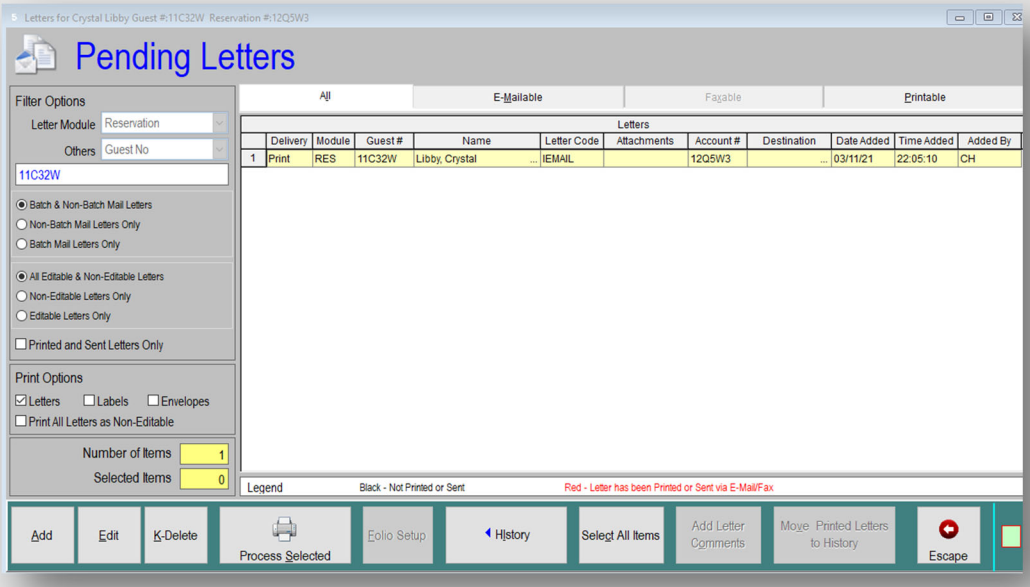
We will discuss Special Occasions in more detail within the Room Reservation Basics section of this manual.

Special Codes

Code	Description
A	Lone Cypress Partner
B	Writer or Rater
C	Site Inspection
D	Celebrity
I	Guest of LC Partner
J	PB Senior Mangement
K	Group VIP
L	Special Attention
M	Participant Sponsor
N	Club Pro Progam
O	Honeymoon
P	Anniversary
Q	Retirement
R	Birthday
S	Other
T	Group Staff

Letters

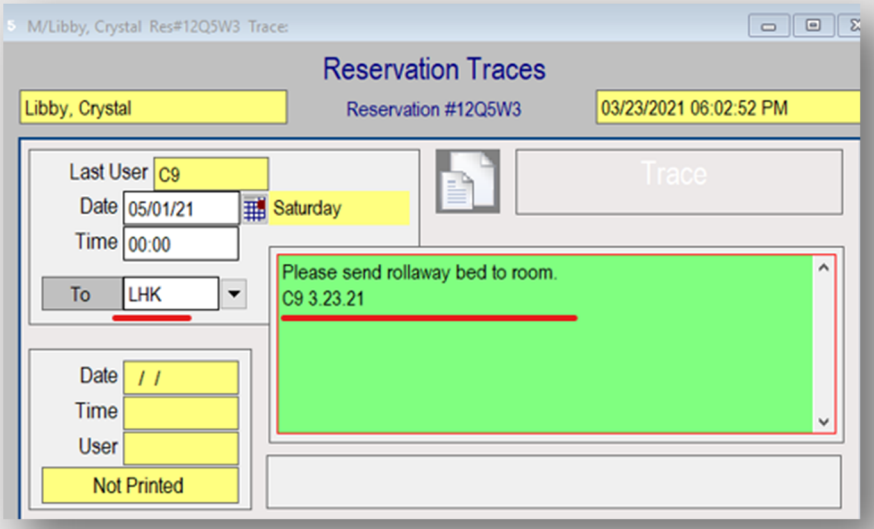
Letters is a function of SMS through which we send confirmation emails.
You will also see a Letters button in the Guest Tile.



Traces

Reservation Traces are messages that are sent between departments regarding the specific reservation. A Trace is a To-Do item meaning that the message always involves an action to be done by the directed department.

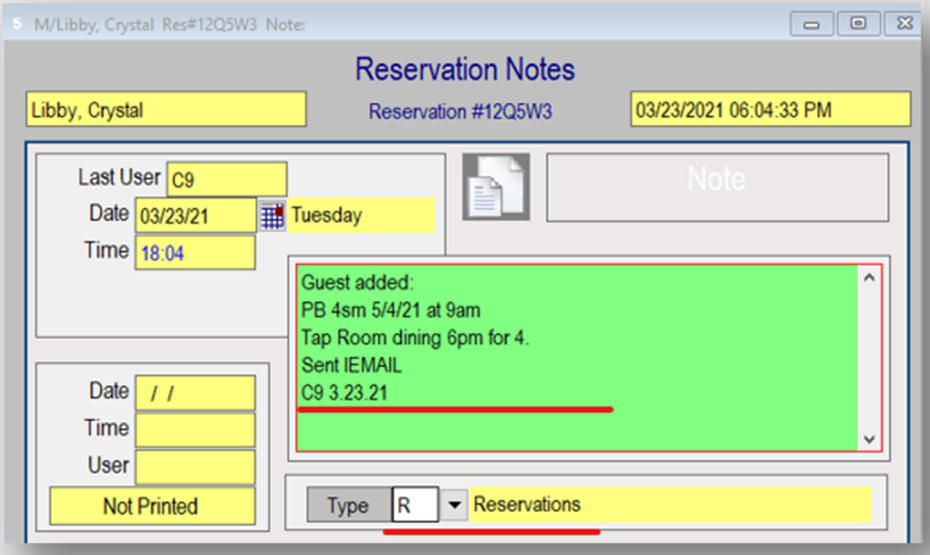
For example, you would send a Trace to the Housekeeping department to request that a rollaway bed be put in the guest's room. If the guest is staying at The Lodge, his would be an LHK Trace for Lodge Housekeeping.



More Notes

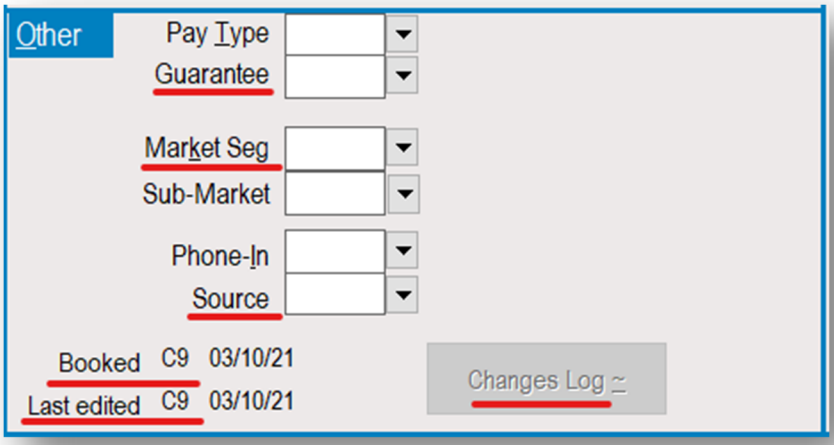
More Notes will open a window that appears very similar to the Traces function, but instead of sending To-Do requests between departments, Notes are purely documentation of information about the reservation.

For example, you would leave a Note each time you modify a reservation to explain what you have changed. This would be an R note for Reservations.



Other

The "Other" section of the Reservation Tile is all codes. It is very important to fill out these codes correctly because many reports are generated based on the coding within these fields.

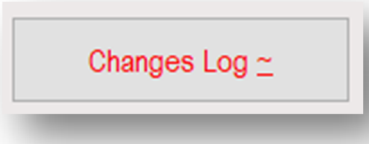


Pay Type	Not applicable to Reservations
Guarantee	Identifies how the guest is securing their reservation. The most common codes you will use are: • A – Advanced Deposit (The guest has paid the first two nights of the room) • J – Other Reservation (Another guest on the Itinerary has paid for this particular room's deposit instead of the occupants.)
Market Segment	This identifies the type of Guest. You will almost always select R for RACK which indicates that this guest is not in any special category and will pay the full rack rate.
Sub-Market	This will narrow down the Market Segment more precisely. If you are selecting RACK as your Market Segment, your Sub-Market will also be RACK.
Phone-In	Identifies which department the guest has contacted to book their reservation. As a Reservations Agent, you will always select option 01 for Reservations Center.
Source	The Source Code identifies why the guest made their reservation. This is the same code you will have filled out if you created a Guest Tile for your booking. Very often, your source code will be Internet – www.pebblebeach.com.



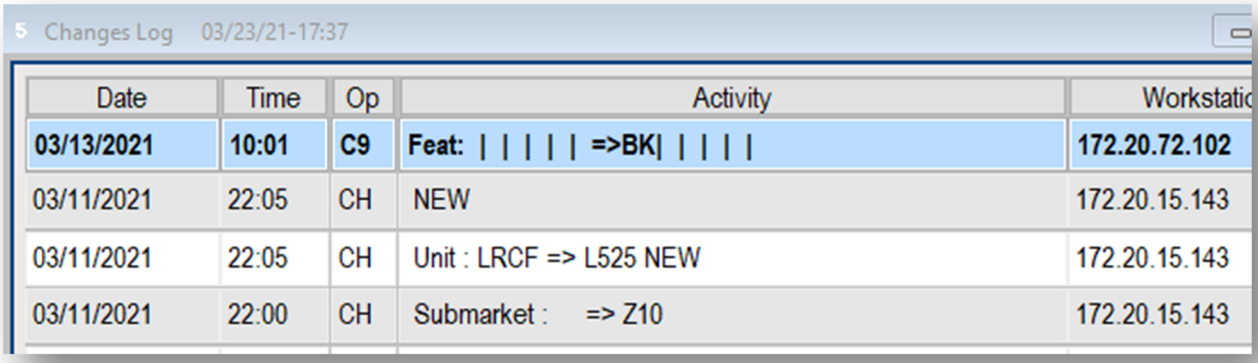
The bottom left corner of the Other section identifies which agent booked and has most recently edited the Reservation Tile using each agent's SMS User Code.

The **Change Log** is a running history of what has been modified on the reservation.



This log is written in shorthand code, so it will take some experience for you to fully grasp the meaning within the log. The log is written with the most recent changes at the top.

As you are learning and creating new bookings, it is good practice to read the Change Log to understand the meaning of the codes used by SMS.

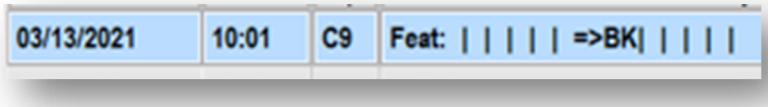


In the example above:

1. CH edited the reservation on March 11th, 2021. She updated the Sub-Market to Z10, assigned the unit number of this Fairway One Partial Ocean View Room to room #L525.



2. On March 13th, C9 added the King Bed Room Feature.



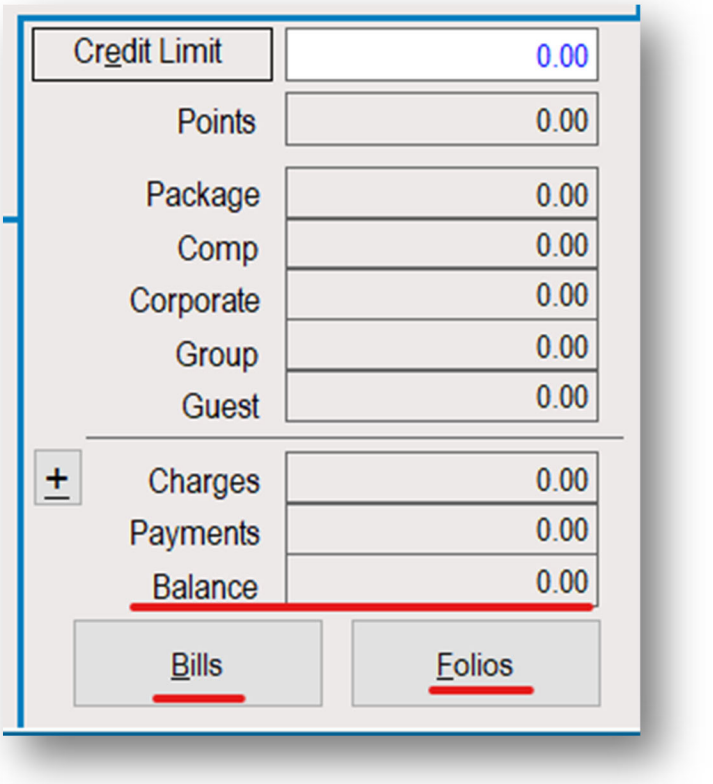
Payment

When you create a reservation, you will most often be collecting our standard two-night deposit.

1. You will click the **Bills** button to charge the guest's credit card.

2. The **Balance** refers to the amount of money the guest has on file with us to be used for this reservation. At the time of booking, this number should equal the required deposit amount.

3. The history of all financial transactions on a reservation are stored within the **Folios**. If a guest requests an itemized receipt after their trip, Accounting will send them a copy of their Folio.

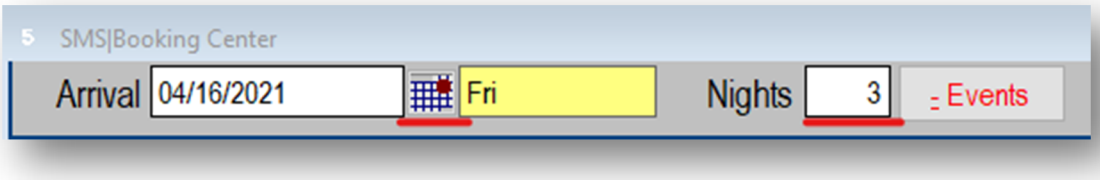


Search for Room Availability

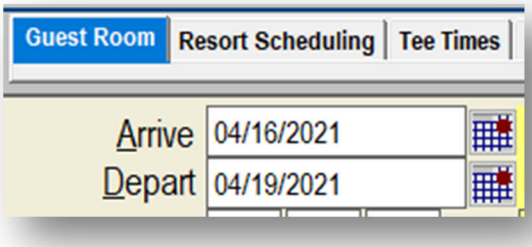


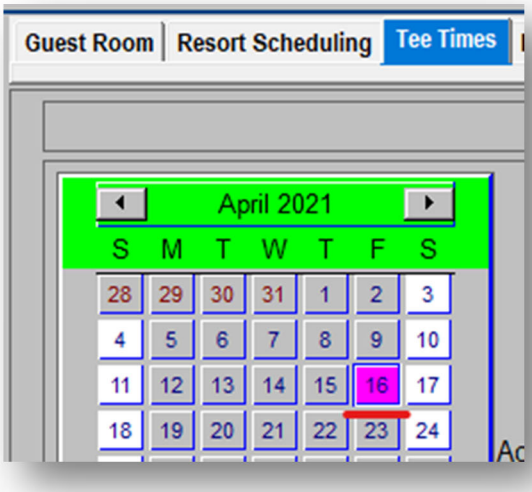
To begin your search for room availability, you should first enter the date of arrival into the Master Data Range field in the top left corner of NAVIS.

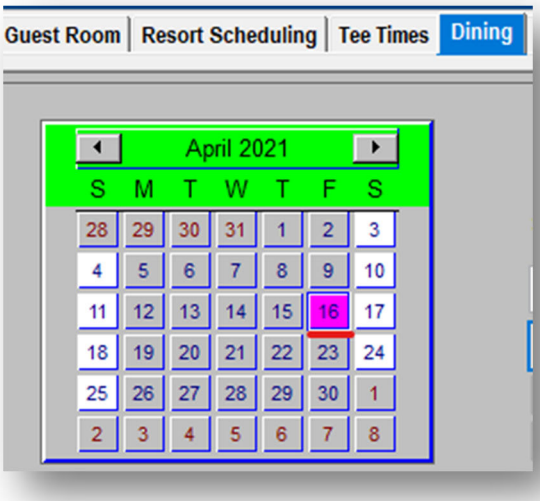
In the following example, a guest would like to book one room for 3 nights beginning on April 16th, so we click the **Calendar Button** to set the date to April 16th, then type a "3" into the **Nights** field. Click anywhere in the booking away from the Nights field to apply the update.



Now that the Master Data Range has been updated, all calendars within each Booking Tab will be set to the same dates:

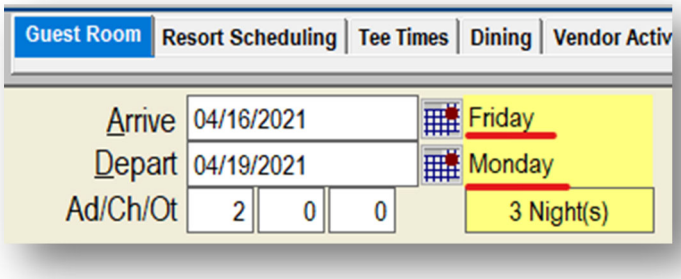






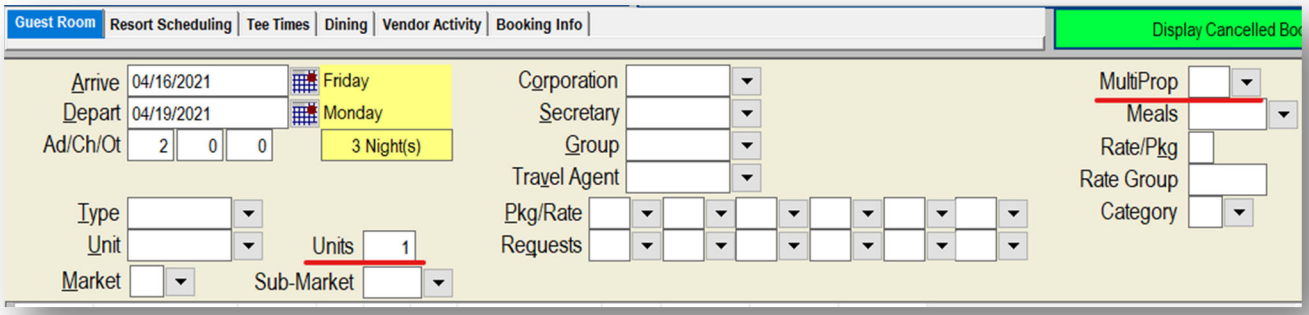
The **Guest Room Tab** will be the default tab for the Booking Center.

Once your dates are entered, it is good practice to verify the days of the week of the stay with the guest to avoid mistakes.



There are many Pick Lists (the fields with down arrow buttons) on the Guest Room to narrow down your search, but it is typically best practice to keep your search broad at first so you can offer multiple options to your guest.

However, there are two Pick Lists in particular that are very useful during calls: **Units** and **MultiProp.**



Units

The **Units** tab indicates the number of rooms that the guest wants to book. By updating the number in this field, you will only see results for that have at least that number of available rooms in that room type category.

For example, if we only have one Ocean View room left on your set dates, if you set the Units field at "2," you will not see Ocean View rooms appear in the search results.

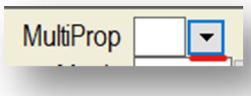
Keep in mind, even if a guest wants to book 2 rooms, they don't necessarily need to be the same room type, so you can still search for multiple rooms while keeping the Unit field set at 1.

To update this field, type the number of rooms into the Units field, then click away from that field with your mouse anywhere in the booking center.

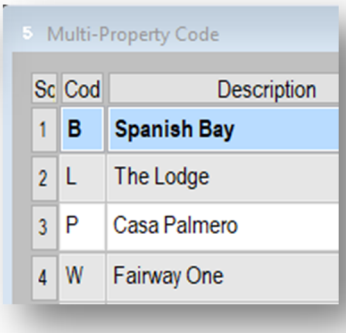
MultiProp

The MultiProp field will set your search for a specific resort property. Our guests have three properties to choose from, each of which have a specific code in SMS.

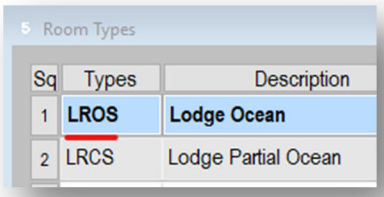
To set this field, you can type the code for the property you want to search, then click away from this field anywhere in the Booking Center, or you can click the down arrow next to the field and select the property from the Pick List.



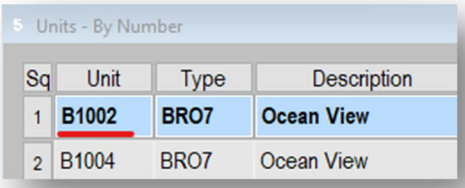
There are four options on the pick list, but we only utilize the first three. The Fairway One buildings are part of The Lodge.



The **Type** field allows you to select a specific room type for your search, such as Lodge Ocean View or Casa Palmero Spa Room.



The **Unit** field allows you to go even further and search for a specific unit/room number, such as the Garden Spa Room at The Lodge in room L191. It will be very rare if ever that you will need to utilize this search tool.

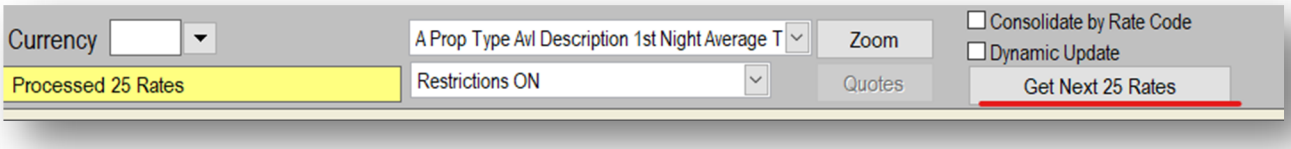


The **Requests** fields allow you to enter specific room features, such as a room with two queen beds, a ground floor room, a room with an adjoining room next to it.

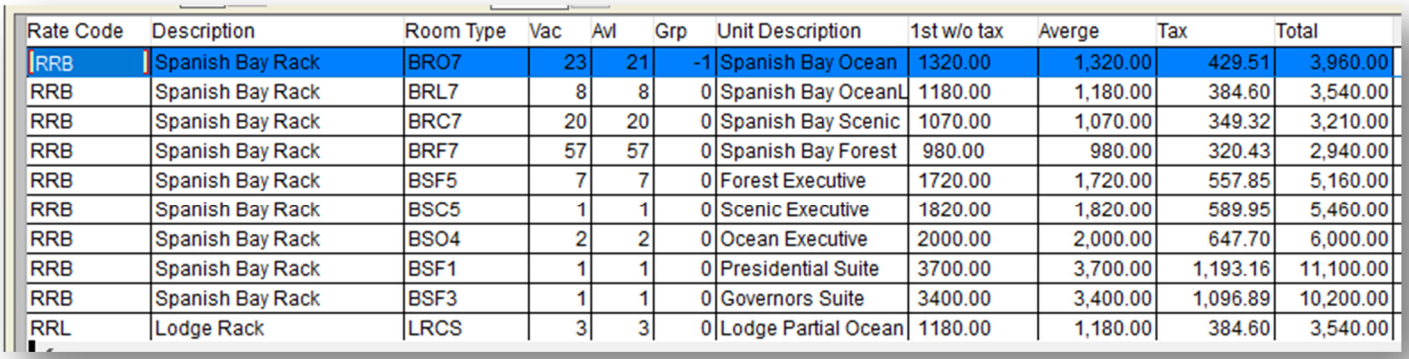


Each selection from the Pick Lists have a corresponding code (underlined in red in the images above) that will populate in the search fields once you make your selection. You will see these same codes utilized in multiple areas across SMS.

Once your dates and any other appropriate fields are set, click the **Get Next 25 Rates** button at the bottom of the page to submit your search.



Your search results will then populate:



Rate Code	Description	Room Type	Vac	Avl	Grp	Unit Description	1st w/o tax	Averge	Tax	Total
RRB	Spanish Bay Rack	BRO7	23	21	-1	Spanish Bay Ocean	1320.00	1,320.00	429.51	3,960.00
RRB	Spanish Bay Rack	BRL7	8	8	0	Spanish Bay OceanL	1180.00	1,180.00	384.60	3,540.00
RRB	Spanish Bay Rack	BRC7	20	20	0	Spanish Bay Scenic	1070.00	1,070.00	349.32	3,210.00
RRB	Spanish Bay Rack	BRF7	57	57	0	Spanish Bay Forest	980.00	980.00	320.43	2,940.00
RRB	Spanish Bay Rack	BSF5	7	7	0	Forest Executive	1720.00	1,720.00	557.85	5,160.00
RRB	Spanish Bay Rack	BSC5	1	1	0	Scenic Executive	1820.00	1,820.00	589.95	5,460.00
RRB	Spanish Bay Rack	BSO4	2	2	0	Ocean Executive	2000.00	2,000.00	647.70	6,000.00
RRB	Spanish Bay Rack	BSF1	1	1	0	Presidential Suite	3700.00	3,700.00	1,193.16	11,100.00
RRB	Spanish Bay Rack	BSF3	1	1	0	Governors Suite	3400.00	3,400.00	1,096.89	10,200.00
RRL	Lodge Rack	LRCS	3	3	0	Lodge Partial Ocean	1180.00	1,180.00	384.60	3,540.00

Rate Code	This code indicates the type of rate the guest is paying. Rack Rate means full price, which is what you will be booking for most guests. The Rack Rates will always appear at the top of your search result list.
Description	This field will explain the meaning of each rate code: The code RRB mean "Rack Rate Bay" The code RRL means "Rack Rate Lodge" The code RRP means "Rack Rate Palmero" '

Rate Code	Description
RRL	Lodge Rack
RRL	Lodge Rack
RRL	Lodge Rack
RRP	Casa Rack
RRP	Casa Rack

Room Type	Room Type is the code for each specific room category.
Unit Description	This field will explain the meaning of the Room Type Code.

Room Type	Vac	Avl	Grp	Unit Description
LRCF	15	10	5	FW1 Partial Ocean
LRGF	15	9	6	FW1 Garden
LROD	21	18	3	Lodge Ocean Deluxe

Description	Room Type	Vac	Avl	Grp	Unit Description
Lodge Rack	LROD	21	18	3	Lodge Ocean Deluxe

Vacant	The number of rooms available excluding any group blocks.
Available	Number of rooms available to host guests during these dates. If any group rooms are blocked out, this column will list the number of available rooms left to sell. This is the column you will want to look at to determine room availability. This information is for internal use only. We do not quote the total number of available rooms to guests.
Group	This column displays the number of remaining rooms within a group block. GRP + AVL = VAC

Unit Description	1st w/o tax	Averge	Tax	Total
Spanish Bay Ocean	1320.00	1,320.00	429.51	3,960.00
Spanish Bay OceanLft	1180.00	1,180.00	384.60	3,540.00
Spanish Bay Scenic	1070.00	1,070.00	349.32	3,210.00
Spanish Bay Garden	870.00	870.00	285.15	2,610.00

1st w/o tax	The nightly rate for one room in this category, not including tax, service fees, or assessment charges.
Average	This column is not applicable to Pebble Beach Resorts because we do not have different rates for different days of the week. If we did, this column would average out the daily rates for each day the guest wants to book.
Tax	The nightly total tax, service fee, and assessment charge for this room type.
Total	The total room cost for all nights in the set date range excluding taxes, fees, and assessment charges. 1st w/o Tax x Number of Nights = Total

Once you have found a room option that works for your guest, double click anywhere on the item line to pull that room into your Booking Center's **Itinerary**.

Rate Code	Description	Room Type	Vac	Avl	Grp	Unit Description	1st w/o t	Averge	Tax	Total
RRB	Spanish Bay Rack	BRO7	21	21	0	Spanish Bay Ocean	1290.00	1,290.00	419.91	3,870.00
RRB	Spanish Bay Rack	BRL7	8	8	0	Spanish Bay OceanL	1160.00	1,160.00	378.18	3,480.00

Group

00:59

Itinerary # 1050RI216

Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location	Amount	Duration	Booking#
R			12Q6M8	NEW	RRB	Spanish Bay R...	03/16/21-03/19/21		2	BRO7	4,373.91	0	

Complete A Room Reservation

Once you have your room added to your Booking Center, there are several steps we need to take to complete the reservation.

Associate A Guest Tile

This process is discussed in detail within the **Create A Guest Tile** section of this manual:

- Click the down arrow to the right of the Guest section of the Booking Center
- Search for an existing Guest Tile in Universal Lookup
- If you find an existing Guest Tile, verify the information on the tile with the guest to ensure accuracy.
- If you do not find an existing Guest Tile, click "Add New Guest Tile to create a new Guest Tile for your guest.

Collect the Credit Card

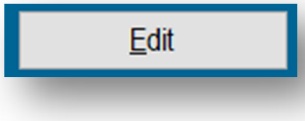
- Inform the caller:
  In order to confirm your reservation, we will need to collect a deposit for the first two nights of your room stay. The total deposit we will be collecting today, including tax, fees and assessment, is $____.

  We have a 14-day cancellation policy for this tee time which means you have up until 14 days prior to your day of play to make any changes or cancel your booking.

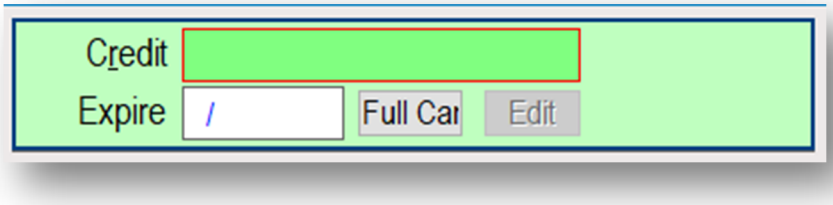
  I am going to pause our call recording to protect your personal information.
  Would you like to confirm this tee time with a MasterCard?"

- Pause your recording in NAVIS by clicking the "**Payment**" button in HUB.

- Click the **E** button on your keyboard to **Edit** the Guest Tile
  This is a crucial step before entering the credit card

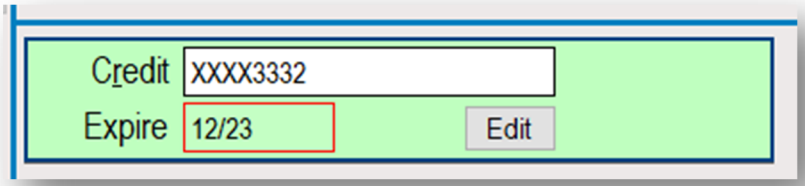


- Place your curser into the green Credit field. It does not need to be set at the very beginning of the line; it just needs to be within the box.

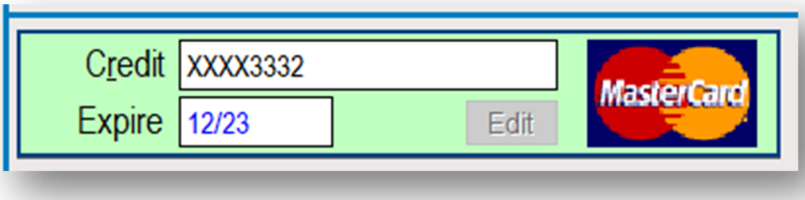


- Use your **IDTECH credit card machine** to enter the guest's:
  - Credit Card Number
  - Expiration Date
  - Security Code

- As soon as you hit Enter for the final time on your Credit Card Machine, the guest's credit card information will populate into the Guest Tile.



- Hit **Page Down** or click **OK** to save the card on file.
  Once saved, you should immediately see the logo for their credit card company appear next to the encrypted credit card information.



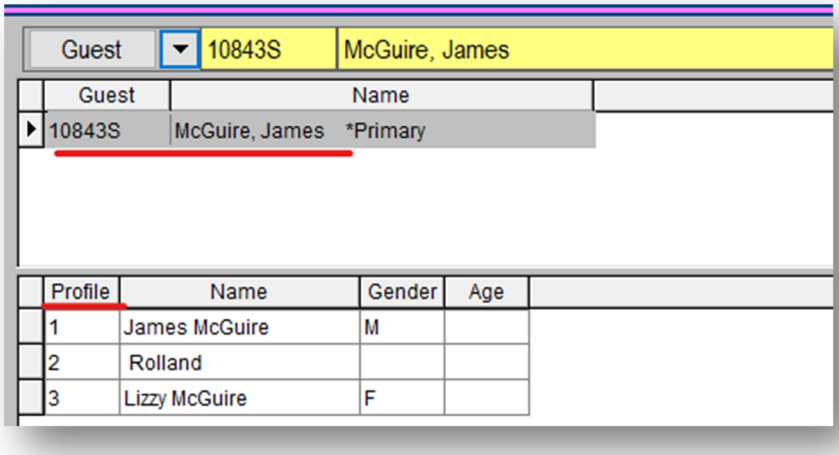
Finalize the Booking

20. Ask the guest if you can place them on a brief hold while you finalize their reservation.

21. Place the guest on hold using your desk phone.

22. Now that you have saved your Guest Tile and saved the credit card, you can click escape to get back to the Booking Center.

    You can see at this point that your new **Guest Tile** has automatically been attached to this Itinerary in the Guest Section.



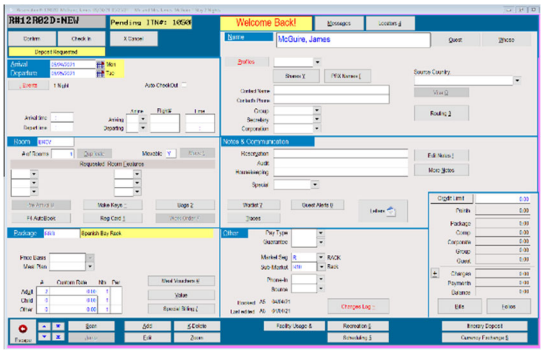
The **Guest Tile number** has also been automatically associated with the Room Reservation in the Itinerary Detail section.



Itinerary # 1050RI4TO

	Ty	Gst	Prf	Res	Lev	Code	Description	Date	Tim
▶	R	10843S		12R02D	NEW	RRB	Spanish Bay Rack ...	05/24/21-05/25/21	

23. Double click on the room reservation within the Itinerary Detail section of the Booking Center. This will open the **Reservation Tile**.

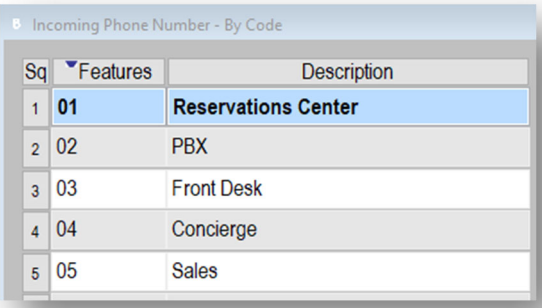


24. Once you are inside the Reservation Tile, use your keyboard to type **Edit + Page Down**. This will launch a series of prompts to select the basic settings of your reservation.

The first three prompts are the same ones you will see when saving a new Guest Tile.

Pop Up #1: Incoming Phone Number
Select Reservations Center to indicate the department to which the guest dialed.

You can use your curser to click the one or type "01" as a shortcut.



Incoming Phone Number - By Code

Sq	Features	Description
1	01	Reservations Center
2	02	PBX
3	03	Front Desk
4	04	Concierge
5	05	Sales

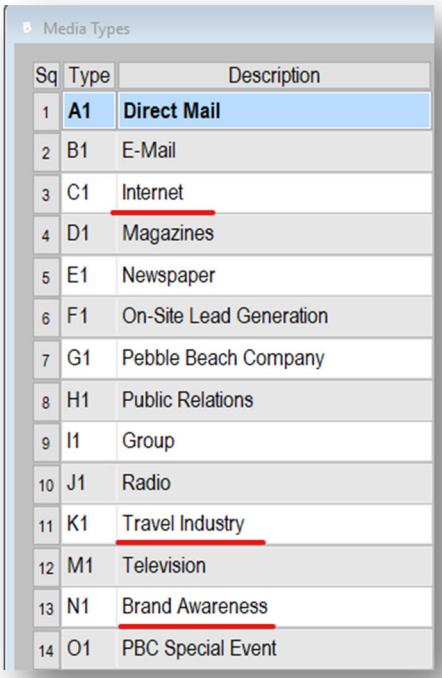
Pop Up #2: Media Types

This field should indicate what the guest saw/heard that prompted them to call.

The most common selections will be:

- Internet (pebblebeach.com or Vacation Planner)
- Travel Industry (Travel Agent)
- Brand Awareness (Common Knowledge or Customer Referral)

In this example, we will select Internet by typing 03 on our keyboard.



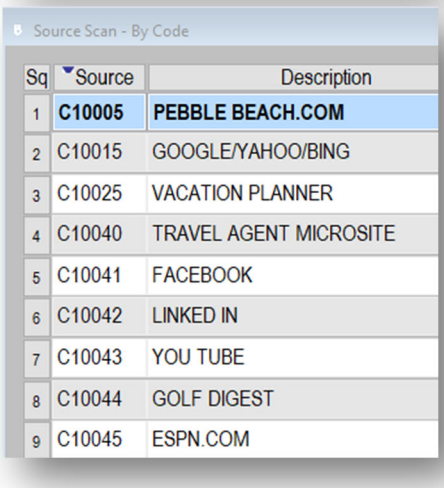
Sq	Type	Description
1	A1	Direct Mail
2	B1	E-Mail
3	C1	Internet
4	D1	Magazines
5	E1	Newspaper
6	F1	On-Site Lead Generation
7	G1	Pebble Beach Company
8	H1	Public Relations
9	I1	Group
10	J1	Radio
11	K1	Travel Industry
12	M1	Television
13	N1	Brand Awareness
14	O1	PBC Special Event

Pop Up #3: Source Scan – By Code

The selections in this window will be different depending on which Media Type you selected.

For our example, we will select Pebble Beach.com since our guest started planning their trip by visiting our website.

Type 01 to select the first option.



Sq	Source	Description
1	C10005	PEBBLE BEACH.COM
2	C10015	GOOGLE/YAHOO/BING
3	C10025	VACATION PLANNER
4	C10040	TRAVEL AGENT MICROSITE
5	C10041	FACEBOOK
6	C10042	LINKED IN
7	C10043	YOU TUBE
8	C10044	GOLF DIGEST
9	C10045	ESPN.COM

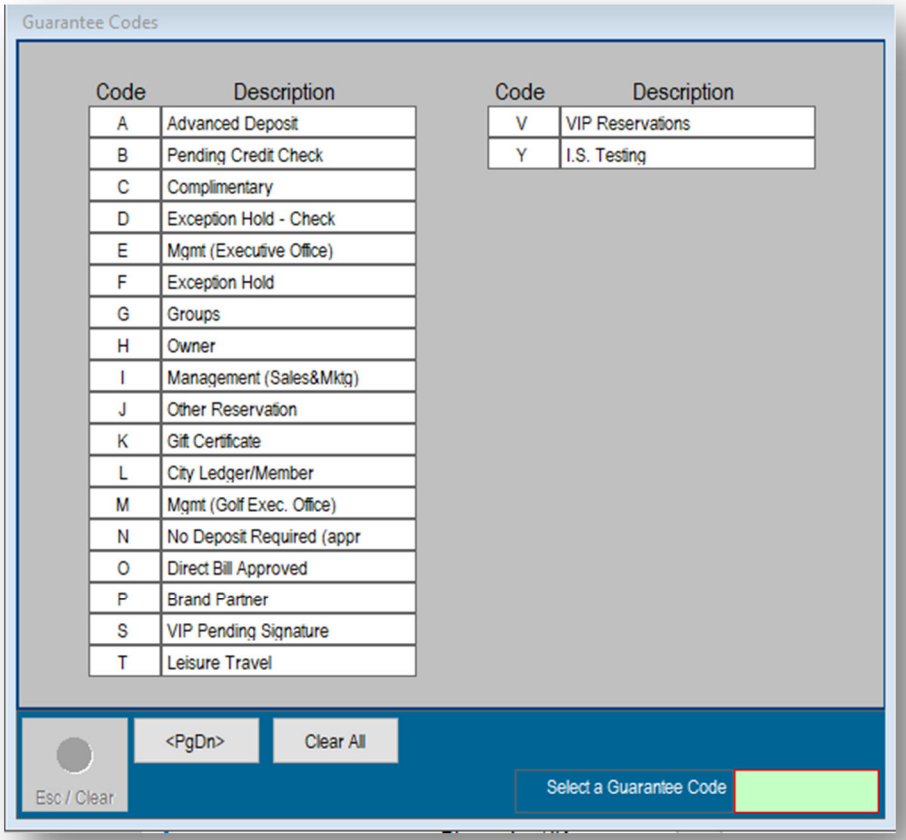
Pop Up #4: Guarantee Codes

The Guarantee Code explains why we have agreed to hold this reservation for the guest.

In most cases, you will be selecting "Advanced Deposit" which indicates that the guest is paying the full two-night deposit to guarantee that we hold their full Itinerary.

Other common codes you will use will be:

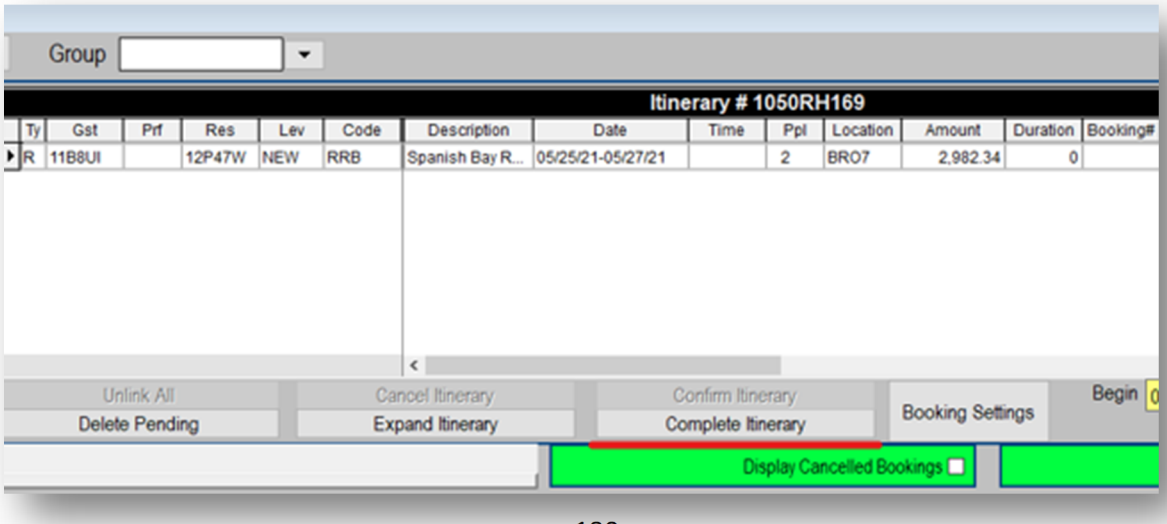
- Other Reservation
- Exception Hold
- City Ledger/ Member



25. After selecting the Guarantee Code, you will be brought back to the **Reservation Tile**.

26. Click **Escape** or hit the **Esc** button on your keyboard to go back to the **Booking Center**.

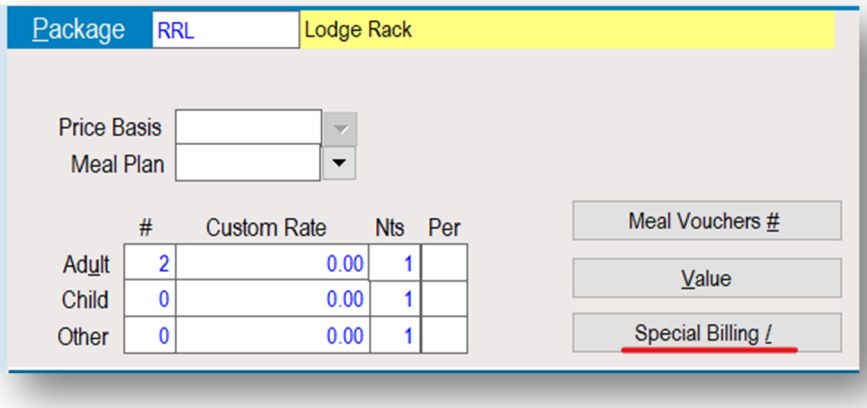
27. In the Itinerary Detail Section, the **Complete Itienrary** button, which was previously grayed out, is now available to click. Click Complete.



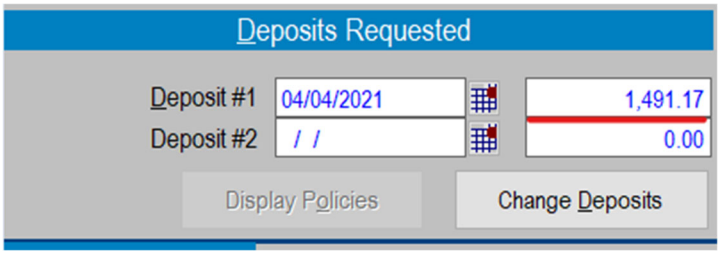
Charge the Deposit

- Double Click on the room in the Itinerary Detail section to return to the **Reservation Tile**.

- Once in the Reservation Tile, navigate to the section titled **Package** and click the **Special Billing** button, or type "**/**" on your keyboard.



- Take a look at the **Deposit Requested** section of the Special Billing window.
This dollar amount should be equal to the required two-night deposit per your room rate sheets.

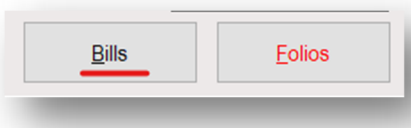


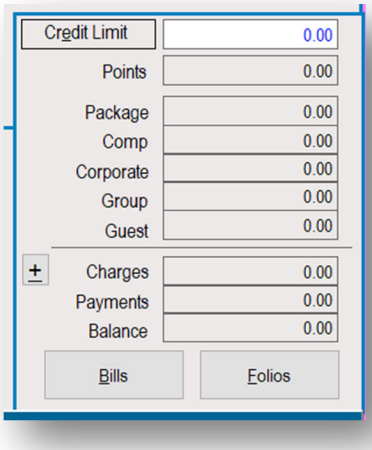
If the number you see does not match the deposit you quoted, this is an indication that you have either quoted the deposit incorrectly or selected the wrong room code.

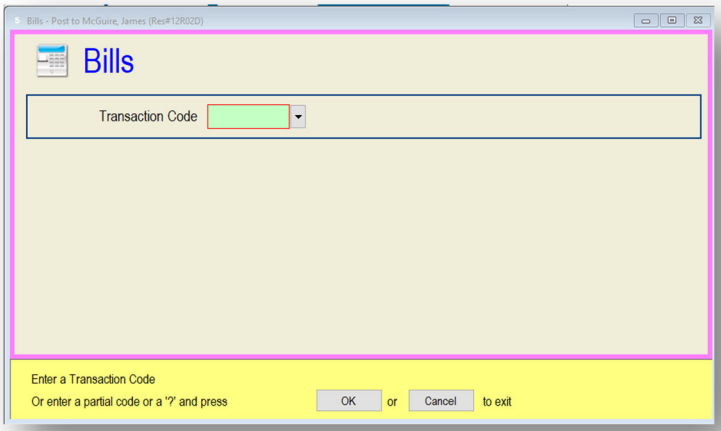
- Once you have verified that the rate is accurate, click escape to go back to the Reservation Tile.

- In the bottom right corner of the Reservation Tile, you will see a section that begins with Credit Limit. This is the **Payment** section that will reflect the balance of funds the guest has on file for this reservation.

- Click **Bills**. This will open the Bills window which is where you will charge the guest's credit card.

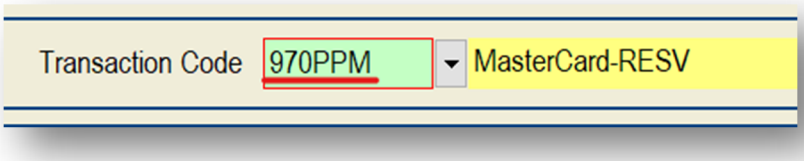






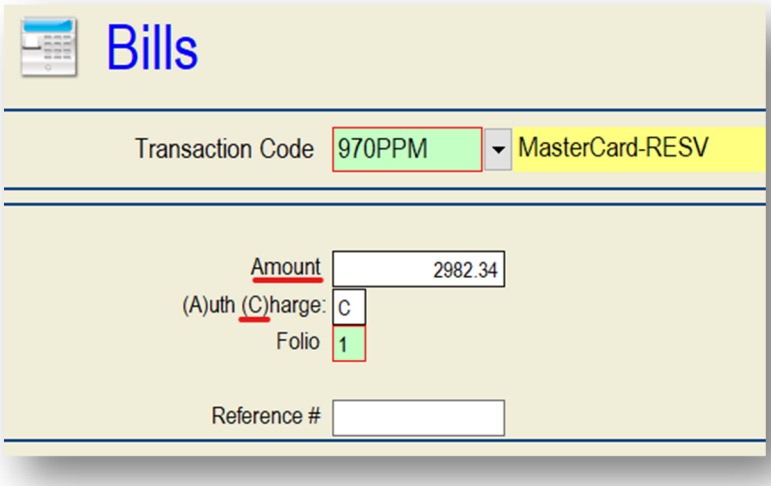
- To charge the guest's credit card, you must enter a code into the **Transaction Code** field of the **Bills** window.

  The Transaction code is comprised of three parts:
  - The department that is processing the charge: 970 = The Reservation Center
  - The type of charge that is being taken: PP = Pre-Payment
  - The type of credit card being used:
    M = Mastercard
    V = Visa
    S = Discover
    A = American Express
    Y = Pebble Beach Gift Card

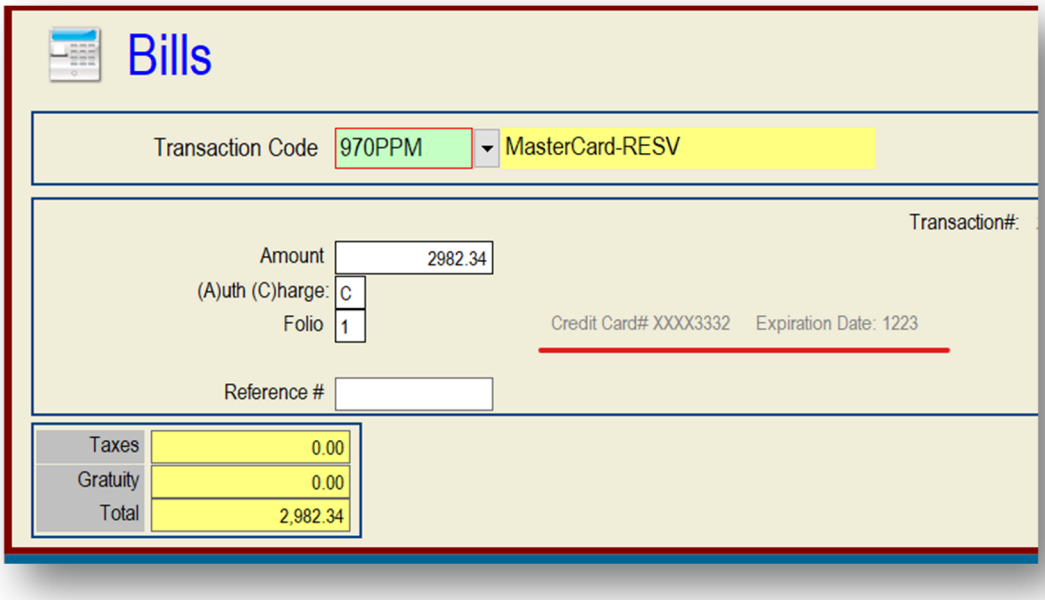


- As soon as this code is entered, new fields will appear. You will only need to edit two of these new fields:
  - The amount of the charge (the two-night deposit)
  - The letter C in the Auth Charge field to indicate that we want to charge the card now.

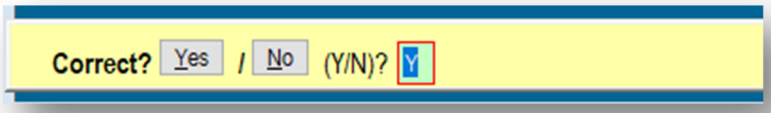
Once entered, hit **Page Down** to save.



If you have entered the Transaction Code correctly, you will see some of the guest's credit card details appear in the window.



- A prompt along the bottom of the window will ask you to confirm if the **Total Charge** and all credit card information is accurate.
  Type **Y** or select **Yes** to continue.

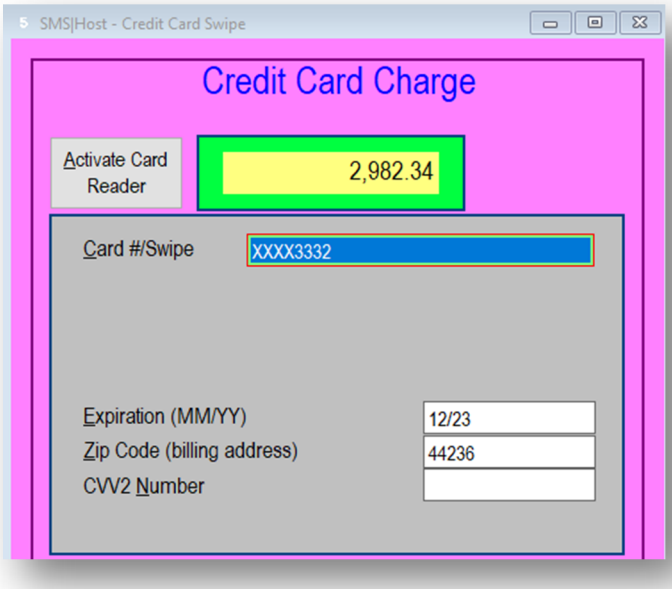


- A new window will open with a similar preview of the credit card information.

- Your curser will automatically be placed into the Credit Card number field (the blue field).

  Before you charge this card, move your curser into a different field in the window. It can be in any other field as long as it is not the field holding the credit card number.

- Click **Page Down** to charge the credit card.



If your charge was successful, you will see a transaction code appear along the bottom of the window.

If your charge was not successful, in this same area at the bottom of the window, you will see the word "**Declined**."

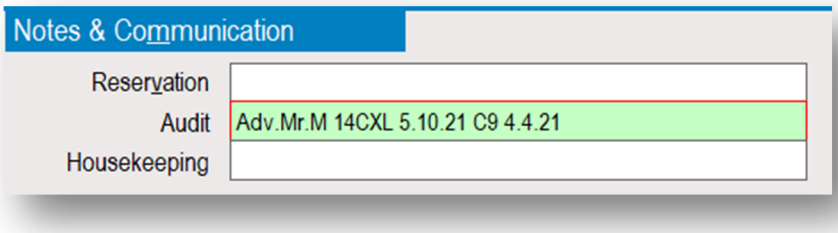


- Press any key to close this credit card window
- Pres escape to exit the Bills window and return to the Reservation Tile.
- You can now take your caller off of hold by clicking Line 1 on your desk phone.
- Close your call with the guest:
  - Recap all bookings on this Itinerary with the guest
  - Reiterate the cancellation policy with the guest
  - Ask the guest if you can help them with anything else.
  - Tell the guest they will receive their confirmation email in approximately 1 hour
  - Thank the guest for calling Pebble Beach Resorts
- Your booking is complete! Proceed to **Clean Up** your booking.

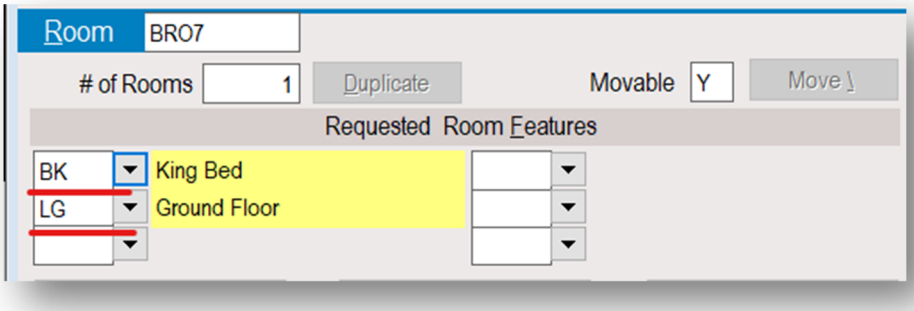
Clean Up a Room Reservation

Now that the guest is off the line, you can take your time to make sure all information is complete within your room reservation.

- Double click the room in the Itinerary Detail section to re-enter the Reservation Tile.
- Click Edit to modify the Reservation Tile
- Enter the **cancellation timeframe** that you quoted to the guest into the Audit Line

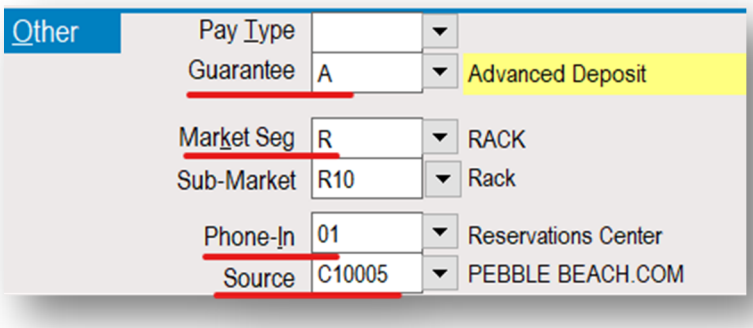


- Enter any requested **Room Features**

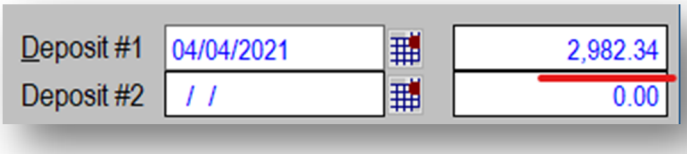


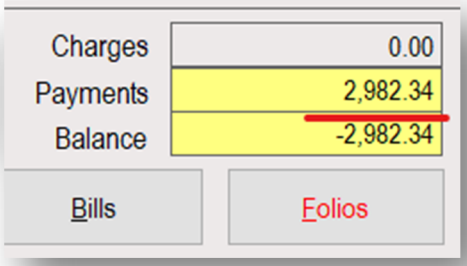
Important Note: In regard to **Room Feature Requests**, we guarantee the view purchased by the guest and standard amenities. It is important to express to the guest that bedding arrangements, room numbers, location, etc. are considered requests that are granted based on availability; they are not guaranteed. If a guest is specifically requesting a King Bed and wants a 100% guarantee, recommend that they book a suite because all suites have King beds.

- **Page Down** to save.
- Double check that all codes in the **Other** section are set correctly.



- Open **Special Billing** and double check that your Deposit #1 amount matches the amount you have charged the guest.





- Click **Escape** to Exit Special Billing

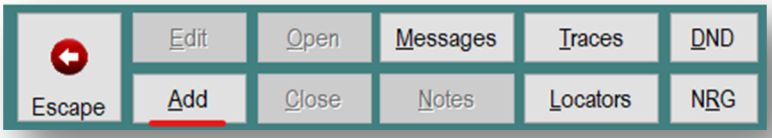
- Type **V + Z** to enter **Value + Zoom**

Add the Total Nightly charges of the first two nights. That new total should also equal the amount you charged the guest for your two-night deposit.
$1491.17 + $1491.17 = $2982.34

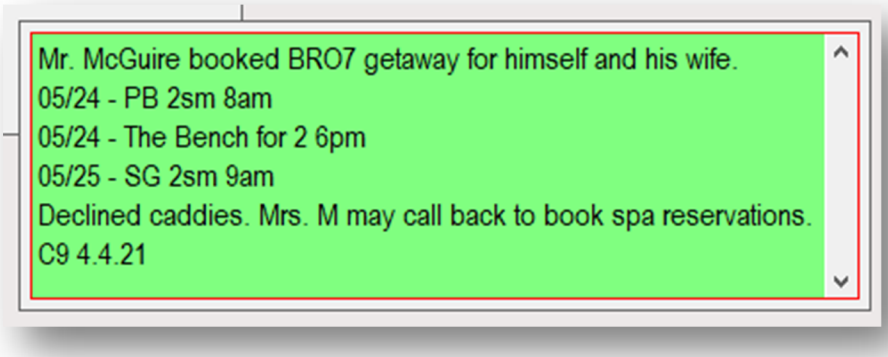
Day	Date	Shr	Ad	Ch	Ot	Room	Extras	Taxes	Grats	Total
Mon	**05/24/2021**	**1**	**0**	**0**	**0**	**1,320.00**	**0.00**	**143.17**	**28.00**	**1,491.17**
Tue	05/25/2021	1	0	0	0	1,320.00	0.00	143.17	28.00	1,491.17
Wed	05/26/2021	1	0	0	0	0.00	0.00	0.00	0.00	0.00

- Click the **More Notes** button to create an **R Note** for your booking. This will open the Reservations Notes window. The R Note is a note intended to assist your fellow Reservations Agents should this guest call back to reconfirm, edit, or cancel their booking.

  - Click Add or type A to start a new Note.



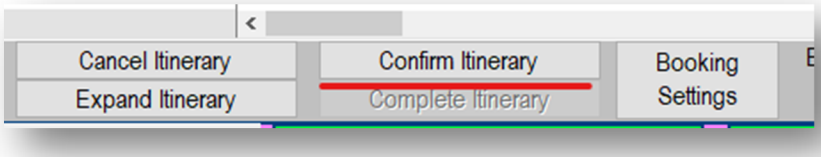
  - Your note should be a succinct explanation of who the guest is, why they are visiting, and what they booked.



  - Set the Note Type as **R** for **Reservations Note**
  - **Page Down** to save
  - Type **C** to **Close** the note.

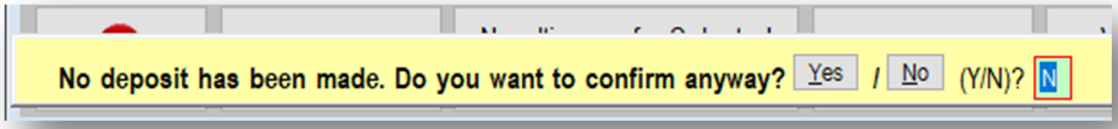
- **Escape** to make your way back to the **Booking Center**.

- Now that you have double checked your entire reservation for accuracy, click the **Confirm Itinerary** Button at the bottom of the Itinerary Detail section.



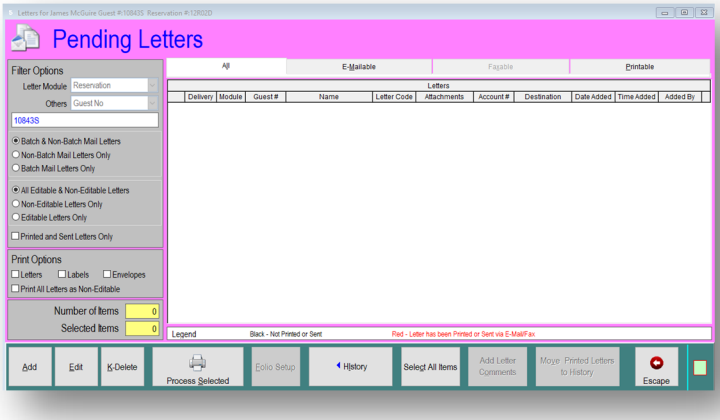
- Upon clicking Confirm, the **Bills** window will automatically open. Since we already charged the guest their deposit, click **Escape.**

- A message at the bottom of your **Booking Center** will state that no deposit has been made, but this is not accurate. Click **Yes** to continue with the Itinerary Confirmation.

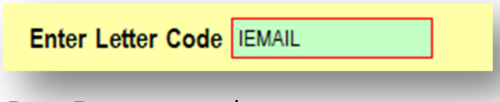


This inaccurate message is a result of Pebble Beach's customization of the SMS system. We do not follow the exact sequence of room processing that other hotels who use SMS follow, therefore some functions will not sync with our order of operations.

The **Letters** window will now open.

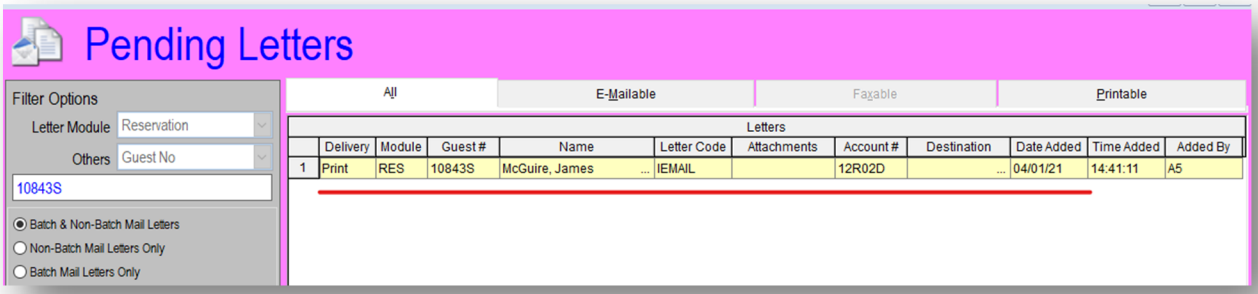


- Send your guest a confirmation email for their entire Itinerary:
  - Press the **A** key or click **Add.**
  - Type the code for Itinerary Confirmation Emails into the **Letter Code** field. **IEMAIL = Itinerary Email**



  - **Page Down** to send.

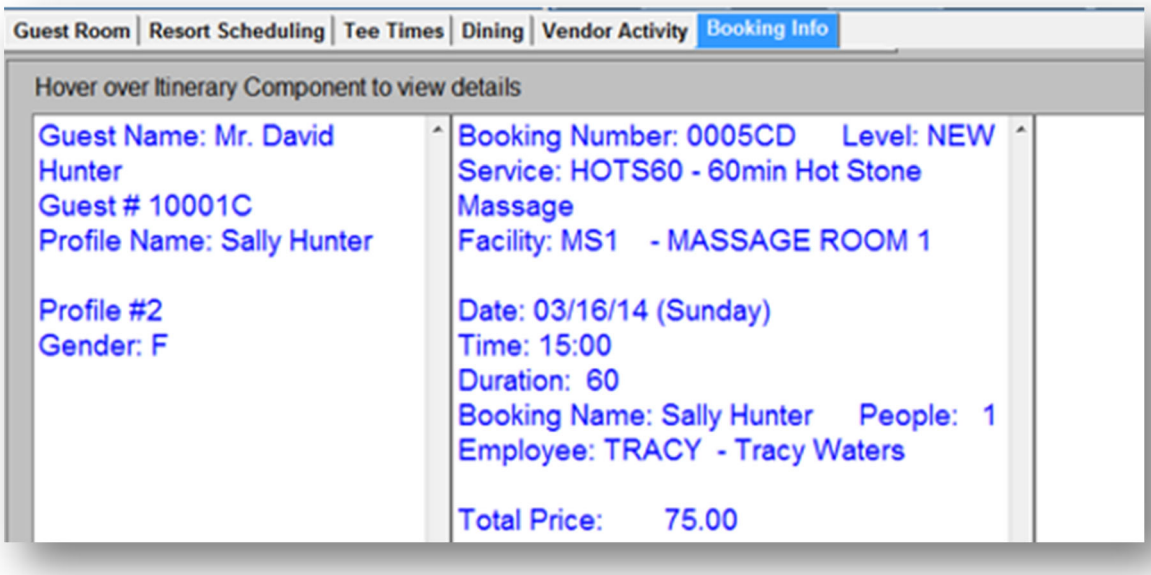
Your letter/confirmation email should now appear in the **Letters** history section of the window.



- **Escape** to return to the Booking Center.
- Complete and Save your booked NAVIS Lead, then move on to your next call!

Use the **Booking Information Tab** to Review all line items in your Itinerary for accuracy:

After selecting the tab, position your mouse cursor over each item the **Itinerary Detail** pane to display details for a booking in this panel



The left column displays guest information including the guest name and guest number along with some basic profile information.
The center column displays information specific to the booking itself.

The right column displays notes written about the booking such as the cancellation timeframe.

Special Occasions

Many guests choose to celebrate special milestone occasions with a visit to Pebble Beach Resorts.

We always want to acknowledge these special events both in conversation and by presenting the guest with a surprise amenity in their room when they arrive.

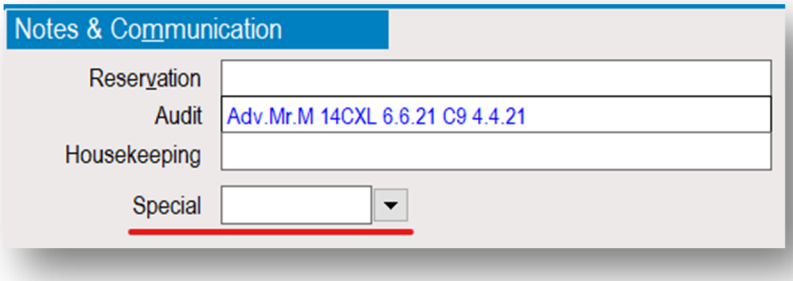
Whenever a guest mentions that they are celebrating a special occasion, make a note of the type of occasion, the name(s) of those involved, and any amenity preferences you discover during your conversation. This will help you determine which item to send to your guest.

To document a Special Occasion on a Reservation Tile, there fields that need to be updated:

- Special
- Meal Plan
- Traces

Special

The **Special** field is located within the **Notes and Communications** section of the Reservation Tile.

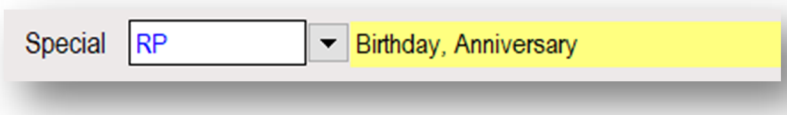


Code	Description
A	Lone Cypress Partner
B	Writer or Rater
C	Site Inspection
D	Celebrity
I	Guest of LC Partner
J	PB Senior Mangement
K	Group VIP
L	Special Attention
M	Participant Sponsor
N	Club Pro Progam
O	Honeymoon
P	Anniversary
Q	Retirement
R	Birthday
S	Other
T	Group Staff

Click **Edit** on the Reservation Tile, then click the **down arrow** next to this field to open the window of Special Occasion options. Page Down to save your selection.

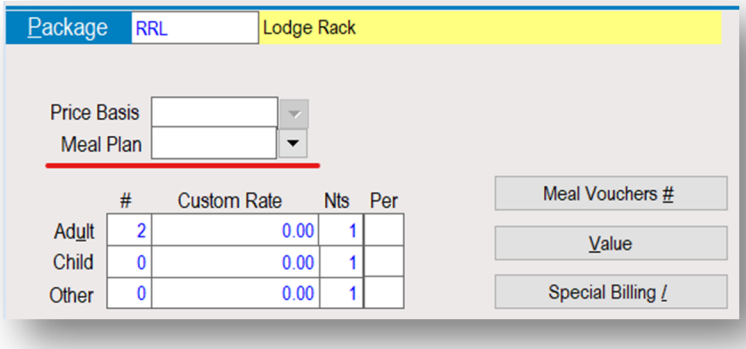
There is only one additional occasion not included on this list that is an "eligible" Special Occasion to receive a complimentary amenity: Graduation. If a guest is graduating High School or College, you may select "Other" as the occasion.

If a guest is celebrating more than one occasion, such as a birthday and anniversary, you can select multiple options from this menu. However, we are only permitted to send one complimentary amenity per room.



Meal Plan

The **Meal Plan** field is located in the **Package** section of the Reservation Tile.

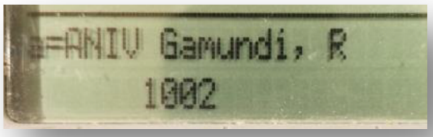


Code	Desc
ANIV	**Anniversary**
ATTN	Special Attention
BDAY	Birthday
CELB	Celebrity
GLCP	Guest of Lone Cypress Partner
GVIP	Group VIP
HM	Honeymoon
LCP	Lone Cypress Partner
OPP	Opportunity Guest
PBSM	PB Senior Management
RETR	Retirement
SITE	Site Inspection
STAF	Group Staff

The Meal Plan field is another example of how Pebble Beach Resorts has repurposed features of SMS to fit our specific business needs.

Instead of using this field for Meal Plans, we use this field to notate Special Occasions for our guests that will appear on the caller ID any time the guest calls a department of our Resort from their hotel room phone.

For example, let's say a guest is celebrating their anniversary. If the guest decides to call the concierge to discuss plans for the day, the concierge will see the code for **Anniversary (ANIV)** notated next to the guest's name on the Caller ID.

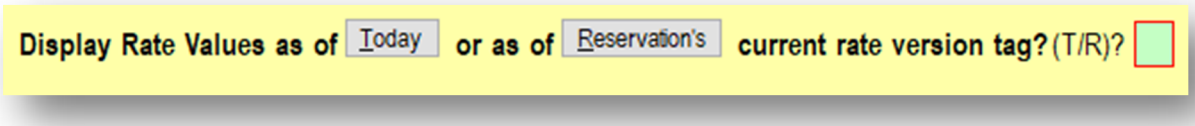


The concierge now knows to work the guest's anniversary into their conversation, thereby providing the guest with more personalized service.

To enter a Special Occasion Meal Plan Code, click **Edit** on the Reservation Tile, then click the **down arrow** next to this field and select the occasion from the dropdown list.

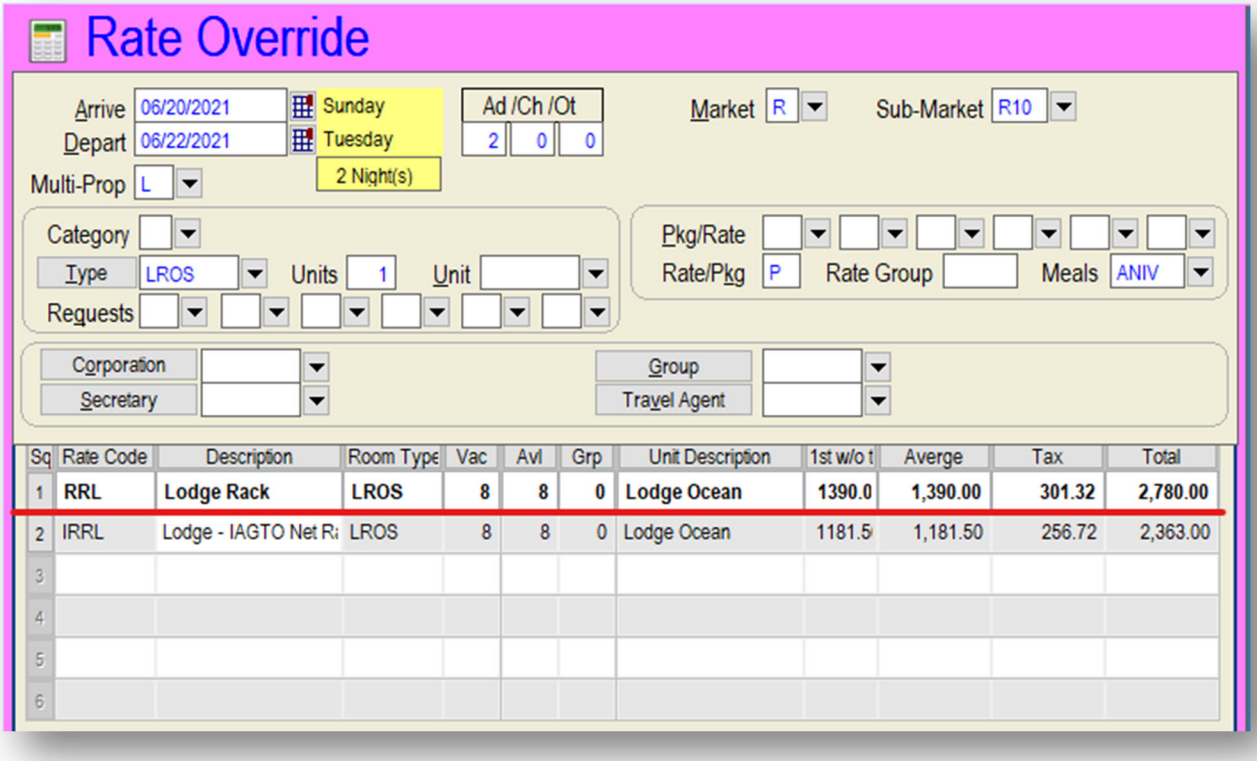
Unlike the Special field, Mean Plan only allows you to select one occasion per reservation. It is at your discretion to determine which occasion is at the forefront if a guest is celebrating two events.

Page Down to save your selection. You will be prompted to reconfirm the **Rate Values** of your reservation. Select **Today** to confirm that you wish to keep the room rate set based on today's date.

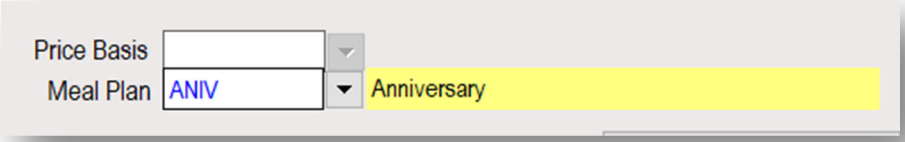


The **Rate Override** window will open. You must reconfirm rate for the room on this reservation by selecting the correct Rate Code from the list provided.

The correct rate code will commonly be the rate at the top of the list. Click the 1 or type 01 on your keyboard to select this rate.



Your **Meal Plan Code** is now saved.



Traces

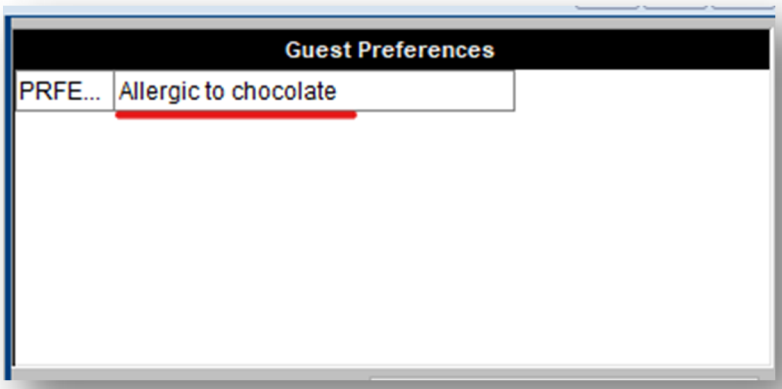
Now that the Special Occasion codes have been entered, a **Trace** must be sent to the Room Service department of the Resort in which the guest is staying. This Trace will be a request that they send a complimentary amenity to the guest's room as a surprise on their night of arrival.

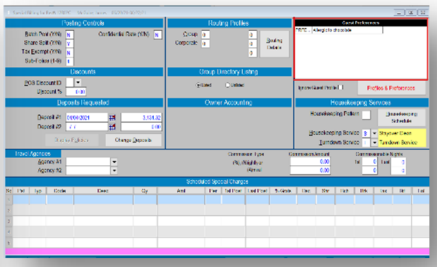
Complimentary Amenity Options

You may only request complimentary amenities from this list.

- House champagne, chardonnay, cabernet, sauvignon blank/noir
- Sparkling cider
- Beers
- Assortment of Cookies and Milk (chocolate chip only if the guest has nut allergies)
- Chocolate Strawberries
- Fruit and Cheese Plate
- Snack Attack Basket

Before choosing an amenity, it is good practice to open **Special Billing** and see if any notes have been left on the guest's profile about allergies or past preferences. This information is pulled directly from the guest Profiles and can be viewed in the top right-hand corner of the Special Billing window.

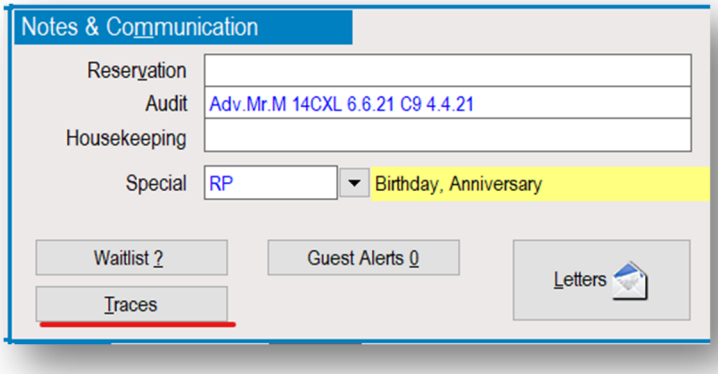




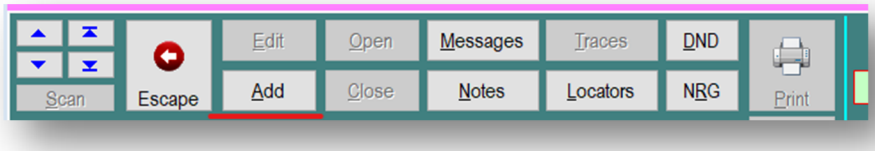
A popular amenity option for anniversaries is Chocolate Covered Strawberries, but because this guest's chocolate allergy has been notated in their profile, we know to select an alternative amenity.

How to Set Your Room Service Trace

Begin by clicking the **Traces** button in the **Notes & Communication** section of the Reservation Tile.



When the Reservation Traces window opens, click Add (type A on your keyboard) to begin a new Trace.



Set the **Date** as the night of arrival

- If the guest told you the exact date of their occasion, enter that date instead.

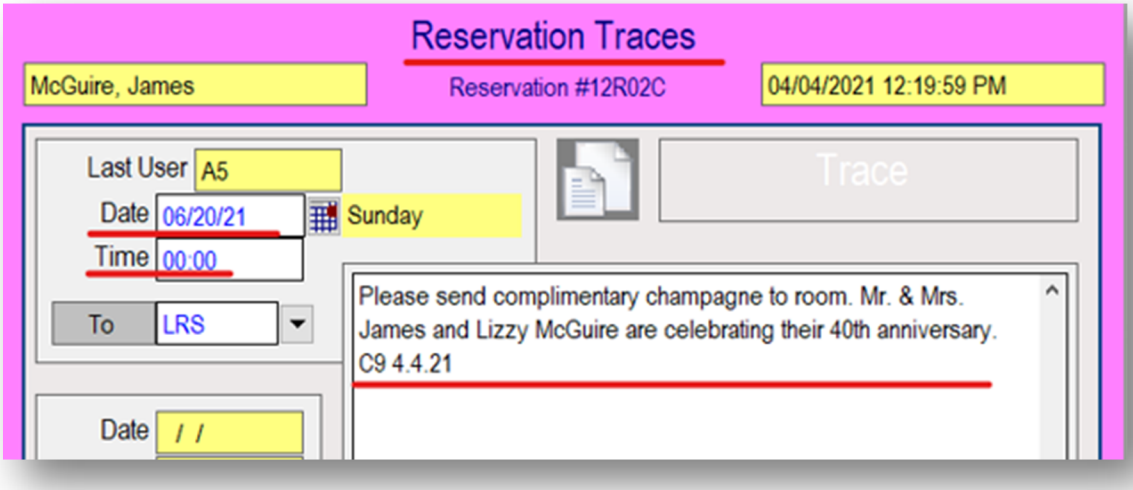
Set the **Time** as 00:00

Set the **To** field to the code of the Room Service department the guest's Resort Property

- SRS = Spanish Bay Room Service
- LRS = Lodge Room Service AND Casa Palmero Room Service

Your **note** should include:

- The names of the guests (Room service needs the names because they will only see this note; they will not have access to see the details on the Reservation Tile
- The specifics of the special occasion, including the date if you obtained this information
- The specific amenity you wish to send the guest.



Third Adults

All rooms and suites at Pebble Beach Resorts are designed to host two adult guests (18 years old and above).

If a guest wishes to stay in a room or suite with more than two adults total, they will incur a fee of $50 per night ($55.35 with tax) for each adult beyond the first two.

For example:

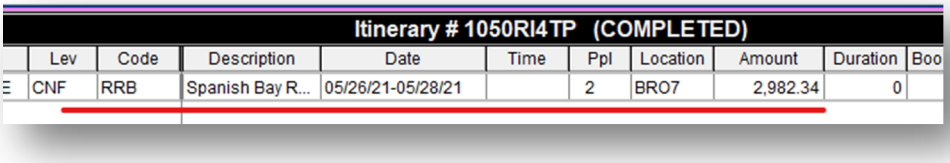
- A room with three adults will be billed $55.35 per night above the room rate.
- A room with four adults will have an additional charge of $110.70 per night above the room rate.

Each room or suite may have maximum of 4 adults.

How to Process A Third Adult Charge

- Inform the guest that this $50 per night charge will be added for the 3rd adult. Ask them if they would like to pre-pay this charge with their deposit or wait to pay this charge at checkout.

- Double click the room in the Itinerary Detail section of the Booking Center to access the Reservation Tile.



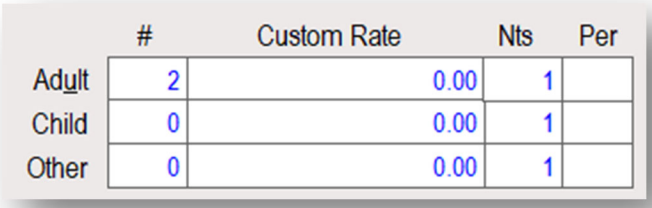
Itinerary # 1050RI4TP (COMPLETED)

	Lev	Code	Description	Date	Time	Ppl	Location	Amount	Duration	Boo
E	CNF	RRB	Spanish Bay R...	05/26/21-05/28/21		2	BRO7	2,982.34	0	

- In the Package section, you will see a box that has fields for the number of **Adults**, **Children**, and **Other** (dogs).

- Click **E** to **Edit** the Reservation Tile

- Modify the **Adult** box to the new number of adults in the room.



	#	Custom Rate	Nts	Per
Adult	2	0.00	1	
Child	0	0.00	1	
Other	0	0.00	1	

- **Page Down** to save.

- Click **V** to access the **Value** screen.
  The nightly rate for the room should instantly reflect a $50 increase per additional adult.

2 Adults:

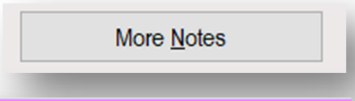
Average Daily Rate	1,320.00
Average Daily Revenue	1,320.00

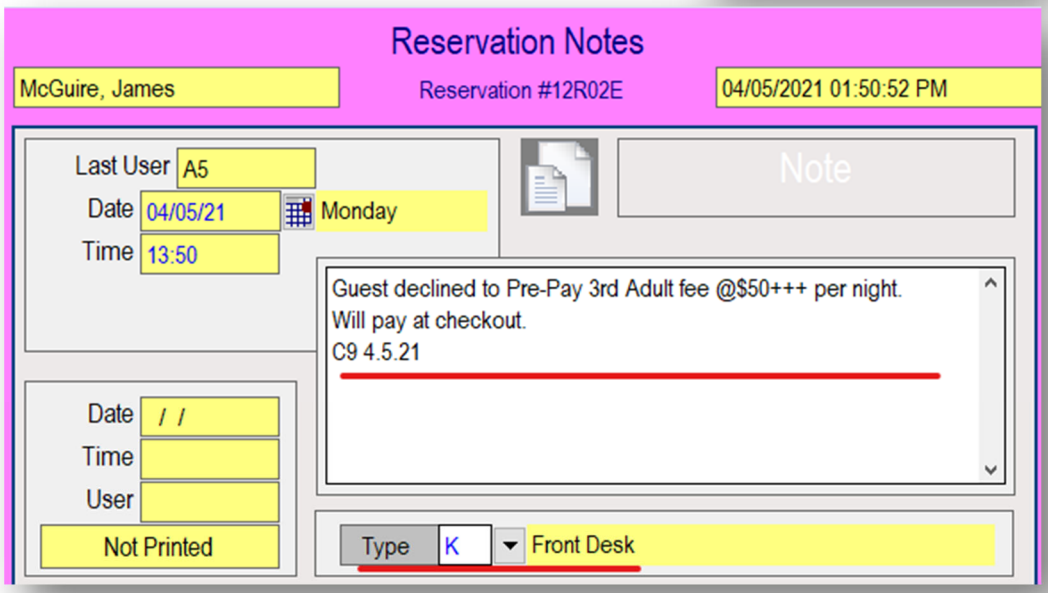
3 Adults:

Average Daily Rate	1,370.00
Average Daily Revenue	1,370.00

If the Guest Declined to Pre-Pay the 3rd Adult Fee:

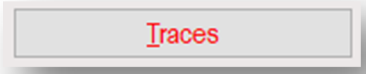
Click the More Notes button to add a **Front Desk K Note**.



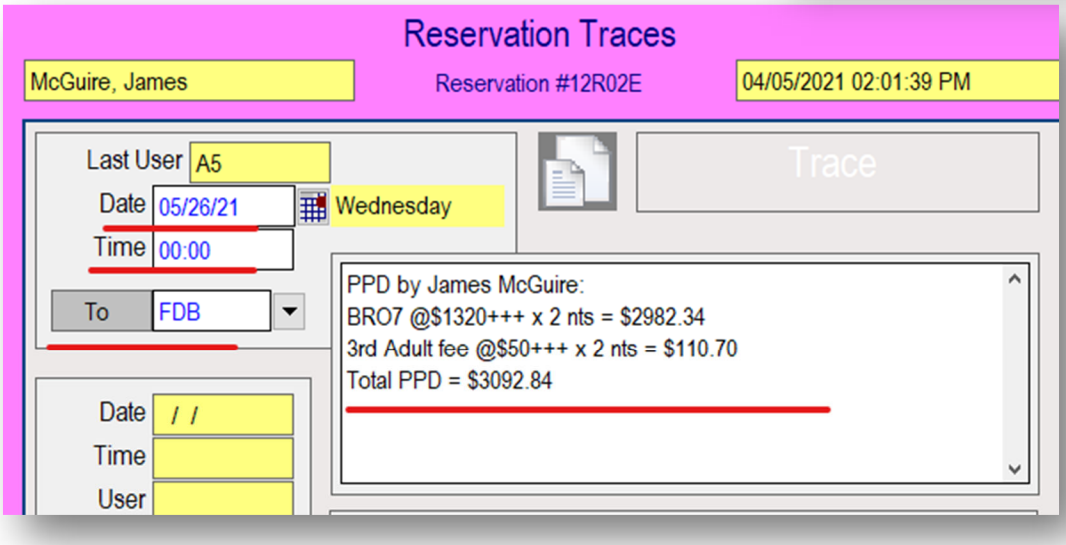


If the Guest Agreed to Pre-Pay the 3rd Adult Fee:

Click the Traces button to leave a **Front Desk Billing FDB Trace.**



1. Set the Trace date for the guest's day of arrival.



The **Deposit #1** amount in Special Billing should still only reflect the two-night required deposit.
The FDB Trace explains why this guest paid more than the amount they are required to pay at booking.



Pets

Pebble Beach Rules for Pets on Property

Resort Restaurants

2. Dogs are allowed in the outdoor seating areas of all Pebble Beach Restaurants.
3. No pets other than dogs will be permitted, i.e. cats
4. Guests with pets are not given priority to sit outside; outdoor seating still remains on a first come first serve basis.

Resort Rooms

- Pets (dogs only) are allowed in rooms at **The Lodge at Pebble Beach**
- Pets may not be left unattended in the room (much like children)
- Pets are not permitted in rooms at:
    - The Inn at Spanish Bay
    - Casa Palmero
    - The Fairway One rooms at The Lodge

> **Tip:** To help you remember which resort allows pets between The Lodge and The Inn, think of how all rooms at The Inn at Spanish Bay have indoor room access, therefore pets would need to be taken through an indoor hallway to get outside to go to the bathroom. This is one reason pets are not permitted.
>
> The Lodge, on the other hand, primarily has rooms with outdoor room access which is easy for pets to step out to relieve themselves.

Pet Fee

- The pet fee is **$100 per night**, which **does not include tax**
- This can be described as a nightly "cleaning fee" Some guests are allergic to dander, so our housekeeping staff needs to do a deep clean in all rooms with pets to make sure dander does not remain present for the next guest.
- The fee is per room, not per pet
- This fee is due at checkout, but the guest may pre-pay

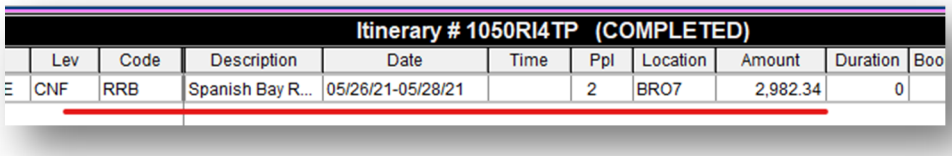
Service Animals

- Pet fees are waived for service animals
- Service animals may be allowed in any room type at any Resort Property
- A K note must be added to the Reservation to explain why the fee is waived

How to Process A Pet Fee on a Room Reservation

1. Inform the guest that a $100 per night cleaning fee will be added to their reservation for their pet. Ask for the **name and breed** of their dog(s).

2. Double click the room in the Itinerary Detail section of the Booking Center to access the Reservation Tile.



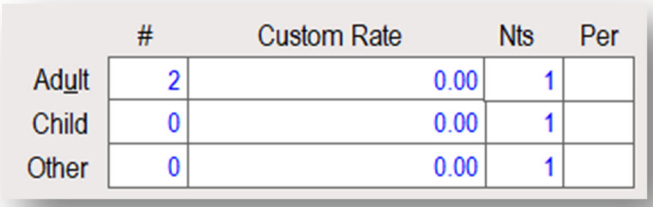
Itinerary # 1050RI4TP (COMPLETED)

	Lev	Code	Description	Date	Time	Ppl	Location	Amount	Duration	Boo
E	CNF	RRB	Spanish Bay R...	05/26/21-05/28/21		2	BRO7	2,982.34	0	

3. In the Package section, you will see a box that has fields for the number of **Adults**, **Children**, and **Other** (dogs).

4. Click **E** to **Edit** the Reservation Tile

5. Modify the **Other** box to the new number of dogs in the room.



	#	Custom Rate	Nts	Per
Adult	2	0.00	1	
Child	0	0.00	1	
Other	0	0.00	1	

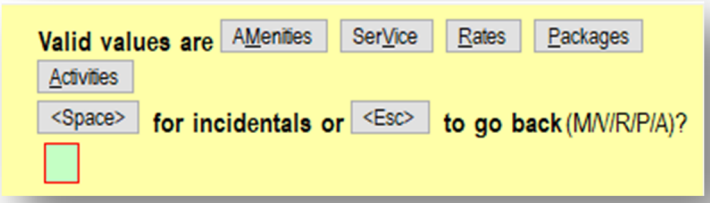
6. **Page Down** to save.

   Unlike adding a third adult fee, updating the Other field will **not** automatically update the room rate. We must add a special fee to this reservation.

7. Type **/** to access **Special Billing**

8. Click **A** to **Add** a new charge

9. When you see this prompt, hit **Enter** to bypass.

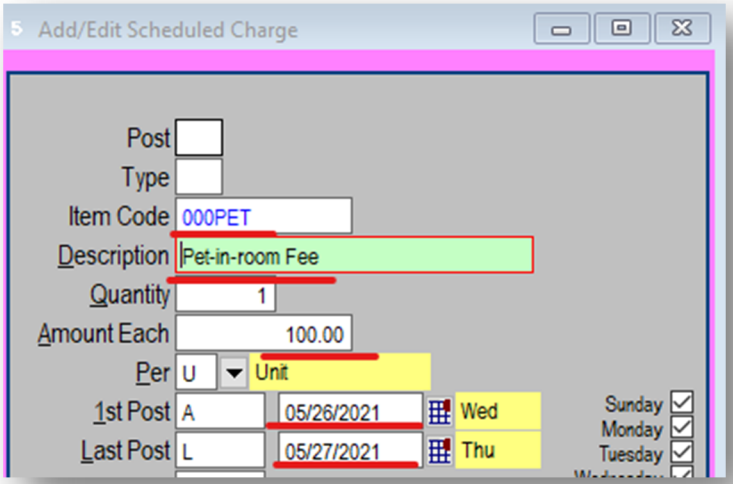


10. Enter the Pet Fee Code into the new prompt's Code field.

    The Pet Fee Code is 000PET

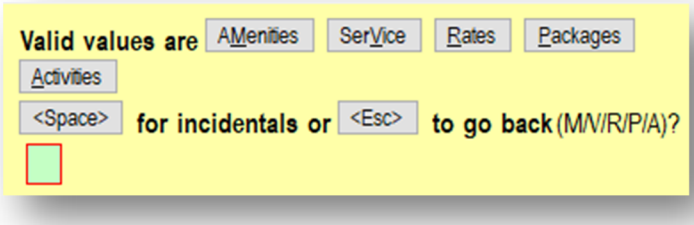


11. As soon as you enter this code, the pet fee information will automatically input into the **Add/Edit Scheduled Charge** screen.
    The charge will be automatically set to $100
    The dates will be automatically set to the dates of your reservation.

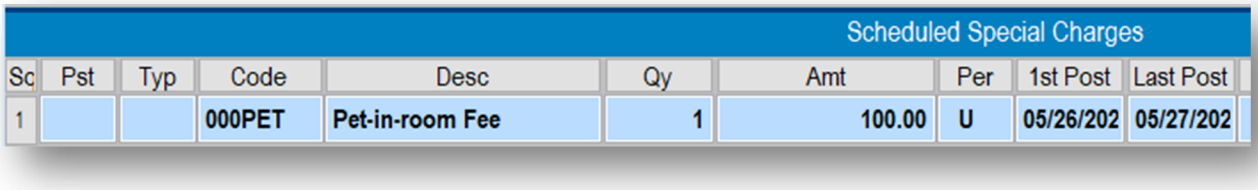


12. Page Down to save.

13. You will see this prompt again. Hit escape to exit this window and return to **Special Billing.**

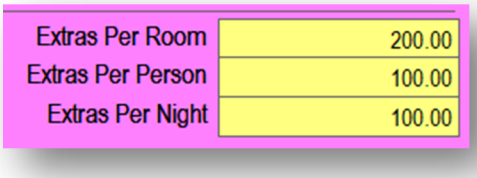


14. The charge you just created appear in a blue line of the **Scheduled Special Charges** section of **Special Billing.** The charge will be set to "**post**" on every single night the guest is in their room, therefore, you only need to add this new charge into Special Billing one time.

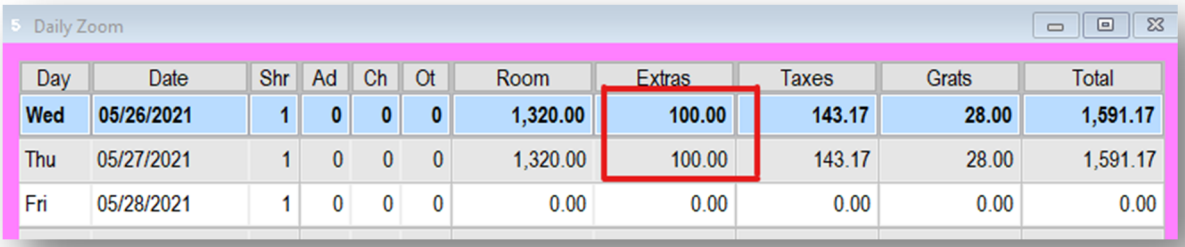


15. **Escape** to Exit Special Billing and return to the Reservation Tile.

16. Click **V** to access **Value**
    You will see this Pet Fee appear in the **Extras** section.



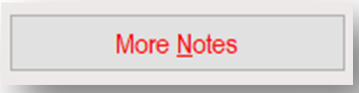
17. Click **Zoom** to make sure this additional charge is posting to each night of the guest's stay.
    In the example below, this guest is staying two nights, so the $100 charge posts to the day they check in and the second day of their trip, but not the day they check out.

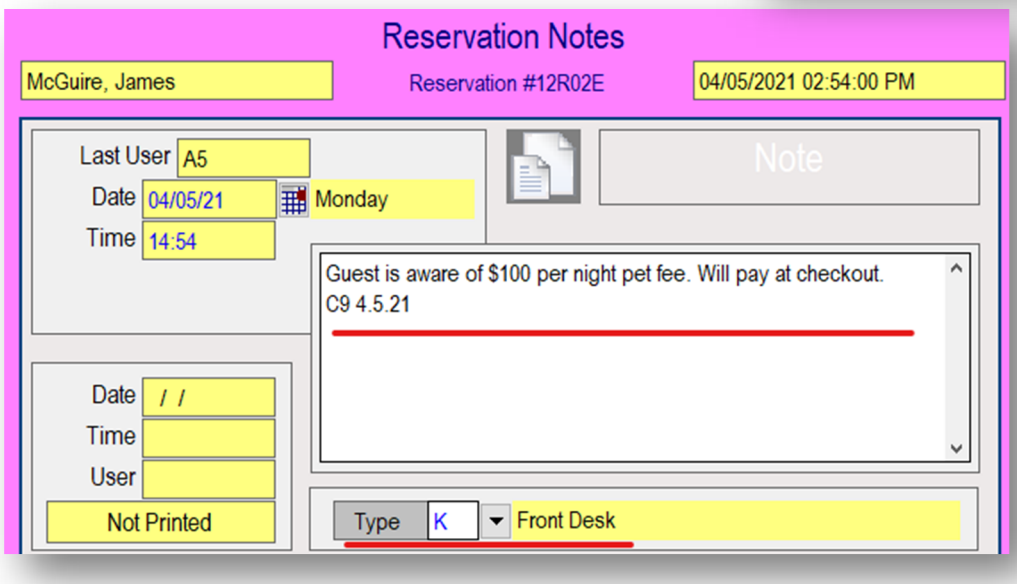


Day	Date	Shr	Ad	Ch	Ot	Room	Extras	Taxes	Grats	Total
Wed	**05/26/2021**	**1**	**0**	**0**	**0**	**1,320.00**	**100.00**	**143.17**	**28.00**	**1,591.17**
Thu	05/27/2021	1	0	0	0	1,320.00	100.00	143.17	28.00	1,591.17
Fri	05/28/2021	1	0	0	0	0.00	0.00	0.00	0.00	0.00

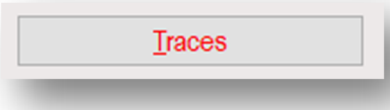
18. Click escape until you return to the Reservation Tile

19. Access the More Notes button to leave a **Front Desk K Note**.

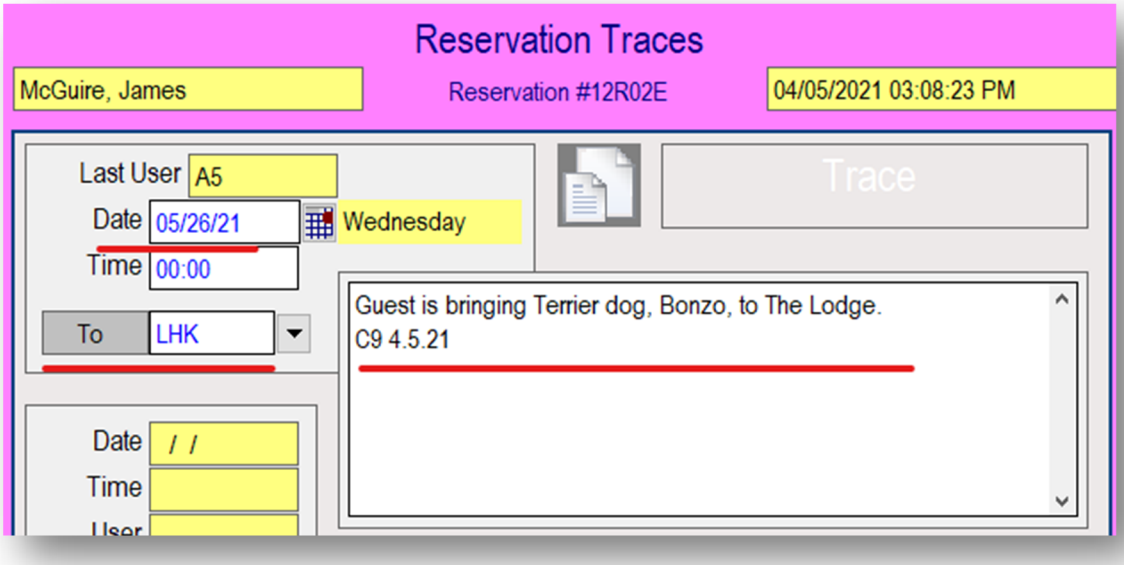




20. Access the Traces button to leave a **Room Service Trace** AND a **Housekeeping Trace.**
    1. Both traces should be set to the date of arrival.

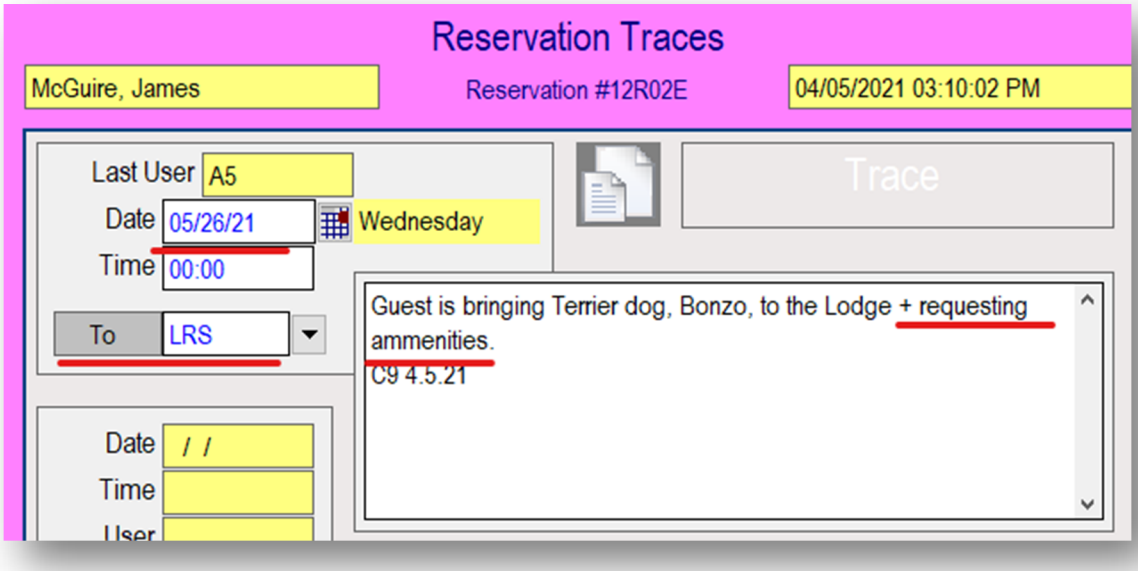


Lodge Housekeeping Trace (LHK)



Lodge Room Service Trace (LRS)

2. You may request amenities in your LRS trace even if the guest does not ask for them.
3. These are not a guarantee.
4. Room service will typically bring a water/food bowl, poop bags, and possibly fresh baked dog biscuits.



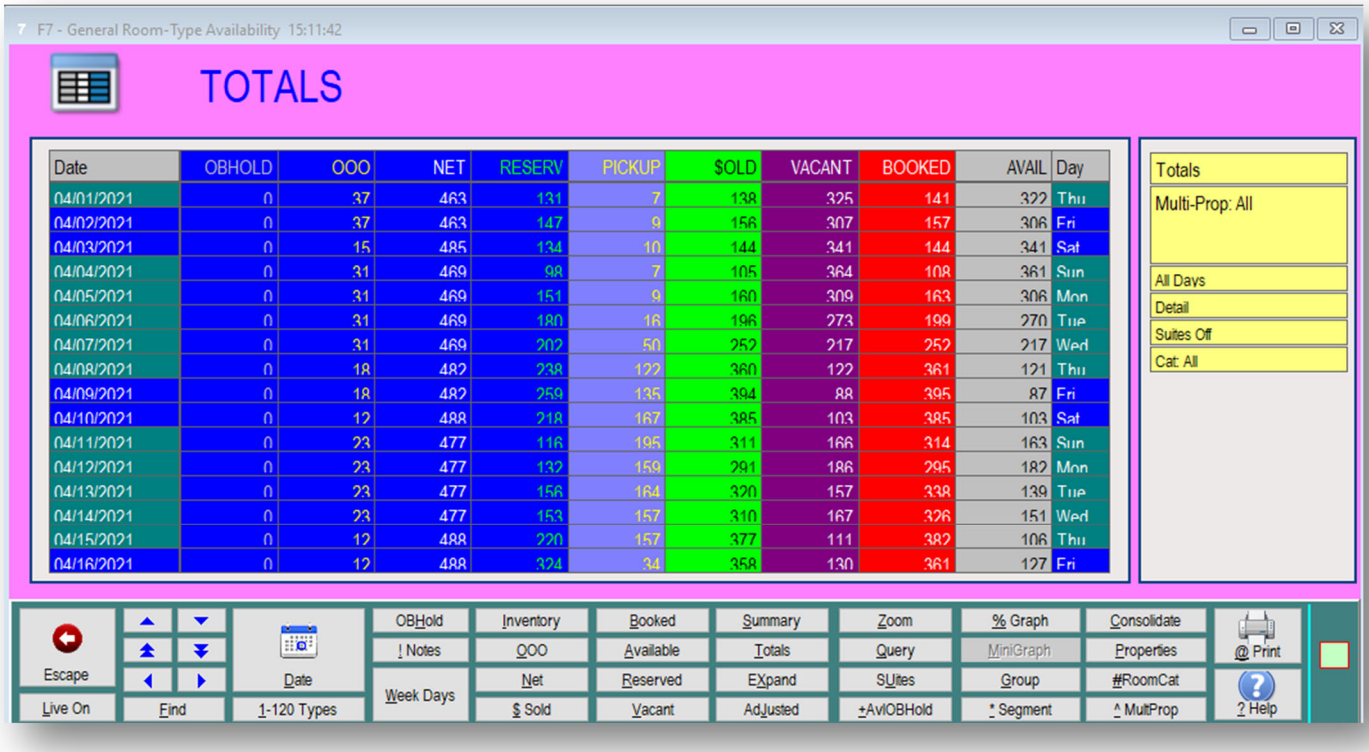
Tip: While you can add this amenity request on the reservation, you should also mention to the guest that they can visit the **Enhance Your Stay** section of our website to order **fresh baked dog treats** for their room in advance of their visit. If the dog is staying at The Inn at Spanish Bay, they will need to call **Room Service** as opposed to using the online form since the biscuits come from The Lodge.

General Availability (F7)



In the SMS Toolbar, you will see a button with a calendar icon.
This button will open **General Availability.**
To easily access the General Availability from anywhere in SMS, hit **F7 + G.**

The **General Availability** function of SMS will show you the availability at the Resort over specific dates.



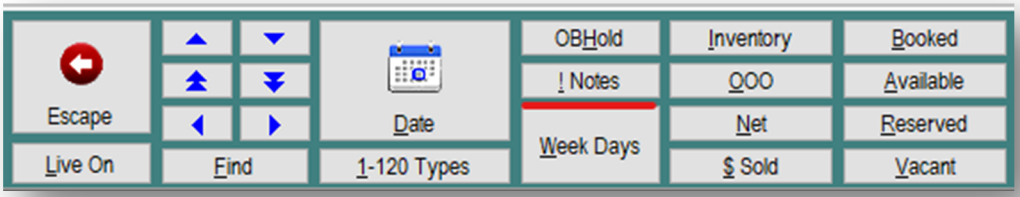
Date	OBHOLD	QOO	NET	RESERV	PICKUP	$OLD	VACANT	BOOKED	AVAIL	Day
04/01/2021	0	37	463	131	7	138	325	141	322	Thu
04/02/2021	0	37	463	147	9	156	307	157	306	Fri
04/03/2021	0	15	485	134	10	144	341	144	341	Sat
04/04/2021	0	31	469	98	7	105	364	108	361	Sun
04/05/2021	0	31	469	151	9	160	309	163	306	Mon
04/06/2021	0	31	469	180	16	196	273	199	270	Tue
04/07/2021	0	31	469	202	50	252	217	252	217	Wed
04/08/2021	0	18	482	238	122	360	122	361	121	Thu
04/09/2021	0	18	482	259	135	394	88	395	87	Fri
04/10/2021	0	12	488	218	167	385	103	385	103	Sat
04/11/2021	0	23	477	116	195	311	166	314	163	Sun
04/12/2021	0	23	477	132	159	291	186	295	182	Mon
04/13/2021	0	23	477	156	164	320	157	338	139	Tue
04/14/2021	0	23	477	153	157	310	167	326	151	Wed
04/15/2021	0	12	488	220	157	377	111	382	106	Thu
04/16/2021	0	12	488	394	34	358	130	361	127	Fri

There are 3 common Availability Charts used by Reservations Agents:

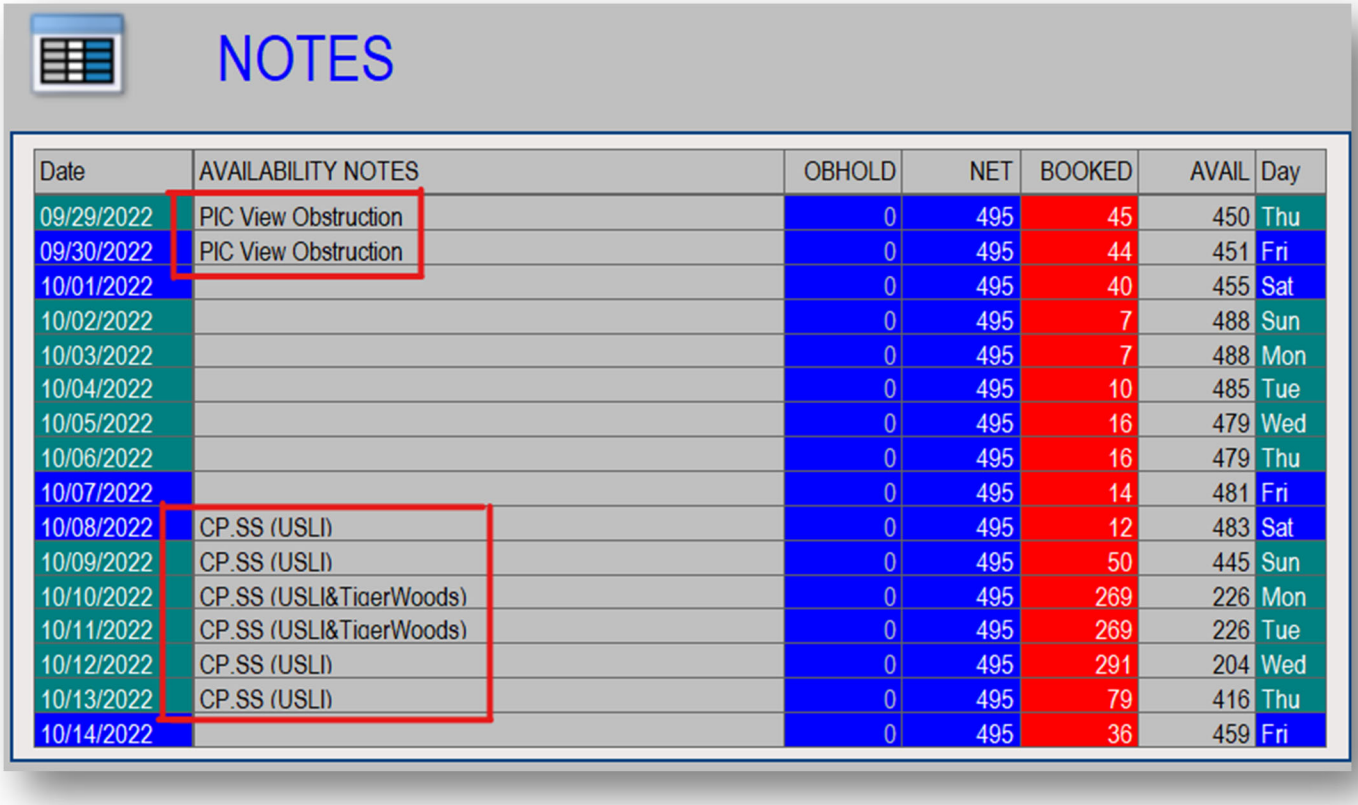
- **Availability Notes**
- **Availability by Property**
- **Availability by Room Type**

Availability Notes

From any page in the **Availability** screens, you can click the **!** button on your keyboard or click **! Notes.**



This will open the **Availability Notes** screen which allows you to see notes about events, booking rules, or other specific situations occurring on each day of the year.



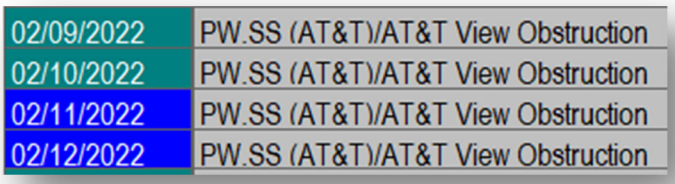
Date	AVAILABILITY NOTES	OBHOLD	NET	BOOKED	AVAIL	Day
09/29/2022	PIC View Obstruction	0	495	45	450	Thu
09/30/2022	PIC View Obstruction	0	495	44	451	Fri
10/01/2022		0	495	40	455	Sat
10/02/2022		0	495	7	488	Sun
10/03/2022		0	495	7	488	Mon
10/04/2022		0	495	10	485	Tue
10/05/2022		0	495	16	479	Wed
10/06/2022		0	495	16	479	Thu
10/07/2022		0	495	14	481	Fri
10/08/2022	CP.SS (USLI)	0	495	12	483	Sat
10/09/2022	CP.SS (USLI)	0	495	50	445	Sun
10/10/2022	CP.SS (USLI&TigerWoods)	0	495	269	226	Mon
10/11/2022	CP.SS (USLI&TigerWoods)	0	495	269	226	Tue
10/12/2022	CP.SS (USLI)	0	495	291	204	Wed
10/13/2022	CP.SS (USLI)	0	495	79	416	Thu
10/14/2022		0	495	36	459	Fri

If you are searching for availability for a guest, but cannot find any availability at any Resort Property, that may be because of an event or conflicting occurrence during those dates. You can visit the Availability Notes page to see exactly what is occurring on your selected dates.

Key Abbreviations

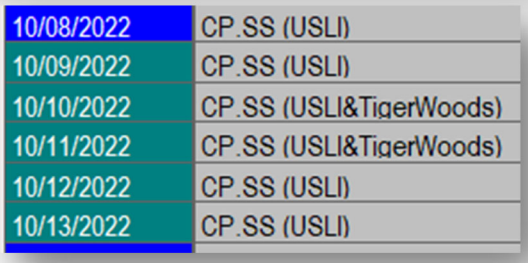
CP / L / B	The note on this date pertains exclusively to either CP (Casa Palmero), L (Lodge), or B (Spanish Bay).
PW	Property-Wide – Any note with PW means that the note applies to all three Pebble Beach Resort Properties.
View Obstruction	An event is occurring on this day for which structures such as grandstands, booths, television equipment, etc. will be visible from the Ocean View Rooms at The Lodge at Pebble Beach.
SS	Stop Sell – Transient guests may not book rooms at the specified resorts on any dates with a stop sell. This means the rooms are blocked out for a group or event.
L to 0 (or B/CP/PW to 0)	Any property that says "to 0" means that all rooms may be sold, but we cannot sell any rooms beyond zero availability. In other words, do not oversell rooms on these dates.
LOSS	Lodge Ocean Stop Sell – Do not sell Ocean View Rooms at The Lodge at Pebble Beach on this date.
(parentheses)	Words in parentheses should not be disclosed to guests. Typically, this will be the name of a group visiting on date with a Stop Sell note. In those cases, you are free to discourse to guests that the dates are unavailable because a large group is visiting, but you should never say the name of the group.

Availability Note Examples:



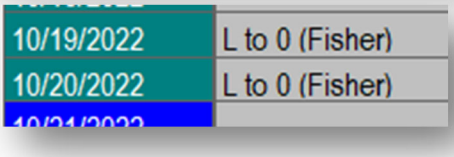
02/09/2022	PW.SS (AT&T)/AT&T View Obstruction
02/10/2022	PW.SS (AT&T)/AT&T View Obstruction
02/11/2022	PW.SS (AT&T)/AT&T View Obstruction
02/12/2022	PW.SS (AT&T)/AT&T View Obstruction

There is a Property-Wide stop sell on these dates due to the AT&T Pro Am. This event will involve equipment/tents/etc. that will obstruct the view at The Lodge.



10/08/2022	CP.SS (USLI)
10/09/2022	CP.SS (USLI)
10/10/2022	CP.SS (USLI&TigerWoods)
10/11/2022	CP.SS (USLI&TigerWoods)
10/12/2022	CP.SS (USLI)
10/13/2022	CP.SS (USLI)

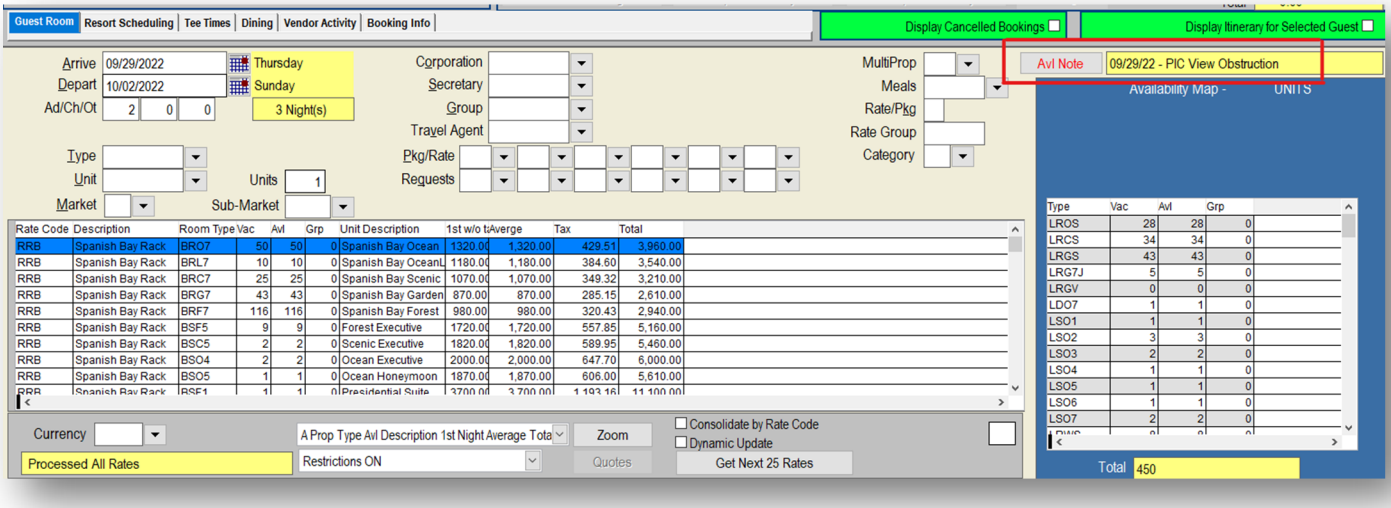
There is a Stop Sell at Casa Palmero because the rooms are saved for the USLI Group. Tiger Woods will be visiting with this group on 10/10 and 10/11. Do not disclose the name of this group or Tiger Woods to guests.



10/19/2022	L to 0 (Fisher)
10/20/2022	L to 0 (Fisher)

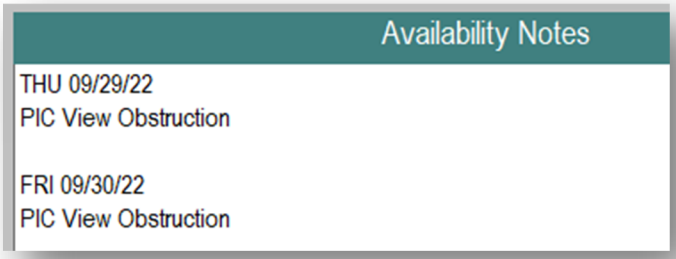
On these dates, all rooms at The Lodge may only be sold to zero availability because rooms need to be available for the Fisher group. Do not oversell any Lodge rooms.

These same **Availability Notes** can be seen in the **Booking Center** in the top right corner of the **Guest Room Tab** when you search for room availability.



The note can be seen in the yellow box:





If you click the Availability Note button, you will over which dates in your Itinerary search this note applies.

In this example, I searched for the dates of September 29th through October 2nd. This search prompted the **PIC View Obstruction Note** to appear – which is View Obstruction due to the Pure Insurance Championship Tournament.

However, based on the **Availability Note**, this View Obstruction only applies to September 29th and 30th, **not** October 1st- 2nd. This guest may simply want to shift their visit dates by a couple of days to avoid this view obstruction in the Ocean View Rooms.

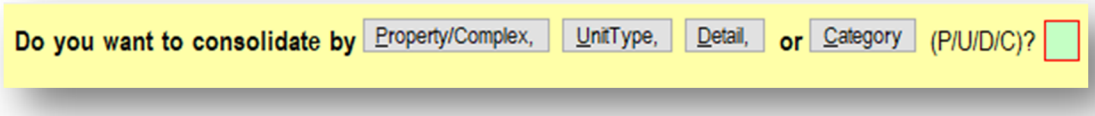
If you look at this same time of year in the **F7 Availability Notes** screen, you will see that the Pure Insurance Championship starts at least two weeks prior to my guest's desired start date of 9/31.

Date	AVAILABILITY NOTES
09/16/2022	PIC View Obstruction
09/17/2022	PIC View Obstruction
09/18/2022	PIC View Obstruction
09/19/2022	PIC View Obstruction
09/20/2022	PICViewObstrLRCS&up/FWY1/CP.SS
09/21/2022	PICViewObstrLRCS&up/FWY1/CP.SS
09/22/2022	PICViewObstrLRCS&up/FWY1/CP.SS
09/23/2022	PICViewObstrLRCS&up/FWY1/CP.SS
09/24/2022	PICViewObstrLRCS&up/FWY1.SS
09/25/2022	PICViewObstrLRCS&up/FWY1.SS
09/26/2022	PIC View Obstruction
09/27/2022	PIC View Obstruction
09/28/2022	PIC View Obstruction
09/29/2022	PIC View Obstruction
09/30/2022	PIC View Obstruction
10/01/2022	

Availability by Property

Once you have opened the General Availability window:

- Click C for Consolidate
- Click P to Consolidate by Property

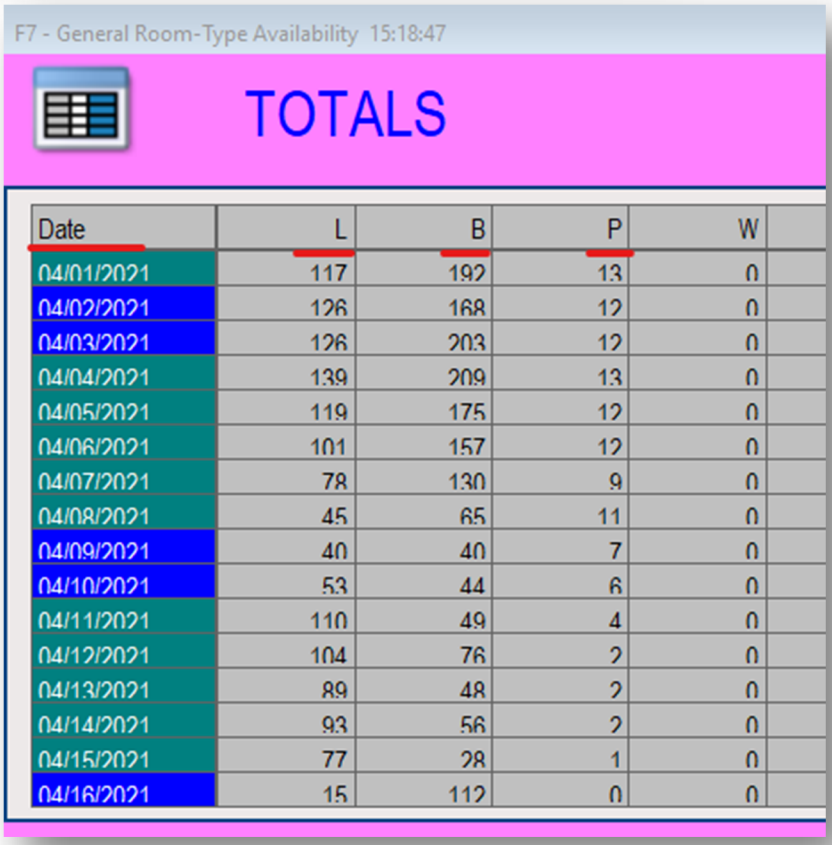


The **Property Availability Chart** will show you how many rooms are available at each Resort Property.

L = The Lodge at Pebble Beach
B = The Inn at Spanish Bay
P = Casa Palmero

In this example to the right, you can see that on April 3rd:

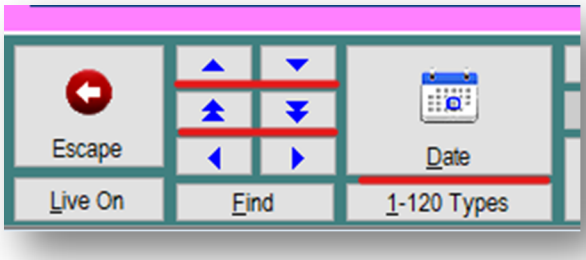
- The Lodge has 126 rooms available
- The Inn at Spanish Bay has 203 available
- Casa Palmero has 12 rooms available



Date	L	B	P	W
04/01/2021	117	192	13	0
04/02/2021	126	168	12	0
04/03/2021	126	203	12	0
04/04/2021	139	209	13	0
04/05/2021	119	175	12	0
04/06/2021	101	157	12	0
04/07/2021	78	130	9	0
04/08/2021	45	65	11	0
04/09/2021	40	40	7	0
04/10/2021	53	44	6	0
04/11/2021	110	49	4	0
04/12/2021	104	76	2	0
04/13/2021	89	48	2	0
04/14/2021	93	56	2	0
04/15/2021	77	28	1	0
04/16/2021	15	112	0	0

Change the Dates on the Availability Chart:

- Use the Up/Down arrows to move one date at a time (single arrows)
- Use the Page Up / Page Down arrows to move one full page at a time (double arrows)
- Click the Calendar button and choose your date from the calendar



One Night Stay Over Weekend – No Golf

The most common occurrence in which you will need to open the Availability by Property is when a guest who is not golfing during their stay wants to book a one-night stay over a weekend.

Pebble Beach Resorts has a two-night stay requirement for guests who wish to visit Friday-Sunday. The reason for this rule is because Pebble Beach wants to give priority for weekend rooms to guests who want to stay multiple nights and play golf, which is more profitable to the company.

If a guest is adamant that they can only stay one night AND they are not going to be golfing, we can check the **Exception Calendar** to see if we can book their trip despite the two-night rule.

Per the Exception Calendar, to book a One Night Stay over a Weekend for a guest who will not be playing golf, **BOTH** of the following criteria must be met

- The visit date must be within 2 months
- There must be certain minimum number of rooms available at the Resort that night.

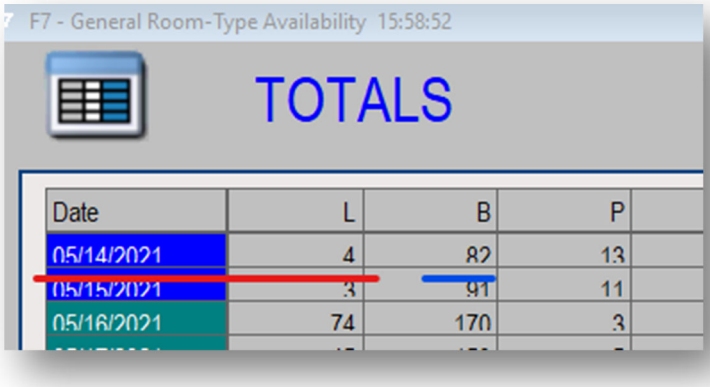
One Night Stay on Weekend (No golf)				
		LD	INN	CP
2 Months Out	Hotel at 70%	60+ avail	80+ avail	7+ avail
1 Month Out	Hotel at 85%	30+ avail	40+ avail	4+ avail

For example, today is April 1st and a guest wants to book a one-night weekend stay at The Lodge at Pebble Beach on a Saturday in July, we can immediately tell them this is not permitted per our booking guidelines because we are more than 2 months out from their visit date.

If the guest wants to book their one-night stay on Saturday, May 14th, which is within 2 months of today's date, we can potentially allow this exception IF we have 60 or more available rooms at The Lodge on that night.

Per the **Property Availability Chart,** there are only 4 rooms available at The Lodge on May 14th, so we cannot book a one-night stay.

However, there are 82 rooms available at The Inn at Spanish Bay on this night. We can offer an exception to this guest if they agree to stay at the Inn at Spanish Bay instead of The Lodge.

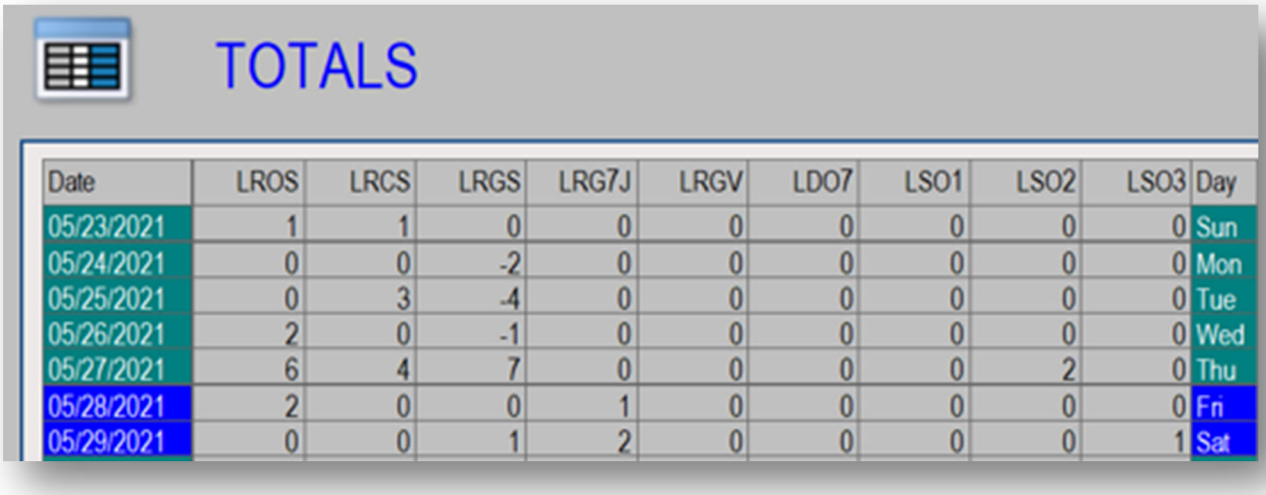


Availability by Room Type

The **Availability by Room Type** Chart will show you how many units of each room category are available every day.

To Access Availability by Room Type:

- Click F7
- G for General Availability
- C for Consolidate
- D for Detail



Date	LROS	LRCS	LRGS	LRG7J	LRGV	LDO7	LSO1	LSO2	LSO3	Day
05/23/2021	1	1	0	0	0	0	0	0	0	Sun
05/24/2021	0	0	-2	0	0	0	0	0	0	Mon
05/25/2021	0	3	-4	0	0	0	0	0	0	Tue
05/26/2021	2	0	-1	0	0	0	0	0	0	Wed
05/27/2021	6	4	7	0	0	0	0	2	0	Thu
05/28/2021	2	0	0	1	0	0	0	0	0	Fri
05/29/2021	0	0	1	2	0	0	0	0	1	Sat

The Left Column will list dates beginning with the first date in your Booking Center
The Top Row will list each Room Code.

Use the **Left and Right Arrows** to cycle through all room type options in this chart.



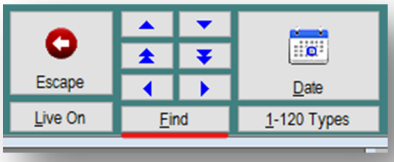
Tip: Always double check your availability in the **Booking Center** after checking **F7**. Agents are permitted to oversell rooms to a certain extent, so a room with 0 availability in F7 may still pull up as an option to book in the Booking Center.

Find Function

Some guests really have their heart set on specific room types or suites. Once we get down to a low level of availability, it can be difficult to find a set of dates in the Booking Center in which we can book those specific rooms.

For example, if a guest wants to book the Monterey Suite for 5 nights, but you are not finding any availability in the Booking Center, a good next move would be to open F7 General Availability and use the Find Function.

- Click F7
- General Availability
- F for Find



- Type in the room code for the Monterey Suite



- Page Down to submit.

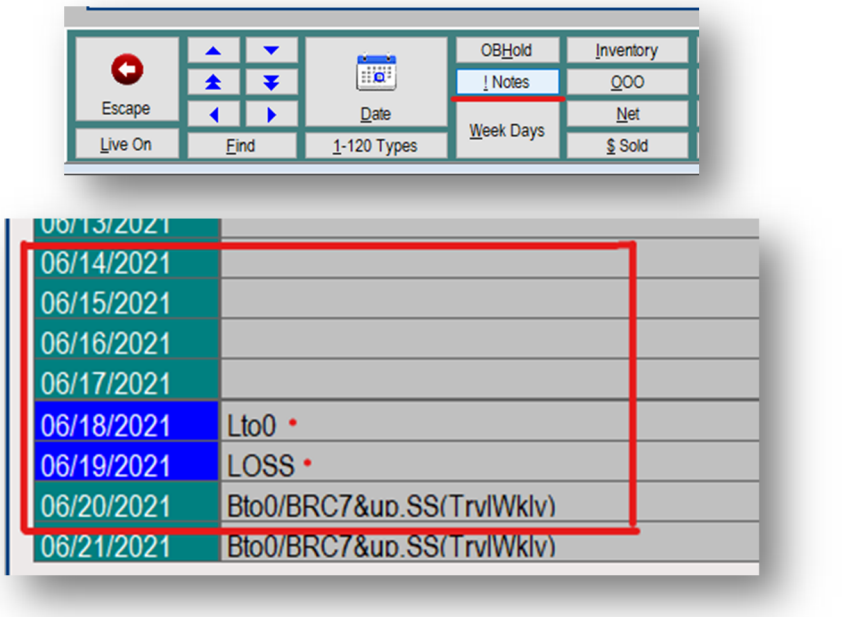
Focus on the **AVAIL** column of this chart. This will show you on which days the Monterey Suite will be available to book.

You can see on the chart below that there is a set of 5 days available to book the Monterey Suite between 6/14/21 and 6/20/21.

Date	NET	RESERV	PICKUP	$OLD	%SLD	VACANT	GRPBKD	AVAIL
06/07/2021	1	0	1	1	100.00	0	1	0
06/08/2021	1	0	0	0	0.00	1	0	1
06/09/2021	1	0	0	0	0.00	1	0	1
06/10/2021	1	0	0	0	0.00	1	0	1
06/11/2021	1	1	0	1	100.00	0	0	0
06/12/2021	1	1	0	1	100.00	0	0	0
06/13/2021	1	1	0	1	100.00	0	0	0
06/14/2021	1	0	0	0	0.00	1	0	1
06/15/2021	1	0	0	0	0.00	1	0	1
06/16/2021	1	0	0	0	0.00	1	0	1
06/17/2021	1	0	0	0	0.00	1	0	1
06/18/2021	1	0	0	0	0.00	1	0	1
06/19/2021	1	0	0	0	0.00	1	0	1
06/20/2021	1	0	0	0	0.00	1	0	1
06/21/2021	1	0	1	1	100.00	0	1	0
06/22/2021	1	0	1	1	100.00	0	1	0

Important Note

Once you have located a set of dates in **F7** during which your specific room/suite is available, click the **!Notes** button to see if there is a Stop Sell or Property to Zero note that may prevent you from booking this room on these dates.



Double check the availability by looking up those same dates in the **Booking Center** before confirming availability to the guest.

Overbooking/Overselling Rooms

It is important to review the **Availability by Room Type** chart to determine whether or not it is wise to **Overbook / Oversell a room category.**

The reason we can sell more rooms than we have available is because, depending on how far out we are from the guest's visit dates, it is likely that some guests will cancel. If we still do not have that room type available by the time the guest arrives, our front desk will typically upgrade the guest to the next closest available room type.

As a Reservations Agent, you have the authority to oversell room categories to a certain extent. If you try to exceed your authority to oversell, SMS will prevent you from completing your booking. You can, however, ask a supervisor override SMS to oversell beyond your authority.

Questions to Research Prior to Asking a Supervisor for an Oversell Exception:

- In the F7 Availability Notes, is there a Stop Sell or Sell to Zero note?
  A supervisor will not grant an exception to oversell against one of these notes.

- How many nights are your guests booking?
  A larger booking is more likely to get an exception from a Supervisor if a large oversell is needed

- Which month are they booking?
  We avoid overselling rooms in peak season.

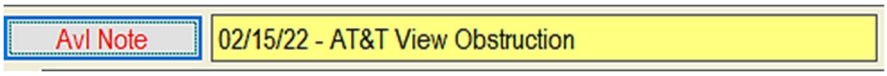
- How far in the negative is the room category?
  If it is only slightly negative, a supervisor is likely to allow an oversell

- How far away is the date? i.e. How long do we have to work on attrition in that category?
  If the room is slightly negative and several months out, a supervisor will give likely allow overselling.
  If a room type with negative numbers is on a date upcoming very soon, do not go further into the negative

- Do we have room types in higher categories available for the Front Desk to potentially move oversold bookings into?
  An Ocean View, for example, is a bad room type to oversell because we have very limited rooms above this category aside from Suites. (And no guest wants to be *down*graded due to an oversell)
  If a guest wants an Ocean View but that has negative availability, you should recommend that the guest book a Suite.

- Are there several other room categories that also have negative numbers?
  If multiple room categories have negative numbers, you cannot assume that the positive room categories will remain available. In this situation, likely, the Front Desk will need to upgrade the overbookings to the positive room categories when they set the house.

View Obstruction


Avl Note
02/15/22 - AT&T View Obstruction

Negotiated Rates

Last Chance Rates:

- $575 Inn (+++ = $666.50)
- $675 Lodge (+++ = $774.19)

This shouldn't include pricing because this changes.

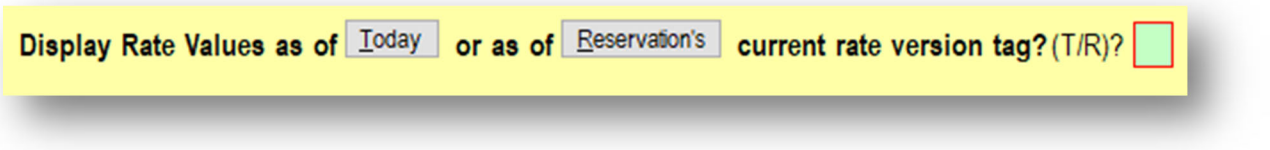
Include how to calculate taxes and fees based on any last chance rate

Must get approval from any negotiated rate.

Winter Rates

Room Reservation Changes

Do not override rates when you make changes.



Rate Override is Time Stamping. We do not want to time stamp resevations that should be keeping previous rates from before our rates updated.

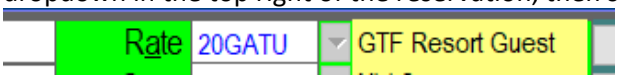
Like a guest who books for April before we have rates that will eventually be new new price after March 31st.

Tips

- Before booking any changes, check Notes & Traces for special instructions, exceptions, or cancellation timeframe notes.
- Do not delete notes or traces after changes are made. If they are no longer relevant, close them.
- After making changes, always use Value Zoom to ensure that amount matches the charges on their itinerary. Add the first two-line items together to equal your deposit amount. Hitting zoom again should automatically add them.
- Upgrade/Downgrade =
  - Guest has been upgraded to a higher level room at no additional cost to them or the guest has been downgraded to a lower level room, typically the cost of this room would change to a lower rate.
- Upsell/Downsell = Guest is paying or being credited for the change
  - Guest decides to get a better room and pay the difference, or they decide to get a lower level room after their original booking.
- If you add or change bedding requests to a reservation that has already been blocked by the front desk, let the front desk know so they can be sure they are in the correct room type

Golf Changes:

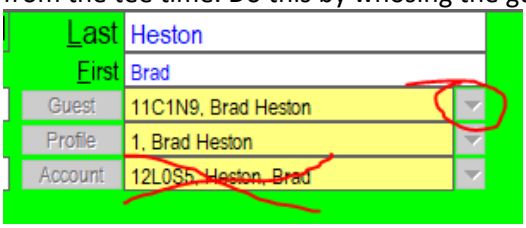
- If you need to change the rate code, you can open the reservation and change this via the dropdown in the top right of the reservation, then save.



- To see the history of changes made on golf reservations, click the "Change Log" button
- If you need to cancel golf, do so through the 5 Schedule only which gives you a clear view and prevents you from accidentally unlinking from the itinerary.

Whosing differences between Resort Guest Golf & Day Guest Golf:

- A Resort Guest will have their room whosed to their tee time to guarantee the booking whereas a Day Guest will have only their guest tile whosed. If you change tee times between Resort and Day Guest, you must update the Whosing as well as the rate code.
- Change Example: A guest has a 4 night stay but decides to change it to 3 nights. They still want to play golf on the day they cancelled the room, so we need to change that golf tee time from "Resort Guest" to "Day Guest"
- In addition to changing the rate code per instructions above, you need to disassociate the room from the tee time. Do this by whosing the guest tile to the tee time.



- When you click the arrow next to "Guest" to attach the guest tile, a message will appear letting you know that doing this will disassociate the room. Once this is done, you can change the rate code to "Outside Guest."

How to find existing golf reservations:

- Day Golf VEMAIL confirmations only have a Guest # which is searchable in:
  - Universal Lookup > All Scheduled Bookings
  - Or Universal Lookup > Golf Tee Times
    (This option must be used for Del Monte Duke's Members since they often only book to the Tee Sheet, not through guest tile with guest #)
- If a guest wants to change times within the same date of play, just go to the tee sheet and drag their reservation to the new time.
- If a guest wants to change the number of players, and you can see that the number will fit in that time slot, just open their reservation and type the correct number into the large box on the left side.
- If you book Pebble Beach as day golf prior to 24 hours due to it being an exception calendar date, leave this R Note:
  "Ok per exception calendar to book PB on xx.xx.xx."

Changing Tee Times within the Same Day

- If you are moving tee times within the same day, the easiest way to do this is to open the tee sheet for that day and simply drag your tee time to the new time they want.
- Be sure to move any tee sheet notes because those will stay assigned to the time slot, not the people on the booking.

Changing Tee Times to Different Days

- If you are changing the tee time to a different day, you need to cancel and rebook the entire reservation, making sure to move over all caddies/carts/notes/credit cards/names.

Golf Upgrade:

If a guest is booked at Spanish Bay, but wants to Upgrade to Spyglass, and is within the 3 month booking timeframe:

- Locate the SG tee time they want, add it to the Itinerary, and hit complete right away.
  - Be sure to move over caddies/rentals/carts and type in the CXL advisement
- Open the old golf reservation and hit "cancel" on the right side
- Select the reason code: rebooked other tee time
- Type the CXL reason: "changed to SG"
- Once cancelled, you cannot re-open this reservation, but you can see the details by checking the "view cancelled bookings box," going to the Booking Center tab, and hovering over the reservation line.
- Go to the guest tile and leave an R Note:
  "Mr. ___ changed from SB to SG on xx.xx.xx. Reconfirmed caddies/etc."
- Paste this same note into NAVIS

Dining Changes:

- To find a previously booked dining reservation without an Itinerary #:
  - Search the guest's name in Workslate
  - Ask for the Guest # from the confirmation to search in Universal Lookup
  - On their guest tile, hit F5 to show all recreation
- To make changes to the time within the same day, or to change the number of people dining, open the reservation and make changes within the reservation tile.
- If they are changing restaurants, cancel the reservation and re-enter it from scratch.

Package Changes

- If a package is upgraded to PB/SG, take the additional required deposit.
- If a package is downgraded to PB/SB, change the reservation, but ask if they want to be refunded the difference in the deposit or keep that money on file to use during their stay.
- If there is aeration on a package date, we charge the regular package rate, then the pro shop will discount upon arrival.

Package to Rack Rate:

- The deposit will likely be more than required for 2-night rack. In this case, leave a FDB trace such as this:

  Mr. Stanford pre-paid $2637.24 as the deposit for their original package reservation in March 2020.
  Due to the COVID-19 Resort Closure, their reservation was rescheduled to rack 2 Nights + Golf in July 2020.
  $2185.34 of their funds on file are being applied as their new July 2 nt deposit.
  Guest has a refundable amount or $451.90 to use during their July stay.
- Be sure to update the guarantee codes, package codes, trace dates, ADM notes, R notes, any attached recreation.

Partial Room Changes:

- To cancel a room, go into the reservation tile and click "cancel" in the top left corner. A pink window will pop up. Type all money that needs to be refunded into the top line and save. The 5 Schedule will then pop up where you can cancel recreation.
- You do not actively refund their credit card. Accounts take care of all cancellation refunds. We need to send Accounting an FDB trace
  - If we are replacing an old FDB trace, simply close the other one. Accounting does not care about the history of an order, only the money result at the end. Save detailed explanations for your R note and Navis.

Move a Room Reservation to New Dates

- Verify availability of their room type during their new date range inside the booking center before updating the reservation tile.
- Update the dates on all room traces to match the new dates of stay.
- Re-pre-block as required by room type

How to Change the Rate Code within a Reservation:

- F5
- Select "Today"
- Page down until you locate the code you want
- Select
- Use Value Zoom to verify the charges add up to the correct deposit by adding the 1st and 2nd lines together

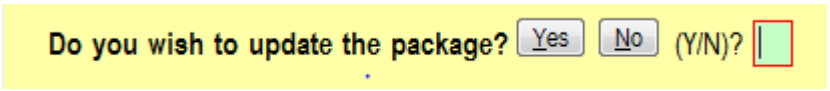
Downgrade a Room within 14 Day CXL Period

- We can downgrade the room, but their entire deposit will stay with us
- The difference in price will be turned into a Resort Credit as opposed to a refund, so the guest can use that money throughout their trip
- We must remind guests that they should charge everything to their room to make sure they utilize that money
- We must leave an FDB Trace such as:
  "Guest has Non-refundable $___ to use for stay."

Upgrade vs. Upsell Procedures

- *Overselling a category to close a sale* – Done by a Manager

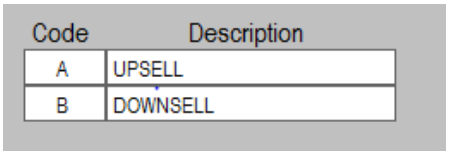
Change the unit type to the desired room. Select "N" to not update the package.



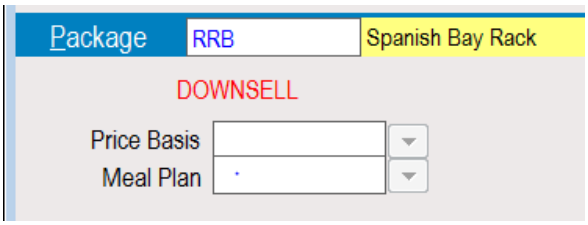
Choose "Downsell."



Choose "Downsell."

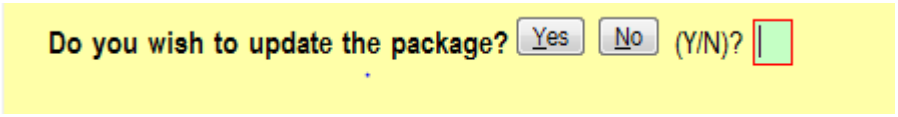


Code	Description
A	UPSELL
B	DOWNSELL

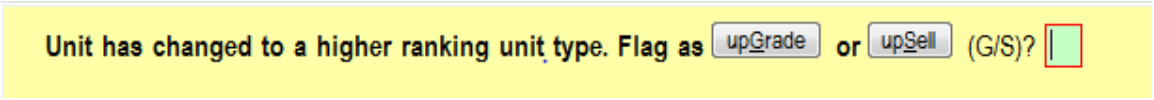


- *Promotional Upgrade* – Done by a Manager

Change the unit type to the desired room. Select "N" to not update the package.

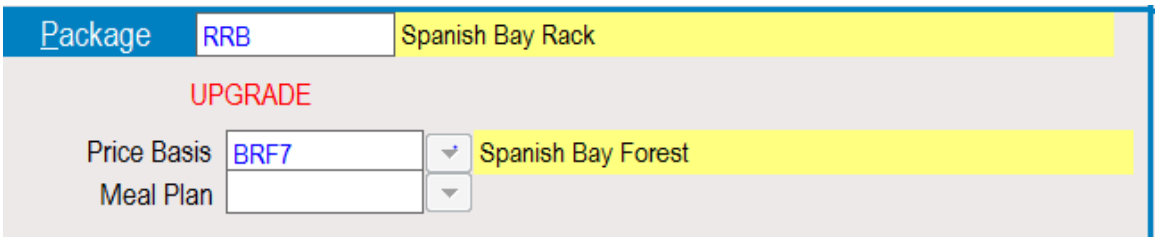


Choose "Upgrade."



Choose "H" or "I" as your upgrade reason.

Code	Description
A	Construction, Noise
B	Dissatis, Past/INH Gst
C	EXEC OFFICES, Senior Staf
D	Fix Avail,
E	Gst, Tier 1-3 VIP
F	Guest Request,
G	Ovsld Prop Move,
H	Promotion Offer, Upgrade
I	Res Negotiation, Upgrade

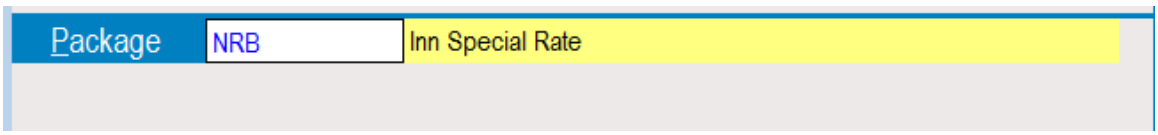


Also add in the same code in the Secretary Field.



- *Negotiated rate* – Done by a Manager

Enter the NR_ code.

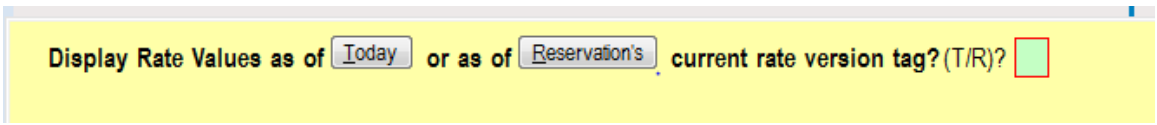


Special Bill the rate and add the correct code to the Secretary Field.



- *True Downsell* – Done by Agent

When the guest has booked a higher category and decides to either move dates to get a lower category or the lower category is now available. The agent must change the unit type to the desired room and choose "Today."

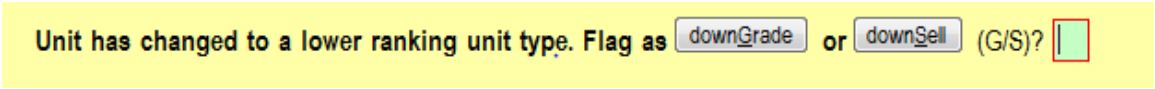


The Rate Calculator will give them new rate to choose.

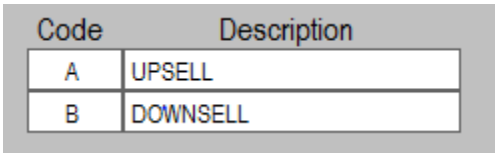


1	RRB	Spanish Bay Rack	BRG7	42	42	0	Spanish Bay Garde	670.0	670.00	144.70	1,340.00

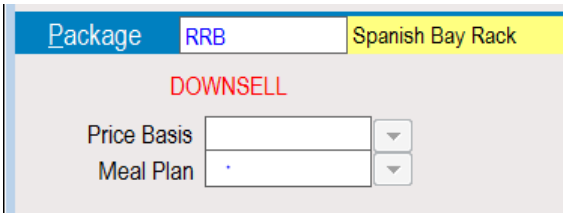
Choose "Downsell."



Choose "Downsell."

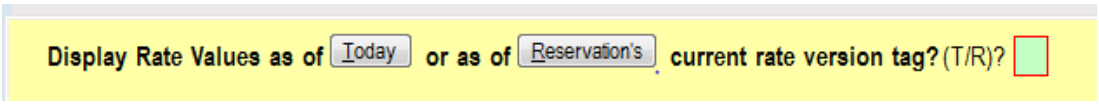


Code	Description
A	UPSELL
B	DOWNSELL

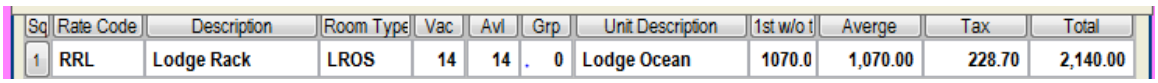


- *Property Move* – Done by a Agent

When the guest has booked a reservation and decides to move to another property. Each category has been qualified against the other. Depending on the type of room they are moving to, the pop-up screens will see it as an upsell or downsell. The agent must change the date and desired unit type, and then choose "Today."

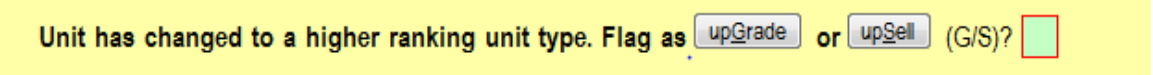


The Rate Calculator will give them new rate to choose.

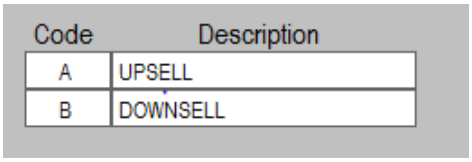


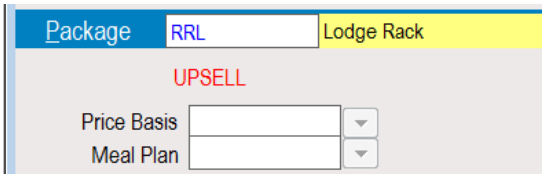
Sq	Rate Code	Description	Room Type	Vac	Avl	Grp	Unit Description	1st w/o t	Averge	Tax	Total
1	RRL	Lodge Rack	LROS	14	14	0	Lodge Ocean	1070.0	1,070.00	228.70	2,140.00

In this case it deems this new category as an upsell, choose "Upsell."



Choose "Upsell."

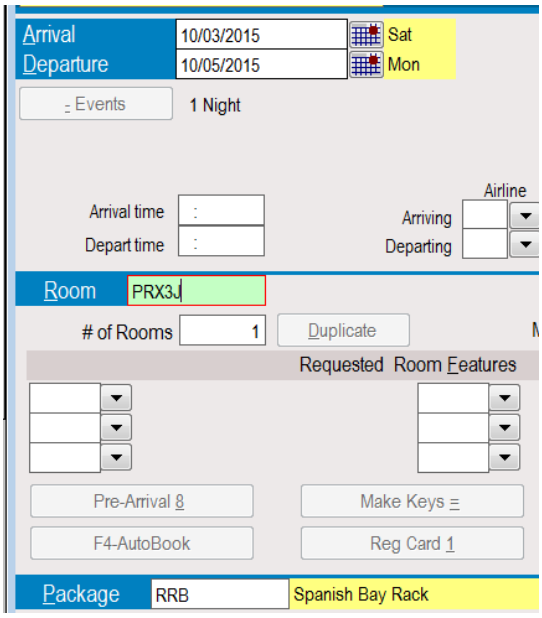




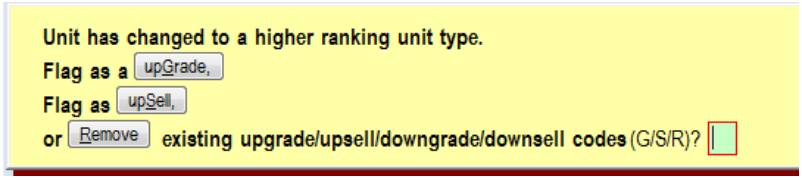
- *Property Move When There is an Existing Room Move Code* – Done by a Manager

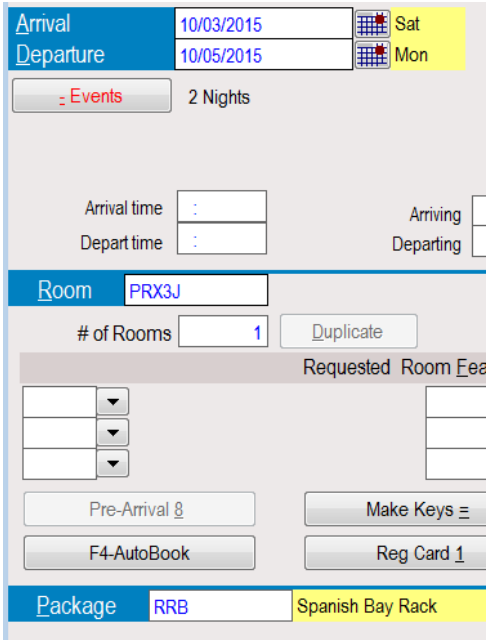
When the guest has booked a reservation and decides to change dates and move category/property and there is already been a move done in the past. Change the dates and unit as necessary only

.



Select "Remove" as this is neither an upgrade/upsell/downgrade/downsell.

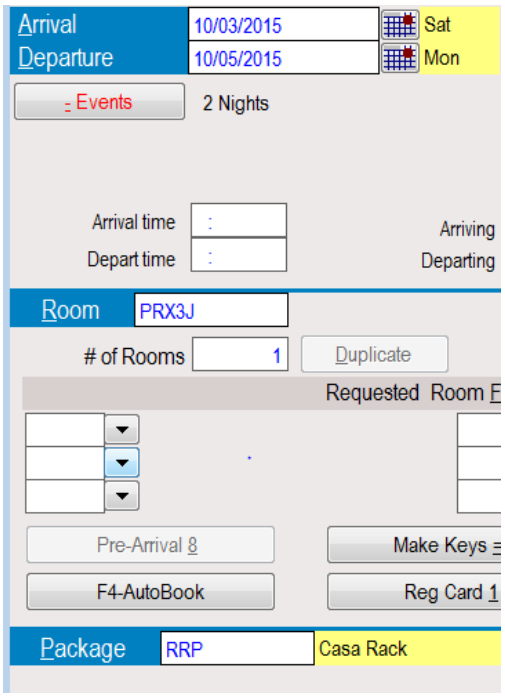




Now add the Rate code for the appropriate property.



The room will have the correct rate and no room move codes.



Room Reservation Changing Properties

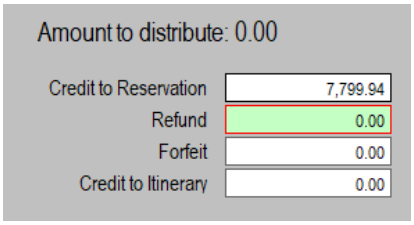
- First, verify that the room type on the other property is available via the booking center
- In the reservation tile, click edit and change the room code to the new room they want
- Say "No" to updating the package
- Click Upsell, Upsell (or Downsell, Downsell)
- Update the package code to the other property
    - For example, change RRL to RRB
- Update Special Billing to reflect the correct deposit amount per the new room type
    - If an upsell, charge additional money for the deposit
    - If a Downsell, ask the guest if they want to leave the additional money on file as a resort credit, or have it refunded.
        - To keep on file, leave an FDB Trace: "Guest has refundable $___ on file to use for stay due to room Downsell."
        - To refund, leave an ADM Trace to accounting to instruct them to credit back the guest. List the specific amount for the credit and why.
- Check for any other traces or notes that need to be modified to reflect the new property, such as Room Service.
- Leave an R note explaining the situation
- Copy R Note to NAVIS

Room Reservation Cancellations

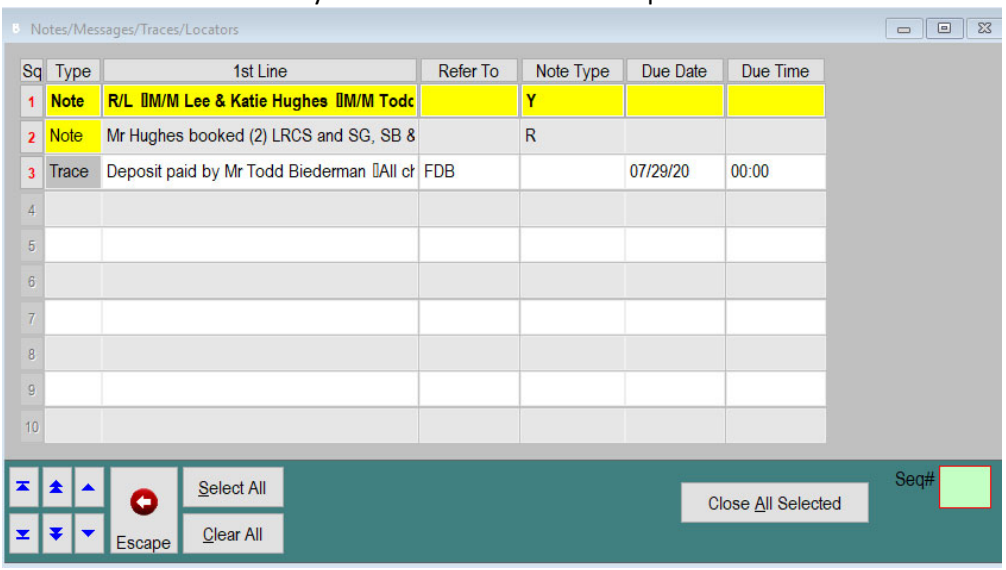
Cancellations

Room with Golf/Dining/Spa Cancellations

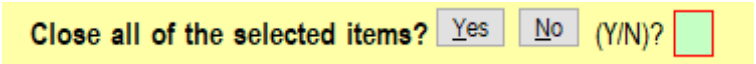
- First, ensure that the guest is outside the cancellation period – 14 days
- Gather information about the reason for the cancellation and discuss their flexibility to change/modify dates.
- Quote refund amount to the guest and advise them that they should see the funds back on their card in approximately 7-10 business days.
- On the reservation tile:
    - Click "Cancel"
    - Yes
    - Type the balance to be refunded into the top line that says, "Credit to Reservation," then click "OK."
        - DO NOT use the "Refund" line – Accounting will not see that, and the guest will not be refunded.



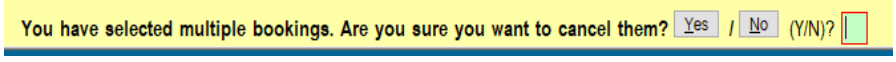
- A window with a summary of all Notes & Traces will open. "Close all selected"



- Select "Yes" to the question below:



- The F5 Active Schedule will pop open
    - Confirm with guest you are cancelling all activities
    - Click "Select All"
    - Cancel
    - Yes



  - Choose the appropriate reason code
  - Escape to exit the 5 Schedule
- A second "Cancellation Reason Code" box will open, so, again, select the appropriate code
  - The 1st box was referring to the F5 cancellation.
  - The 2nd box is referring to the room stay cancellation.
- Create an R note in which you thoroughly describe the cancellation reason
- Accounting
  - If you are making an exception to any rule - such as cancelling within 14 days - you must leave an ADM trace
  - Otherwise, cancelling will automatically alert Accounting to refund the guest
- NAVIS
  - Copy your R Note into the NAVIS notes field
  - Change the Lead Status to "Cancelled"
  - Click "Save and Edit"
  - Offer to send the guest a cancellation email, we send this through NAVIS:
    - Click the "Send Email" button above the Conversation History



    - In the new window, use the drop-down box labeled "Insert Template" to select "Cancellation Email Template."



    - Enter the email subject line:
      Pebble Beach | Itinerary Cancellation | #1050_____
    - In the body of the email, edit the guests title appropriately (Mr./Mrs./Dr./ETC) and fill in the Itinerary number.

Dear Mr./Ms. Hughes,

This is your email confirming your canceled reservation at Pebble Beach Resorts, 7/29/2020 to 8/2/2020.

Below is your Itinerary number for reference:
1050_____

    - Chose which cancellation scenario is appropriate for your call, deleting the other one. Then fill in the dollar amount that is being refunded.

You should see a refund to your credit card in the amount of $xxxxxxx within the next 5-10 business days.

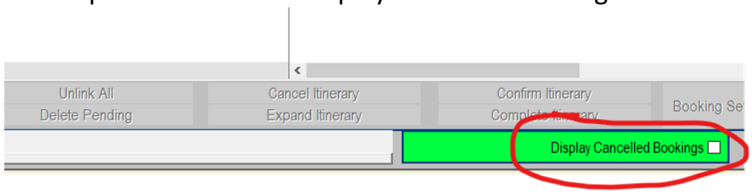
OR

Your balance of $xxxxxx will be on file with us, under your name, for a future stay. You have until (Day, Date, Year) to complete your next stay and use this balance. Once you make a new reservation with us, it will be non-cancellable.

    - Click "Send and Edit to review your notes, lead settings, and email; then close.
- Your call disposition will be "CXL Res"

Reinstate a Cancelled Booking

- In the booking center, look up cancelled itinerary number
- Once opened check the "display cancelled bookings" box



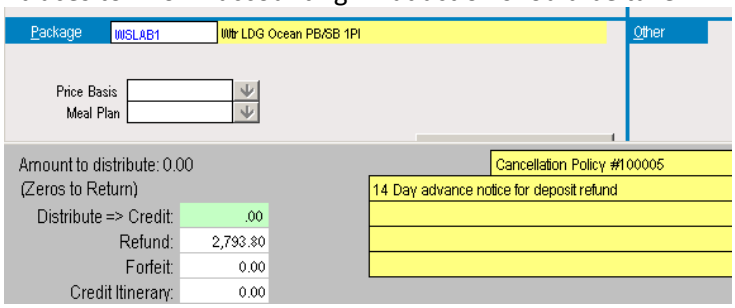
- Click "reinstate" – This will ONLY reinstate the room. Rooms may only be reinstated 24 hours after cancellation, after which point you would need to start a new reservation/itinerary.
- To reinstate golf, after the room is back, go to the 5 schedule and click "reinstate"
- Dining cannot be reinstated, so you must book this again manually

Hotel Guests who cancel Golf within 14 Days

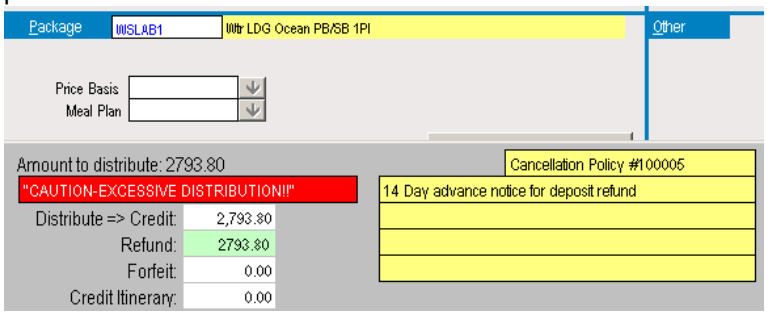
- For hotel guests only, we will attempt to resell their tee time
- We must leave the following tee sheet note:
  Cancelled w/in 14 days. If not re-sold, charge 4sm/2sm/single/3sm to (name) R#____
- We must also leave an R note with same details on the room reservation

How to Refund Room Deposits in SMS

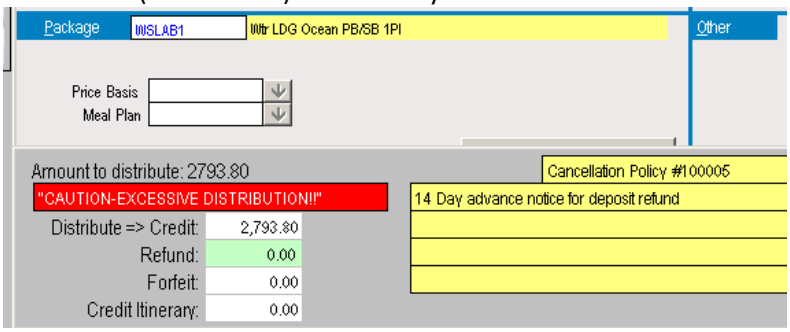
- Select the "X-Cancel" button to begin cancelling.
    - This reservation shows that the system wants you to refund because of the cancellation date (outside of 14 days.)
    - You must remember that our accounting department needs to have sole control of reconciling these accounts.
- We ALWAYS put the balance on the "Credit" field and clear all other fields as in the steps below, no matter where the money should go.
- Use your ADM traces to inform accounting what action should be taken in regard to the deposit.



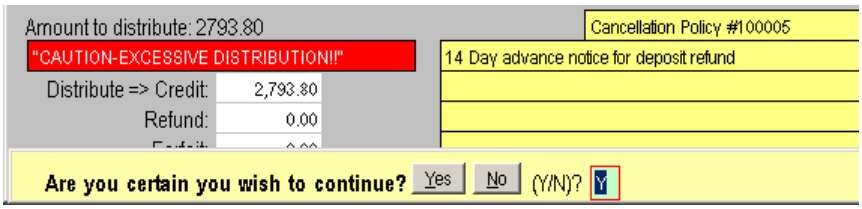
- Enter the deposit amount on the "Credit" field.



- Zero out the "Refund" (or "Forfeit") field so only "Credit" has a balance.



- Even though the system thinks you have "Excessive Distribution" be sure to select "Yes" to continue. Remember only the "Credit" field should have a balance.


Amount to distribute: 2793.80
Cancellation Policy #100005
"CAUTION-EXCESSIVE DISTRIBUTION!!"
14 Day advance notice for deposit refund
Distribute => Credit:
2,793.80
Refund:
0.00
Are you certain you wish to continue?
Yes
No
(Y/N)?
Y

Multiple Room Itineraries



It is very common for guests to visit Pebble Beach Resorts in groups. In those cases, you will have multiple room reservations on the same group Itinerary.

Key Terms for Multiple Room Bookings

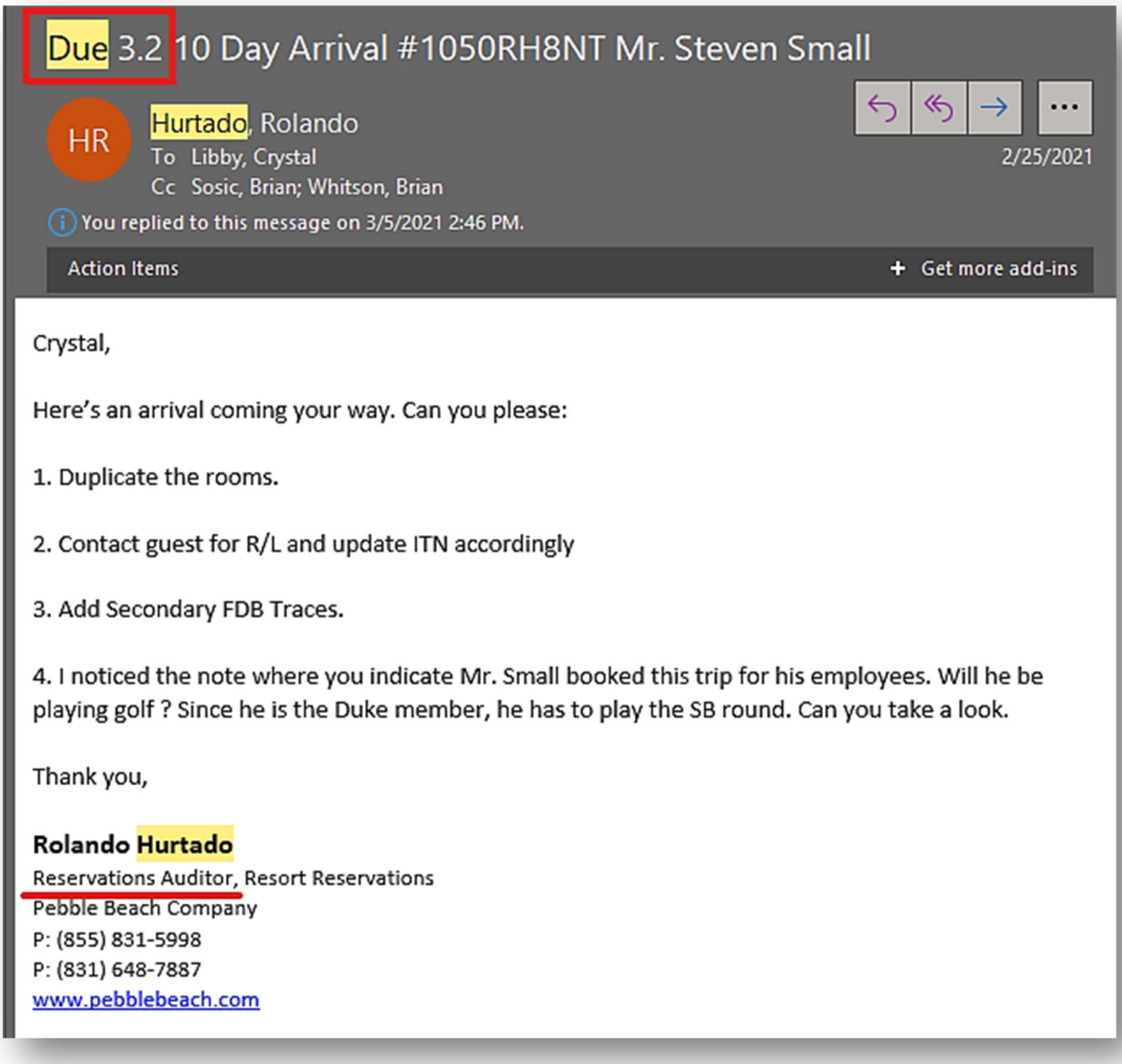
Duplicate / Split Out the Rooms	Duplicating Rooms is done when a guest is booking multiple rooms of the same category, such as four Ocean View Rooms at The Lodge. All rooms will be added to the reservation as 1 Reservation Tile, but since the primary guest will not be staying in all rooms at once, we need to divide the rooms up and put the correct Guest Names on each room to allow those guests to check in.
J Guarantee Code	Whenever a guest reserves a room by prepaying the first two nights as their deposit, the Guarantee Code should be an A for Advanced Deposit. If we have multiple rooms, it is common that one person will pay the deposit for all rooms on the reservation at the time of booking. In that situation, the person who put down the deposit will have an A guarantee Code, but all other rooms will have a J Guarantee Code which means Other Reservation which indicates that this guest's deposit was covered by another reservation on this Itinerary.
Y Note	This Y Note is the Rooming List. On all reservations with multiple rooms, we ask the guest for the names of every person who will be staying in each room. These names are documented in this Y Note. Having this information up front will allow each guest to check into their rooms individually without the Primary Guest present.
FDB Trace	This is a Trace directed to the Front Desk regarding the Billing Arrangements for the group. We should always ask the Primary Guest how billing should be handled when guests arrive. o Will one guest pay for everything? o Will billing be split up room by room? o Is the Primary Guest paying for rooms, but all golf tee times will be paid individual? o If guests are sharing a room, should we divide room charges between both guests?
10 Day Arrival	The instruction within the following pages will be divided into two key timeframes:

	1. Instruction for the day you book the reservation 2. Instruction for 10 days prior to your guest's arrival date. The reason certain tasks are only completed within 10 days is because this will be a point during which the guest can no longer make any changes or cancel. Our guests plan visits very far in advance which allows them to have great flexibility to make modifications between the day they book and the day they visit. These changes are much easier to do on our end in the Reservations Department if we keep the guest's booking as basic as possible, then add all of our intricate adjustments just before they arrive.
Group Link / Code	This is a code inputted into the Group field of multiple Reservation Tiles to indicate that they are all part of the same group of guests.
Scan + Link	If you click Scan + Link on a reservation tile that has a Group Code, a window will open with a list of all Reservation Tiles that are part of that group. You can select any Reservation from the group list to open that particular Reservation Tile. This is an easy way to navigate between related reservations.
C/O (care of) Tiles	This is a placeholder Guest Tile that we create when we know that a secondary guest (form the Y Note) will be paying for charges upon checkout, but we have not directly spoken to the guest to gather their contact information. The Front Desk of the resort will fill in the Guest Tile with accurate contact information once the guest checks in.

10 Day Arrivals

10 Days prior to your guest's visit date, you will receive an email from a **Reservations Auditor** asking you to **Prepare Your Booking for Arrival**.

- The Auditor will include a list of what needs to be completed on the booking.
- You must complete all arrival duties by the due date listed in the Subject Line of the email.
- Your Direct Supervisor will be CC'd on this email.
- Once you have completed these tasks, you must Reply All to this email to inform the Auditor and your Supervisor that it is complete.
- Your supervisor then will do a quick check to make sure everything is accurate.



Front Desk Billing Traces



An **FDB Trace,** or **Front Desk Billing Trace**, is a set of instructions for the front desk informing them of how to bill each guest on an Itinerary.

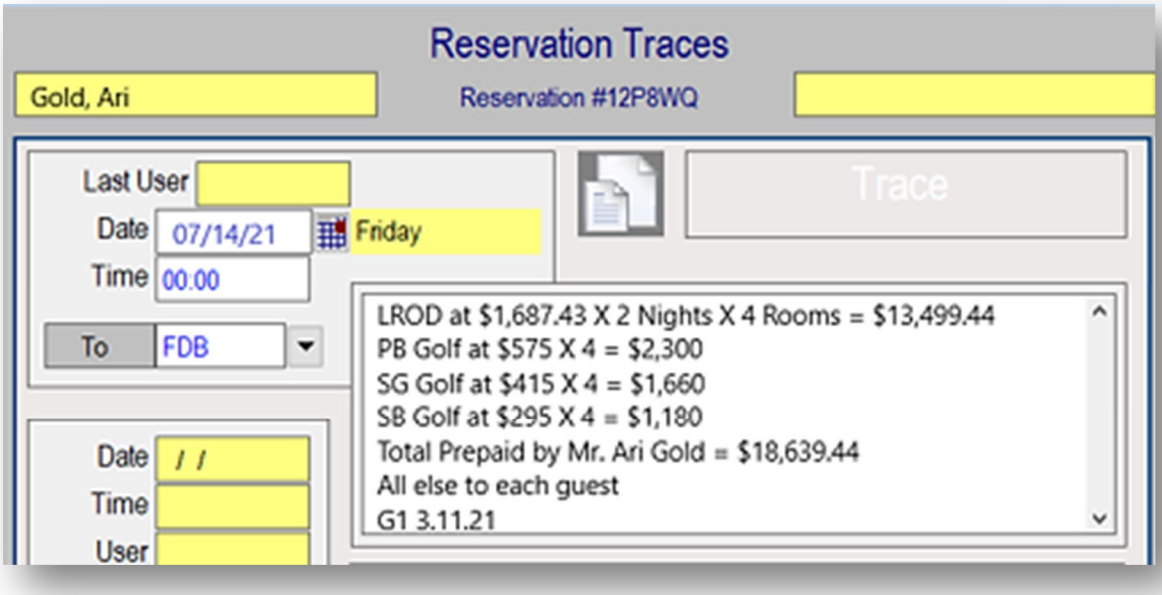
In other words, *who is paying for what?*

Here is an example of how you can phrase your question to obtain clear billing instructions from your primary guest:

"You have paid for the 2 Night deposit/Package. Will you be handling all charges for your guests, or should we ask for individual credit cards at check so each guest can handle their own additional charges?"

FDB Trace Example:

**The date should always be set for the date of the guest's arrival.*



Billing Scenarios

Partial Pre-payment by Primary

Primary FDB Trace
Prepaid by (Full Name):
(Room Type) at $(current rate)+++ x (Qty) x (Nights) = (Room Total)
(Golf Course) at $ (rate) x (players) = $ (total)
Total Pre-Paid $(Room + Golf Total)
All other charges to each guest

Secondary FDB Trace
Transfer "PKG" or "Room" or "Room and Golf" to R#xxxxx (Guest Name).
All other charges to each guest.

Add Chargeback Notes on all Pre-Paid Recreation: "PPD (Golf Course) x (Players). Charge to R#xxxxxx"

Primary Paid Deposit & Will Cover All Charges at Checkout

Primary FDB Trace
All charges for other rooms will be handled by R#xxxxx (Guest Name).

Secondary FDB Trace
DO NOT ASK FOR CC.
Transfer all charges to R#xxxxx (Guest Name).

Partial Pre-payment by Primary

Primary FDB Trace
Deposit paid as guarantee only.
Each guest to cover own charges.
Please refund any balance onto CC on file at checkout.

Secondary FDB Trace
(N/A)

Prepayment by Third Party (Confidential Rate= Y)

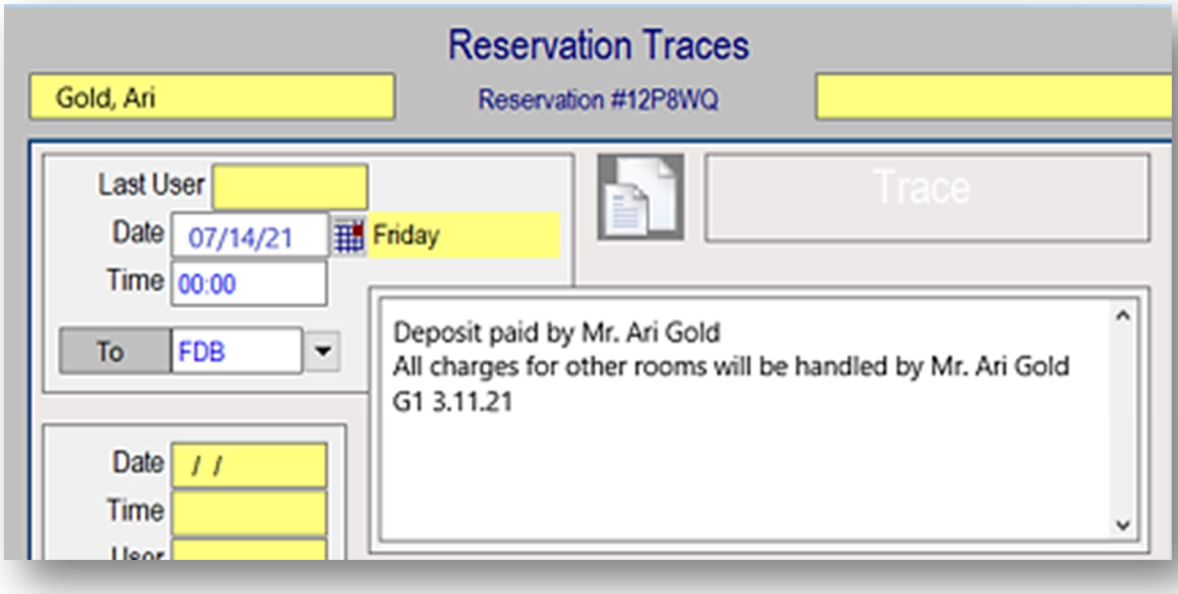
Primary FDB Trace
DO NOT DISCLOSE RATES – Move Deposit to C Folio.
3rd Party Prepayment By (Full Name):
(Room Type) at $(current rate)+++ x (Qty) x (Nights) = (Room Total)
(Golf Course) at $ (rate) x (players) = $ (total)
Total Pre-Paid $(Room + Golf Total)

Secondary FDB Trace
DO NOT ASK FOR CC.
Transfer all charges to R#xxxxx (Guest Name).

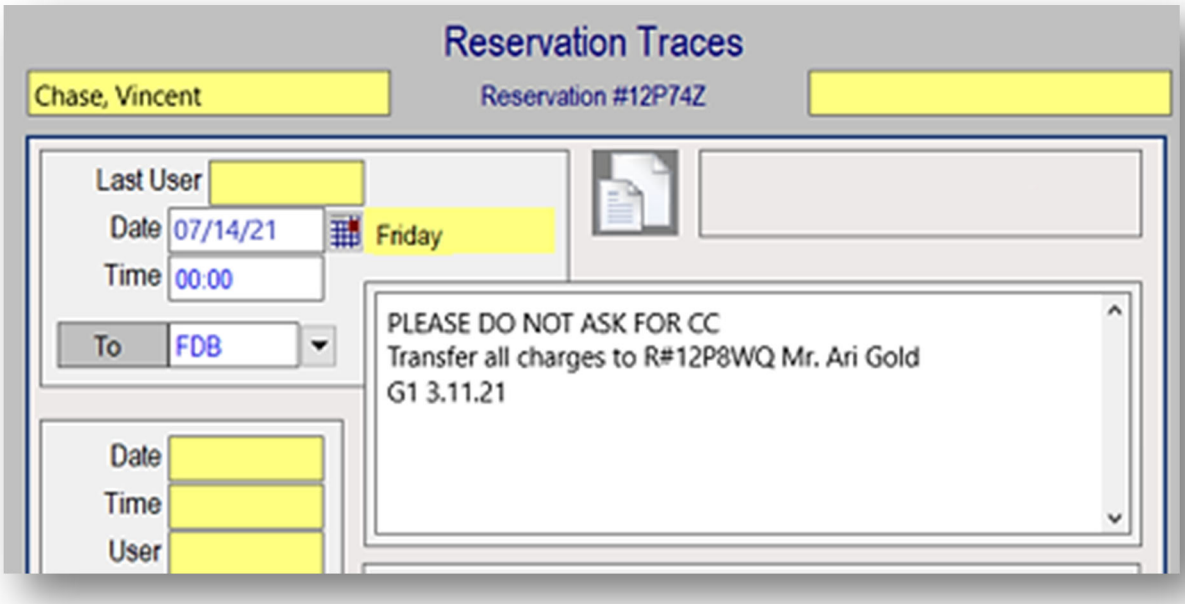
Add Chargeback Notes on all Pre-Paid Recreation: "PPD (Golf Course) x (Players). Charge to R#xxxxxx"

Scenario 1: The Primary Guest will handle all charges for all rooms.

Primary FDB Trace

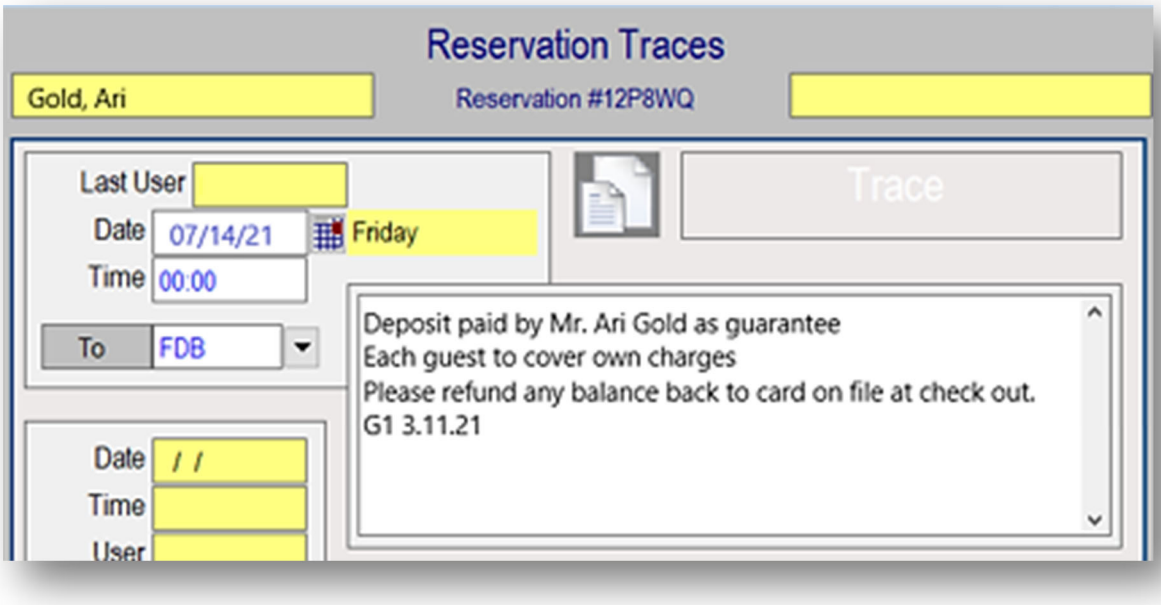


Secondary FDB Trace



Scenario 2: The Primary Guest paid the deposit,
but all charges will be split between each guest at checkout.

Primary FDB Trace

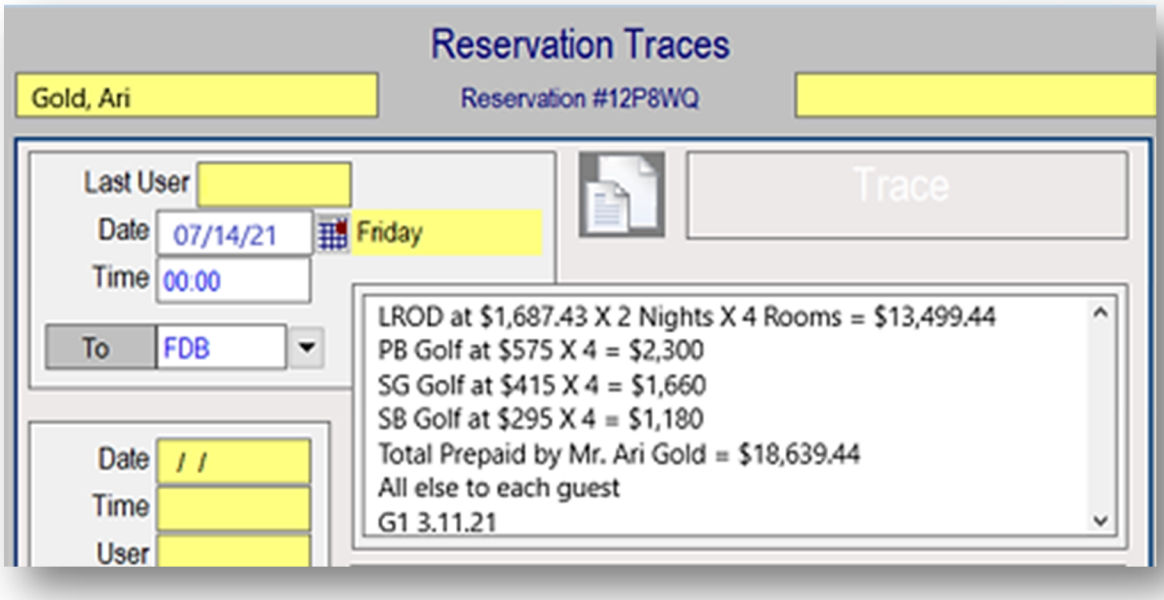


Secondary FDB Trace

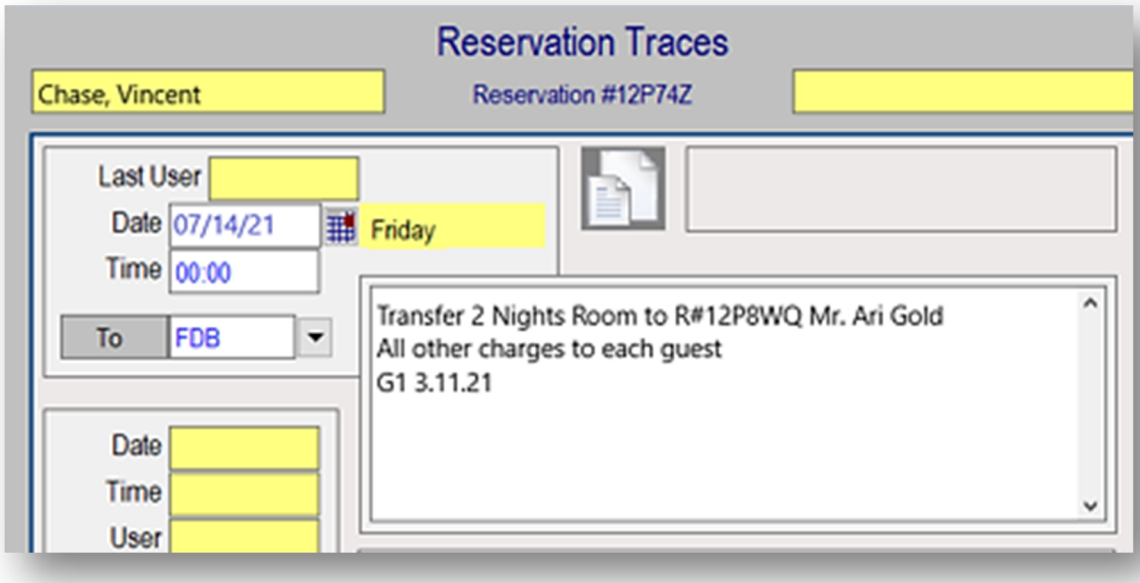
No Secondary FDB Trace is required for this Billing Scenario.

Scenario 3: The Primary Guest pre-paid all Room and Golf charges, but each guest will pay for their own incidentals at checkout.

Primary FDB Trace



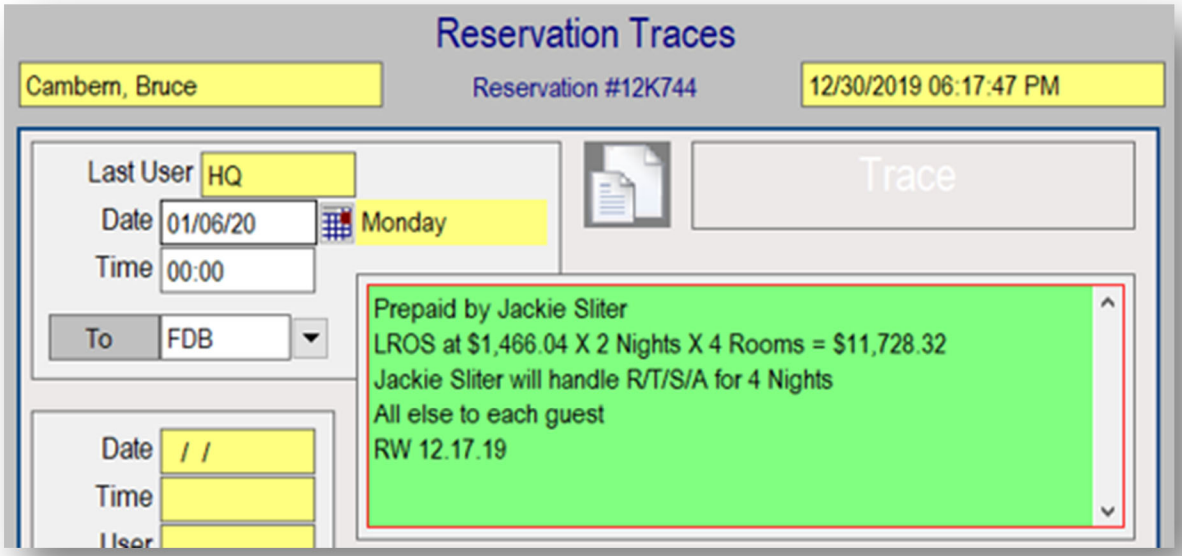
Secondary FDB Trace



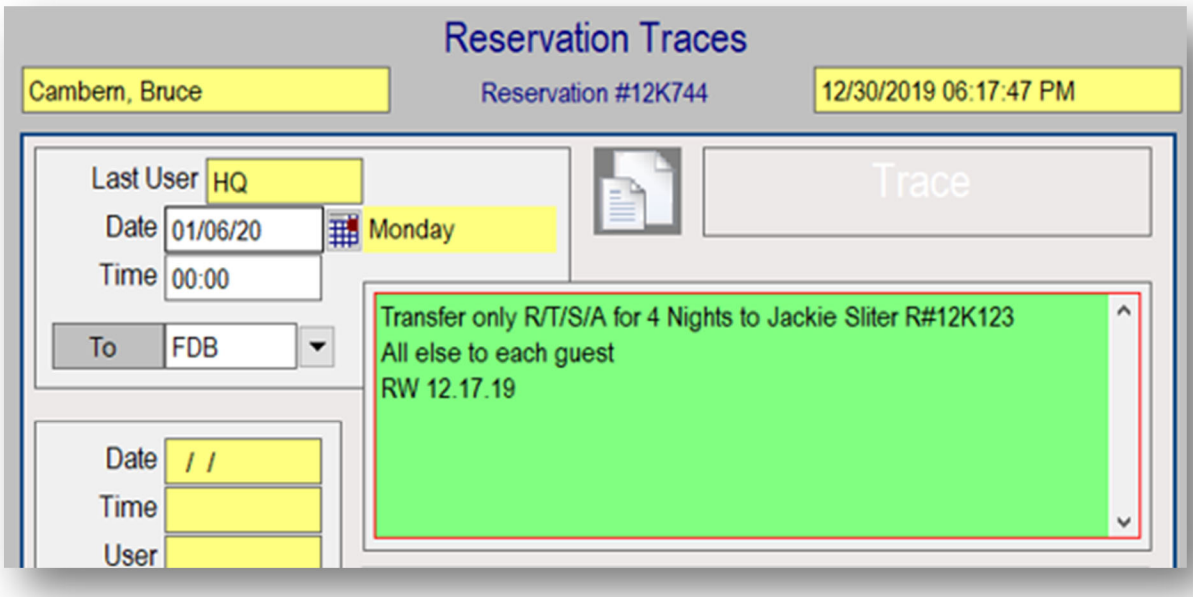
Note: The Pre-Paid golf is not included in the Secondary FDB Trace because all golf on the Itinerary should be whosed to the Primary Room Reservation.

Scenario 4: The Primary Guest is paying for all Rooms on the reservation, but each guest will pay for their own golf and incidentals at checkout.

Primary FDB Trace

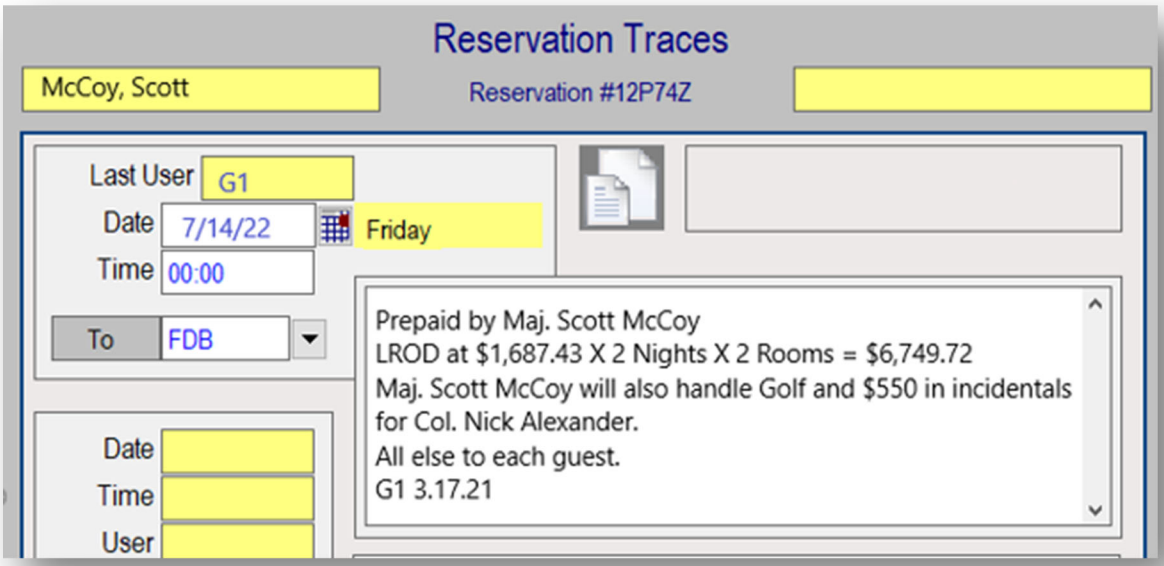


Secondary FDB Trace

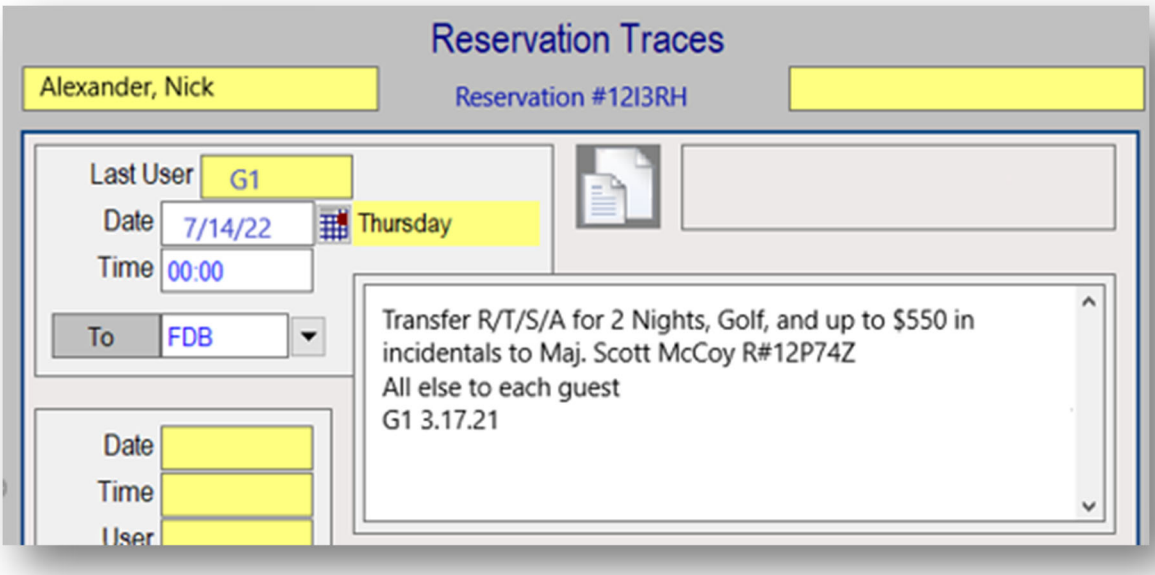


Scenario 5: The Primary Guest paid the deposit and will handle some additional charges, but all charges beyond the primary's instruction will be handled by each guest.

Primary FDB Trace

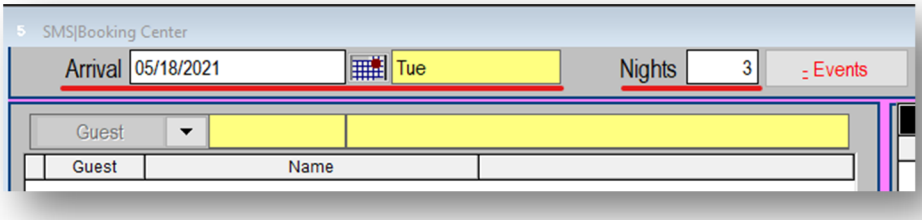


Secondary FDB Trace

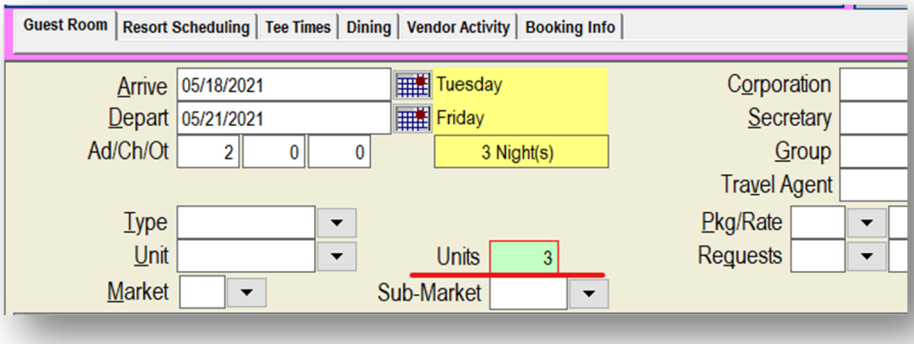


Multiple Rooms | Same Room Type

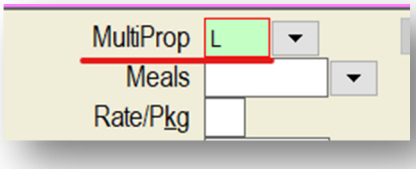
1. If a guest wants to book 2 or more rooms of the same type, begin your search in the Booking Center by entering the guest's requested dates of stay into the **Master Data Range** calendar.



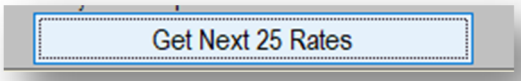
2. Navigate to the **Guest Rooms Tab** of the Booking Center and edit the **Units** field to the total number or rooms needed.



3. If the guest knows which **Resort Property** they want, you can add the Resort Code into the **MultiProp** field to narrow your results to one property.



4. Click **Get Next 25 Results**



Description	Your eyes should automatically zone in on Rack Rate rooms
Available	Since we are searching for 3 of the same room types, you should take a look at the Availability column to see exactly how many rooms are available within each room category. Reservations are allowed to oversell rooms to a certain extent, but it is best to try to avoid dipping into negative room availability.
1st w/o Tax	Since we entered 3 into the Unit field, the pricing in the 1st w/o Tax column is the nightly rate for all three rooms combined.

Rate Code	Description	Room Type	Vac	Avl	Grp	Unit Description	1st w/o tax
IRRL	Lodge Rack	LROS	13	8	1	Lodge Ocean	4170.00
RRL	Lodge Rack	LRCS	2	1	-3	Lodge Partial Ocear	3540.00
RRL	Lodge Rack	LRGS	12	7	0	Lodge Garden	2970.00
RRL	Lodge Rack	LRWS	5	5	-2	Lodge Fairway	3240.00
RRL	Lodge Rack	LRCF	9	9	0	FW1 Partial Ocean	3780.00
RRL	Lodge Rack	LRGF	3	3	0	FW1 Garden	3120.00
IRRL	Lodge - IAGTO Net R	LROS	13	8	1	Lodge Ocean	3544.50
IRRL	Lodge - IAGTO Net R	LRCS	2	1	-3	Lodge Partial Ocean	3009.00
IRRL	Lodge - IAGTO Net R	LRGS	12	7	0	Lodge Garden	2524.50
IRRL	Lodge - IAGTO Net R	LRWS	5	5	-2	Lodge Fairway	2754.00

5. Double click on the guest's preferred Room Type to add all three rooms to the Itinerary

   - On a single room booking, the **Location** column of the Itinerary Detail section will list the Room Code for the Room Type you selected, such as LROS.
   - Since we booked multiple rooms at once of the same room type, instead of the Room Code, the **Location** field lists the number of rooms we have booked.

Itinerary # 1050RI4TQ

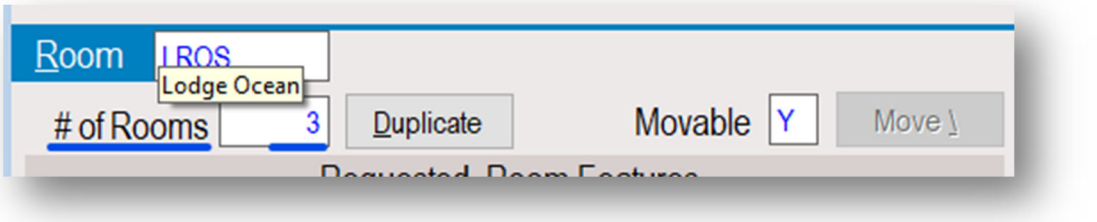
Res	Lev	Code	Description	Date	Time	Ppl	Location	Amount	D
12R02F	NEW	RRL	Lodge Rack ...	05/18/21-05/21/21		2	*3	14,090.94	

6. At this point in your booking process, you would proceed as normal:

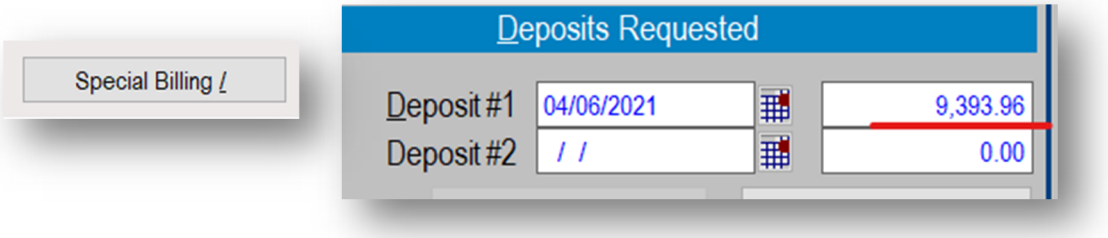
   - Add or create a Guest Tile to associate with the booking
   - Advise the guest of the two-night deposit – This two-night deposit is ***per room***
   - Quote the 14-day cancellation policy
   - Collect the guest's credit card.
   - Put the caller on hold so you can proceed to charge the deposit.
   - Return to the Booking Center

7. Double click the room reservation in the Itinerary Detail section to open the **Reservation Tile**. You will see that the Room section that this **Reservation Tile** includes **three** Lodge Ocean View Rooms.

Tip: If you hover your curser over the Room Code (LROS), a window will appear with the full name of that Room Type.



In **Special Billing**, you will see that your **Deposit #1** field contains the two-night deposit for all three rooms combined.



8. Prepare your Reservation Tile and collect the deposit like normal:

   - On the Reservation tile, click **E** for **Edit** and **Page Down**.
   - Follow the prompts to select the:
     - **Media Type** – Internet
     - **Media Source** – Pebblebeach.com
     - **Incoming Phone Number** – Reservation Center
     - **Guarantee Code** – A for Advanced Deposit
   - **Escape** to return to the Booking Center
   - Click **Complete** Itinerary
   - Double click the room to return to the Reservation tile
   - Click **Bills**
     - Enter Transaction Code - 970PPV (M, V, A, or D for the credit card code)
     - Enter the deposit amount
     - Enter C for Charge
     - Page Down
     - Select Yes to verify that all entries are correct
     - Move your curser outside of the credit card number field
     - Page Down
     - Press any button to return to Bills
     - Exit to return to the Reservation Tile
     - Exit to return to the Booking Center

9. Gather information from the Primary Guest about all rooms:
    - *What are the names of the guests staying in each room?*
    - *Will the Primary Guest be covering all charges, or will each guest be paying for their own charges at checkout?*
    -

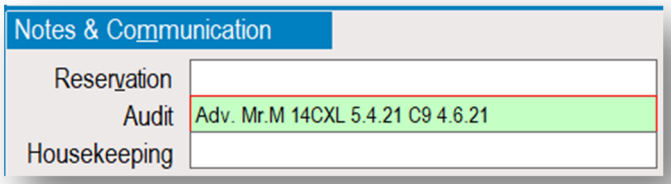
10. Close your call:
    - Reconfirm the booking and cancellation window with your guest
    - Inform the guest that their confirmation email will arrive within one hour
    - Ask if they need assistance with anything else
    - Thank them for calling
    - End the call.

Clean Up Your Reservation

1. Double click the room in the Itinerary Detail section to open the Reservation Tile

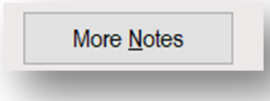
2. Click E to Edit the Reservation Tile

3. Enter the quoted cancellation window into the Audit line in Notes & Communications



4. Page Down to save.

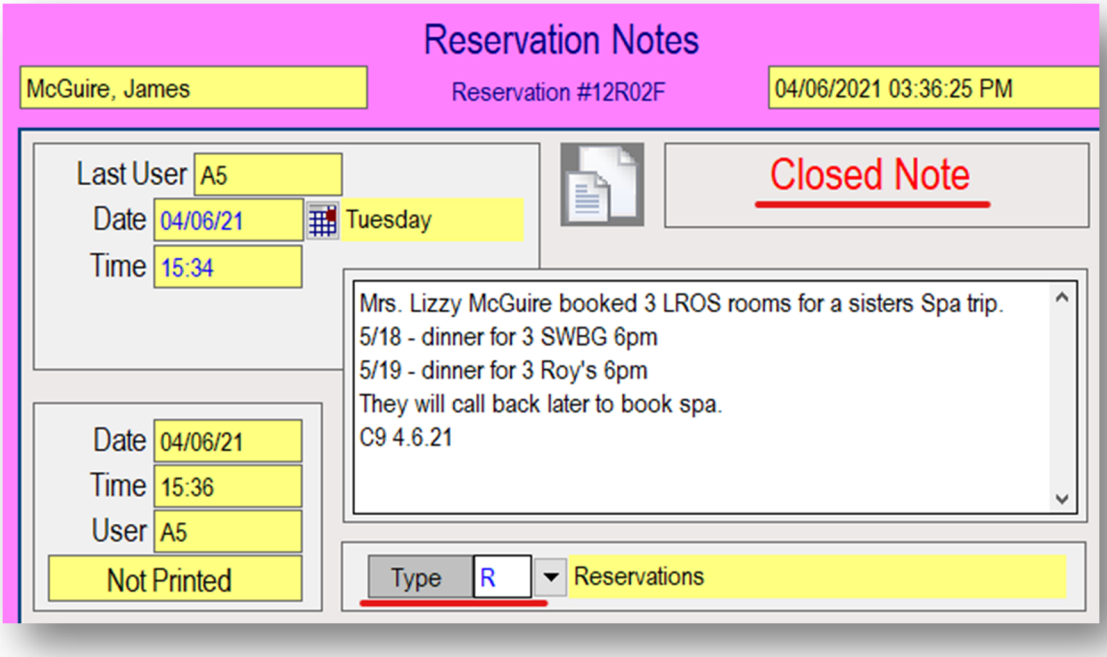
5. Click **More Notes** to add a **Y Note** and an **R Note**



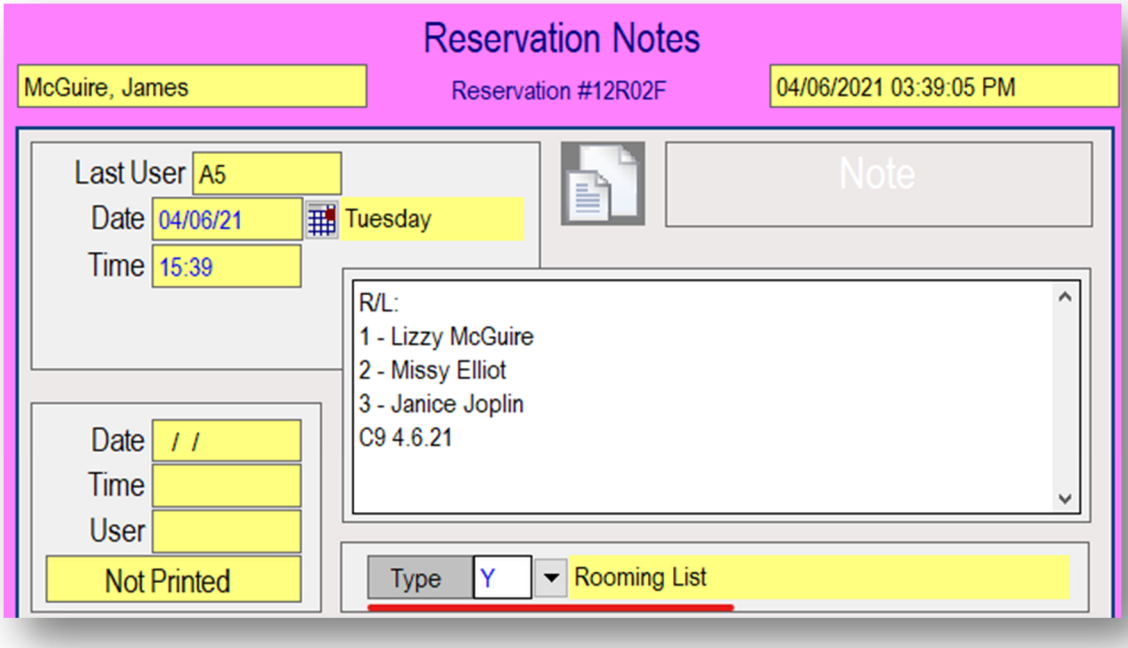
The **R Note** must state:

- Who the guests are
- Why they are visiting
- A brief synopsis of what was booked
- Any pertinent notations.

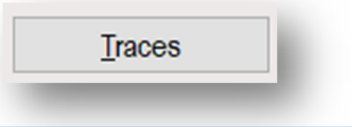
**This should be a Closed Note*



The **Y Note** will be your **Rooming List**, i.e. the names of all guests who will be staying in each room:



6. Click the **Traces** button on the Reservation Tile to add a **Front Desk Billing FDB Trace**



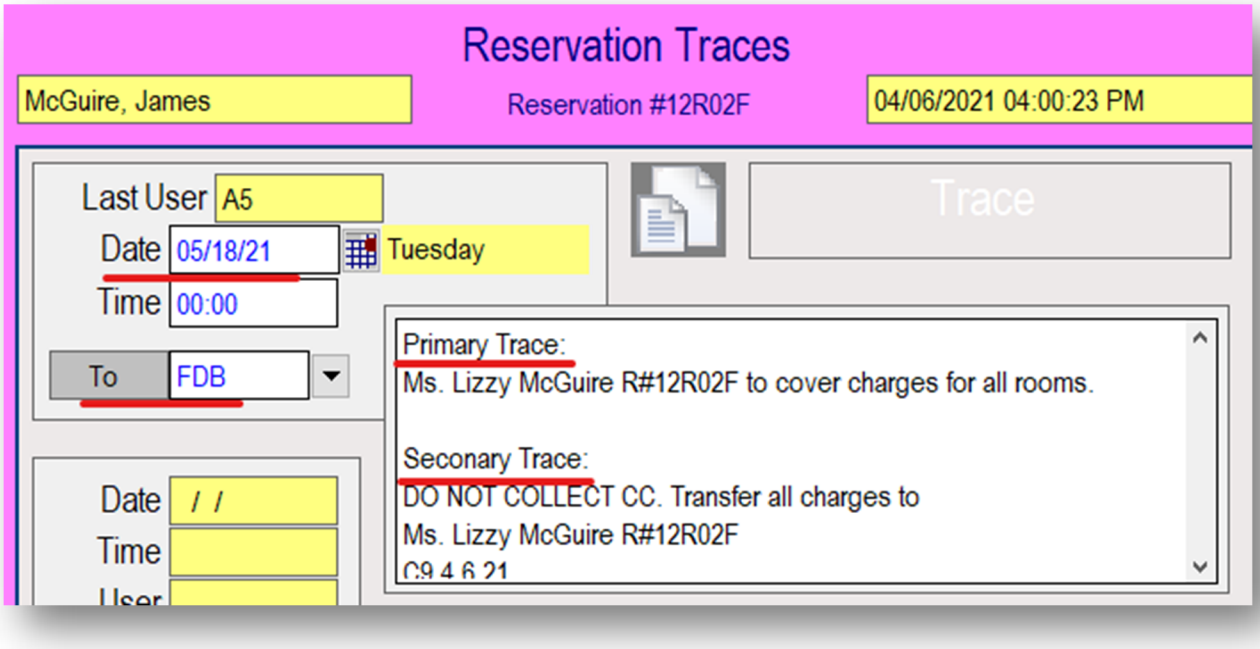
In this example, we booked three rooms within one Reservation Tile. Eventually, we will need to split – or **Duplicate** – these rooms into three separate Reservation Tiles; one for each guest.

Consequently, we will also need to put a separate **FDB Trace** on each Reservation Tile to provide the Front Desk with billing instructs for all three rooms.

These two tasks do not need to be completed until the **Reservation Auditors** send us our **10 Day Arrival** emails.

To simplify that process later on, we are going to create one master FDB Trace right now with the messages for all three rooms. Once we are within 10 days, we will just need to copy/paste the corresponding message from this Master Trace into a new Trace within the other two rooms.

- Set the **Date** of the FDB Trace for the night of arrival
- See the **Front Desk Billing Trace** section of this manual for assistance on how to write your FDB Traces based on your guest's **Billing Scenario**



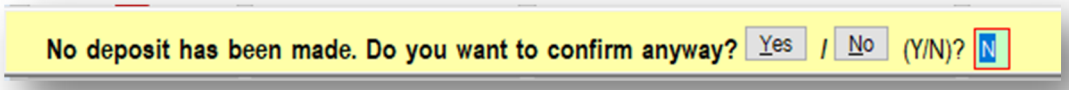
7. **Escape** to return to the **Booking Center**

8. Click Confirm Itinerary

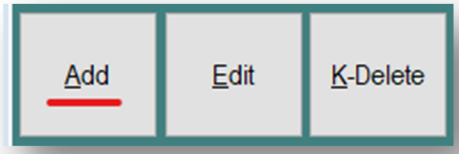


9. Click Escape to exit the pop-up Bills window

10. Click Yes to continue with your confirmation



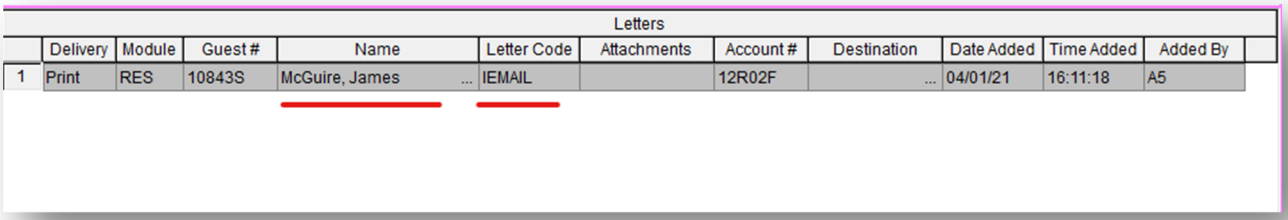
11. In Letters, click A to Add a new confirmation email.



12. Enter the Itinerary Confirmation Email Code: IEMAIL



13. Page Down to send



14. Escape to return to the Booking Center

15. Complete and Save your Booked NAVIS Lead, then move on to your next call!

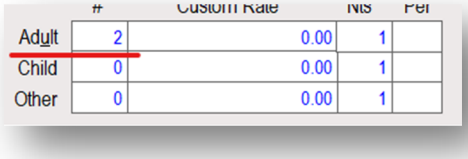
10 Day Arrival Process

1. Prepare the Primary Reservation Tile before Duplicating the Rooms:

In our example booking, we have three rooms that need to be Duplicated. When we Duplicate the room, SMS will create two additional Reservation Tiles that are identical to the initial Reservation Tile.

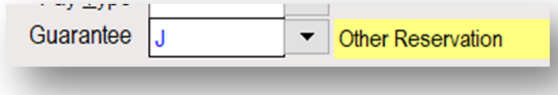
Reservation Tile 2 and 3 will need to be set up differently than the Primary. To make this process easier, we adjust the Primary Reservation Tile to exactly what we want Tiles 2 and 3 to look like before Duplicating. This way, after the Reservation is split into three rooms, we only need to re-edit the Primary Reservation Tile instead of manually editing both rooms 2 and 3.

- Click **Edit** to adjust the **Reservation Tile**
  - Change the **number of adults** to the correct # that will reside in each room.



	#	Custom Rate	Nts	Per
Adult	2	0.00	1	
Child	0	0.00	1	
Other	0	0.00	1	

  - Change the Guarantee Code to J for Other Reservation



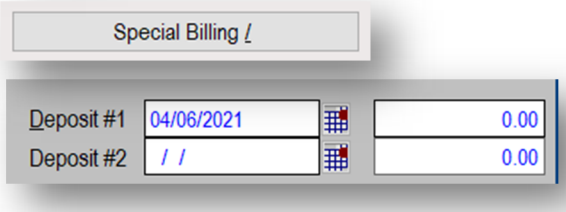
Guarantee J Other Reservation

  - Delete the cancellation quote in the **Audit** line
    (Cut and Paste this elsewhere temporarily since you will need to add this line back later.)



Audit Adv. Mr.M 14CXL 5.4.21 C9 4.6.21

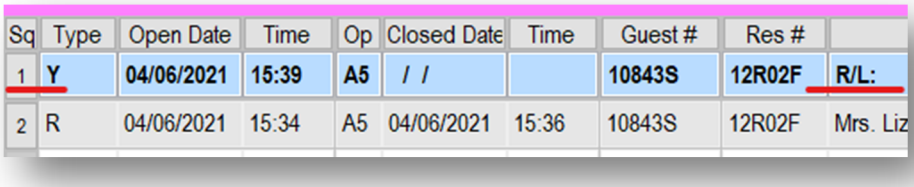
- Enter **Special Billing**
  - Click E to **Edit**
  - Change the **Deposit 1** field to $0.00
  - **Page Down** to Save.



Special Billing /

Deposit #1	04/06/2021	0.00
Deposit #2	/ /	0.00

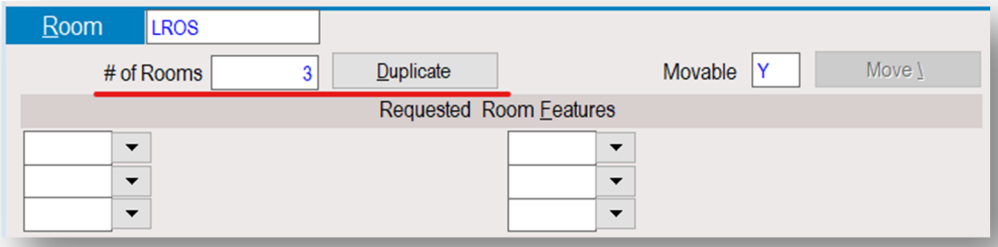
- Open the More Notes Tab and open the **Y Note Rooming List**
  - Copy these names using your computer's Snipping Tool or a scratch paper



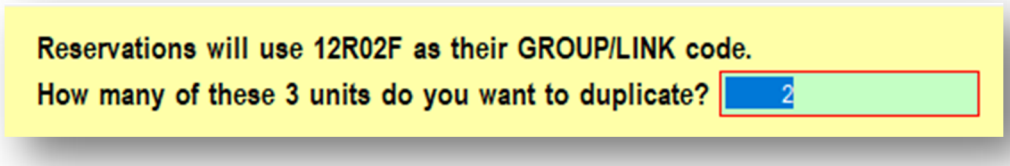
Sq	Type	Open Date	Time	Op	Closed Date	Time	Guest #	Res #	
1	**Y**	**04/06/2021**	**15:39**	**A5**	**/ /**		**10843S**	**12R02F**	**R/L:**
2	R	04/06/2021	15:34	A5	04/06/2021	15:36	10843S	12R02F	Mrs. Liz

2. Duplicate the Reservation:

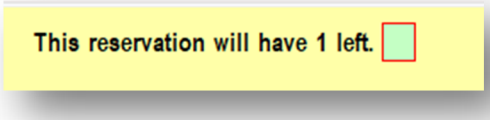
- Click the **Duplicate** button in the **Room** section of the **Reservation Tile**



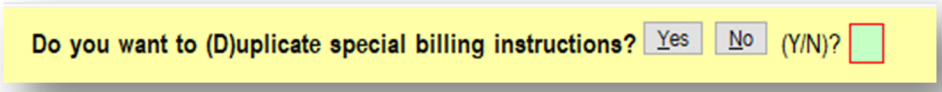
- Page Down to agree to Duplicate the reservation for all rooms.



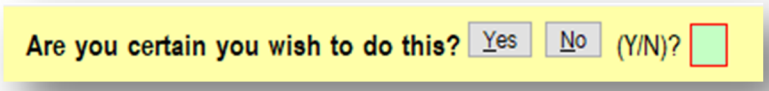
- Page Down again to confirm.



- Click Y on your keyboard to agree. (This is why we changed the Deposit #1 line to $0.0)



- Click Yes to confirm.

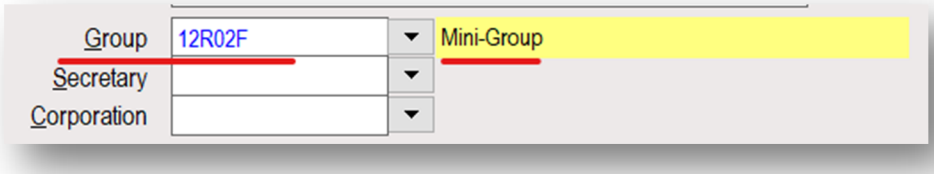


3. Reset the Primary Reservation Tile:

- Change the Guarantee Code back to A for Advanced Deposit
- Update the Deposit 1 amount in Special Billing to the total deposit paid by the Primary Guest
- Paste the cancellation message back into the Audit line in the Notes & Communications section

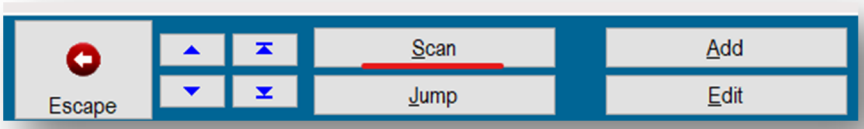
4. Add the Secondary Guest Information to the Secondary Reservation Tiles

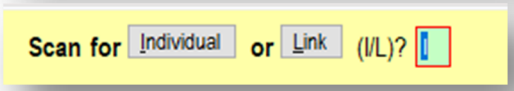
On the Primary Reservation Tile, you will see that a code has auto-populated into the Group field with the term "Mini-Group" written next to it.



Because we duplicated this Guest Tile, all three Reservation Tiles that now exist on this Itinerary will have this same Group Code in this field, which links these rooms together.

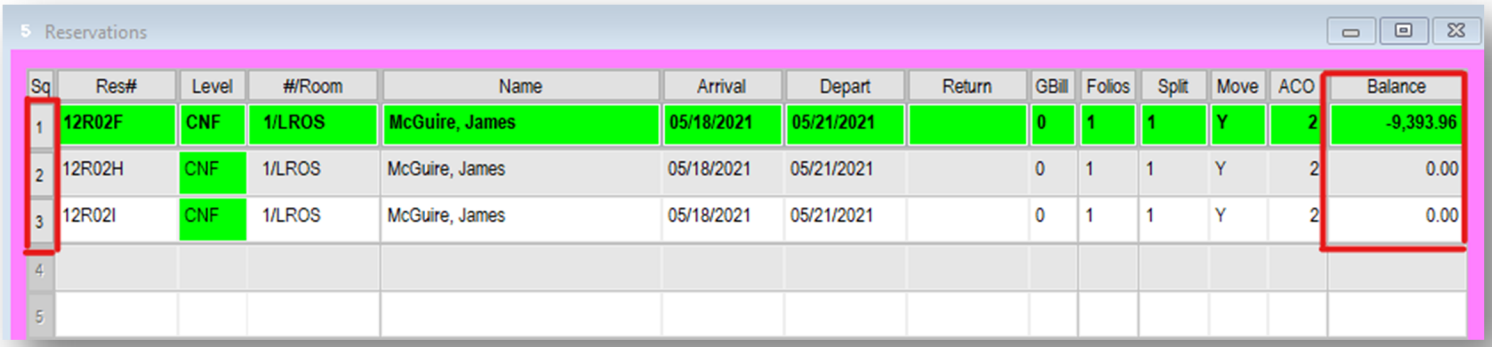
- Click the **Scan** Button, then **Link**
  (Keyboard shortcut: **S + L**)





A window will appear that lists all room reservations with the same Group Code in the Group field. These are our three rooms that were previously all on one Reservation Tile. You can see which room is the primary because the **Balance column** will list the deposit that was paid by the Primary Guest, while the balance of the other two Secondary Reservations are $0.00.

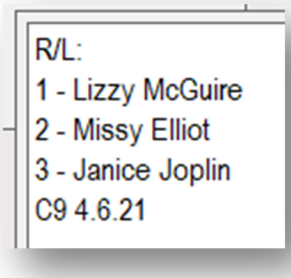
- Select the **Sequence Number** of a Secondary Reservations to open that Reservation Tile



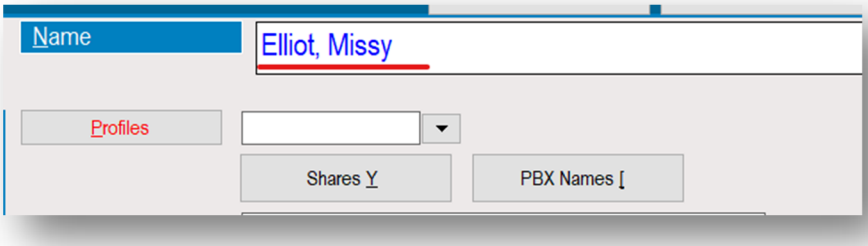
Sq	Res#	Level	#/Room	Name	Arrival	Depart	Return	GBill	Folios	Split	Move	ACO	Balance
1	12R02F	CNF	1/LROS	McGuire, James	05/18/2021	05/21/2021		0	1	1	Y	2	-9,393.96
2	12R02H	CNF	1/LROS	McGuire, James	05/18/2021	05/21/2021		0	1	1	Y	2	0.00
3	12R02I	CNF	1/LROS	McGuire, James	05/18/2021	05/21/2021		0	1	1	Y	2	0.00
4													
5													

- Click E to Edit this Secondary Reservation Tile.

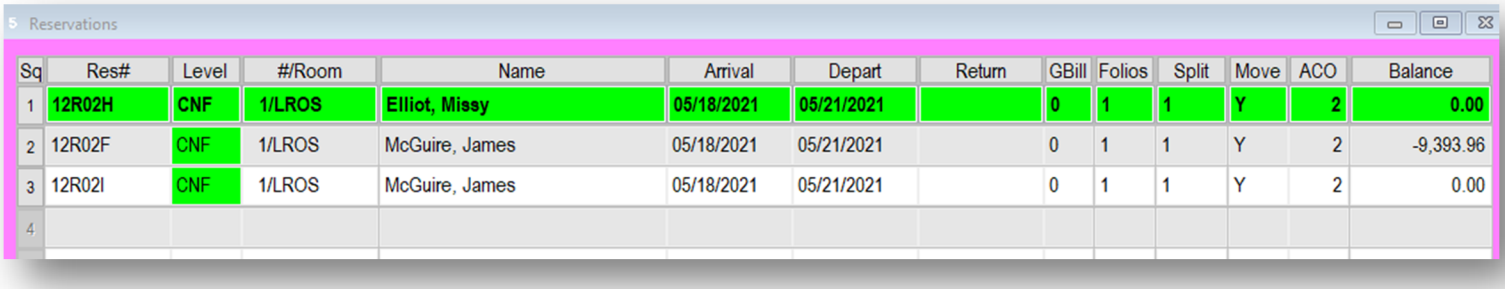
- Review the information you set aside from the **Y Note**.
  Input the name of your second guest into the Name Field in the **Last Name, First Name** format.
  Page Down to Save.



- Your Secondary Reservation Tile Name Field should now look like this:

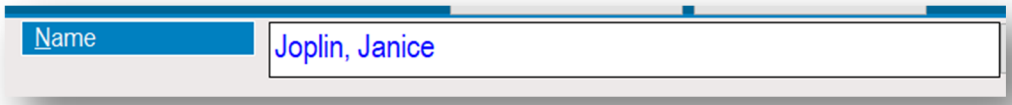


- Slick **Scan + Link** again to re-open the list of Reservations with this same Group Code
  You can now see that the name you just entered is now visible on this list.



Sq	Res#	Level	#/Room	Name	Arrival	Depart	Return	GBill	Folios	Split	Move	ACO	Balance
1	**12R02H**	**CNF**	**1/LROS**	**Elliot, Missy**	**05/18/2021**	**05/21/2021**		**0**	**1**	**1**	**Y**	**2**	**0.00**
2	12R02F	CNF	1/LROS	McGuire, James	05/18/2021	05/21/2021		0	1	1	Y	2	-9,393.96
3	12R02I	CNF	1/LROS	McGuire, James	05/18/2021	05/21/2021		0	1	1	Y	2	0.00
4													

- Select the Sequence Number of the remaining Secondary Reservation to add the final name to the third room following the same steps as above.

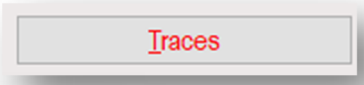


Sq	Res#	Level	#/Room	Name	Arrival	Depart
1	**12R02H**	**CNF**	**1/LROS**	**Elliot, Missy**	**05/18/2021**	**05/21/2021**
2	12R02I	CNF	1/LROS	Joplin, Janice	05/18/2021	05/21/2021
3	12R02F	CNF	1/LROS	McGuire, James	05/18/2021	05/21/2021

5. Edit / Add the Secondary FDB Traces to each room:

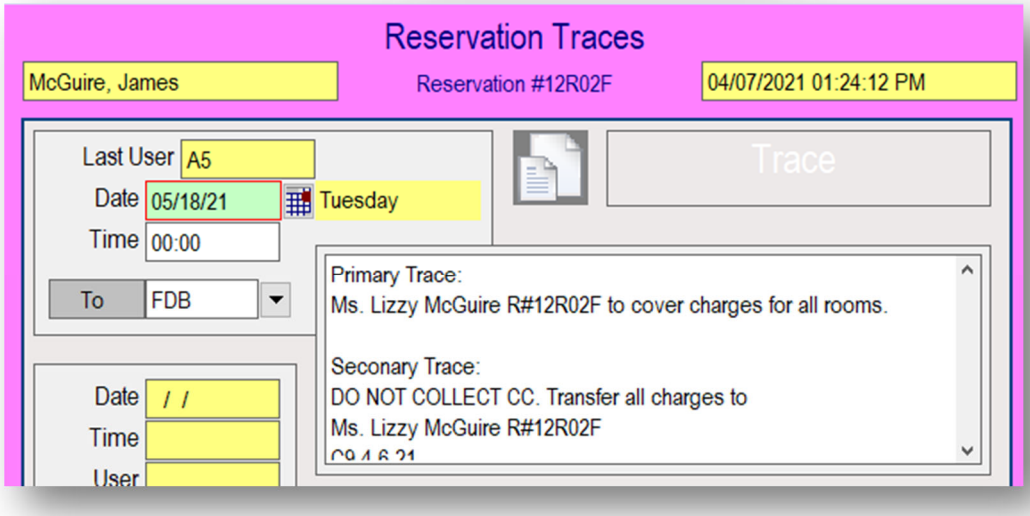
- **Scan + Link** and select the **Sequence Number** of the **Primary Guest** to return to the **Primary Reservation Tile.** (The Reservation with the money on it.)

- Click on the **Traces** button and open the **FDB Trace**



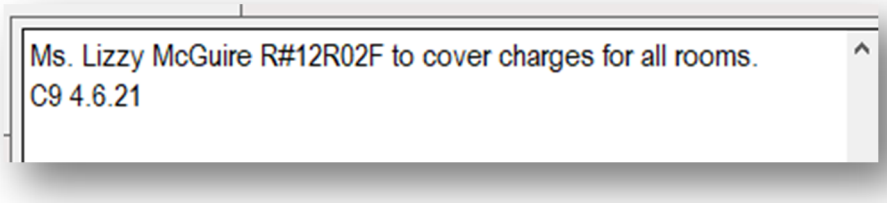
- Click **Edit** to modify the Trace





- Copy/Paste the Secondary Trace to a scratch document
- Delete the Secondary Trace from this FDB
- Delete the words "Primary Trace" from the top line
- Page Down to Save

This is your new Primary FDB Trace:

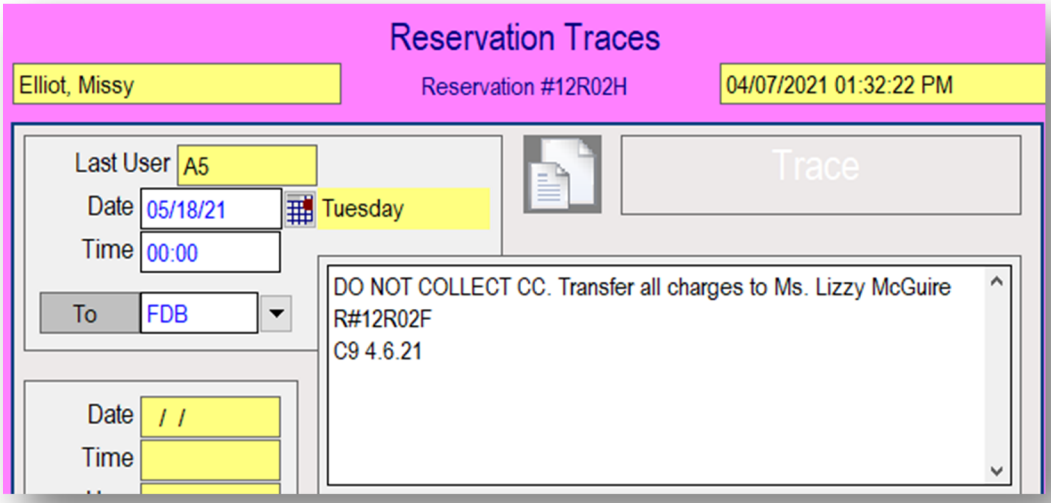


- Escape to return to the Reservation Tile

- Scan + Link and select the Sequence Number for one the Secondary Reservation Tiles.

- On the Secondary Reservation Tile:
  - Click **Traces**
  - Click **A** to Add a new Trace
  - Set the **Date** as the Date of Arrival
  - Set the **Time** as 00:00
  - Set the **To** field as FDB (Front Desk Billing)
  - Paste the **Secondary FDB Trace** that you had copied to your scratch document
  - **Page Down** to Save

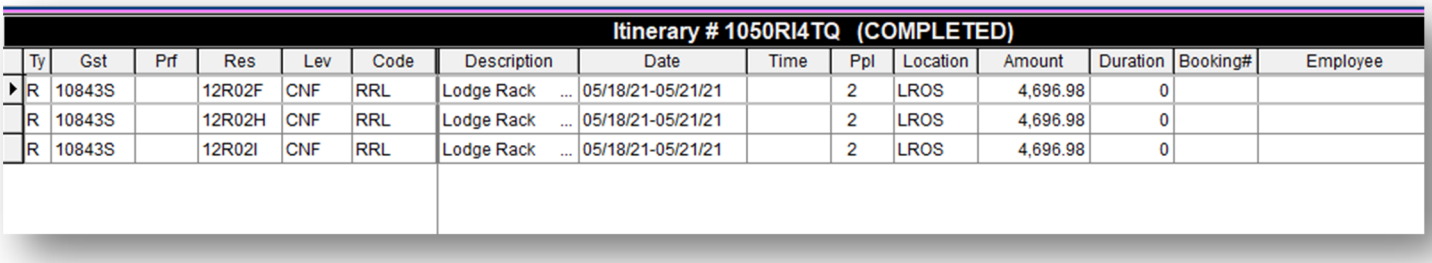
This is your Secondary FDB Trace:



- **Scan + Link** and repeat this same process to add an identical **Secondary FDB Trace** to the third room on this Itinerary.

- Escape until you arrive back in the **Booking Center**.

  You can now see all three rooms, which were previously one line in the Itinerary Detail section, have been Split Out and are visible as three separate lines.



Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location	Amount	Duration	Booking#	Employee
R	10843S		12R02F	CNF	RRL	Lodge Rack ...	05/18/21-05/21/21		2	LROS	4,696.98	0		
R	10843S		12R02H	CNF	RRL	Lodge Rack ...	05/18/21-05/21/21		2	LROS	4,696.98	0		
R	10843S		12R02I	CNF	RRL	Lodge Rack ...	05/18/21-05/21/21		2	LROS	4,696.98	0		

6. Add any Room-Specific Information to each of the Reservation Tiles, such as:

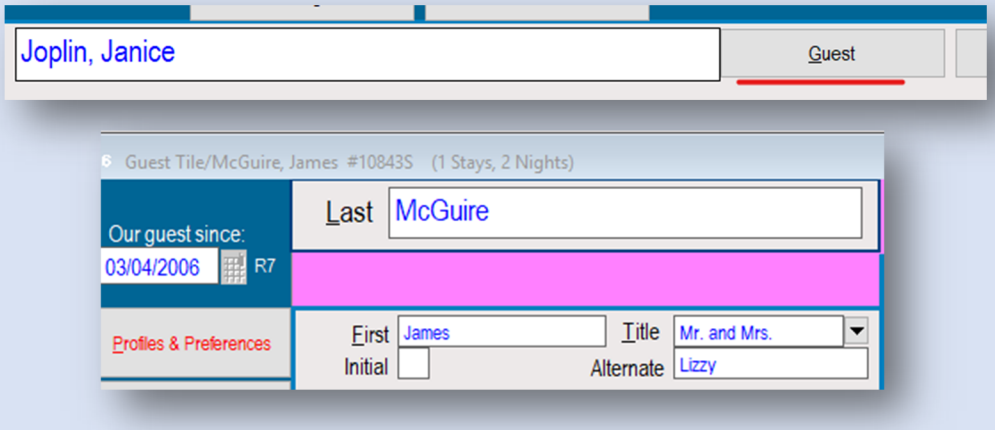
- the number of adults/children
- Special room requests
- Special Occasions

7. Reply All to your 10 Day Arrival Email in Outlook to let the Auditors and your Supervisor know that this reservation is ready for arrival.

Important Note:

In our example booking that we just completed, Mrs. McGuire was covering all charges, which means we do not need Guest Tiles for our other two guests because they will not be paying for anything therefore do not need to have a credit card saved on file.

If you visit one of the Secondary reservation Tiles on that booking and click **Guest** next to the **Name** field, Mrs. McGuire's Guest Tile will open in a new window because all charges will be paid by Mrs. McGuire's credit card.



If the other guests in this group *had* planned to pay for some or all of their own charges, we would, at this point, need to create **C/O (care/of) Guest Tiles** for the two Secondary Guests. Please proceed to the following page for instruction on how to create **Care/Of Guest Tiles**.

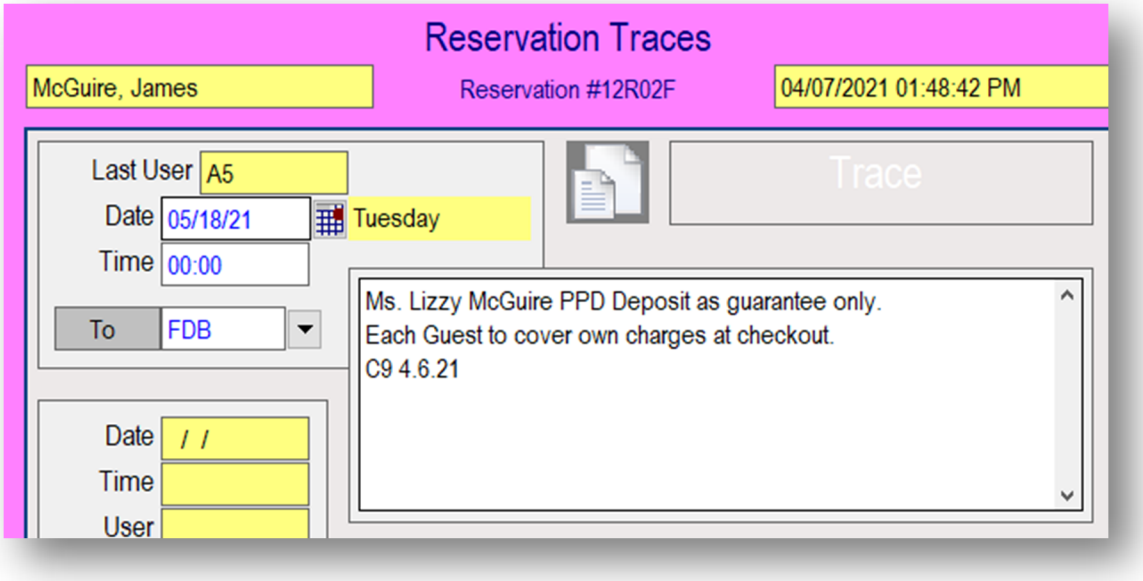
C/O Guest Tiles

Any time a Guest is going to be paying for something, they need to have their own Guest Tile. If you have booked a multiple room reservation in which multiple guests will be paying for some or all of their own charges at checkout, you will need to create C/O (care of) Guest Tiles for each Guest that plans to pay.

Since you, as the Reservations Agent, will likely only speak to the Primary Guest on a Multiple Room Reservation, you will not have enough information to complete a full Guest Tile for every single Secondary Guest who will attend the trip. Because we do not have all details of every guest, we create C/O Guest Tiles that are essentially placeholder Guest Tiles that only contain the absolute minimum of information required to save it.

The Front Desk will fill in the missing details of the C/O Guest Tile once the Secondary Guests arrive to check in.

This is an example of an FDB Trace that would require us to create C/O Guest Tiles:

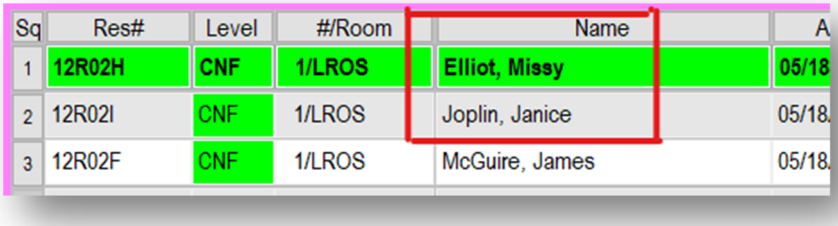


Create a C/O Guest Tile

Note: This instruction follows the 10 Day Arrival Instruction in the previous section of this manual.

1. Beginning on the **Primary Reservation Tile**, **Scan + Link** to open the list of all Reservation Tiles associated with this booking's **Mini-Group Code**.

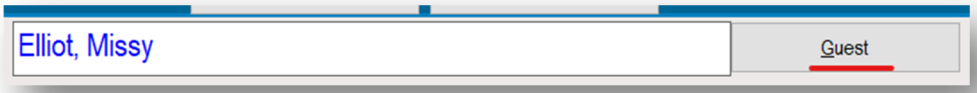
2. Take a screenshot or notate all **Secondary Guest Names** from this list of rooms and set this list aside.



Sq	Res#	Level	#/Room	Name	A
1	12R02H	CNF	1/LROS	Elliot, Missy	05/18
2	12R02I	CNF	1/LROS	Joplin, Janice	05/18
3	12R02F	CNF	1/LROS	McGuire, James	05/18

3. Select the **Sequence Number** of one of the Secondary Reservation Tiles to open their reservation.

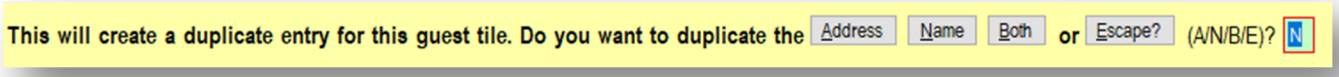
4. Click the Guest button next to the Name Field to open the Primary Guest's Guest Tile



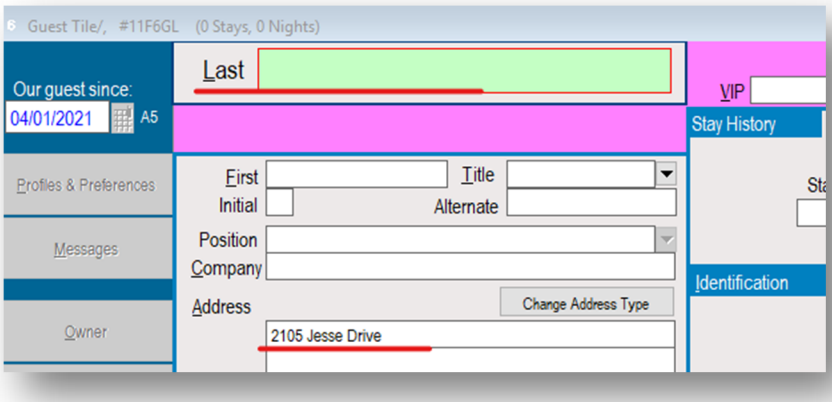
5. The Guest Tile of Primary Guest who initially booked the reservation will open.
Click the Duplicate button from the button bar at the bottom of the Guest Tile window.



6. Type A or click the Address button



7. A **new Guest Tile** with a **blank Name field** will open and will automatically be set in **Edit Mode**

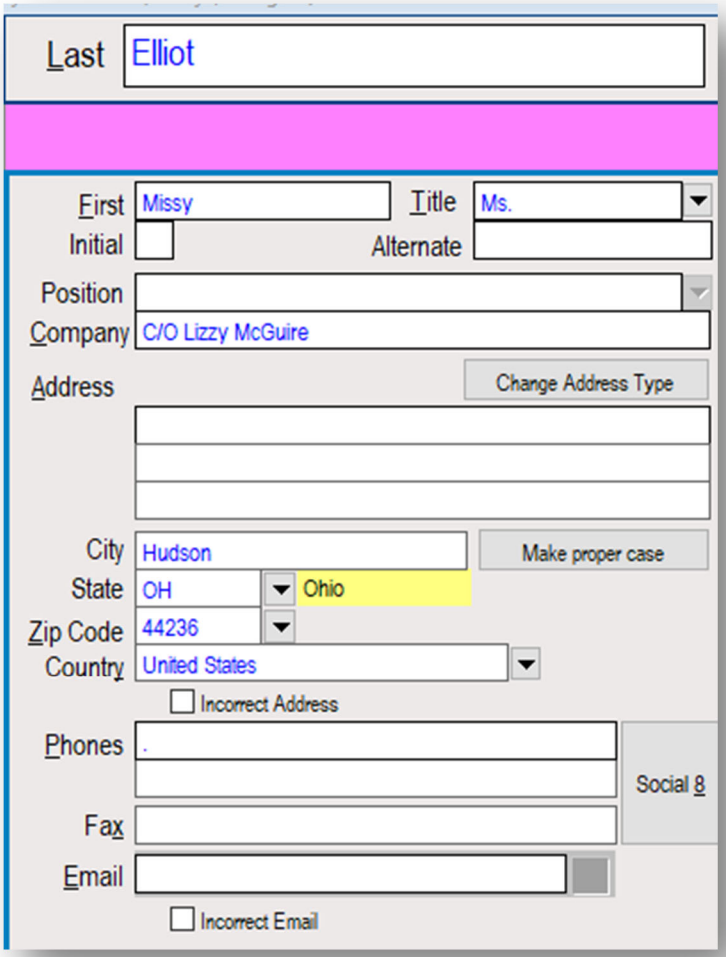


Some information (the Address, Phone Number, and Email fields) will be carried over from the Primary Guest's Guest Tile.

8. Remove some of the Primary Guest's Information from the new Guest Tile:
   - Delete the first line of the Address (Leave the City/State/Zip)
   - Delete the Phone Number, but leave a dot (.) in its place
   - Delete the Email Address

9. Fill in information from the Secondary Guest:
   - Enter one of the Secondary Guest' names into the Last and First name fields
   - Select the appropriate Title for the Secondary Guest
   - In the Company Field, write "C/O" followed by the Primary Guest's Name

10. Page Down to Save and select the following codes for each prompt:
    **These are specific selections that should be chosen for all C/O Guest Tiles*
    - Media Type – 13 | N1 | Brand Awareness
    - Source Scan – 03 | N10015 | Customer Referral



11. Once saved, enter Profiles & Preferences:
    - Click Edit to add the M or F into the Gender field.
    - Page Down to save, then Escape return to the main page of the Guest Tile

12. Now that one C/O Guest Tile is complete, you can quickly create as many additional Guest Tiles as you need:
    - Click Duplicate again to create your second C/O Guest Tile.
    - Select A for Address just like the first time.
    - Since you are duplicating an existing Guest Tile, the only fields you need to update are the Last Name, First Name, and Title
    - Page Down to save.
    - Select the same prompt codes as your initial Guest Tile
    - Enter Profiles &Preferences to update the Gender field once more.

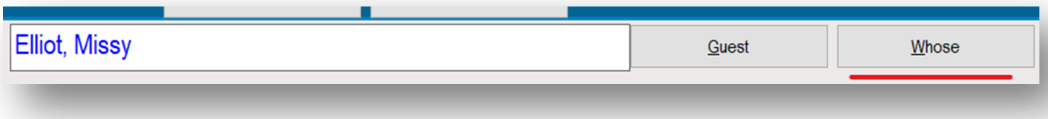
13. **Escape** to return to the Reservation Tile

14. **Scan + Link** to pull up the list of Reservations in this Mini-Group

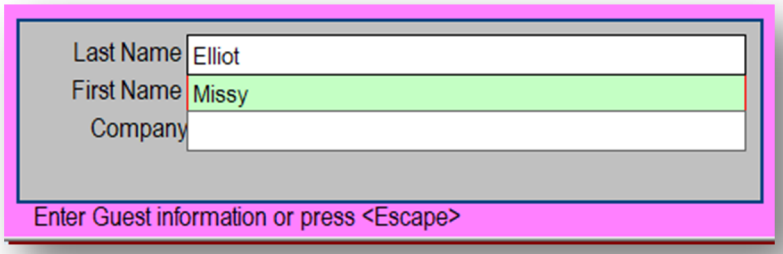
15. Select the **Sequence Number** of one of the **Secondary Reservation Tiles**

16. **Whose** the appropriate Guest Tile that you just created to this Reservation Tile

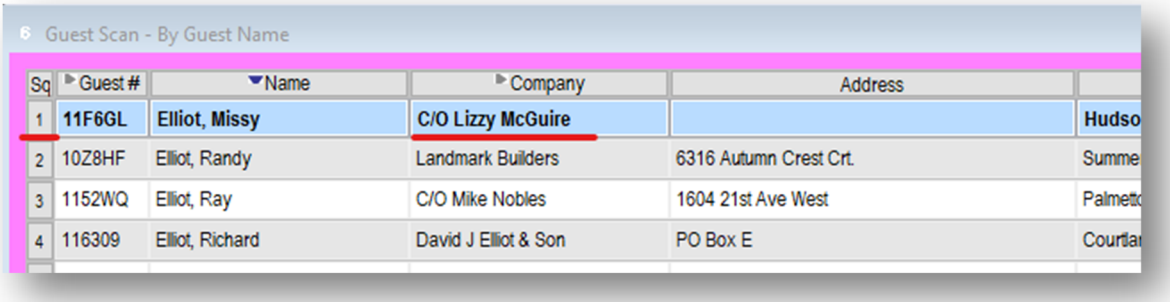
- Click the **Whose** button in the **Name** section of the Reservation Tile



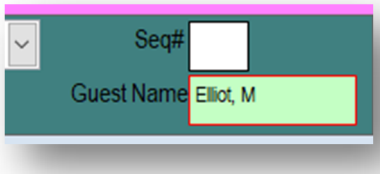
- A **search box** will appear at the bottom of the window.
  - Enter the Last Name and First Name of the Secondary Guest on this Reservation Tile
  - Page Down to search



- A **Guest Scan Search Window** will open:
  - The most relevant search result at the top of the list.
  - In the event that multiple Guest Tiles exist with the same name as your guest, you can recognize which listing is your C/O Guest Tile because the **Company** field will say "C/O (Your Primary Guest's Name)"

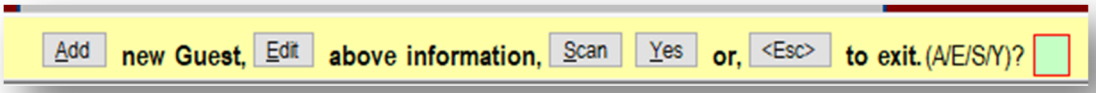


Note: If you do not see your C/O Guest Tile at the top of this list, you can use the **Guest Name Search Field** in the bottom right corner to search for your guest:
  - The search should be entered in this format: Last Name, First Name
  - Page Down to Search



- Select the **Sequence Number** of your **C/O Guest Tile** to associate that Guest Tile to the Reservation Tile.

- Click **Y** for **Yes** to proceed

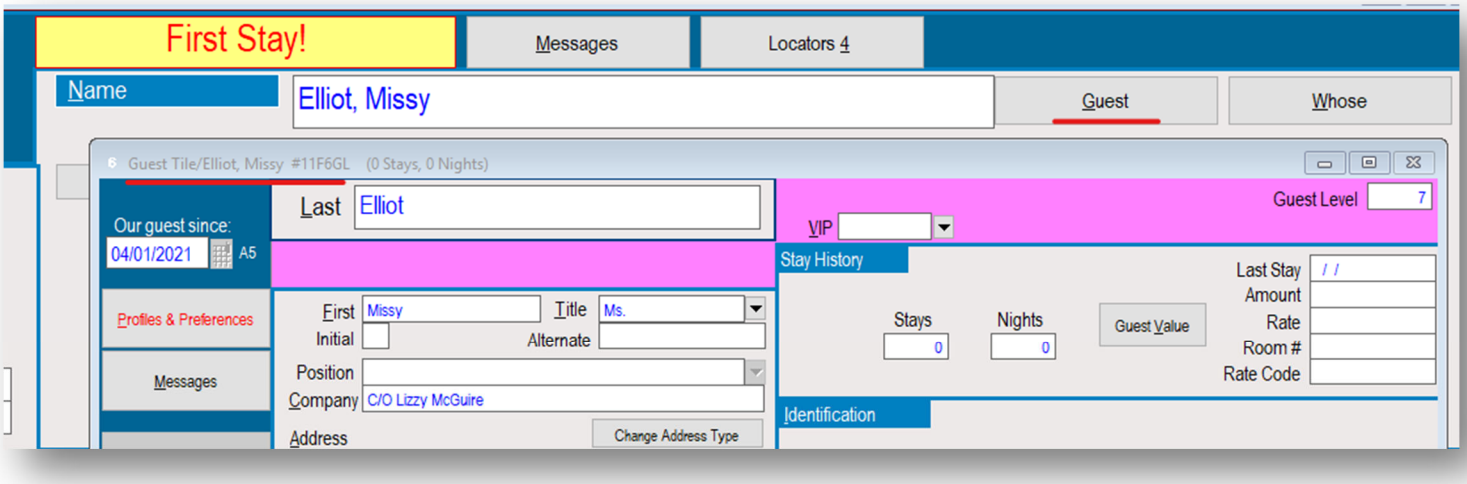


- Click **Y** for **Yes** to proceed



You have now **Whosed** a **C/O Guest Tile** to this **Secondary Guest's Reservation Tile**!

Now, if you click the **Guest Button** next to the **Name** field of the Reservation Tile, instead of the Primary Guest's Guest Tile opening, you will see the Secondary Guest's C/O Guest Tile open in a new window.



17. Repeat this Whosing Process with the next Secondary Guest's Reservation Tile until all Secondary Guests have their own C/O Guest Tiles associated with their room reservations.

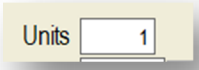
Multiple Rooms | Different Room Types



In the previous section, we discussed booking multiple rooms of the same room time which meant that we started by having all rooms within one Reservation Tile.

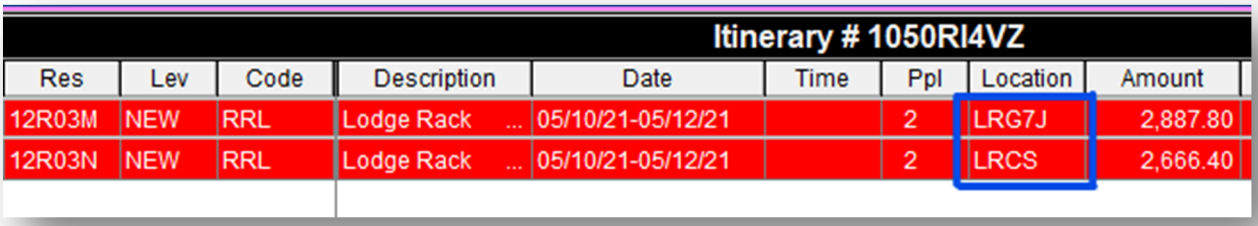
We can only combine rooms into one Reservation Tile if all rooms are the same Room Type. If the rooms are not the same, we need to add them to our Itinerary one at a time creating one Reservation Tile for every different Room Type.

In the **Booking Center**, even though we want to book multiple rooms, set your **Availability Search** to one unit at a time. We want to book one room of each room type instead of multiple rooms of the same type.



Double click on the different room types your guest wants to book to pull the selections into your Itinerary.

As you can see, we will have multiple lines in the Itinerary Detail – one for each room – instead of one line for all rooms at once like we saw in the previous section. The Location column will have the room code of the different room types we selected.



Itinerary # 1050RI4VZ

Res	Lev	Code	Description	Date	Time	Ppl	Location	Amount
12R03M	NEW	RRL	Lodge Rack ...	05/10/21-05/12/21		2	LRG7J	2,887.80
12R03N	NEW	RRL	Lodge Rack ...	05/10/21-05/12/21		2	LRCS	2,666.40

At this point, it is important to clarify with the guest which of the two room types they themselves will be residing. When the guest pays the deposit for the reservation, we want to make sure the money they pay will be visible on that guest's specific Reservation Tile.

Let's assume the guest on the phone with us will be staying in the **Garden Spa Room (LRG7J)** at The Lodge at Pebble Beach.

Click the Down Arrow next to the Guest field in the Booking Center to search for or create the Guest Tile and collect the credit card.

Once complete, Escape to return to the Booking Center.

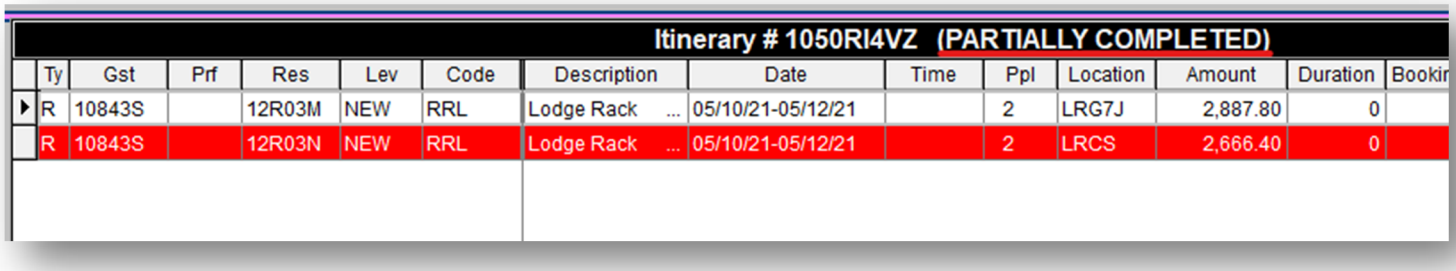
Double click the Garden Spa Room in the Itinerary Detail to open the Garden Spa Reservation Tile.

1. Prepare your Reservation Tile and collect the deposit like normal:
    - On the Reservation tile, click **E** for **Edit** and **Page Down**.
    - Follow the prompts to select the:
        - **Media Type** – Internet
        - **Media Source** – Pebblebeach.com
        - **Incoming Phone Number** – Reservation Center
        - **Guarantee Code** – A for Advanced Deposit
    - **Escape** to return to the Booking Center
    - Click **Complete** Itinerary
    - Double click the room to return to the Reservation tile
    - Click **Bills**
        - Enter Transaction Code - 970PPV (M, V, A, or D for the credit card code)
        - Enter the deposit amount
        - Enter C for Charge
        - Page Down
        - Select Yes to verify that all entries are correct
        - Move your curser outside of the credit card number field
        - Page Down
        - Press any button to return to Bills
        - Exit to return to the Reservation Tile
        - Exit to return to the Booking Center

2. Gather information from the Primary Guest about all rooms:
    - *What are the names of the guests staying in each room?*
    - *Will the Primary Guest be covering all charges, or will each guest be paying for their own charges at checkout?*

3. Close your call:
    - Reconfirm the booking and cancellation window with your guest
    - Inform the guest that their confirmation email will arrive within one hour
    - Ask if they need assistance with anything else
    - Thank them for calling
    - End the call.

At this point, we will have one **Complete Reservation** for the **LRG7J** room and one **Incomplete** Reservation for the **LRCS** room.



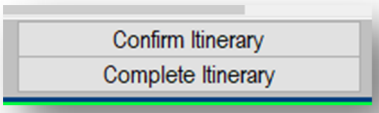
Itinerary # 1050RI4VZ (PARTIALLY COMPLETED)

Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location	Amount	Duration	Bookir
R	10843S		12R03M	NEW	RRL	Lodge Rack ...	05/10/21-05/12/21		2	LRG7J	2,887.80	0	
R	10843S		12R03N	NEW	RRL	Lodge Rack ...	05/10/21-05/12/21		2	LRCS	2,666.40	0	

4. Double Click on the secondary room in the Itinerary Detail to open the LRCS Reservation Tile

5. We will prepare the Secondary Reservation Tile similarly to the Primary Room:
   - On the Reservation tile, click **E** for **Edit** and **Page Down**.
   - Follow the prompts to select the:
     - **Media Type** – Internet
     - **Media Source** – Pebblebeach.com
     - **Incoming Phone Number** – Reservation Center
     - **Guarantee Code** – **J** for **Other Reservation**
   - **Escape** to return to the Booking Center

6. Click Complete

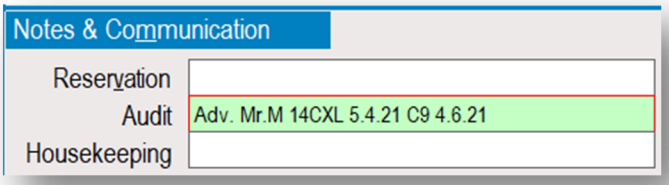


Clean Up BOTH Reservations

1. Double click the Primary room in the Itinerary Detail section to open the Reservation Tile

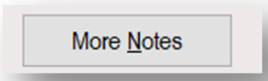
1. Click E to Edit the Reservation Tile

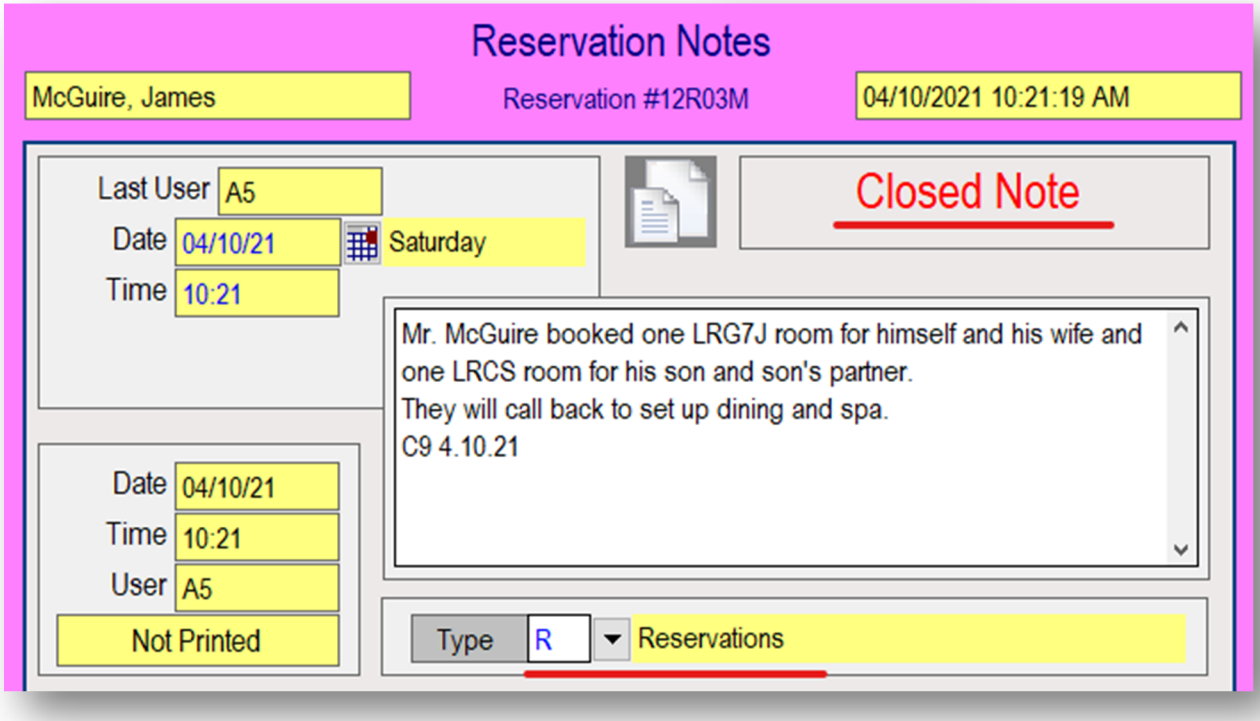
2. Enter the quoted cancellation window into the Audit line in Notes & Communications



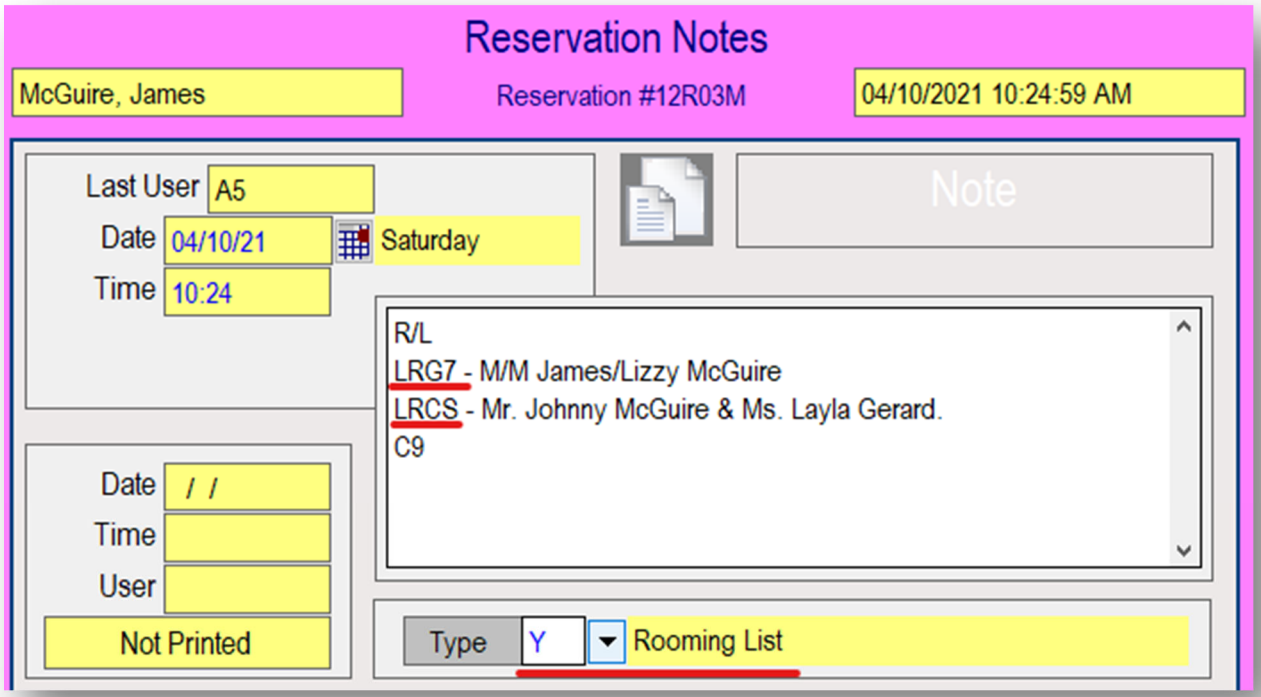
3. Page Down to save.

4. Click **More Notes** to add a **Y Note** and an **R Note.**

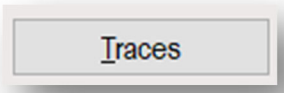




The Y Note must clearly state not only the names of the guests in both rooms, but which guests will be staying in which room type:



5. Click the **Traces** button on the Reservation Tile to add a **Front Desk Billing FDB Trace**

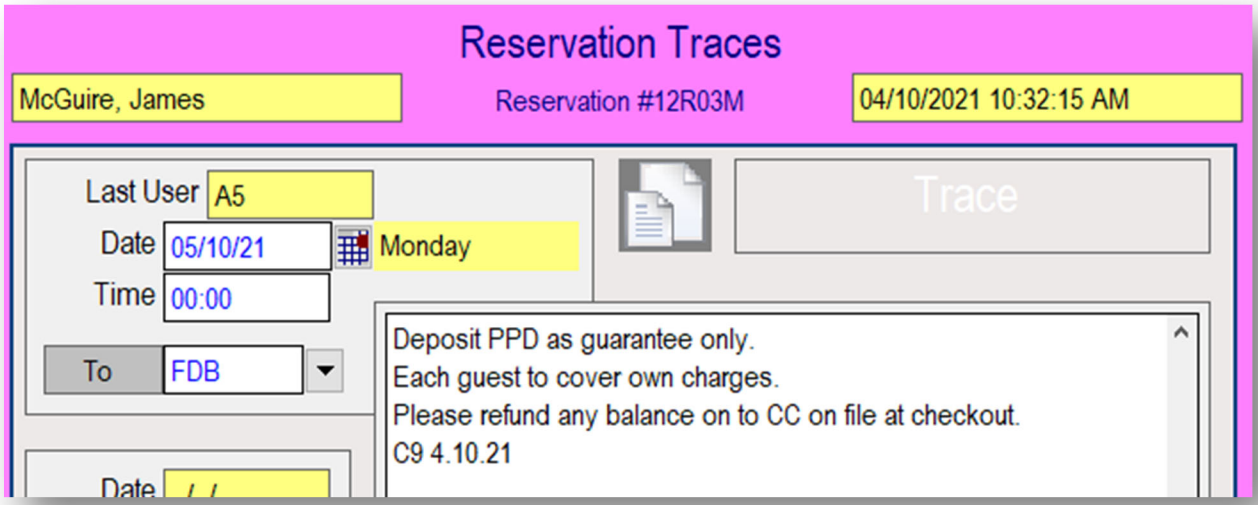


When we previously booked multiple reservations of the same room type, we waited until 10 days prior to arrival to split the reservation into multiple Reservation Tiles. Because our Reservation Tiles were still combined on the day of booking, we documented the Primary and Secondary FDB Traces in one Master FDB Trace on the day of booking.

In this case, we already have two separate Reservation Tiles, so we do not need to create a Master FDB Trace. We can write one FDB Trace on each Reservation Tile.

In this example, let's say that each room will be paying separately.

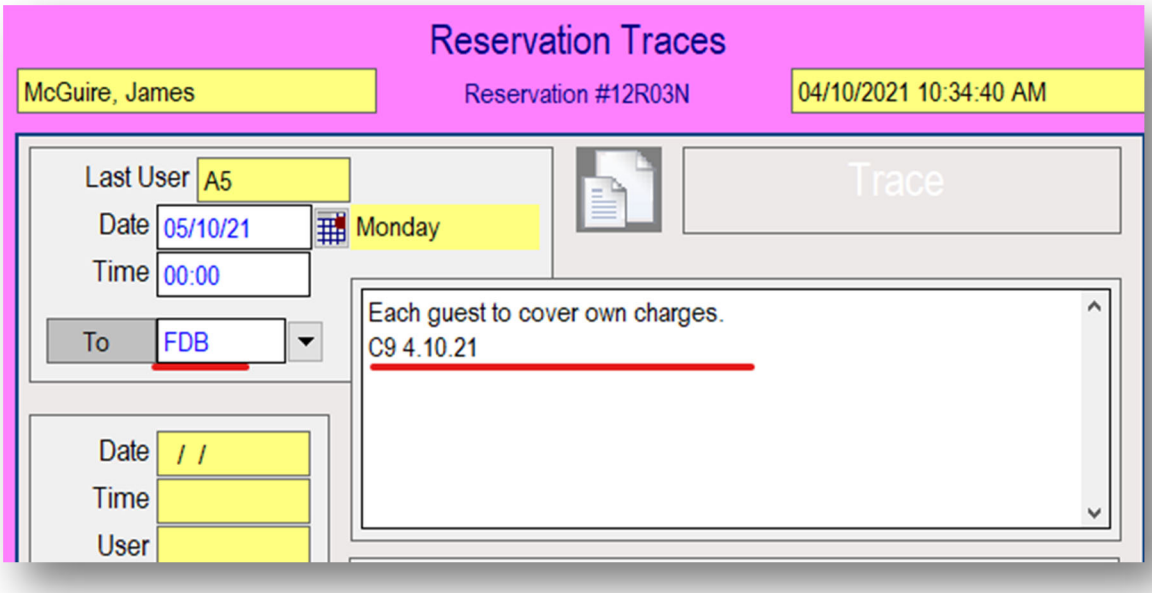
- Set the **Date** of the FDB Trace for the night of arrival
- See the **Front Desk Billing Trace** section of this manual for assistance on how to write your FDB Traces based on your guest's **Billing Scenario**



12. Escape until you return to the *Booking Center*

12. Double click on the LRCS line to enter the Secondary Reservation Tile

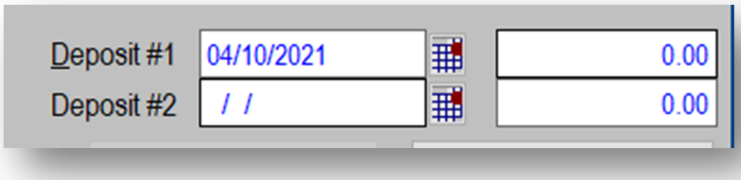
13. Click the **Traces** button on the Reservation Tile to add your secondary **Front Desk Billing FDB Trace:**



14. Exit to return to the Reservation Tile

15. Access Special Billing

16. Delete the amount in the Deposit #1 Line since Johnny's deposit was already taken care of by his father, James McGuire.



17. Exit to return to the Reservation Tile

18. Since Mr. Johnny McGuire will end up being responsible for all charges on his room at checkout, **create a C/O Guest Tile** for Johnny.

- Click Guest next to the name field to open Mr. James McGuire's Guest Tile
- Click Duplicate, then Address to create a blank Guest Tile
- Enter Johnny's first name, last name, and title
- Write "C/O (Primary's Name)" into the Company field
- Delete the first line of the address field and the email address
- Replace the phone number with a dot
- Page Down to save
    - Media Type – N1 Brand Awareness
    - Source Scan – N100015 Customer Referral
- Enter Profiles and Preferences
- Fill in the Gender field
- Escape twice to return to the Reservation Tile

19. **Whose the new C/O Guest Tile to the secondary Reservation Tile**.

- Click the Whose button next to Guest
- Type the secondary guest's first and last name into the search fields
- Page Down to search
- Select the correct listing from the search window that has "C/O (Primary's Name) in the Corporate column
- Type Y for Yes to agree to Whose
- Type Y for Yes to agree to update the Reservation Tile name field

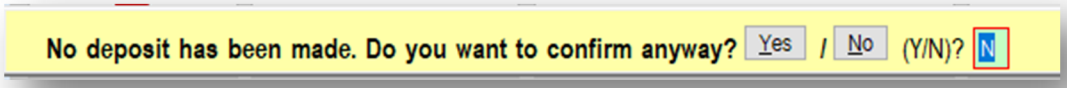
20. Escape to return to the Booking Center

21. Click **Confirm** Itinerary



22. Click Escape to exit the pop-up Bills window

23. Click Yes to continue with your confirmation



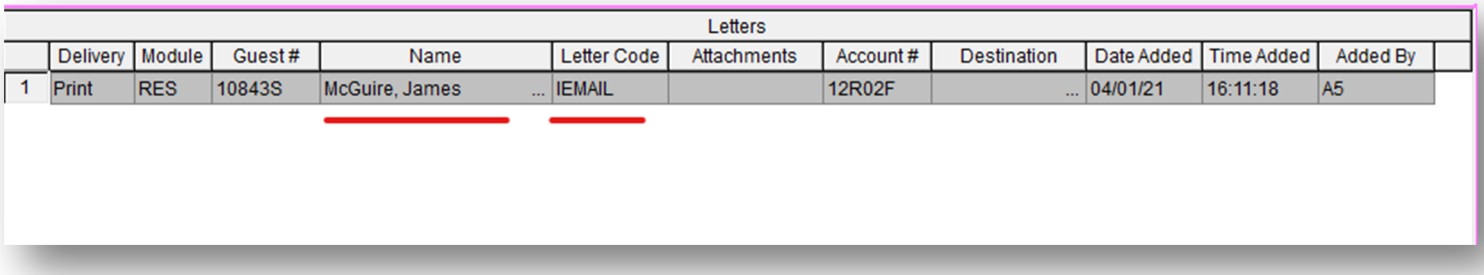
24. In Letters, click A to Add a new confirmation email.



25. Enter the Itinerary Confirmation Email Code: IEMAIL



26. Page Down to send



Because we have two Room Reservation Tiles in the Booking Center, you will see the Bills and Letters windows pop up two times – once for each room.

You only need to send the IEMAIL confirmation email once. The IEMAIL confirmation will send the guest details for the entire Itinerary, meaning that it will include details about both rooms.

Shares



When two (or more) guests share a room and want to each pay separately for their portion, we can divide the room into portions – or Shares.

These shares look like separate Reservation Tiles, which allow us to attach separate Guest Tiles for each guest, but each Share only a fraction of the room.

What is the difference between a PBX And a Share?
After all, they are both places to indicate additional people sharing the room, right?

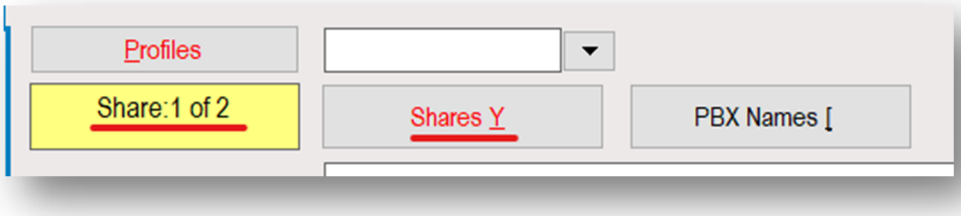
PBX	Shares
PBX Names are secondary adult guests who will be staying in the room and are authorized to add charges to be paid for by the Primary Guest's credit card. This field will often be used for boyfriends or girlfriends who are unable to be listed on the Primary's Guest Tile since they are not legally family. PBX Guests do not require their own Guest Tiles unless they are booking Spa appointments.	If more than one adult is sharing a room and they each want to pay for their own charges, we split that room into portions called Shares. Each Share will have its own Reservation Tile and each guest will have their own Guest Tile associated to their portion of the room.

Identify A Share

There are several indicators that let you know if a Room Reservation is part of a Share:

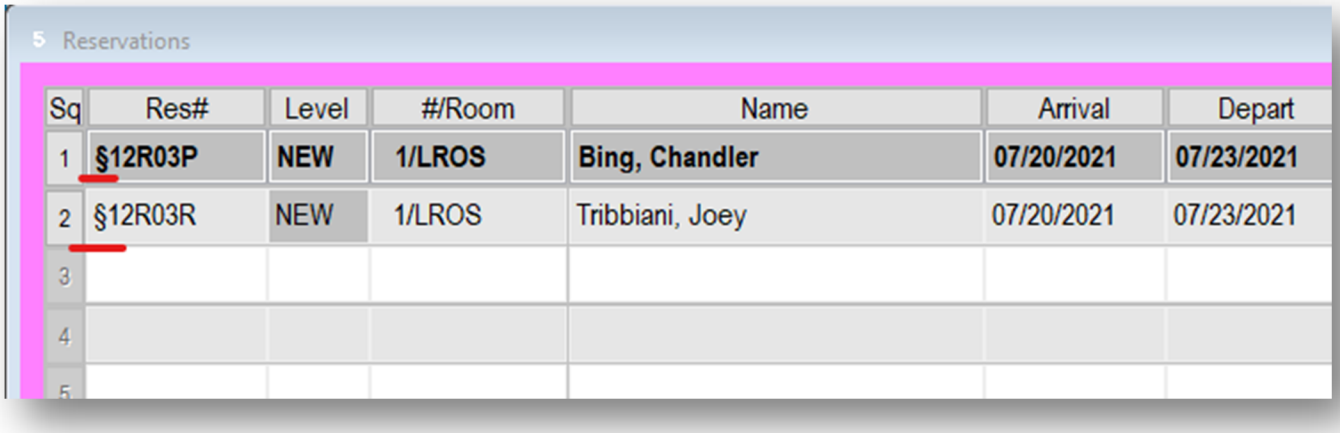
In the Name section of the Reservation Tile

You will see that the Shares button is red which indicates that there is something to see there.
There will also be a yellow box that lets you know how many shares the reservation is split amongst.



Click Scan + Link within the Reservation Tile

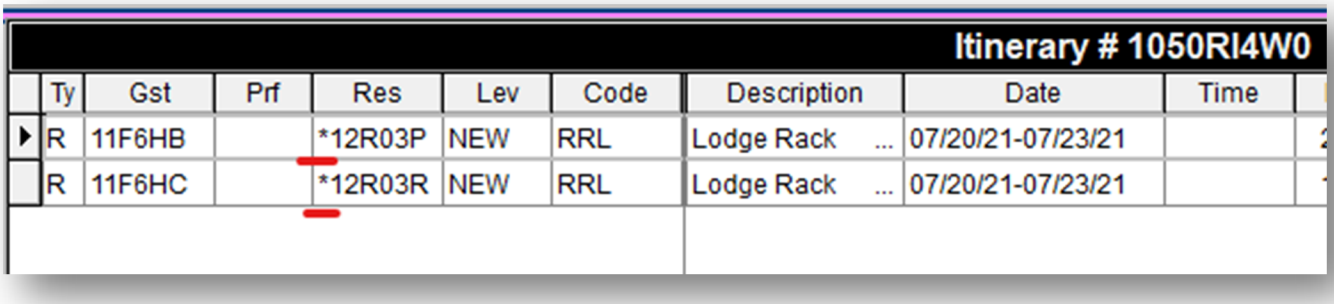
There is a symbol in front of the Reservation Number made up of two overlapping S's which indicates that these two Reservation Tiles are Shares.



Sq	Res#	Level	#/Room	Name	Arrival	Depart
1	§12R03P	NEW	1/LROS	Bing, Chandler	07/20/2021	07/23/2021
2	§12R03R	NEW	1/LROS	Tribbiani, Joey	07/20/2021	07/23/2021
3						
4						
5						

In the Booking Center

There is an asterisk before each Reservation Number in the Itinerary Detail section. This also indicates that these two Reservation Tiles are shares.



Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time
R	11F6HB		*12R03P	NEW	RRL	Lodge Rack ...	07/20/21-07/23/21	
R	11F6HC		*12R03R	NEW	RRL	Lodge Rack ...	07/20/21-07/23/21	

Book A Room with Shares

Joey and Chandler have decided to come to Pebble Beach. They want to have extra money for sightseeing, so they decide to share one room instead of booking two separate rooms. Chandler calls the Pebble Beach Reservation Department to set up the reservation.

1. Use the Guest Room tab of the Booking Center to search for and select the room in which Joe and Chandler will stay.

2. Create Chandler's Guest Tile, Prepare the Booking, and Collect the two-night deposit just like a single room reservation.

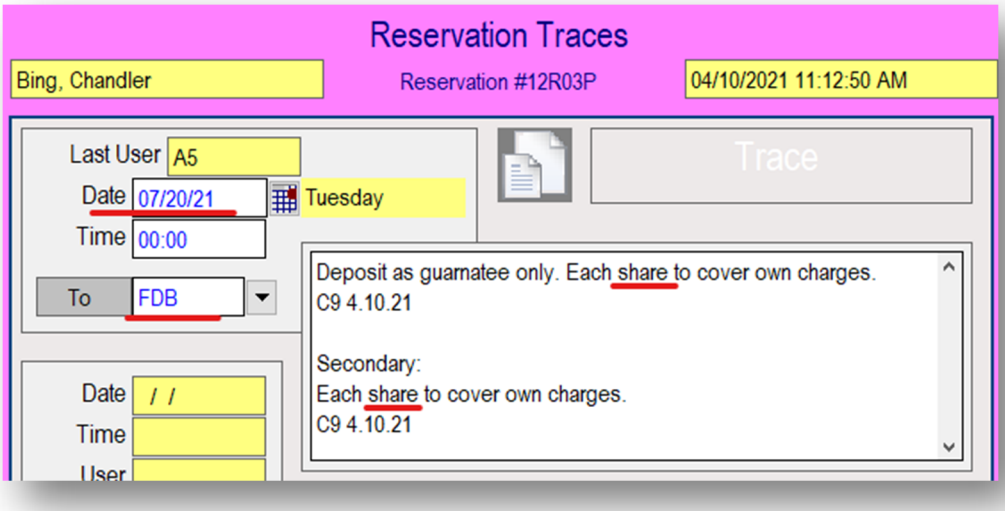
3. Clarify with Chandler the name of the guest with whom he will be sharing the room and how they plan to handle billing. Ask if Joey has ever been to Pebble Beach Before so we can determine whether or not we will need to create a C/O Guest Tile.

4. Reconfirm the booking with Chandler and close the call.

5. Create a Y Note that includes both Joey and Chandler's names

6. Create a closed R Note with a summary of who the guests are, why they are visiting, and what they booked.

7. Create a Master FDB Trace that includes both the Primary and Secondary Traces for Chandler and Joey's billing scenario.



8. Escape until you return to the Booking Center

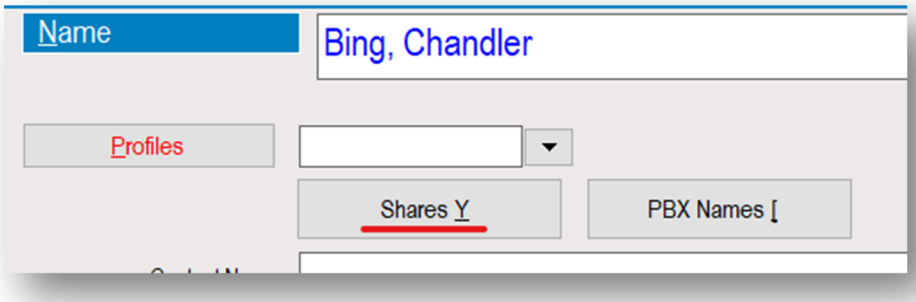
9. Click Confirm and send an IEMAIL confirmation

10. Create and Save your NAVIS Booked Lead

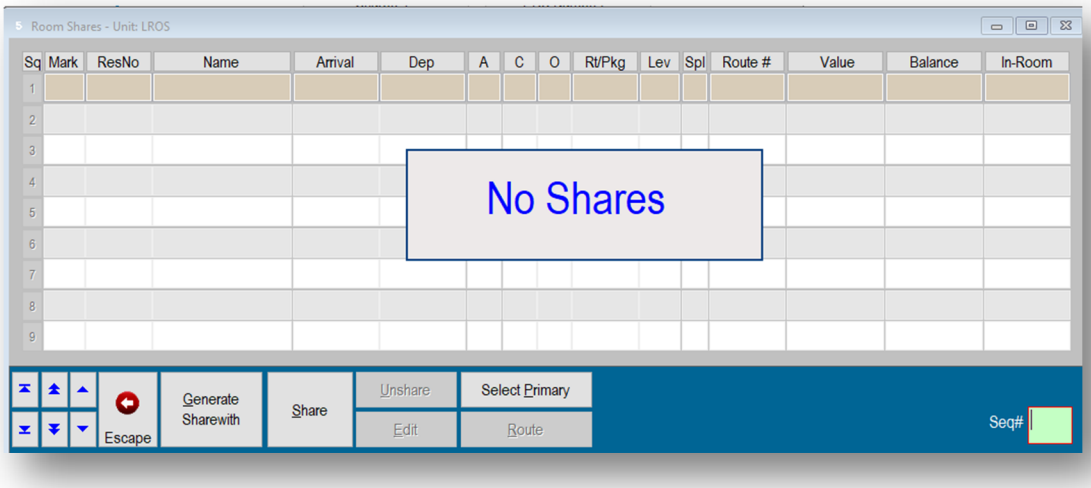
At 10 Day Arrival

1. Open the Reservation Tile and navigate to the Y Note. Take a screenshot or snippet of this note for later.

2. Click the Shares button in the Name field of the Reservation Tile:



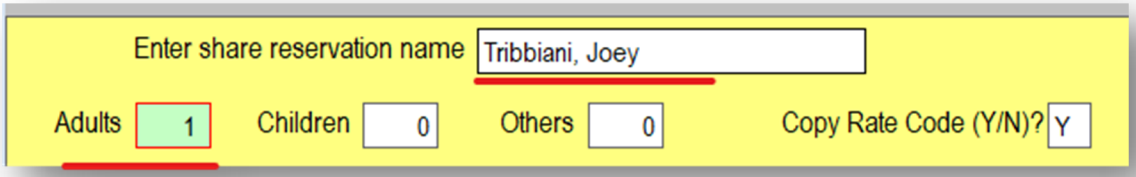
A window titled Room Shares will open. Once shares are created, this window will reflect all shares associated with this Reservation Tile. For now, you can see that No Shares exist.



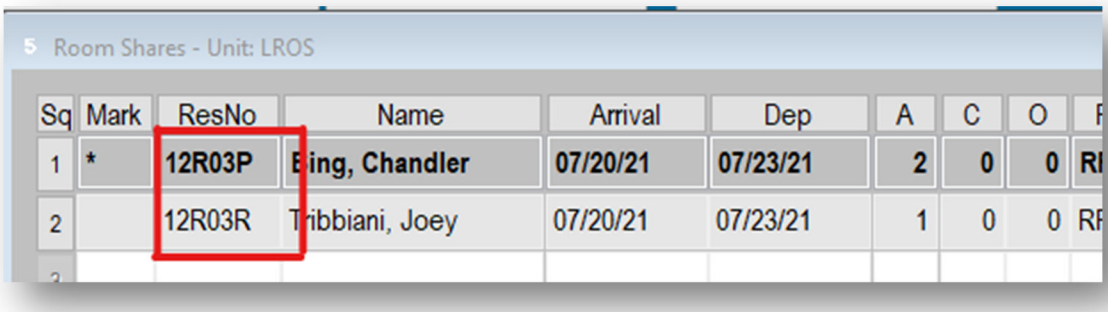
3. Click the Generate Sharewith button along the bottom button bar



- Enter the name of the second guest in the following format: Last Name, First Name
- Change the number of Adults from 2 to 1
- Page Down to Save



The Room Shares window will not update to reflect that this Reservation Tile is split into two shares, one for Joey and one for Chandler. Each Share now has its own separate Reservation Number.



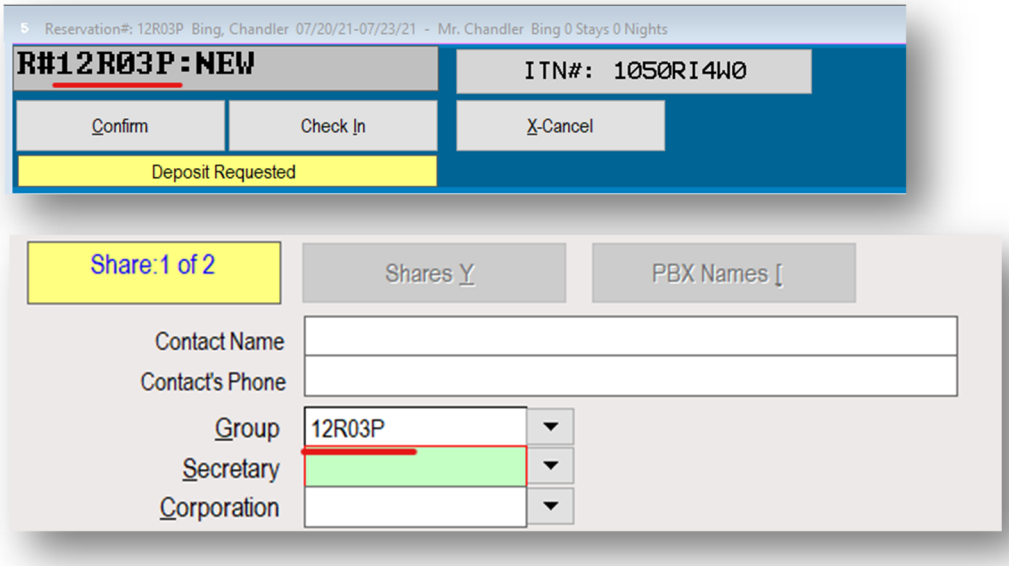
4. Escape to return to Chandler Bing's Reservation Tile

5. Click Edit on the Reservation Tile and change the number of Adults in the room from 2 to 1.

> Since each Share has its own Reservation Tile, the number of adults should reflect the number within each portion of the room, not the number of adults overall.
>
> If we failed to edit the number of adults on each share to 1, this room would appear to contain 4 adults which would result in the guests being responsible for the $50 per additional adult per night fee.

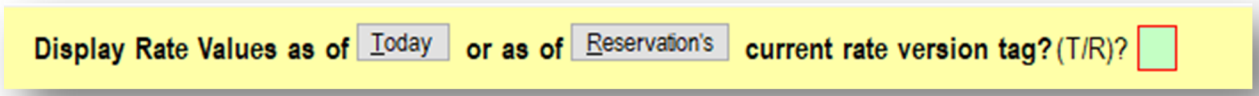
6. Create a **Mini-Group** to connect Joe and Chandler's Shares by typing Chandler's Room Reservation Number into the **Group Field** of the Reservation Tile.

   You can see the **Reservation Number** in the top left corner of the Reservation Tile:



   Page Down to save.

7. You will be prompted with a question about the Rate Values.

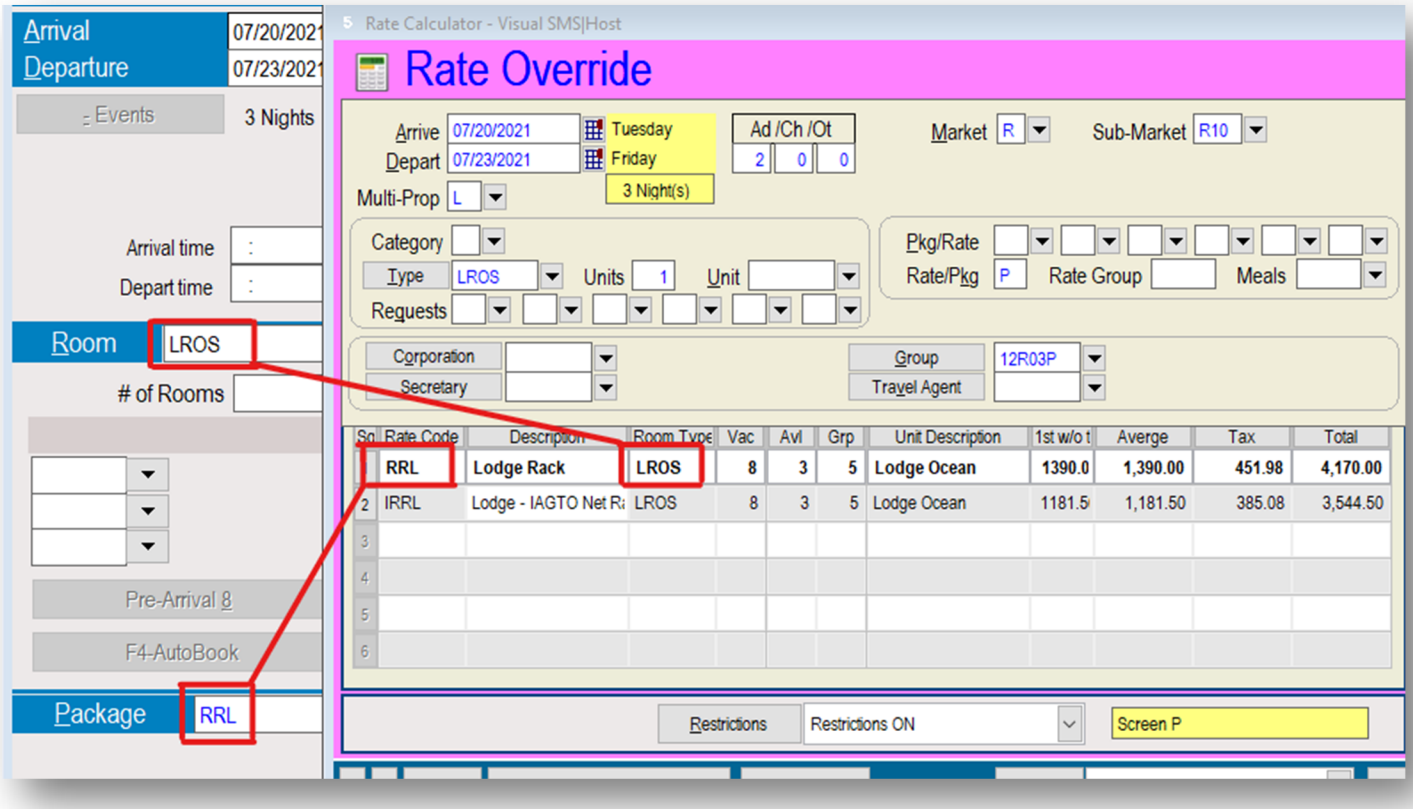


This question is asking if you want to update the room rate to the cost of the room as of today or keep the cost of the room at the rate it was the day the guest booked.

Select R to keep the rate the same as it was on the day the guest booked their reservation.

8. A **Rate Override** window will open. You must select the Rate Code you want to apply to the Reservation. Since we're not changing the rate, we just want to pick the option that matches the rate we already have booked.

If you are unsure of which option to select, you simply make sure **both the Room Code and Package Code** on the Reservation Tile match the rate you select from the list.

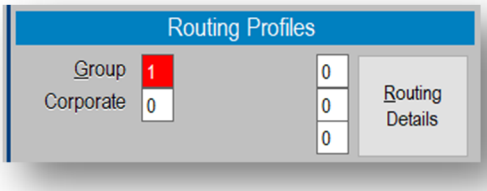


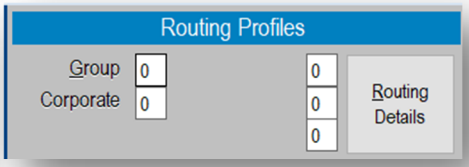
Upon selecting the rate, you will be returned to the Reservation Tile.

9. Access **Special Billing**

   Because we entered the Reservation Number into the Group field on the Reservation Tile, the Group field with Special Billing now reflects a **red one.**

   We do not want anything in this field in Special Billing, so change this red one back to zero.



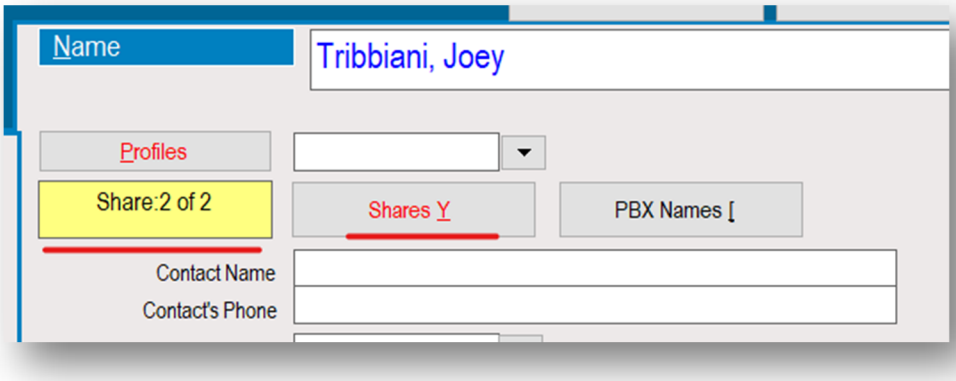


10. Click Traces and open the FDB Trace
    - Copy the secondary FDB Trace to a scratch document
    - Delete the secondary Trace and save.

    Chandler's Reservation Tile is now all set!

11. Escape Traces to return to the Reservation Tile

12. Click the Shares Button and select the Sequence Number for Joey Tribbiani's Reservation. You can see that Joey's Reservation Tile is entirely separate from Chandler's.



13. Click the Guest Button on Joey's Reservation Tile to open Chandler Bing's Guest Tile and create a **C/O Guest** Tile for Joey

14. **Whose** Joey's newly created C/O Guest Tile to Joey's Share

15. Change the Guarantee Code on Joey's Reservation Tile from **An Advanced Payment** to **J Other Reservation**

16. Access **Special Billing**
    - Remove the dollar amount written in the **Deposit #1** Line
    - Remove the **Red 1** in the Group field

17. Escape to return to the Reservation Tile

18. Click the Traces Button and add a new FDB Trace
    Paste and save the secondary FDB Trace that you copied from Chandler Bing's Reservation Tile

    Joey's Reservation Tile is now all set!

Un-share / Re-share

A.k.a. How to re-arrange a large rooming list you've already split/shared

- If you already split out a group of rooms and assigned the guests to the shares, but then the guest calls to re-arrange who is paired with who….
- Notate the R# of each person involved
- Pick one reservation tile for each shared room and click "Share" > "Unshare"
    - This will split the shared room into 2 individual rooms while retaining all golf/funds paid.
- When you are ready to re-pair up each couple, pick one of the Reservation tiles, click "Share," then click "Share" again (instead of "Generate Share")
- Type in the Reservation number of the person you want paired into that room and hit "enter" (do not click "Find")

Tape Chart (F8)

Color	Description
Gray	New (NEW) reservation
Green	Confirmed (CNF) reservation
Red	In-house (INH) reservation
Black	Checked out (OUT) reservation
Dark Blue	Out-of-order (OOO) record. This record will display the out-of-order reason.
Light Blue	Temporary hold (HOLD) record. This record will display the user that placed the unit on hold and the hold reason. For more information, refer to the Temporary Hold section.
Olive Green	Shared reservation record. To view the reservation names, double-click on the record.

- Tape Chart
  - Used to rearrange which guests are in which rooms
  - Example: The booking center says 3 Spa Rooms are available, but when you try to pre-block them, nothing pops up. That is because a Spa room is available on every night, but it's not the same room 3 nights in a row. You need to get with a supervisor and look into rearranging rooms.
  - This is most common with Casa Palmero due to it having fewer rooms but occurs with other properties during busy seasons and when trying to book adjacent rooms.

To see if exact room is available, use the Tape Chart:

- F8
- Set the date
- Type the room number into the "Unit" field
- Page Down

Tips:

- If you need to move rooms, extend the left side menu of the tape chart by dragging it wider so you can see all room features for each room. This ensures you will be moving the guest into an exact same room style.



- Before moving any blocked room, double click the reservation on the Tape Chart and pull up the Reservation Tile. Check the notes to make sure the guest didn't request that exact room by room number and that it is not marked as non-movable.

Use the Tape Chart to see what Bedding arrangements we have for rooms we need to preblock, especially if they need QQ for LROD or BRC7 and FWY 1 and FWY rooms when we only have a couple left

Should I check the tape chart?

1 room left and they want QQ - yes

ADA Accessibility

ADA stands for the **Americans with Disabilities Act** enacted in 1990. **ADA Compliance** refers to the Act's **Standards for Accessible Design.**

Pebble Beach Resorts strives to ensure safety, comfort, and accessibility to all guests with disabilities. These efforts are described on our website here: https://www.pebblebeach.com/inn-at-spanish-bay-accessibility-features/

Resort-Wide ADA Accessibility

- ADA accessible parking stalls
- Accessible paths of travel to guest rooms and public areas
- Restaurants have wheelchair accessible tables and seating options
- All public areas are accessible, including the main lobby, guest check-ins, concierge, pre-function areas, meeting rooms, exterior fire pits, patios, pools and spa
- Accessible fitting rooms and guest service counters
- Pool lifts for pools and hot tubs

Room ADA Accessibility

- All entrances are wheelchair accessible with a minimum of 32" wide doorways
- Roll-in showers with grab bars, a foldable set, and adjustable showerhead
- Hand rails surrounding the bathtubs and toilets
- More space between furniture with clear access to the balcony/patio
- Hand rails on balconies
- Wants on curtain sheers are lowered/hand held
- Dressers and closets are designed for accessibility for guests in wheelchairs
- Desks, counters, and sinks have roll-in access

Hearing Impaired Rooms

- A strobe light will activate when the doorbell rings and when the fire alarm is triggered.
- Housekeeping has additional accessories for Hearing Impaired guests such as an attachment for the phone that lights up when it rings and an attachment for the bed which vibrates when the phone rings.

Golf Course ADA Accessibility

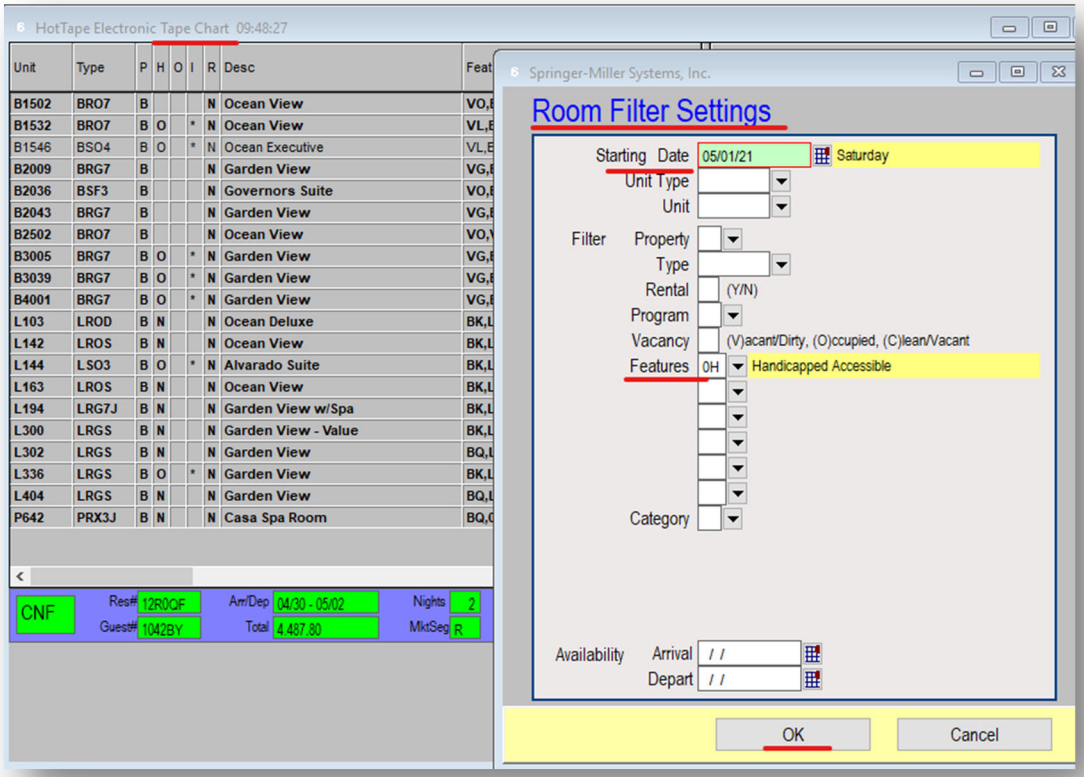
- All courses are wheelchair accessible
- Pro Shops can provide case by case approval for guests with disabilities to drive their golf carts on the fairways
- Pro Shops can provide a Solo Rider cart that enables guests to swing while remaining seated

Find ADA Accessible Rooms via the Tape Chart

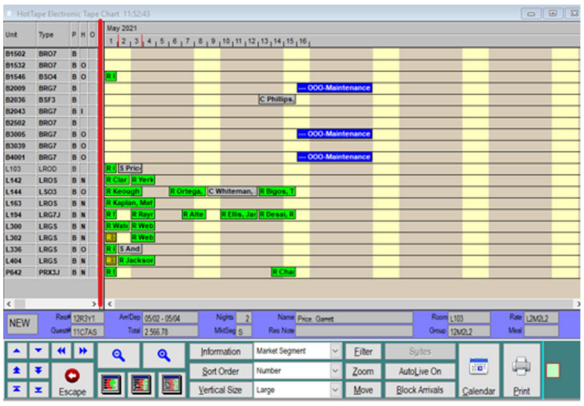
From the **Booking Center**, click **F8** on your keyboard.

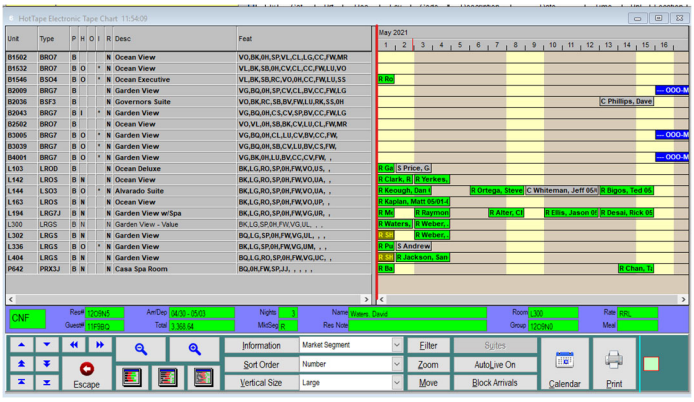
This will open the **Tape Chart** as well as a pop-up window titled **Room Filter Settings**.

- Set the **Starting Date** for your guest's desired date of arrival.
- Set the first **Features Code** to:
  - 0H for Handicapped Accessible
  - H1 for Hearing Impaired



Be sure to expand the left pane of the tape chart enough to see the full name and features of each room in your results. Do so by dragging the bar along the right side of the pane (Indicated in red below).

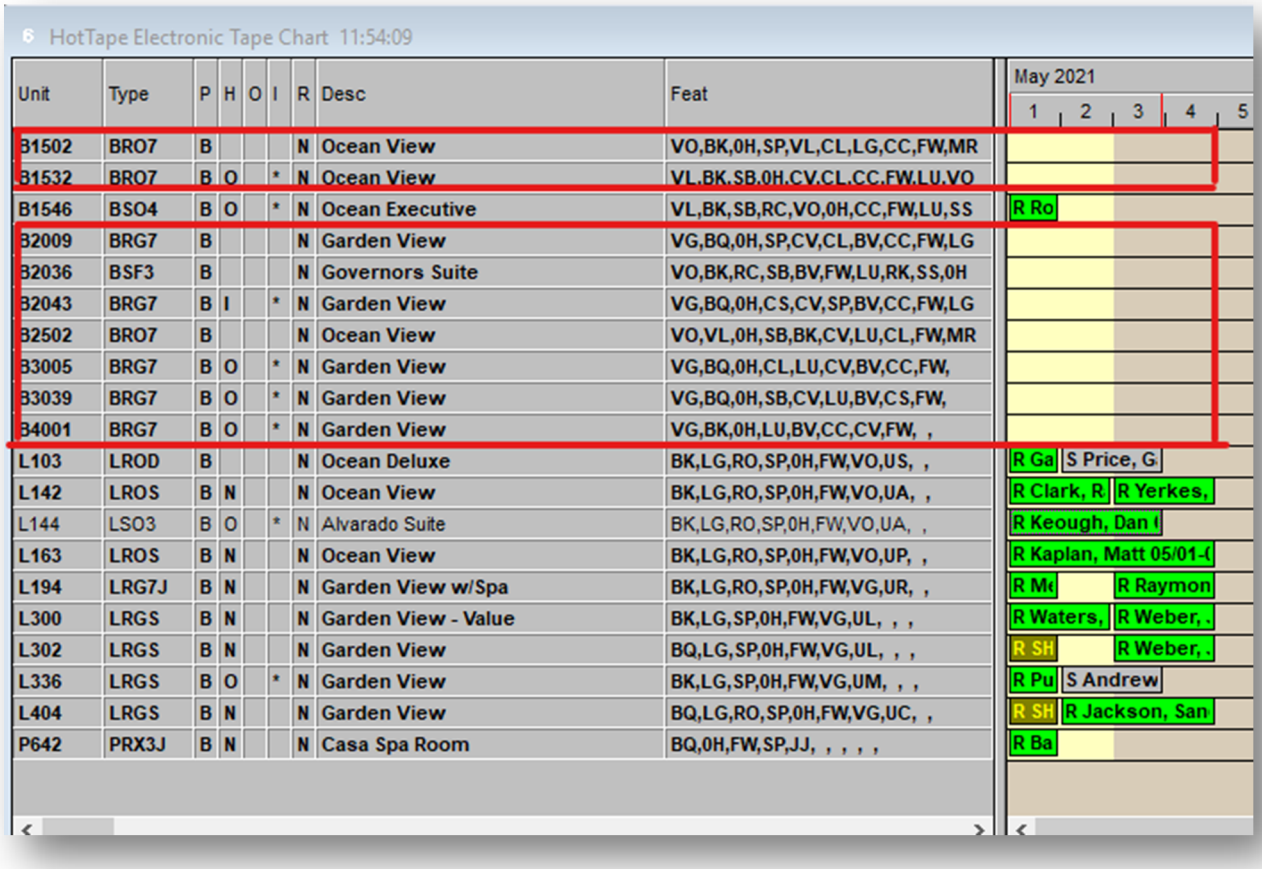




In the example below, the filter set includes the **OH Room Feature Code** which means all results will be **ADA Accessible** rooms.

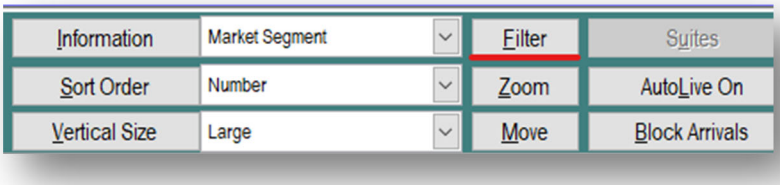
- To book a guest in one of these rooms, you must **pre-block** the guest into the exact Unit Number of the available room.
- You can only book rooms from this list that do not have any guests currently blocked into them during your guest's desired dates of stay.

In this example, if we are looking at ADA rooms available from May 1st-5th, we are limited to the results in the red boxes because all other rooms already have assigned guests.



Unit	Type	P	H	O	I	R	Desc	Feat
B1502	BRO7	B				N	Ocean View	VO,BK,0H,SP,VL,CL,LG,CC,FW,MR
B1532	BRO7	B	O		*	N	Ocean View	VL,BK,SB,0H,CV,CL,CC,FW,LU,VO
B1546	BSO4	B	O		*	N	Ocean Executive	VL,BK,SB,RC,VO,0H,CC,FW,LU,SS
B2009	BRG7	B				N	Garden View	VG,BQ,0H,SP,CV,CL,BV,CC,FW,LG
B2036	BSF3	B				N	Governors Suite	VO,BK,RC,SB,BV,FW,LU,RK,SS,0H
B2043	BRG7	B	I		*	N	Garden View	VG,BQ,0H,CS,CV,SP,BV,CC,FW,LG
B2502	BRO7	B				N	Ocean View	VO,VL,0H,SB,BK,CV,LU,CL,FW,MR
B3005	BRG7	B	O		*	N	Garden View	VG,BQ,0H,CL,LU,CV,BV,CC,FW,
B3039	BRG7	B	O		*	N	Garden View	VG,BQ,0H,SB,CV,LU,BV,CS,FW,
B4001	BRG7	B	O		*	N	Garden View	VG,BK,0H,LU,BV,CC,CV,FW, ,
L103	LROD	B				N	Ocean Deluxe	BK,LG,RO,SP,0H,FW,VO,US, ,
L142	LROS	B	N			N	Ocean View	BK,LG,RO,SP,0H,FW,VO,UA, ,
L144	LSO3	B	O		*	N	Alvarado Suite	BK,LG,RO,SP,0H,FW,VO,UA, ,
L163	LROS	B	N			N	Ocean View	BK,LG,RO,SP,0H,FW,VO,UP, ,
L194	LRG7J	B	N			N	Garden View w/Spa	BK,LG,RO,SP,0H,FW,VG,UR, ,
L300	LRGS	B	N			N	Garden View - Value	BK,LG,SP,0H,FW,VG,UL, , ,
L302	LRGS	B	N			N	Garden View	BQ,LG,SP,0H,FW,VG,UL, , ,
L336	LRGS	B	O		*	N	Garden View	BK,LG,SP,0H,FW,VG,UM, , ,
L404	LRGS	B	N			N	Garden View	BQ,LG,RO,SP,0H,FW,VG,UC, ,
P642	PRX3J	B	N			N	Casa Spa Room	BQ,0H,FW,SP,JJ, , , , ,

If you need an ADA room with additional features such as two queen beds or on a ground floor, you can click the **Filters** button from the bottom button bar and set additional features to narrow your search.





Book ADA Rooms and Golf

ADA Rooms	• Pre-Block the guest into the ADA room number • Leave as moveable • 0H should be added as a requested Room Feature on the Reservation Tile
Hearing Impaired Room	• Pre-Block the room / Leave as moveable • H1 should be added as a requested Room Feature on the Reservation Tile • Set a Housekeeping Trace informing them that the guest is hearing impaired and request that they activate the strobe light. • Not all ADA rooms will be Hearing Impaired Rooms and vice versa.
Golf Access to Drive on Fairways	• Let the guest know that this decision is ultimately up to the pro shop on the day of play • Set a baby note or Tee Sheet Note that states "Req. Blue Flag Access" • Contact the pro shop by phone or email (depending on how far in advance the guest has booked their tee time) • The Pro Shop will need to get approval from the Superintendent of Golf and make sure that no maintenance will be done on the fairways that day.
Solo Rider Carts	• Each Golf Course only has one solo rider • Leave a baby note or tee sheet note that states: "Req. Solo Rider" • Contact the pro shop by phone or email (depending on how far in advance the guest has booked their tee time) • The Pro Shop will need to arrange for the Solo Rider cart to be brought to the appropriate courses on the guest's dates of play.

Note from The Inn at Spanish Bay:

Ocean Executive Suite B1546 is ADA accessible. If a guest who does not require ADA Accessibility books an Ocean Executive Suite, avoid blocking them into this particular room number to keep this option available for guests who require this accessibility.

If B1546 is the last available Ocean Executive Suite, inform that guest that the room is ADA Accessible.

- If the guest is ok with this, proceed as normal and leave a K note advising the guest that they are aware this is an ADA room.
- If the guest is not happy with the ADA accessible room, try to find alternative suite options. If no other options exist, a Reservations Supervisor may approve a rate negotiation.

It is not necessary to inform guests of ADA Accessibility for other ADA Suites.

- V2036 – Governor's Suite
- L144 - Alvarado Suite

Resort Guest Dining



There is little difference between booking **Day Guest Dining** vs. **Resort Guest Dining.**

The primary distinction is that **Resort Guest Dining Reservations** must be associated with the **Room Reservation Tile.**

When booking a Resort Stay for a guest, the Reservations Agent will typically offer to arrange dining toward the end of the call, after the rooms and golf have been added to the Itinerary.

When a Dining Reservation is added on to a room booking, SMS will associate the Dining Reservation with the Reservation Number of the Primary Guest's room.

Itinerary # 1050RI4W0 (PARTIALLY COMPLETED)

	Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl
▶	R	11F6HB		*12R03P	NEW	RRL	Lodge Rack ...	07/20/21-07/23/21		2
	R	11F6HC		*12R03R	NEW	RRL	Lodge Rack ...	07/20/21-07/23/21		1
	D	11F6HB	1	12R03P	NEW	12DR1...	SWBG Dinner ...	07/20/21	18:00	2

If you enter the **Reservation Tile** of R#12R03P in the example above and open the **5 Schedule**, you will see that the Stillwater Bar & Grill Reservation is tied to this room.



Active Schedule for Reservation: Bing, Chandler

Sq	Type	Booking#	Level	Name	Service	Description
1	Dine	09J9QG	NEW	Bing, Chandler	12DR17	Dinner at Stillwater
2						

Resort Guest Golf



A key difference between **Day Guest Golf** and **Resort Guest Golf** is the method through which we **guarantee** the guest's tee times.

Day Guest Golf	Resort Guest Golf
Day Guests must provide a credit card at the time of booking to guarantee their tee time. If the guest cancels their tee time within their cancellation window or fails to show up, we will charge the greens fees to this credit card.	All recreation associated with a Resort Stay is (golf, spa, dining) is guaranteed by the guest's two-night room deposit. If the guest cancels their entire reservation within 14 days or no-shows, this will result in forfeiture of this deposit. If the guest just wants to cancel a tee time on their room reservation within 14 days, the guest will still be billed the greens fees.

Resort Guest Golf Cancellation Resell

If a Resort Guest needs to cancel a golf tee time within their 14-day cancellation window, but they will still be keeping their room reservation, we can offer to try to **re-sell** that tee time for the guest.

This means that we will cancel the golf reservation, thereby opening that time slot for another guest to book. If another guest books that vacated time slot, the Resort Guest will not be charged the greens fees for their cancellation inside 14 days.

If we are unable to re-sell the tee time before that date, the Resort Guest will still be responsible to pay for the Greens Fees.

Resort Guest Golf Guidelines

Pebble Beach Golf Links Guidelines

We give our **Resort Guests** priority to book Pebble Beach up to 18 months in advance.

To take advantage of priority booking, Resort Guests must stay for a minimum number of nights. If they do not meet these guidelines, they may only book Pebble Beach per our Outside Guest Guidelines.

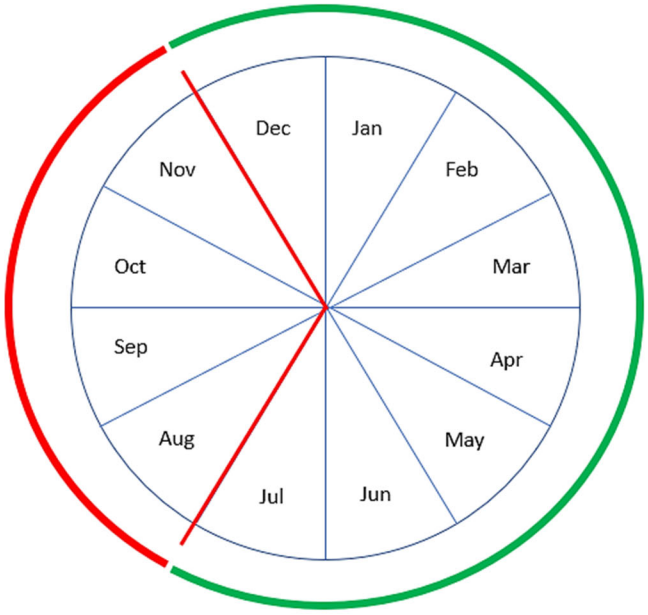
During Peak Season (August – November)	During Non-Peak Season (December – July)
• Resort Guests must book a minimum of a 3 night's stay to book a Pebble Beach Tee Time up to 18 months in advance. • If they wish to play Pebble Beach twice during their trip, they must book a minimum of 5 nights. • If they wish to play Pebble Beach three times during their trip, they must book a minimum of 7 nights.	• Resort Guests must book a minimum of a 2 night's stay to book a Pebble Beach Tee Time up to 18 months in advance. • If they wish to play Pebble Beach twice during their trip, they must book a minimum of 4 nights. • If they wish to play Pebble Beach three times during their trip, they must book a minimum of 6 nights.

1 PB round = 3 Nights

2 PB rounds = 5 Nights

3 PB rounds = 7 Nights

**NGTF may be sold w/ 2 nights all year long*



1 PB round = 2 Nights

2 PB rounds = 4 Nights

3 PB rounds = 6 Nights

Rate	$575 per player (cart is complimentary)
Room Stay Requirement	Not Guaranteed to Finish Times may be booked with a two-night minimum stay all year long. Maximum of 2 golfers per room (If a guest wants to book more than two golfers in advance, they will need to reserve multiple rooms, all of which need to be booked for the required minimum number of nights.)
Cancellation Period	May change or cancel their tee time up to 14 days prior to arrival.

Note:
If a guest meets the Pebble Beach Golf Links Guidelines, they will also meet all guidelines listed below. The below guidelines are for guests who will not be playing **Pebble Beach Golf Links** during their stay.

Spyglass Hill Golf Course Guidelines

Rate	$415 per player (cart is complimentary)
Room Stay Requirement	1-night stay Monday-Thursday or 2 Night stay Friday-Sunday Maximum of 2 golfers per room
Cancellation Period	May change or cancel their tee time up to 14 days prior to arrival.

The Links at Spanish Bay Guidelines

Rate	$295 per player (cart is complimentary)
Room Stay Requirement	1-night stay Monday-Thursday or 2 Night stay Friday-Sunday Maximum of 2 golfers per room
Cancellation Period	May change or cancel their tee time up to 14 days prior to arrival.

Del Monte Golf Course Guidelines

Rate	$110 per player (cart is complimentary)
Room Stay Requirement	1-night stay Monday-Thursday or 2 Night stay Friday-Sunday Maximum of 2 golfers per room
Cancellation Period	May change or cancel their tee time up to 3 days prior to arrival.

The Hay Guidelines

Rate	$110 per player (cart is complimentary)
Room Stay Requirement	1-night stay Monday-Thursday or 2 Night stay Friday-Sunday Maximum of 2 golfers per room
Cancellation Period	May change or cancel their tee time up to 3 days prior to arrival.

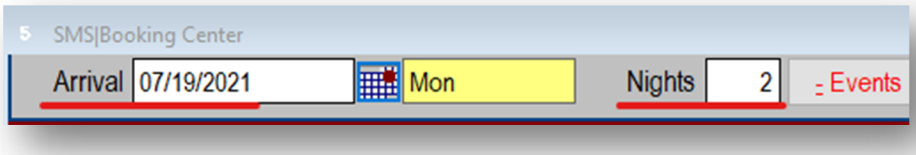
Book A Room + Golf + Dining Itinerary

James Bond wants to book a two-night stay at Pebble Beach Resorts and play one round of golf at all three courses.

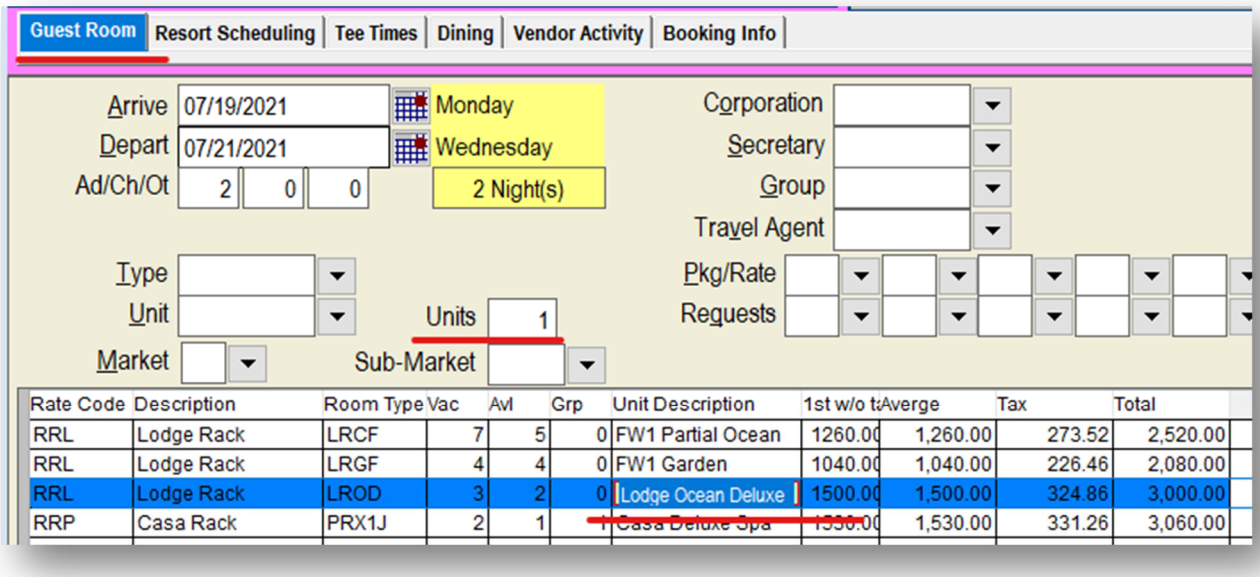
1. Gather information from the caller:

How many rooms will he need?	He only needs one.
How many golfers will be visiting?	Himself and his buddy, Valentine. (Remember, he can only book two golfers max per room)
What dates would he like to play?	He wants August, but we let him know that this is Peak Season, so in order to book Pebble Beach more than one day in advance, he will need to book a three-night stay. He decides to move his dates into July instead.
What type of room would he like?	He decides to book an Ocean Deluxe room at The Lodge
What are his ideal tee times?	He wants to play in the afternoon on the date of arrival, 10am on the middle day, and 7am on his final day so he can catch his flight home.

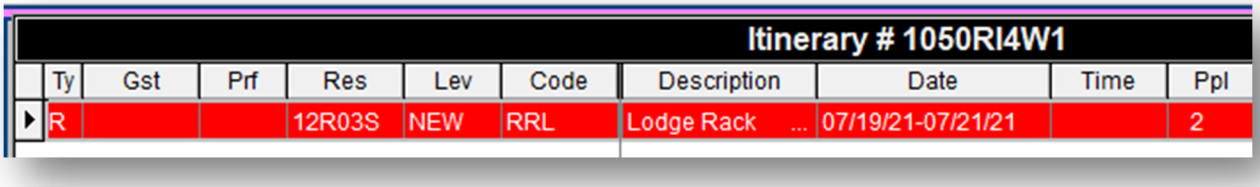
2. Set the **Master Data Range** calendar for Mr. Bonds desired dates of stay. By doing this, all calendars in every tab of the Booking Center will sync to these dates.



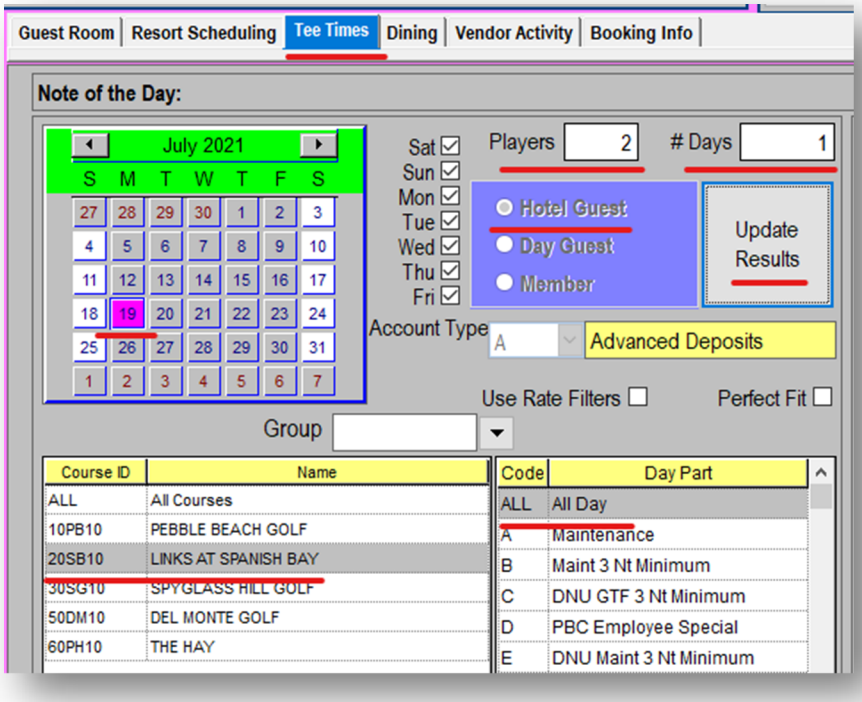
3. Use the **Guest Room Tab** of the **Booking Center** to search for Mr. Bond's Ocean Deluxe Room at The Lodge at Pebble Beach.



4. Double click the room in the search results to add it to your Itinerary.



5. Click on the **Tee Times Tab** of your Booking Center to search for Tee Time Availability.



Because you have a room in your Itinerary, the Guest Type in the Tee Times Tab will be permanently set to Hotel Guest

Set the number of players to 2

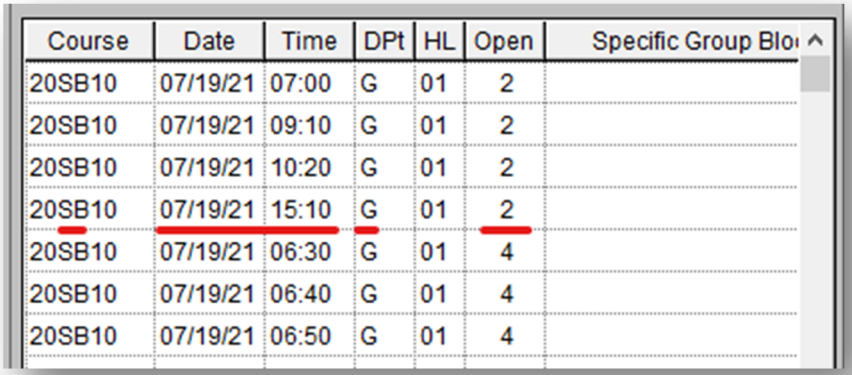
Set the number of days to 1

Set the calendar for the first date you wish to search

Select your course

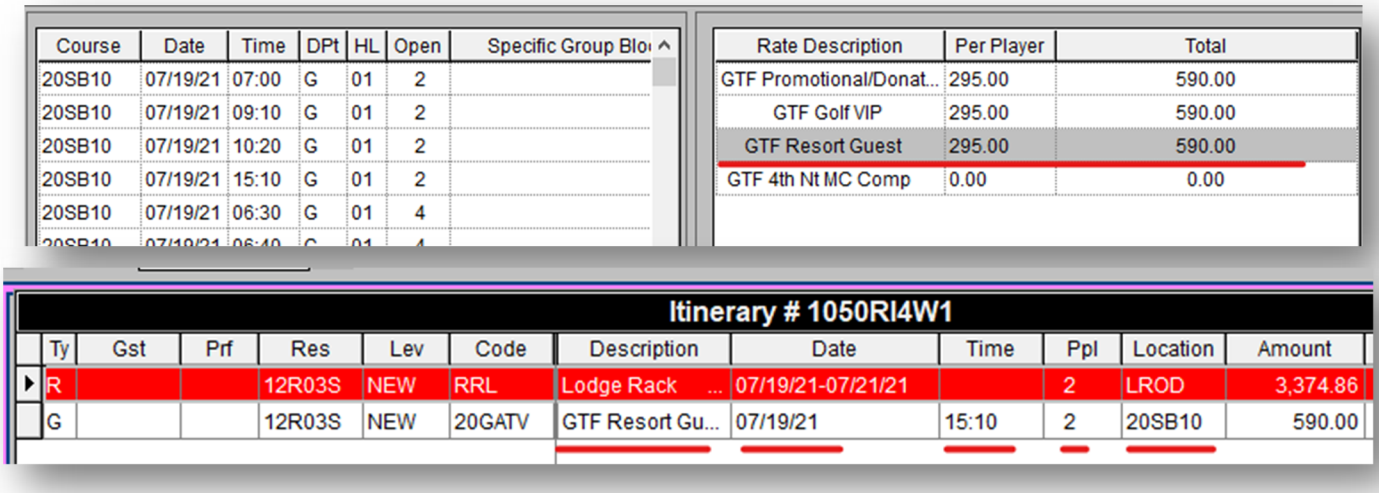
Click Update Results

6. James Bond wants to book an afternoon twosome on his night of arrival.
In order to **smart-book** this guest, we should offer the 3:10pm time slot which is Guaranteed to Finish and has exactly two open spots.



Course	Date	Time	DPt	HL	Open	Specific Group Blo
20SB10	07/19/21	07:00	G	01	2	
20SB10	07/19/21	09:10	G	01	2	
20SB10	07/19/21	10:20	G	01	2	
20SB10	07/19/21	15:10	G	01	2	
20SB10	07/19/21	06:30	G	01	4	
20SB10	07/19/21	06:40	G	01	4	
20SB10	07/19/21	06:50	G	01	4	

7. Upon selecting this tee time, you will see all available rate codes appear for this booking. We want to book **Rack Rate** for our **Resort Guest**, so we double click the **GFT Resort Guest** rate code to add this tee time to our Booking Center.



Course	Date	Time	DPt	HL	Open	Specific Group Blo
20SB10	07/19/21	07:00	G	01	2	
20SB10	07/19/21	09:10	G	01	2	
20SB10	07/19/21	10:20	G	01	2	
20SB10	07/19/21	15:10	G	01	2	
20SB10	07/19/21	06:30	G	01	4	

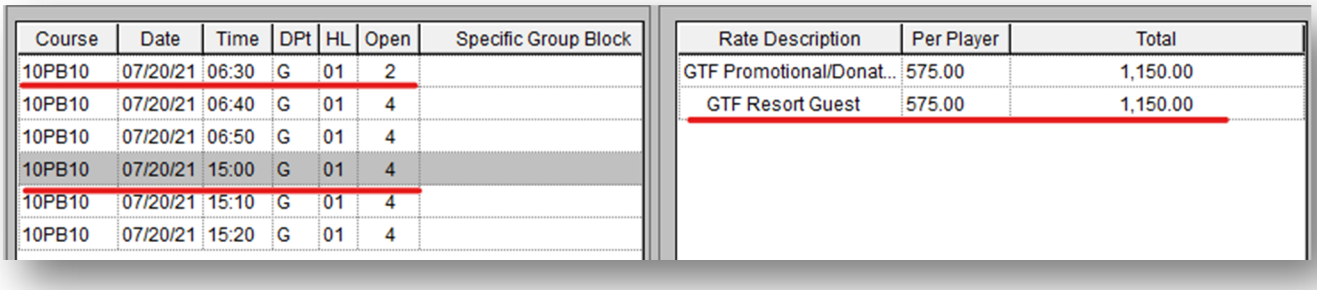
Rate Description	Per Player	Total
GTF Promotional/Donat...	295.00	590.00
GTF Golf VIP	295.00	590.00
GTF Resort Guest	295.00	590.00
GTF 4th Nt MC Comp	0.00	0.00

Itinerary # 1050RI4W1

Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location	Amount
R			12R03S	NEW	RRL	Lodge Rack ...	07/19/21-07/21/21		2	LROD	3,374.86
G			12R03S	NEW	20GATV	GTF Resort Gu...	07/19/21	15:10	2	20SB10	590.00

8. Move on to the next day on the calendar to book the 10am tee time.

   As you can see, availability is limited at Pebble Beach Golf Links on this date. We try to re-arrange the schedule to make Mr. Bond's desired times fit, but it doesn't look like Pebble Beach will work on any other day.



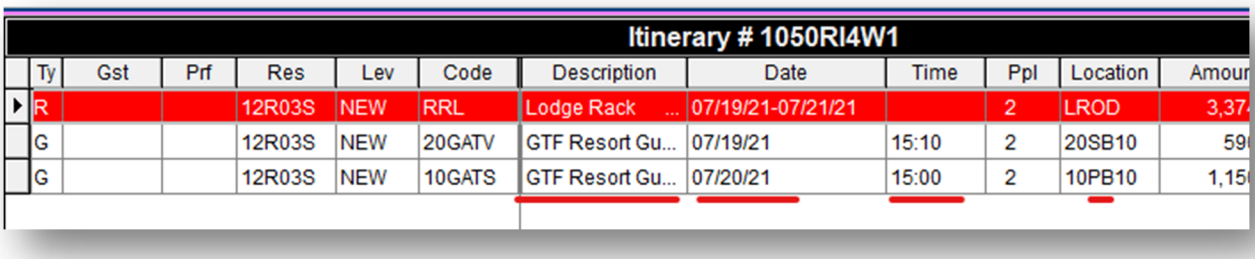
Course	Date	Time	DPt	HL	Open	Specific Group Block
10PB10	07/20/21	06:30	G	01	2	
10PB10	07/20/21	06:40	G	01	4	
10PB10	07/20/21	06:50	G	01	4	
10PB10	07/20/21	15:00	G	01	4	
10PB10	07/20/21	15:10	G	01	4	
10PB10	07/20/21	15:20	G	01	4	

Rate Description	Per Player	Total
GTF Promotional/Donat...	575.00	1,150.00
GTF Resort Guest	575.00	1,150.00

   Instead of offering the guest all six available times on this date, we can simplify our conversation by reducing our offering down to two options:

   "Mr. Bond, I see that we can book Guaranteed to Finish tee times on Pebble Beach Golf Links at either 6:30am (the only morning tee time with exactly 2 available slots) or 3pm (the earliest of the afternoon tee times). Will either of these times work?"

9. Mr. Bond chooses 3pm, so we select GTF Resort Guest to add this tee time to our Itinerary.



Itinerary # 1050RI4W1

Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location	Amour
R			12R03S	NEW	RRL	Lodge Rack ...	07/19/21-07/21/21		2	LROD	3,37
G			12R03S	NEW	20GATV	GTF Resort Gu...	07/19/21	15:10	2	20SB10	59
G			12R03S	NEW	10GATS	GTF Resort Gu...	07/20/21	15:00	2	10PB10	1,15

10. We move onto the final date and Smart Book a 7:50am tee time for Mr. Bond at Spyglass Hill

Course	Date	Time	DPt	HL	Open	Specific Group Blo
30SG10	07/21/21	07:50	G	01	2	
30SG10	07/21/21	13:10	G	01	2	
30SG10	07/21/21	15:00	G	01	2	

Rate Description	Per Player	Total
GTF Promotional/Donat...	415.00	830.00
GTF Resort Guest	415.00	830.00

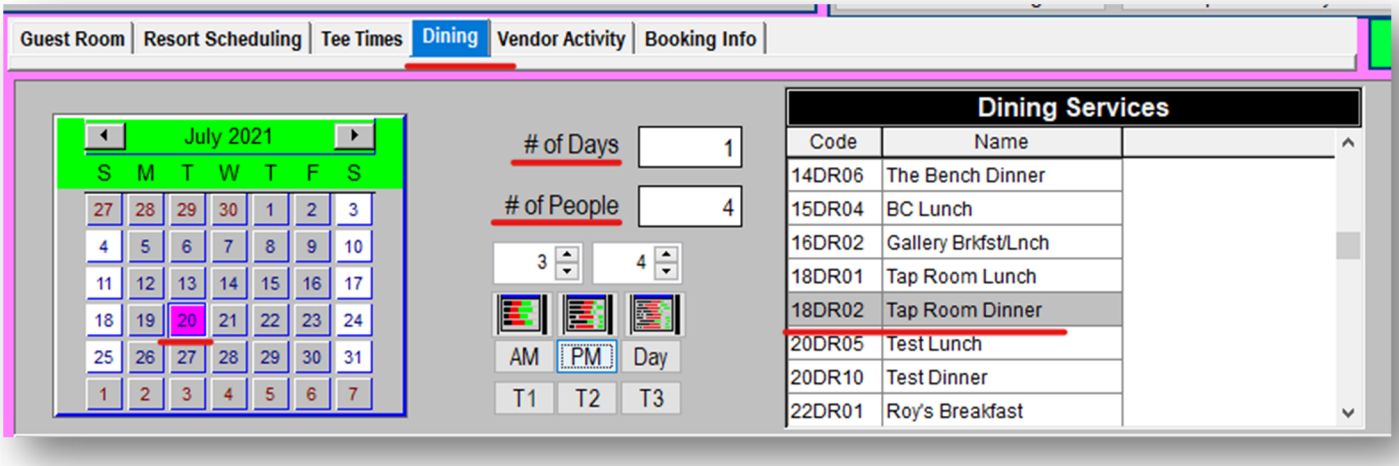
11. Now that all tee times are set, we should ask Mr. Bond if he would like to add:
    - Rental Clubs
    - A Double Caddie
    - A Forecaddie

    Mr. Bond says he wants a double caddie and that Mr. Valentine and himself will both need rental clubs. (The cost to ship clubs from England to Pebble Beach is far too expensive.)
    We make a note of these additions on our scratch document for later.

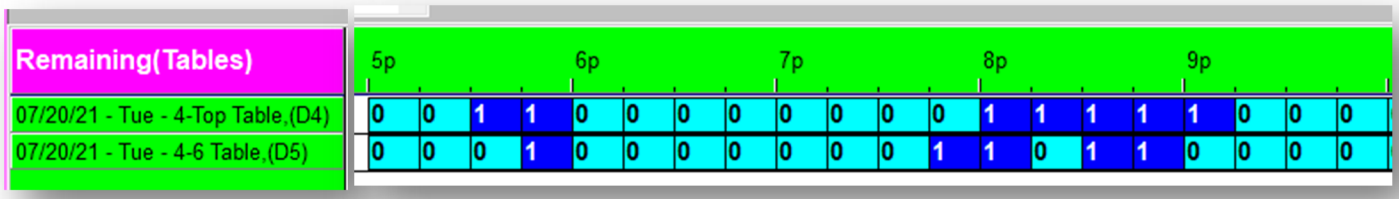
12. Mr. Bond wants to book a dinner reservation at **The Tap Room** after his Pebble Beach round since he has heard that this restaurant is known as the **19th Hole of Pebble Beach**.

    Access the Dining Tab of the Booking Center to search for dinner availability.

    - Set the date to the same day as his Pebble Beach Round
    - Set the number of days to 1
    - Set the number of people to 4 (Mr. Bond's party will be joined by two local friends)
    - Set Dining Service to Tap Room Dinner

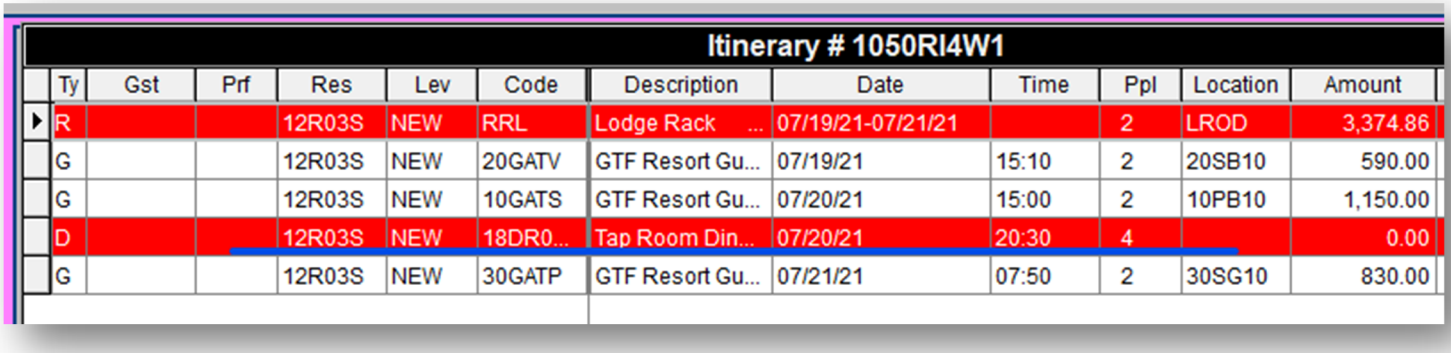


13. We want to Smart Book this dining reservation, so we should be considering two factors:
    - Which time slots are available for the smallest table size that will fit Mr. Bond's Party? (i.e. the 4-Top Tables)
    - What time of day will be far enough away from Mr. Bond's Pebble Beach tee time to ensure that he can complete all 18 holes? (His tee time starts at 3pm, so we need to budget for a 4 ½ to 5 -hour round plus wash up / travel time.)



"Mr. Bond, what would be your ideal time to have dinner? I recommend 8pm at the earliest so we do not cut your Pebble Beach Golf Links round short."

14. Mr. Bond elects 8:30pm, so we double click on the 8:30pm time slot on the **4-Top** row to add this dining reservation to our Itinerary.

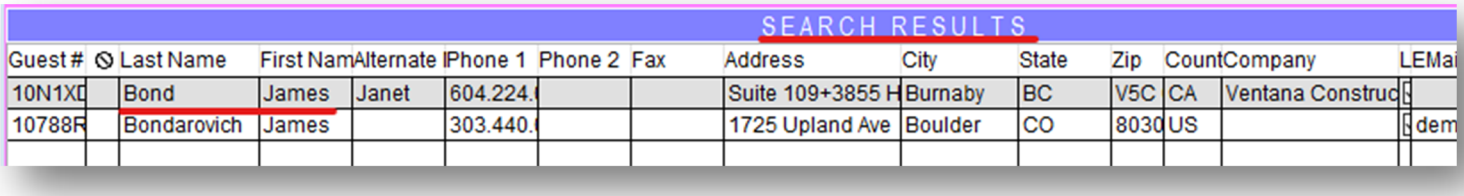


Itinerary # 1050RI4W1

Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location	Amount
R			12R03S	NEW	RRL	Lodge Rack ...	07/19/21-07/21/21		2	LROD	3,374.86
G			12R03S	NEW	20GATV	GTF Resort Gu...	07/19/21	15:10	2	20SB10	590.00
G			12R03S	NEW	10GATS	GTF Resort Gu...	07/20/21	15:00	2	10PB10	1,150.00
D			12R03S	NEW	18DR0...	Tap Room Din...	07/20/21	20:30	4		0.00
G			12R03S	NEW	30GATP	GTF Resort Gu...	07/21/21	07:50	2	30SG10	830.00

15. At this point, we should:
    - Review all bookings with the guest
    - Quote our 14-day cancellation policy
    - Advise of the dollar amount of the 2 Night Deposit
    - Ask for the sale

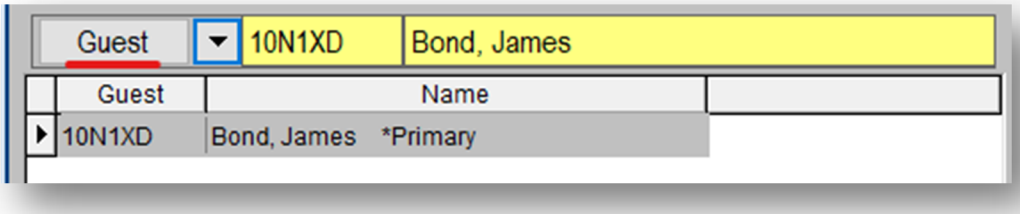
16. Mr. Bond wants to proceed, so we click the down arrow next to the Guest field in the Booking Center. Mr. Bond has been here before, so we just need to find his previous Guest Tile:
    - Ask Mr. Bond to verify his address to ensure we have located his Guest Tile
    - Double click on the Guest Tile line to add this Guest to you Booking Center



SEARCH RESULTS

Guest #	Last Name	First Nam	Alternate I	Phone 1	Phone 2	Fax	Address	City	State	Zip	Count	Company	LE	Mai
10N1XD	Bond	James	Janet	604.224.(			Suite 109+3855 H	Burnaby	BC	V5C	CA	Ventana Construc	N	
10788R	Bondarovich	James		303.440.(			1725 Upland Ave	Boulder	CO	8030	US		N	dem

17. Now that Mr. Bond's Guest Tile has been added to the Itinerary, click the Guest Button to open the Guest Tile and collect his credit card for the deposit.

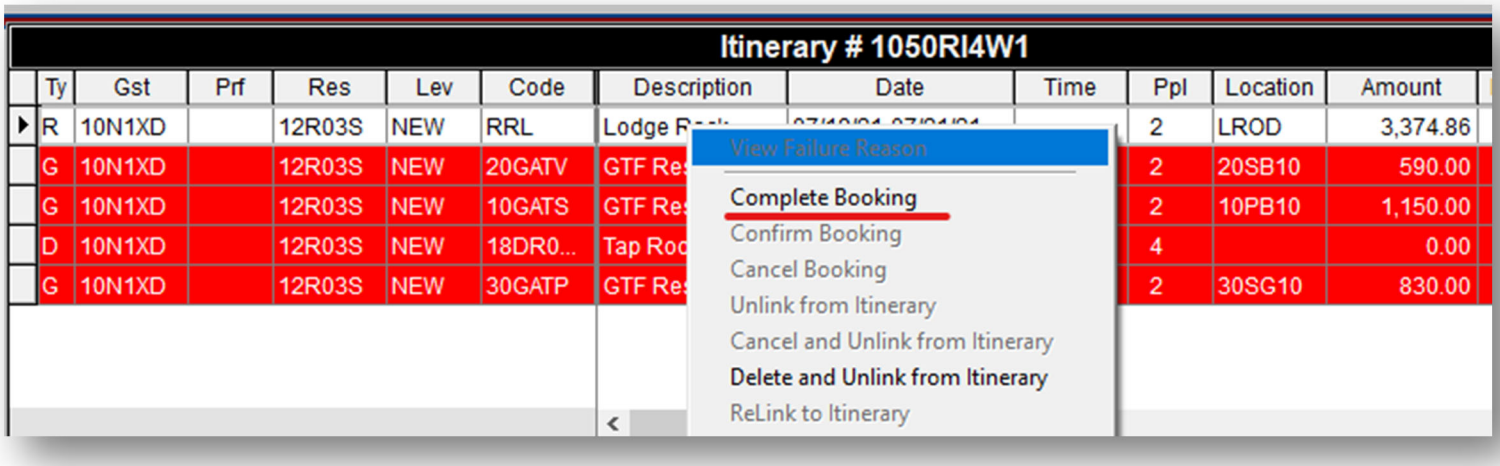


Even if Mr. Bond already has a credit card on file, we must collect a card upon every booking to ensure that the card is still valid.

18. Once the credit card has been collected, un-pause your recording in NAVIS and ask the guest if you may place him on a brief hold while you finalize his booking.

19. Prepare your booking:
    - Access the Reservation Tile
    - Click **E** for **Edit** and **Page Down**.
    - Follow the prompts to select the:
        - **Media Type** – Internet
        - **Media Source** – Pebblebeach.com
        - **Incoming Phone Number** – Reservation Center
        - **Guarantee Code** – A for Advanced Deposit
    - **Escape** to return to the Booking Center

20. You will not be able to click the **Complete** button on this Itinerary yet.
    Instead, you must right click on the line of your room reservation and select Complete Booking. This will only Complete the room, leaving all recreation as incomplete.



21. Re-enter the Reservation Tile to collect the Deposit:
    - Double click the room to return to the Reservation tile
    - Click **Bills**
        - Enter Transaction Code - 970PPV (M, V, A, or D for the credit card code)
        - Enter the deposit amount
        - Enter C for Charge
        - Page Down
        - Select Yes to verify that all entries are correct
        - Tab to move curser outside of the credit card number field
        - Page Down
        - Press any button to return to Bills
        - Exit to return to the Reservation Tile
        - Exit to return to the Booking Center

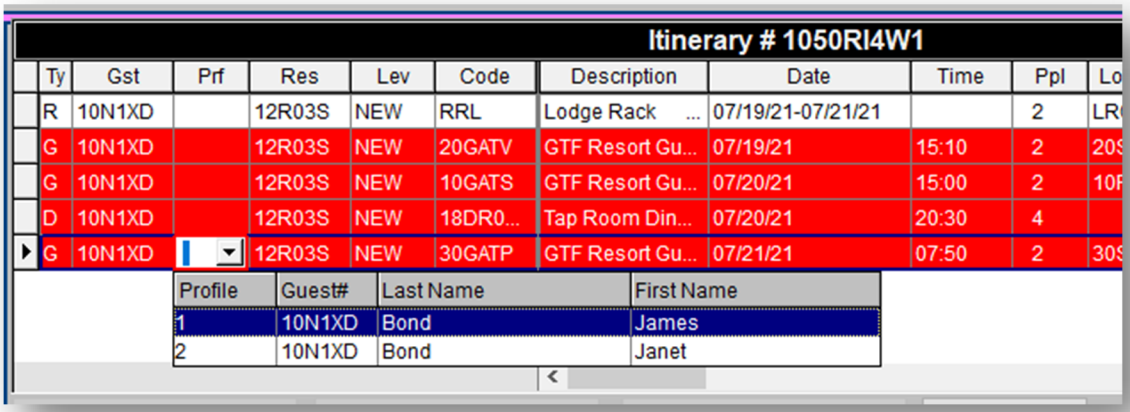
22. Take the caller off hold, thank them for their patience, and gather the final bits of information required for the booking:

Would you like me to request two Queen beds?	Yes
What is Mr. Valentine's full name?	Cupid Valentine
Will you and Mr. Valentine be splitting charges at checkout or should we keep everything under your credit card?	Keep everything under Mr. Bond's card. Mr. Valentine will Venmo Mr. Bond for his portion.

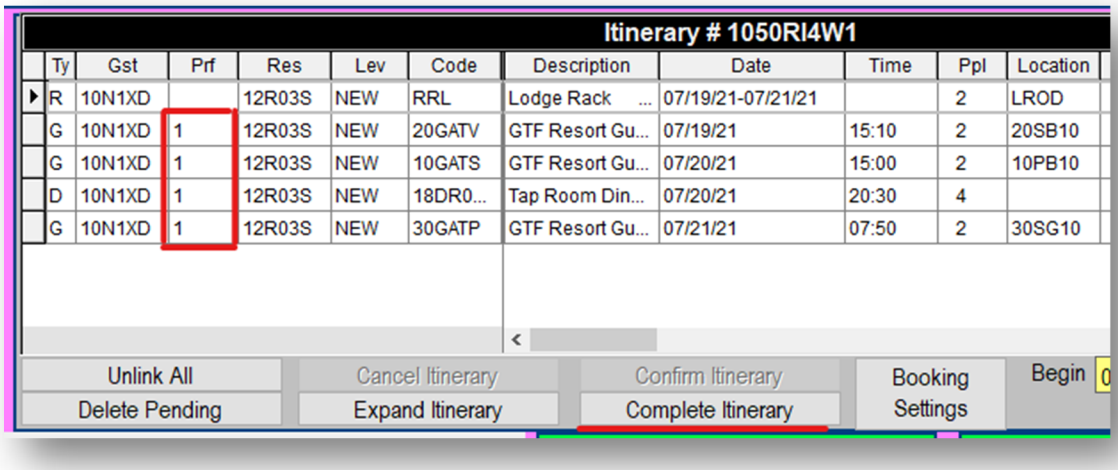
23. Close the call:
    - Read through every booking with the guest in order to ensure accuracy
    - Reaffirm the 14-day cancellation window and the exact final date the booking can be changed/cancelled.
    - Inform the guest that their confirmation email will arrive within one hour
    - Ask if they need assistance with anything else
    - Thank Mr. Bond for calling
    - End the call.

Clean Up A Room + Golf + Dining Booking

1. From the Booking Center, click into the Profile field of each recreational item in your Itinerary to assign one profile from your Guest Tile to each activity.

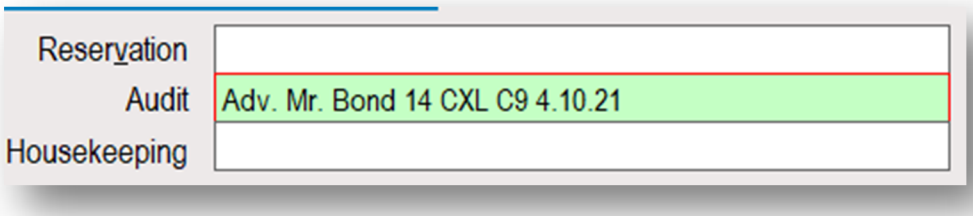


2. Once every activity is assigned a Profile, all line items on the Itinerary will change from red to white, and the Complete button will become available to push.
Complete the Reservation.

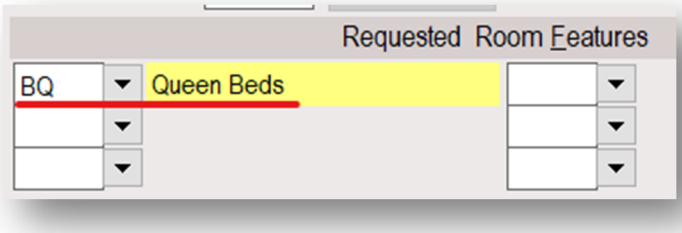


3. Enter the Reservation Tile and click Edit

4. Type your quoted cancellation policy into the Audit line

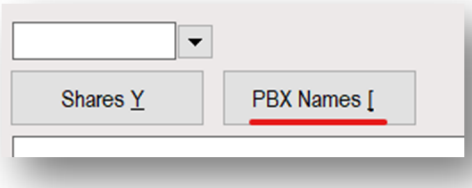


5. Add the Room Feature Request for two Queen Beds

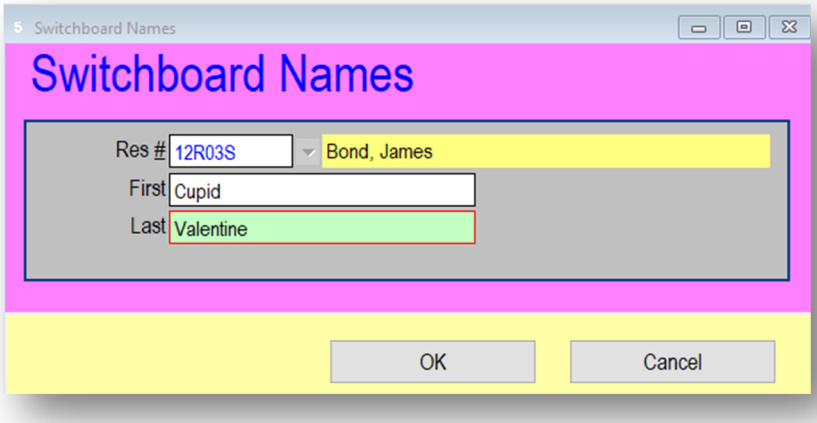


6. Page Down to save

7. Since Mr. Valentine will not be paying for this trip, add him as a PBX Name:
   - Click PBX Names

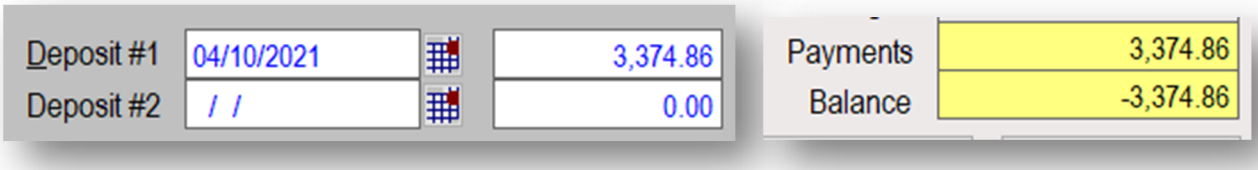


   - Click A for Add
   - Enter Mr. Valentine's full name into the window

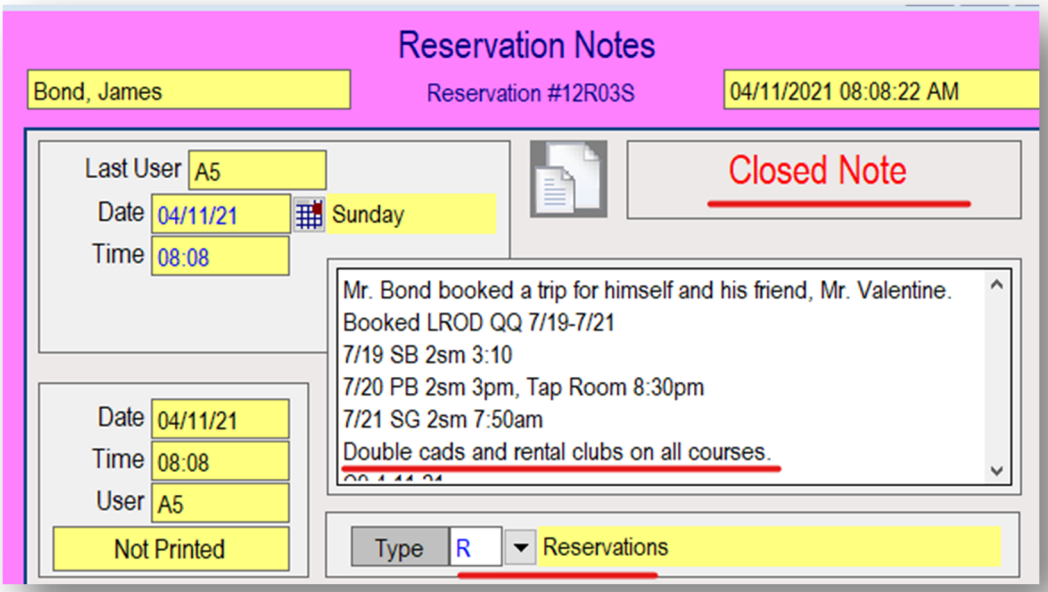


   - Page Down to save
   - Escape to return to the Reservation Tile

8. Access Special Billing to make sure that your Deposit #1 amount matches the deposit you collected from the guest.



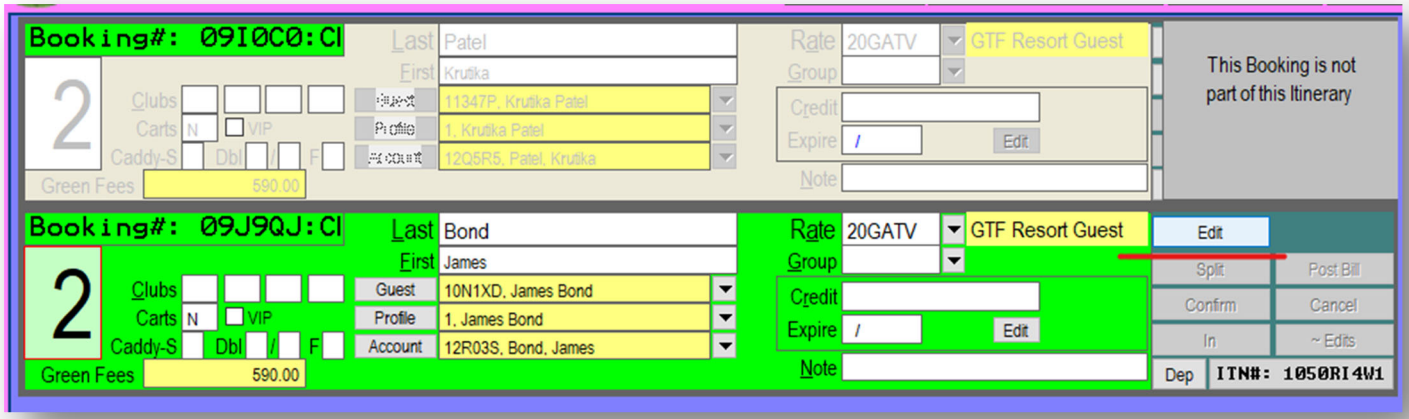
9. Click More Notes to add your Closed R Note about the booking.



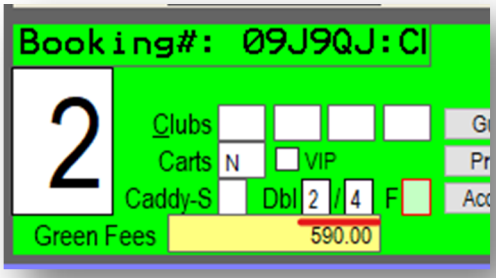
Since we only booked one room, and Mr. Bond will be covering all charges, we do not need to add an FDB Trace. By adding Mr. Valentine's name as a PBX, we have already indicated that Mr. Valentine does not need to put down a credit card with the front desk when he checks in.

10. Escape to return to the Booking Center

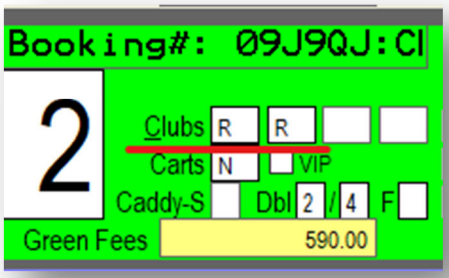
11. Double click on the first tee time to open the Golf Tile and click the small Edit button to the right of Mr. Bond's tee time

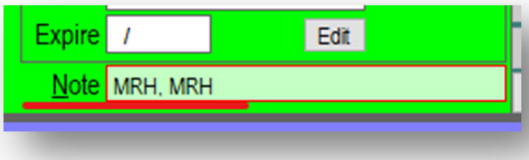


12. Add the Double Caddie request



13. Add the rental club requests



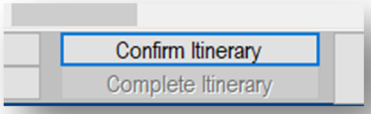


14. Page Down to save all edits

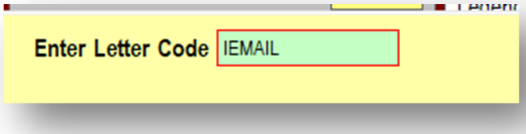
15. Escape to return to the booking center

16. Repeat the Double Caddie and Rental Club requests on the two remaining tee times

17. Confirm the reservation



18. Send an IEMAIL



19. Complete and Save your Booked Lead in NAVIS

As a single room booking, we have already set this reservation up for arrival, so we will not be receiving a 10 Day Arrival notice from the Reservations Auditors.

10 Day Arrivals | Golf Splitting

If multiple guests will be splitting charges on room and golf,

- When to Split
  - When you are creating an itinerary with multiple golf packages, the golf needs to be split and assigned to each package.
  - When the golf payment will be paid for individually by the golfers (in which case, you will have already created Shares and Guest Tiles for each secondary sharing rooms.)
- How to Split:
  - Begin at the 12-day point, after having shared the rooms
  - In your secondary guests' reservation tiles, the 5 schedules will be blank because all golf is currently only associated with the primary's room. Use Scan Link or Jump to get to the primary's tile with the full 5 Schedule, then click "Edit"
  - Click "Split" and select the appropriate ration depending on who will be paying for golf
  - Once the reservation is split, assign the secondary payees to their golf reservations by clicking the "Account" dropdown area. (This is the golf equivalent of Whosing.)
  - Type the secondary's name into the search box in the bottom right corner
  - Select the correct person
  - Choose the appropriate rate code
  - Type "Y" to change the name on the share, then Page down to save
- If the guests pre-paid their golf, add this information (which should already be in an FDB Trace, in the baby notes of the golf.
  - This is so the pro shop can split the bill appropriately. They cannot see the reservation traces; only the tee sheet.
  - Example FDB Trace:
    - (Room Type) at $(Base Rate)+++ = (total for 1 night+++)
    - x 3 Nights = $___
    - PB @$___ x 3 players = $____
    - Total pre-paid by ____ = $____

Example Baby Note: "PPD 2SM. Charge to R#___"

Pre-Blocking



Blocking a Room is the assignment of a specific room to a specific customer.

When a guest books a stay at our Resort, we reserve them a specific **Room Type**. Once we are within 14 Days of their arrival, the Front Desk will **Set the House**, meaning they will assign every incoming guest to a certain room number.

By waiting until we are within the no-cancellation period for each guest's reservation before assigning rooms, our front desk is saved the trouble of needing to continually re-organize the room blocking each time a guest changes their plans or cancels.

There are some instances, however, in which we, as Reservations Agents, need to assign specific room numbers to guests at the time of booking. The process of pre-emptively assigning room numbers to a booking is referred to as **Pre-Blocking.**

The Following Room Types Must Be Pre-Blocked:

Property-Wide:

- Suites (Non-Moveable)
- 2nd room of 2-Bedroom Suites (Non-Moveable)
- Connecting Rooms for Families and small children (Non-Moveable)
- ADA rooms

The Inn at Spanish Bay:

- Scenic View Rooms with QQ beds

The Lodge at Pebble Beach:

- Ocean View Studios
- Garden Spa Rooms
- Fairway Rooms
- Fairway One Rooms
- Deluxe Ocean View Rooms with QQ beds

Casa Palmero / Inspirato

Inspirato is a travel membership agency that provides exclusive stays to its members. One of Inspirato's "exclusive" properties is Pebble Beach's Mediterranean estate, Casa Palmero.

Casa Palmero has a total of 24 rooms, 10 of which are under contract Inspirato beginning April 1st, 2021. Because of this contract, the 10 Casa Palmero rooms on the Inspirato contract are unavailable for us to book in Reservations.

- Inspirato members must book their Resort Stays directly through the Inspirato company.
- Inspirato's contract also includes exclusivity to tee times on all Pebble Beach Golf Courses. Inspirato members need to book all tee times directly through Michelle Zimny.

Michelle Zimny Ext. 6668 zimnyM@pebblebeach.com
info@inspirato.com
Inspirato Phone: 888--625-7525

If a guest who is not a member of Inspirato would like to book one of the 14 non-contracted Casa Palmero rooms/suites, that reservation may be booked through the Reservations Center at Pebble Beach Resorts, including golf tee times.

Casa Palmero Room Blocking

Michelle Zimny is responsible for blocking all Casa Palmero rooms for both Inspirato members and guests who book directly through Pebble Beach.

Unlike the Inn at Spanish Bay and The Lodge at Pebble Beach, Michelle Zimny blocks Casa Palmero as soon as the reservation is booked.

Because Casa Palmero is blocked right away, as Reservations Agents, we need to prepare all Casa Palmero Bookings for Arrival at the time of booking – not at the 10 Day Arrival point.

This includes:

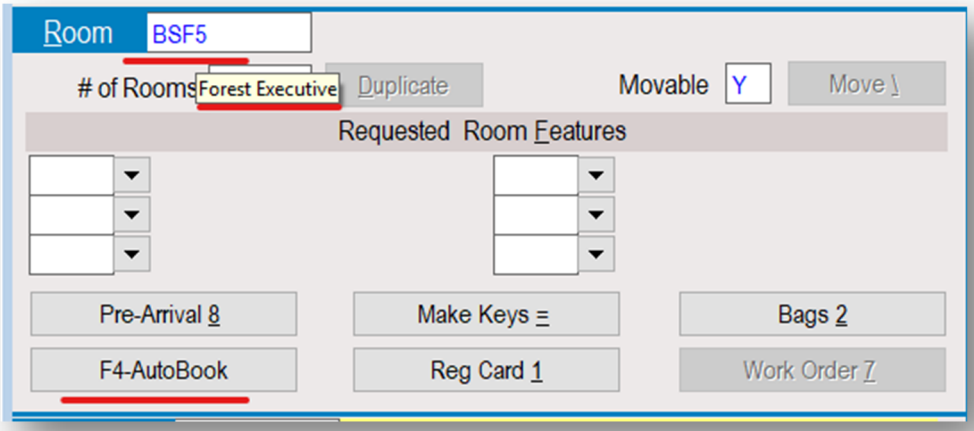
- Duplicating all rooms as needed
- Splitting all golf as needed
- Setting all applicable Notes and Traces

How to Pre-Block / Auto Book

Pre-blocking is done during the Clean Up process after you have completed your call with the guest.

1. Access the Reservation Tile

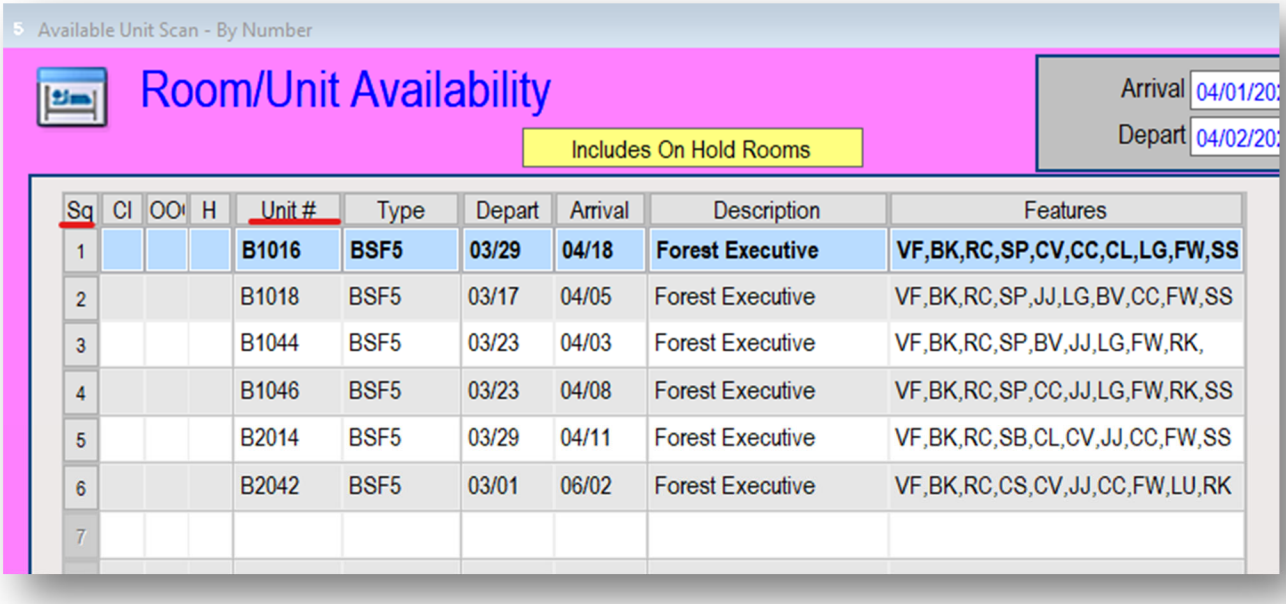
2. Click the Auto Book button (or F4 on your keyboard) in the Room section



3. Type Y for Yes to only search for rooms that are an exact match

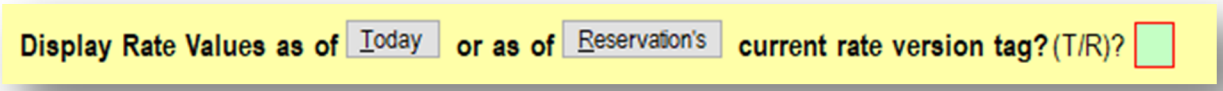


4. The Available Unit Scan window will open with a list of every available room that matches your Reservation Tile Click the Sequence Number of the room you wish to select.

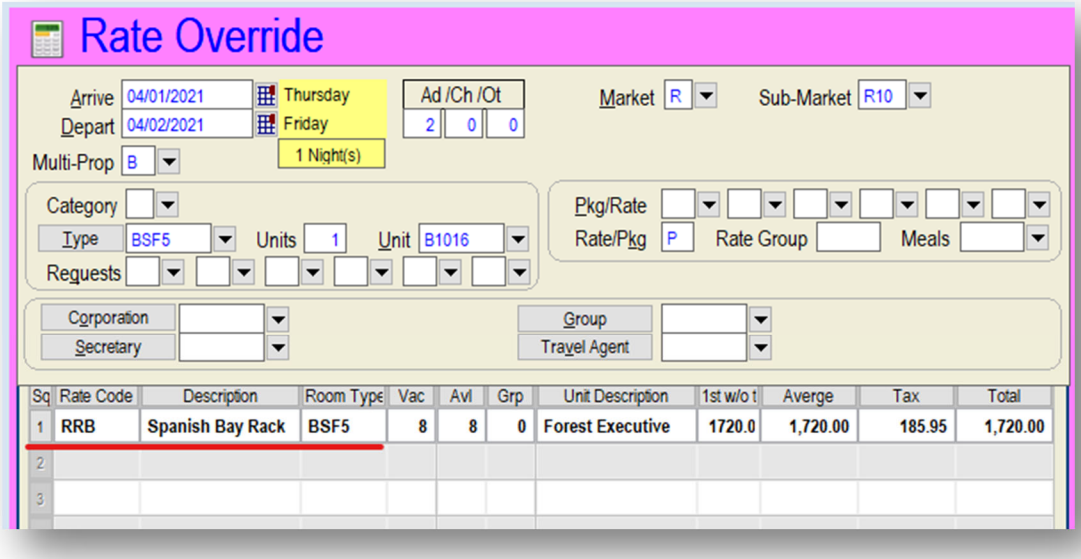


Sq	Cl	OO	H	Unit #	Type	Depart	Arrival	Description	Features
1				**B1016**	**BSF5**	**03/29**	**04/18**	**Forest Executive**	**VF,BK,RC,SP,CV,CC,CL,LG,FW,SS**
2				B1018	BSF5	03/17	04/05	Forest Executive	VF,BK,RC,SP,JJ,LG,BV,CC,FW,SS
3				B1044	BSF5	03/23	04/03	Forest Executive	VF,BK,RC,SP,BV,JJ,LG,FW,RK,
4				B1046	BSF5	03/23	04/08	Forest Executive	VF,BK,RC,SP,CC,JJ,LG,FW,RK,SS
5				B2014	BSF5	03/29	04/11	Forest Executive	VF,BK,RC,SB,CL,CV,JJ,CC,FW,SS
6				B2042	BSF5	03/01	06/02	Forest Executive	VF,BK,RC,CS,CV,JJ,CC,FW,LU,RK
7									

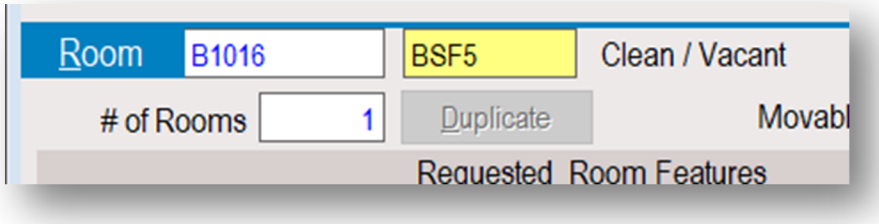
5. You will be prompted to update the Rate Code on your Reservation. We want to keep the Rate Code the same, so we will click R for Reservation



6. Select the Rate Code that matches your current Reservation. I this case, there is only one option:



You will see that the **Room Type Code BSF5** has been moved to a yellow box to the right of the Room field. In its place, the Room field now holds the exact room number that we have assigned to this guest: **Room # B1016**

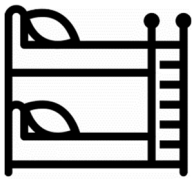


Auto Book Tips:

- If you already know the **room number** of the room you want to block, instead of clicking Auto Book, click Edit on your Reservation Tile, type the room number into the Room field, then save.
- If **multiple rooms of the same room type** are booked onto one Reservation Tile, Duplicate the rooms at the time of booking in order to Auto Book right away.
- If a room that requires Pre-Blocking needs to be **split into Shares**, Pre-Block the room prior to creating the Share. This will prevent SMS from glitching.

When pre-blocking rooms that require specific room features (such as **ADA** rooms and **Scenic View** / **Ocean Deluxe with two Queen Beds**), set your **Room Feature** on the Reservation Tile before clicking Auto Book.

Two Bedroom Suites



A **Two Bedroom Suite** is a suite that is booked in conjunction with a regular room that has a connecting entrance to the suite.

All Suites at the Inn at Spanish Bay and The Lodge at Pebble Beach can be booked as Two-Bedroom Suites.

Two Bedroom Suite Booking Checklist:

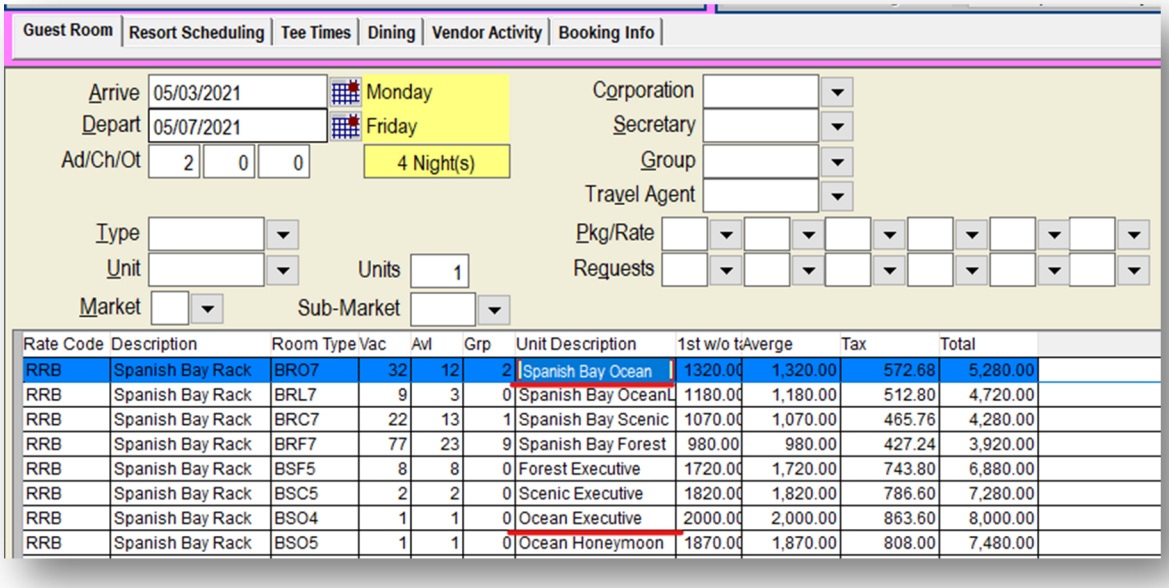
- ✓ Have Supervisor check Delphi (If suite is at Spanish Bay 1+ month out)
- ✓ Pre-Block both the Suite and connecting room
- ✓ Mark the room as Non-Moveable
- ✓ Leave a K note in both rooms advising that the room should not be moved
- ✓ Mini-Group the Suite and room together
- ✓ Leave a R Note if a supervisor checked Delphi for a Spanish Bay Suite

- The Two Bedroom Suite Rate is equal to the Suite Rate and the connecting Room Rate combined
- All suites will have one King Bed
- All rooms that connect to a suite will have two Queen Beds

Book A Two Bedroom Suite

The McGuires are booking a Two Bedroom Suite for themselves and their college-age son and daughter, Johnny and Melissa McGuire.

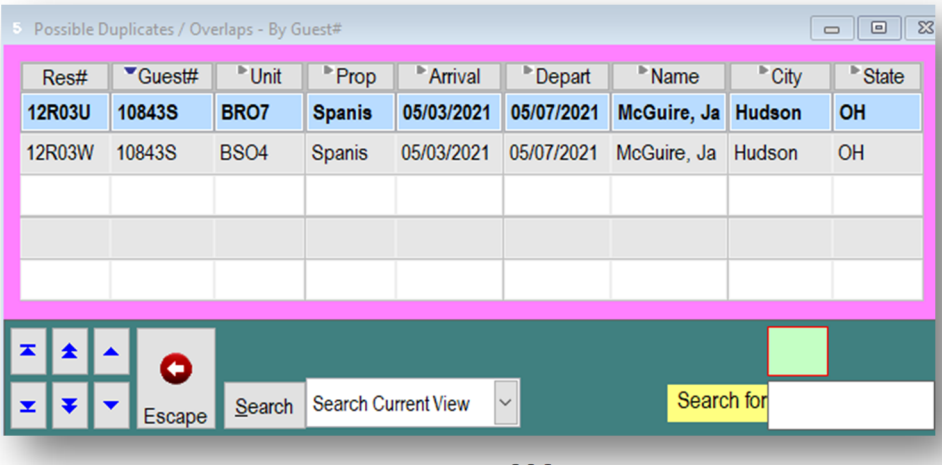
- In the Booking Center, Access the Guest Room Tab to search for room availability. Keep the Unit field set at 1 so we can select one suite and one room.



Rate Code	Description	Room Type	Vac	Avl	Grp	Unit Description	1st w/o t	Averge	Tax	Total
RRB	Spanish Bay Rack	BRO7	32	12	2	Spanish Bay Ocean	1320.00	1,320.00	572.68	5,280.00
RRB	Spanish Bay Rack	BRL7	9	3	0	Spanish Bay OceanL	1180.00	1,180.00	512.80	4,720.00
RRB	Spanish Bay Rack	BRC7	22	13	1	Spanish Bay Scenic	1070.00	1,070.00	465.76	4,280.00
RRB	Spanish Bay Rack	BRF7	77	23	9	Spanish Bay Forest	980.00	980.00	427.24	3,920.00
RRB	Spanish Bay Rack	BSF5	8	8	0	Forest Executive	1720.00	1,720.00	743.80	6,880.00
RRB	Spanish Bay Rack	BSC5	2	2	0	Scenic Executive	1820.00	1,820.00	786.60	7,280.00
RRB	Spanish Bay Rack	BSO4	1	1	0	Ocean Executive	2000.00	2,000.00	863.60	8,000.00
RRB	Spanish Bay Rack	BSO5	1	1	0	Ocean Honeymoon	1870.00	1,870.00	808.00	7,480.00

- Double click on both the suite and the Room Type that connects with your suite to add both rooms to the Itinerary as separate Reservation Tiles,

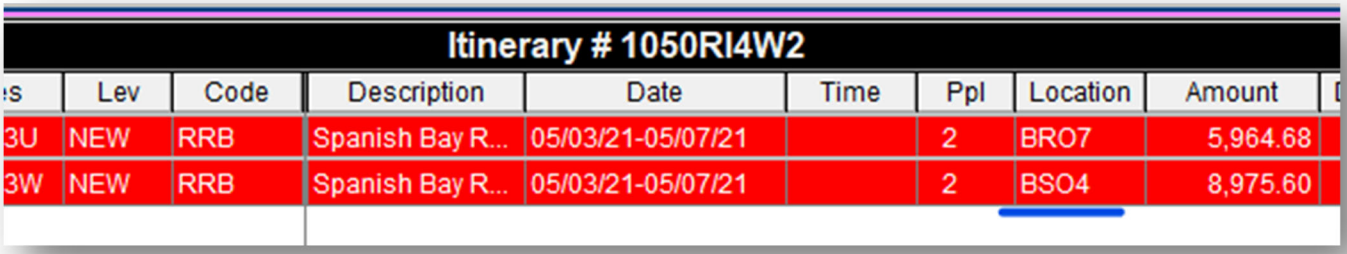
  Upon double clicking the second room, a window will appear titled Possible Duplicates / Overlaps. This is a system flag that is triggered to warn you in the event you selected multiple rooms on the same dates by mistake.
  Escape to bypass this flag.



- In this example, we have selected a Two Bedroom Suite at The Inn at Spanish Bay. Per our booking guidelines, we must contact a Supervisor before we proceed so they can check Delphi and verify that this suite is not on hold for any Groups.
  If the supervisor confirms that the suite is available, proceed to the next step.

- Click the Down Arrow next to the Guest field in the booking center to search for / create the guest's Guest Tile and collect their credit card.

- Ask the guest for permission to place them on hold so you can finalize their booking.
  The deposit should always be processed on the room in which the Primary Guest will be staying, so double click on the Suite (BS04) in the Itinerary Detail to prepare this Reservation Tile.



Itinerary # 1050RI4W2

s	Lev	Code	Description	Date	Time	Ppl	Location	Amount
3U	NEW	RRB	Spanish Bay R...	05/03/21-05/07/21		2	BRO7	5,964.68
3W	NEW	RRB	Spanish Bay R...	05/03/21-05/07/21		2	BSO4	8,975.60

- Prepare your Reservation Tile *and collect the deposit like normal:*
  - On the Reservation tile, click **E** for **Edit** and **Page Down**.
  - Follow the prompts to select the:
    - **Media Type** – Internet
    - **Media Source** – Pebblebeach.com
    - **Incoming Phone Number** – Reservation Center
    - **Guarantee Code** – A for Advanced Deposit
  - **Escape** to return to the Booking Center
  - Right Click on the Suite in the Itinerary Detail section and select **Complete**
  - Return to the Suite's Reservation tile
  - Click **Bills**
    - Enter Transaction Code - 970PPV (M, V, A, or D for the credit card code)
    - Enter the deposit amount
    - Enter C for Charge
    - Page Down
    - Select Yes to verify that all entries are correct
    - Move your curser outside of the credit card number field
    - Page Down
    - Press any button to return to Bills
    - Exit to return to the Reservation Tile
    - Exit to return to the Booking Center

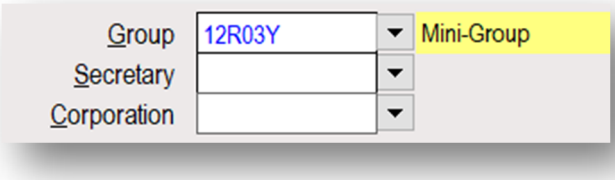
- Gather information from the Primary Guest about all rooms:
  - *What are the names of the guests staying in each room?*
  - *Will the Primary Guest be covering all charges, or will charges be split at checkout?*

- Close your call:
  - Reconfirm the booking and cancellation window with your guest
  - Inform the guest that their confirmation email will arrive within one hour
  - Ask if they need assistance with anything else
  - Thank them for calling
  - End the call.

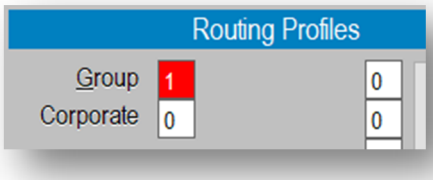
Clean Up A 2 Bedroom Suite Booking

1. Clean Up the Suite Reservation Tile:

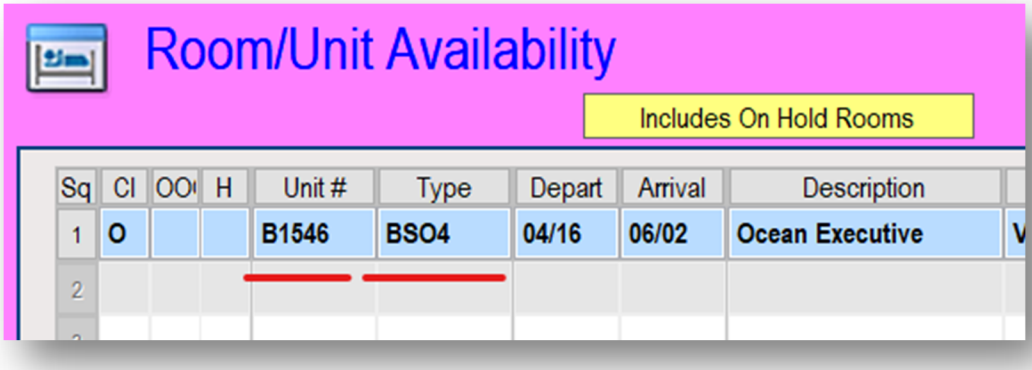
- Add the **cancellation quote** in the Audit line
- Type the Reservation Number into the Group Field to create a Mini-Group



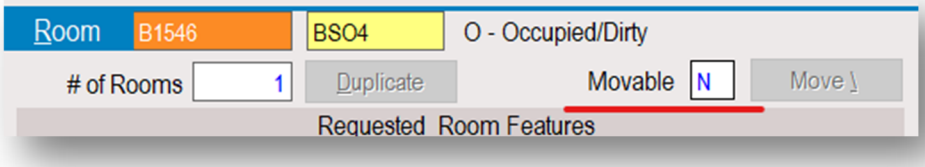
- Access Special Billing and remove the **red 1** that appeared due to your Mini-Group Code



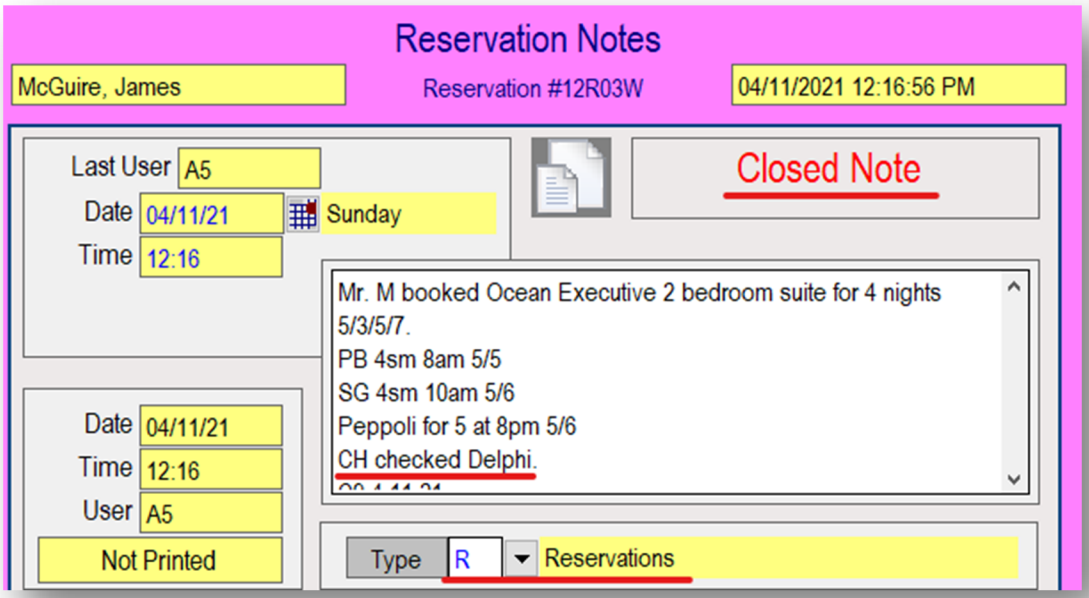
- Click **Auto-Book** to assign the Suite.
  In our example, there is only one available Suite on these dates.



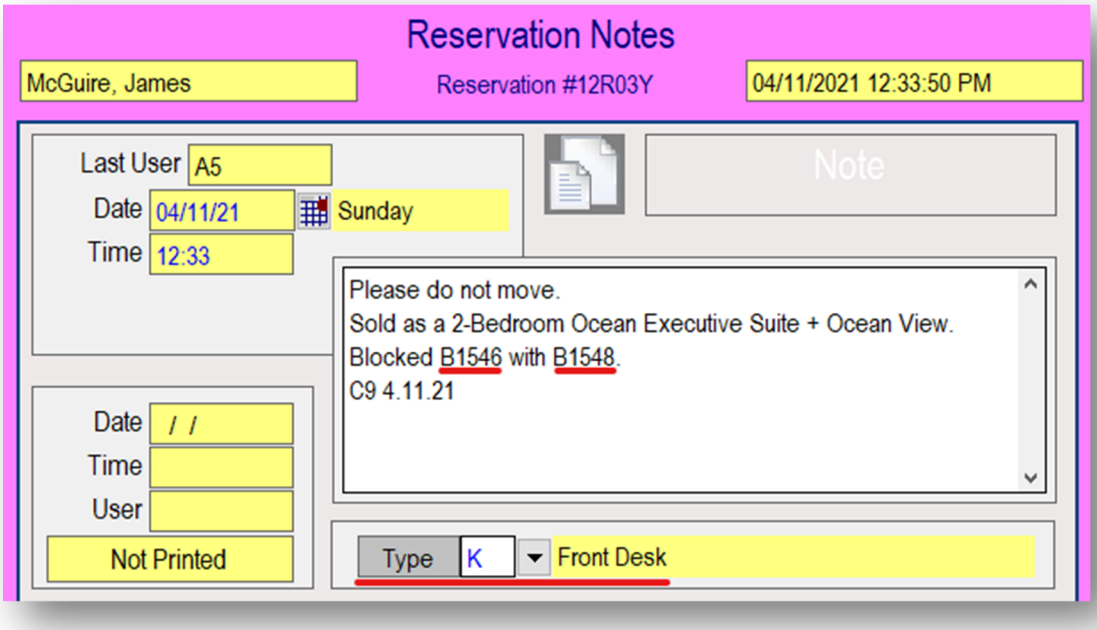
- Mark the room **N** for **Not Moveable**



- Add a Closed **R Note** with a summary of the booking:
(Because we booked a Spanish Bay Inn suite, include a note about checking Delphi)

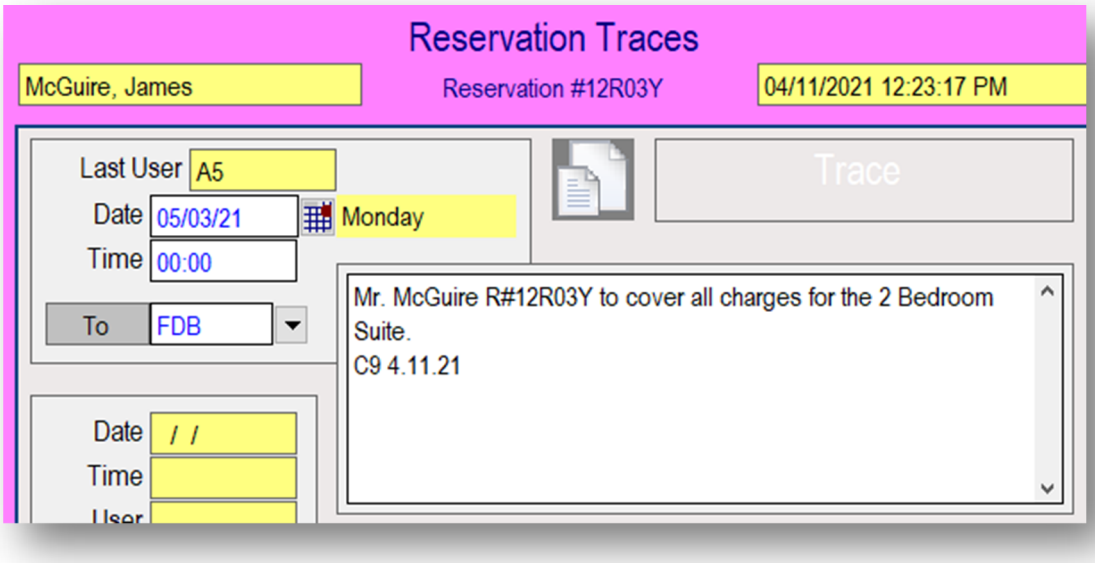


- Add a **K Note** to ensure the Front Desk does not modify your Room Blocking:
(We checked our **Spanish Bay Room Features Chart** to verify that room #B1048 is the Ocean View Room that connects with this Suite.)



Copy this note to a scratch document. This exact note will also be posted on the connecting room's Reservation Tile.

- Add an **FDB Trace** to explain the Billing Scenario:



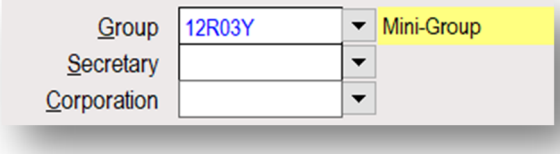
2. Escape to return to the Booking Center, then enter the Reservation Tile of the Connecting Room

3. Prepare the Connecting Room Reservation Tile (as if you were going to take a deposit):

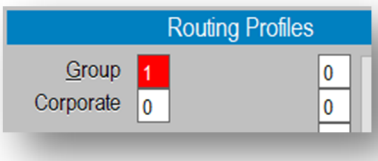
- On the Reservation tile, click **E** for **Edit** and **Page Down**.
- Follow the prompts to select the:
  - **Media Type** – Internet
  - **Media Source** – Pebblebeach.com
  - **Incoming Phone Number** – Reservation Center
  - **Guarantee Code** – **J** for **Other Reservation**
- **Escape** to return to the Booking Center
- Right Click on the Suite in the Itinerary Detail section and select **Complete**
- Return to the Suite's Reservation tile

4. Clean Up the Connecting Room's Reservation Tile:

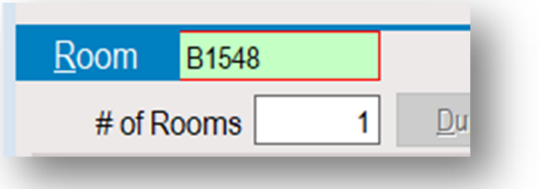
- Type the Reservation Number of the Suite into the Group Field to add the connecting room to our Suite's **Mini-Group**



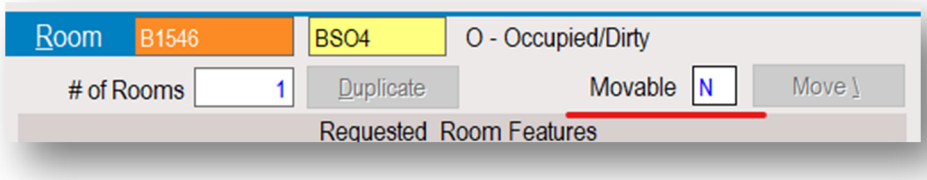
- Access Special Billing and remove the **red 1** that appeared due to your Mini-Group Code



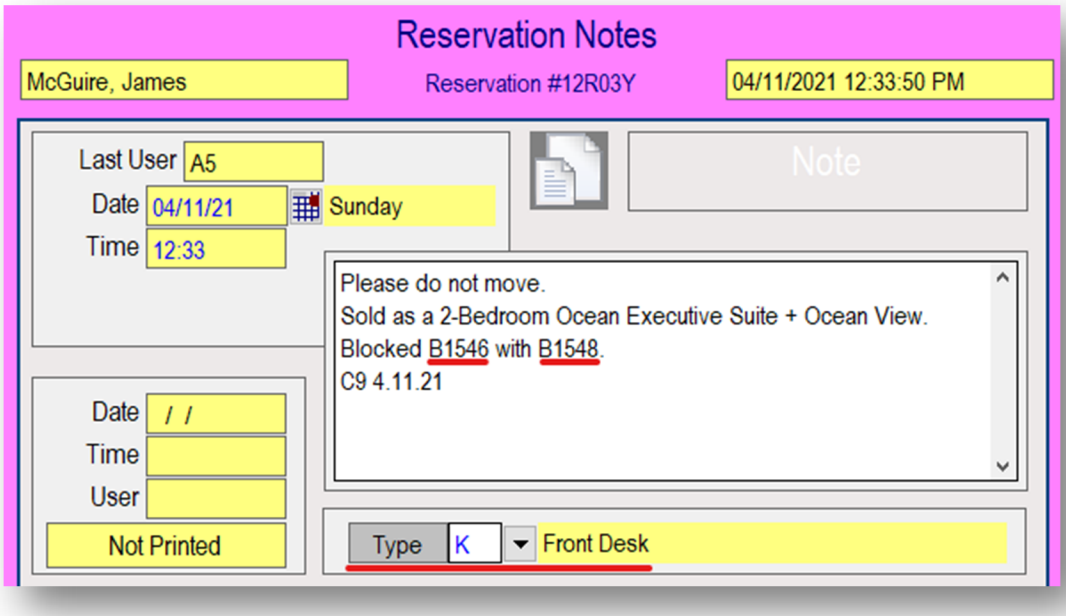
- **Auto-Book** the Ocean View Room that connects to our Ocean Executive Suite
  We already know the exact room number we need to Pre-Block, so instead of clicking Auto-Book:
  - Click E for Edit
  - Type **B1548** into the **Room** field
  - Page Down to save



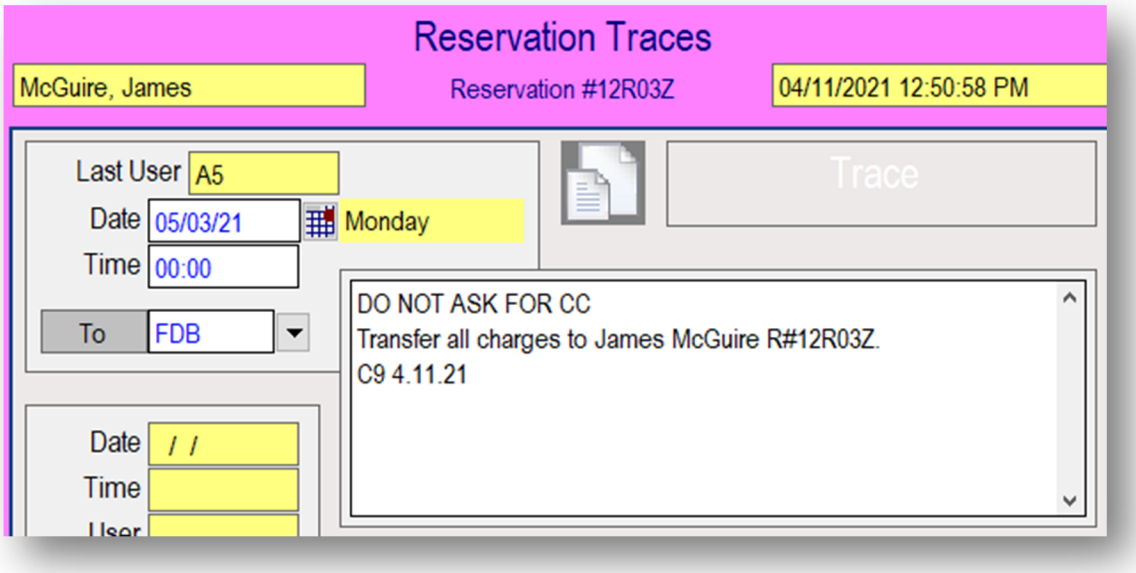
- Mark the room **N** for **Not Moveable**



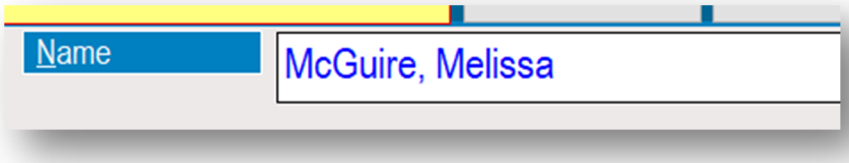
- Create an identical **K Note** to ensure the Front Desk does not modify your Room Blocking:



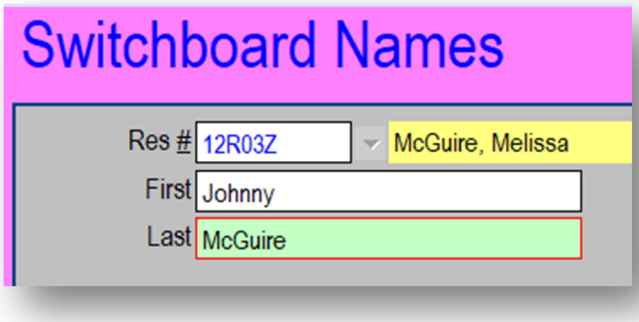
- Add an **FDB Trace** to explain the Billing Scenario:



- Edit the name on the Reservation Tile to the name of one of the adults who will be staying in this room.



- Add the second adult as a PBX Name



5. Escape to return to the Booking Center

6. Confirm the Itinerary

7. Send an IEMAIL confirmation

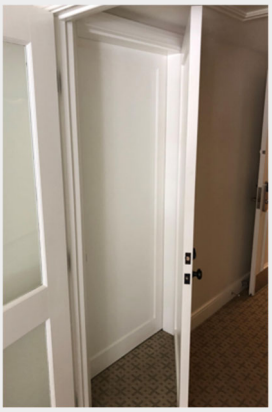
8. Create and save your NAVIS Booked Lead

Families with Children



When **families** with multiple children visit, it is common for them to book two rooms: **one room for the parents** and **one room for the kids.**

In these instances, we want to book the parents in a room that is directly **adjacent** to the children's' room.

Inter-Connecting	Common Entry	Adjacent
Internal doors directly connect the interior of both rooms.	The entrances to both rooms are in a shared entryway.	Two rooms next to each other.
		

You can use your Property Maps to determine which rooms are **adjacent** to each other.

However, if all children in the second room are under 21 years old, the rooms must be pre-blocked as either **Inter-connecting** or **Common Entry** rooms.



Use your Room Features charts to see which rooms interconnect and which have common entry.

-Room #	Category	Inter-Conn. Room #	Common Entry Room #	Bed Type	(P)atio or (B)alcony	Level on Map	Wing	Han Ac
1002	BRO7	1004	-	QQ	P	1ST	D	
1004	BRO7	1002	-	QQ	P	1ST	D	
1006	BRO7	-	-	QQ	P	1ST	D	
1008	BRO7	-	-	QQ	P	1ST	D	
1010	BRF7	-	-	QQ	P	1ST	D	
1012	BRF7	-	-	QQ	P	1ST	D	
1014	BRF7	1016	-	QQ	P	1ST	D	
1016	BSF5	1014	-	KING	P	1ST	D	

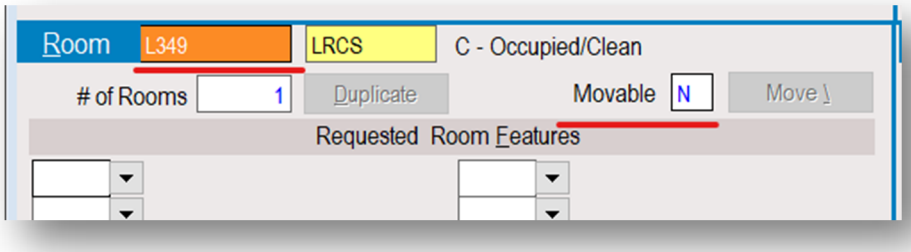
Book A Family with Children in the Second Room

During the Call

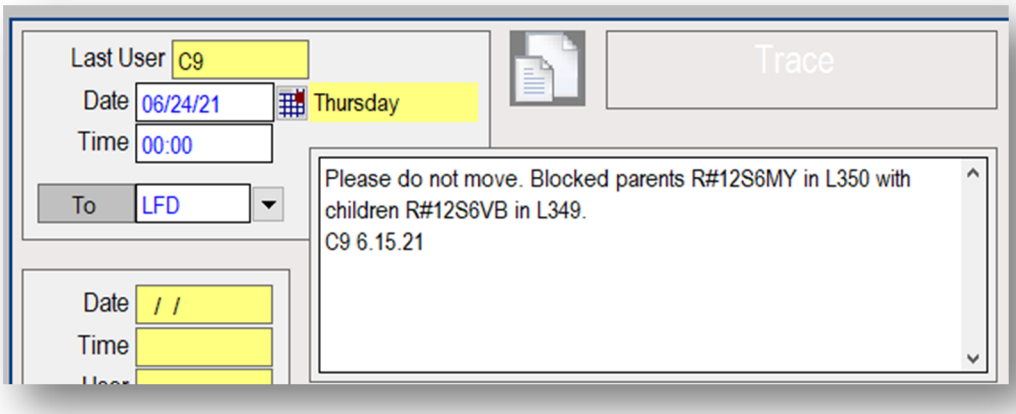
- Build your Itinerary and complete the booking process as normal
- Ask the guest if their children have any allergies of which we should be aware
- Ask the guest the ages of their children

Clean Up

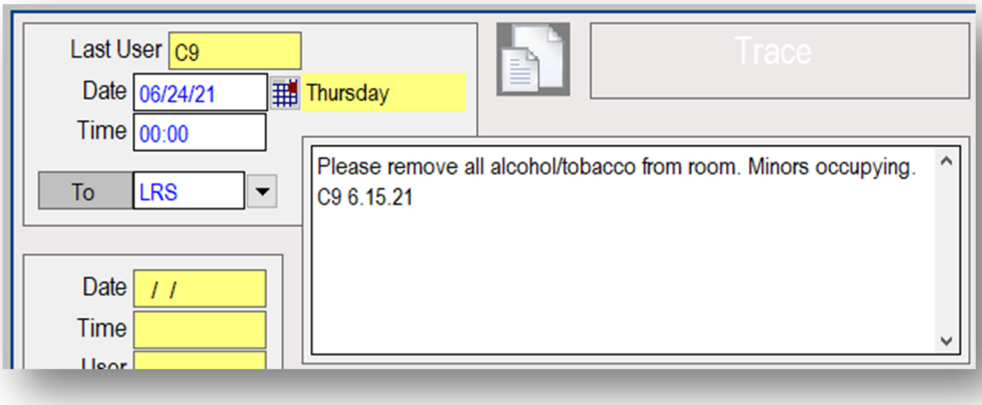
- Add all children as **Profiles** on the Guest Tile and include their **ages** in the notes, such as *7 years old in 2020.*
- **Duplicate** the rooms
- **Pre-block** the rooms as common entry or inter-connecting using your Room Features Chart
  - If you are having trouble finding interconnecting/common-entry rooms that are available, use the F8 Tape Chart to see if any guests can be moved to allow you to block the family's rooms together. (See a supervisor for assistance)
- Mark both rooms with an **N** for **Non-Moveable**



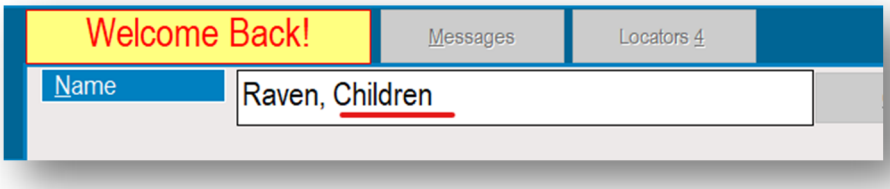
- Set a **Front Desk Trace** on both rooms dated for 3 days prior to arrival:



- Set a **Room Service Trace** on the children's room:



- If all children are minors, **change the name** on the second room:



- If minors will be playing golf, add their ages to the **baby-notes** of the tee times

Fairway One Cottages



The Fairway One Cottages of The Lodge at Pebble Beach are the ultimate clubhouses for a group of golf enthusiasts.

There are two cottages available at Pebble Beach, each of which can be booked with up to four bedrooms: **The Eastwood Cottage** and **The Palmer Cottage.**

Cottage Bedding Arrangements:

- Room 1 – King Bedroom with connecting door to the living room
- Room 2 – Double Queen Bedroom with outside entry and connecting door to the living room
- Room 3 – King Bedroom with outside entry and keycard access to the living room
- Room 4 – Double Queen Bedroom with outside entry and keycard access to the living room

Cottage Breakfast:

- Complimentary Breakfast is included with Cottage Suite Reservations.
- If a Cottage Room is reserved without the Suite, breakfast is not included.
- Breakfast is delivered each morning to the Cottage Suite for all guests, or to individual Cottage Rooms
- Two weeks prior to arrival Lodge Special Services will be responsible to contact the guest to present the Breakfast delivery options listed above. Reconfirm time of said delivery and inform the guest that they should be prepared for delivery beginning ½ hour prior to meal time. Traces set up by Reservations will now be amended by Special Services to reflect the type of breakfast delivery and time for delivery each day.

Information Resources:

- L Drive > Resort Knowledge > Fairway One Cottages
- L Drive > Resort Knowledge > Hotel > Fairway 1

Cottage Booking Guidelines

6 to 18 Months in Advance	The Cottage Suite may only be booked as a 4 Bedroom Suite
3 to 6 Months in Advance	The Cottage Suite may be booked as either a 3- or 4-Bedroom Suite
1 to 3 Months in Advance	The Cottage Suite may be booked as either 2, 3, or 4 Bedroom Suite
Up to 1 Month in Advance	The Cottage Suite may be booked on its own or as a 2, 3, or 4 Bedroom Suite
Up to 1 Month in Advance With Supervisor Approval	Individual Cottage Rooms may be booked

Cottage Booking Checklist

- ✓ **Pre-Block** the Cottage Suites and Cottage Rooms
- ✓ Add a **$50 Breakfast Charge** to each Cottage Room (This is not needed on the suite because the breakfast fee is already included in the rate)
- ✓ **Y Note** Rooming List
- ✓ **FDB** Trace –Billing Scenario
- ✓ **LHK** Trace – For any needed rollaway beds
- ✓ **FWB** Trace "2/3/4 Bedroom Cottage – breakfast included" (Required on every morning they will dine)

Book A Four Bedroom Cottage

1. Set the Master Data Range calendar in the Booking Center to your guest's desired dates.

2. Use the search tool on the Guest Room Tab to search for availability with the unit field set at 1.
   - In order to book a 4-Bedroom Cottage, we need to have at least **1 FW1 Cottage Suite** and **3 FW1 Cottages (rooms)** available.
   - In the image below, you can see that both of our 4-Bedroom Cottages (Eastwood and Palmer) are available on these dates.

Rate Code	Description	Room Type	Vac	Avl	Grp	Unit Description	1st w/o t	Averge
RRL	Lodge Rack	LRWS	16	16	0	Lodge Fairway	1080.00	1,080.00
RRL	Lodge Rack	LSW1	2	2	0	FW1 Cottage Suite	3500.00	3,500.00
RRL	Lodge Rack	LRWF	6	6	0	FW1 Cottage	1300.00	1,300.00
RRL	Lodge Rack	LRCF	15	15	0	FW1 Partial Ocean	1260.00	1,260.00
RRL	Lodge Rack	LRGF	15	15	0	FW1 Garden	1040.00	1,040.00

3. Double click on the Cottage Suite to move this room into your Itinerary.

4. Change the number in the Units field of your search to 3, then search again.

5. Double click the FW1 Cottage room to pull 3 of these into your Itinerary at once.

6. Click the Down Arrow next to the Guest button in your Booking Center to search for / create your guest's Guest Tile and collect their credit card.

7. Ask the guest if you may put them on hold so you may finalize their booking and process their deposit.

8. Return to the Booking Center and double click on the Cottage Suite in your Itinerary Detail to open this Reservation Tile

9. Prepare the Cottage Suite's Reservation Tile
   - Access the Reservation Tile
   - Click **E** for **Edit** and **Page Down**.
   - Follow the prompts to select the:
     - **Media Type** – Internet
     - **Media Source** – Pebblebeach.com
     - **Incoming Phone Number** – Reservation Center
     - **Guarantee Code** – A for Advanced Deposit
   - **Escape** to return to the Booking Center

10. Re-enter the Reservation Tile to collect the Deposit:
    - Double click the room to return to the Reservation tile
    - Click **Bills**
        - Enter Transaction Code - 970PPV (M, V, A, or D for the credit card code)
        - Enter the deposit amount
        - Enter C for Charge
        - Page Down
        - Select Yes to verify that all entries are correct
        - Tab to move curser outside of the credit card number field
        - Page Down
        - Press any button to return to Bills
        - Exit to return to the Reservation Tile
        - Exit to return to the Booking Center

11. Right click on the line of your room reservation and select Complete Booking.
    This will only Complete the room, leaving all recreation as incomplete.

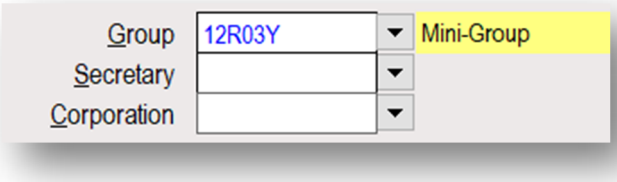
12. Take the caller off hold, thank them for their patience, and gather the final bits of information required for the booking:
    - Rooming List
    - Billing Scenario

13. Close the call:
    - Read through every booking with the guest in order to ensure accuracy
    - Reaffirm the 14-day cancellation window and the exact final date the booking can be changed/cancelled.
    - Inform the guest that their confirmation email will arrive within one hour
    - Ask if they need assistance with anything else
    - Thank Mr. Bond for calling
    - End the call.

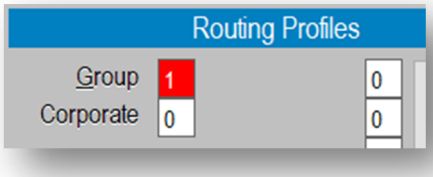
Clean Up Your Cottage Booking

1. Open the Reservation Tile of the Cottage Suite (LSW1)

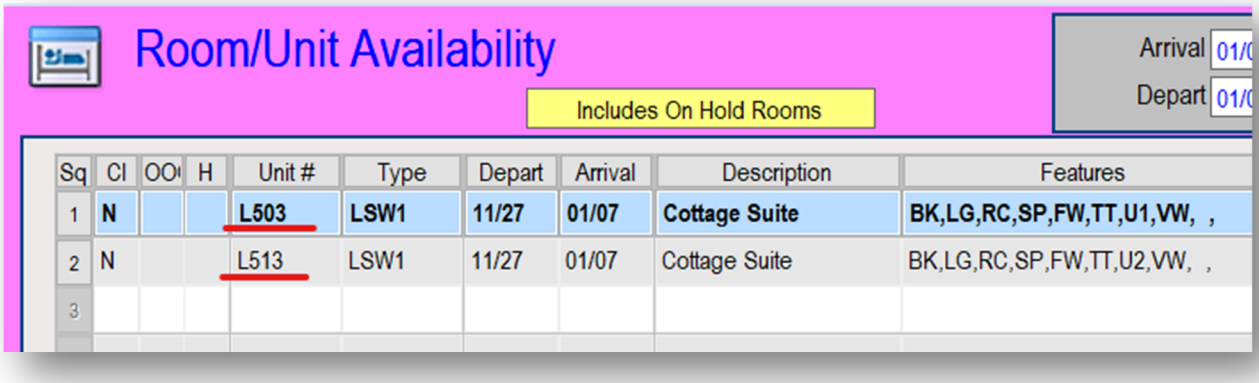
   - Add the **cancellation quote** in the Audit line
   - Type the Reservation Number into the Group Field to create a Mini-Group



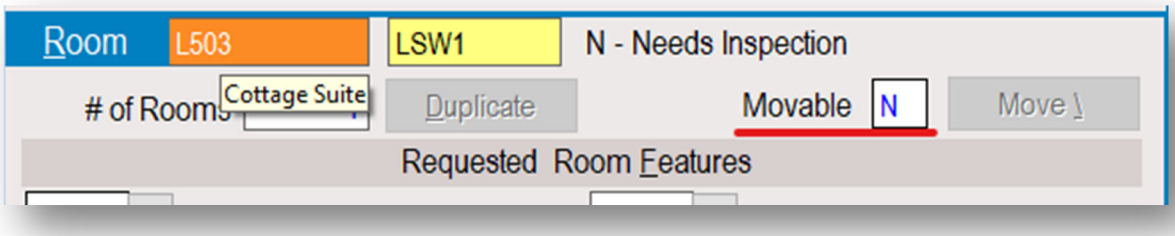
   - Access Special Billing and remove the **red 1** that appeared due to your Mini-Group Code



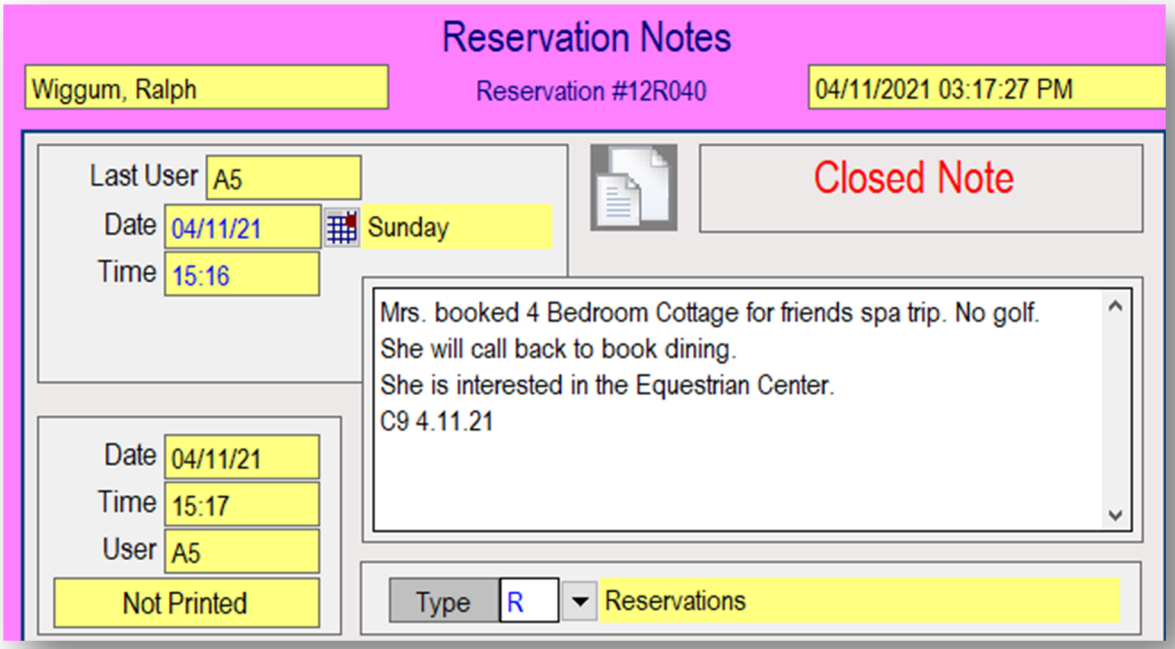
   - Click **Auto-Book** to assign the Suite.
     L503 = Eastwood Cottage
     L513 = Palmer Cottage



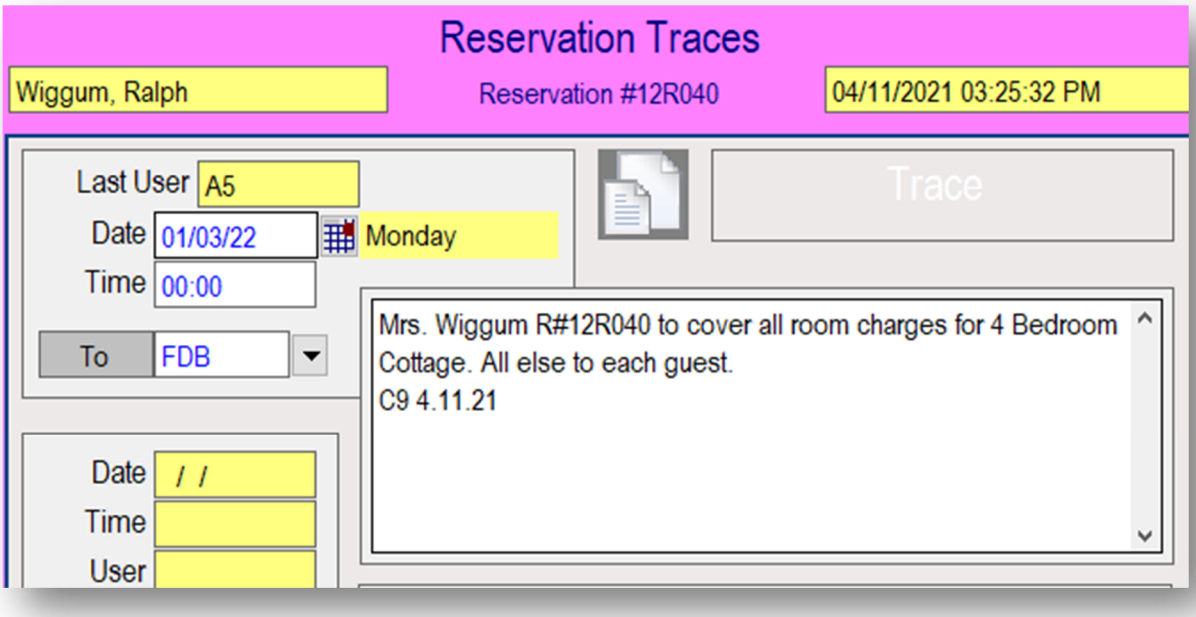
   - Mark the room **N** for **Not Moveable**



- Add a Closed **R Note** with a summary of the booking:



- Add an **FDB Trace** to explain the Billing Scenarios for the Primary Guest:



- Create a **Y Note** with the Rooming List for your Cottage Suite

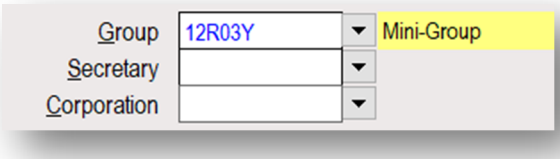
2. Escape to return to the Booking Center, then enter the Reservation Tile of the 3 Cottage Rooms

3. Prepare the Connecting Room Reservation Tile (as if you were going to take a deposit):

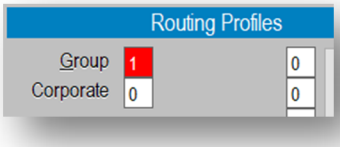
- On the Reservation tile, click **E** for **Edit** and **Page Down**.
- Follow the prompts to select the:
  - **Media Type** – Internet
  - **Media Source** – Pebblebeach.com
  - **Incoming Phone Number** – Reservation Center
  - **Guarantee Code** – **J** for **Other Reservation**
- **Escape** to return to the Booking Center
- Right Click on the Suite in the Itinerary Detail section an select **Complete**
- Return to the Suite's Reservation tile

4. Clean Up the Cottage Room(s) Reservation Tile:

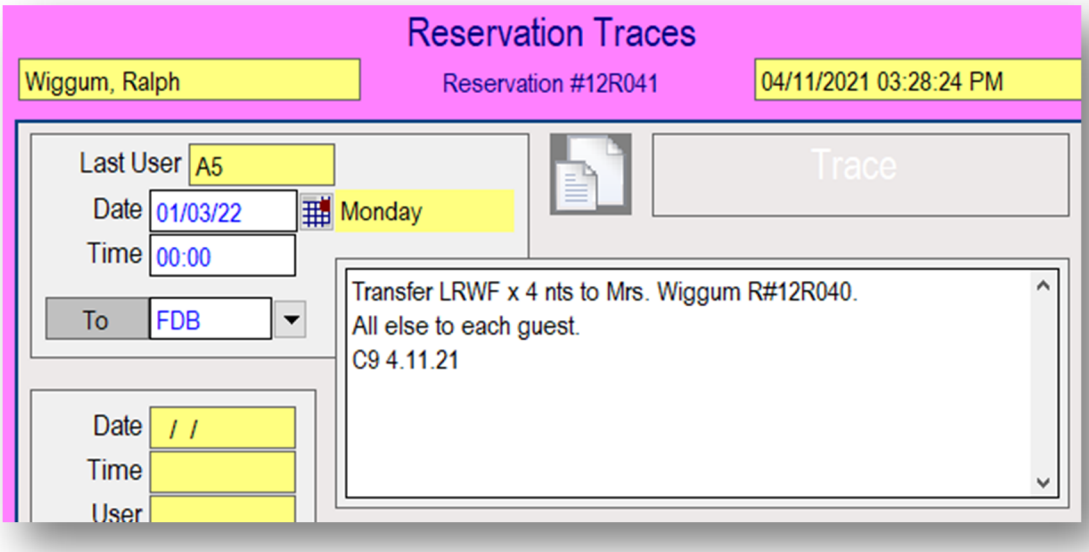
- Type the Reservation Number of the Cottage Suite into the Group Field to add the connecting room to our Suite's **Mini-Group**



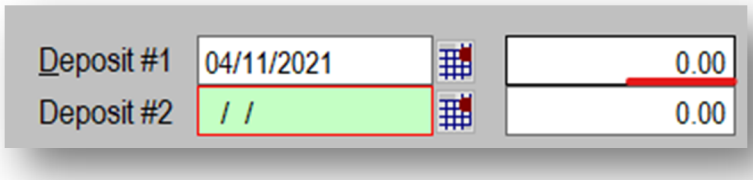
- Access Special Billing and remove the **red 1** that appeared due to your Mini-Group Code



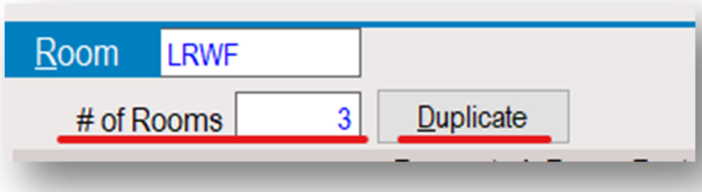
- Add an **FDB Trace** to explain the Billing Scenario for the guests in the 3 Cottage Rooms: Copy/Paste this Trace to a scratch document because you will need to use it again.



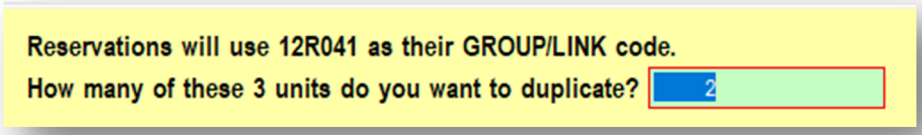
- Access Special Billing and change the amount in the Deposit #1 line to $0.00



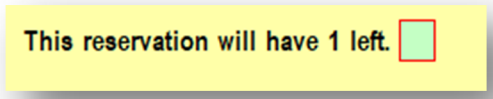
5. Split out the 3 Cottage Rooms by clicking the Duplicate button



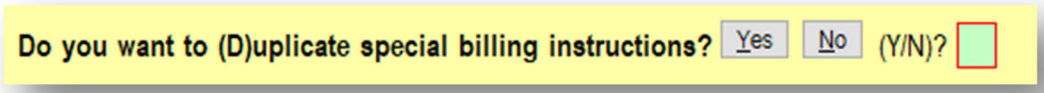
- Page Down to agree



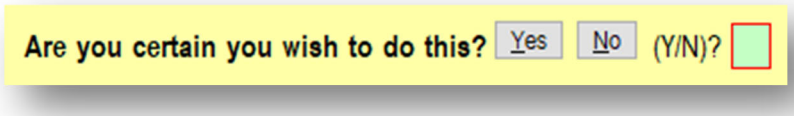
- Page Down to Agree



- Y for Yes

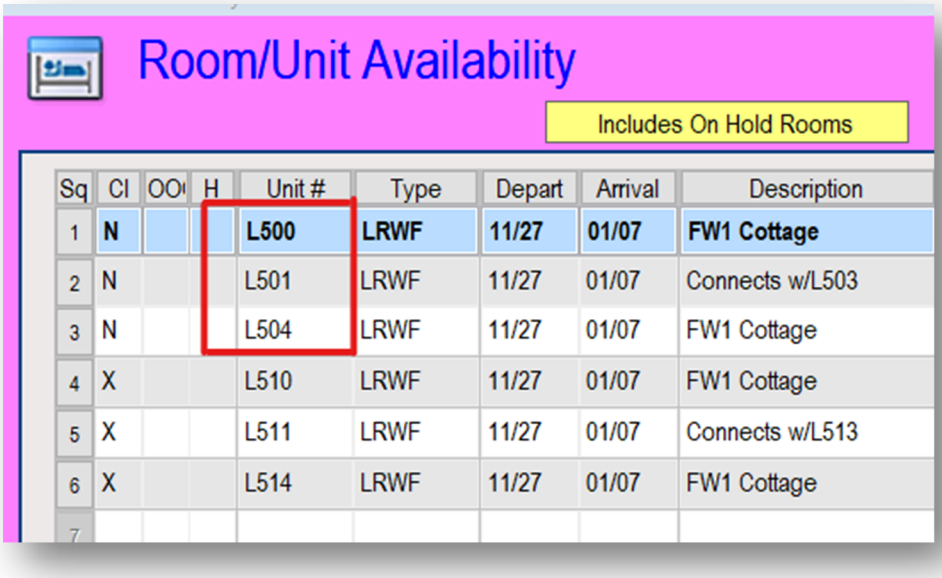


- Y for Yes



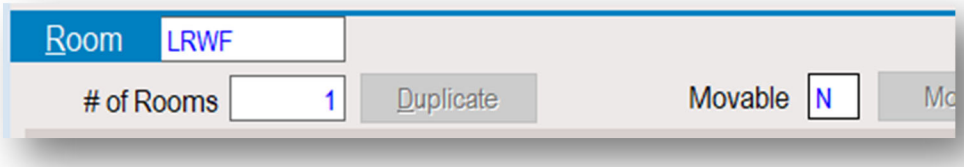
6. Click **Auto-Book** to Pre-Block the 1st Cottage Room

Remember, we booked the Eastwood Suite, Room L503. This means that we need to Pre-Block the Cottage Rooms that connect with the Eastwood Cottage Suite: 500, 501, and 504



Sq	Cl	OO	H	Unit #	Type	Depart	Arrival	Description
1	**N**			**L500**	**LRWF**	**11/27**	**01/07**	**FW1 Cottage**
2	N			L501	LRWF	11/27	01/07	Connects w/L503
3	N			L504	LRWF	11/27	01/07	FW1 Cottage
4	X			L510	LRWF	11/27	01/07	FW1 Cottage
5	X			L511	LRWF	11/27	01/07	Connects w/L513
6	X			L514	LRWF	11/27	01/07	FW1 Cottage
7								

7. Mark the Cottage Room as N for Non-Movable



8. **Scan + Link** – or click **J to Jump** to the next Reservation Tile in this Mini-Group

9. Repeat the Pre-Blocking Process until all Cottage Rooms are blocked into the Eastwood Cottage room

10. Escape to return to the Booking Center

11. **Confirm** the Itinerary

12. Send an **IEMAIL** confirmation

13. Create and save your **NAVIS Booked Lead**

Important Note: You are not required to create C/O Guest Tiles for every guest in each room until the 10 Day Arrival point – with one exception:

If you know the guest(s) will be booking Spa Appointments (Like in this example Spa Trip Scenario), you will need to create C/O Guest Tiles right away because the Spa cannot create multiple spa appointments at the same time under one guest's name.

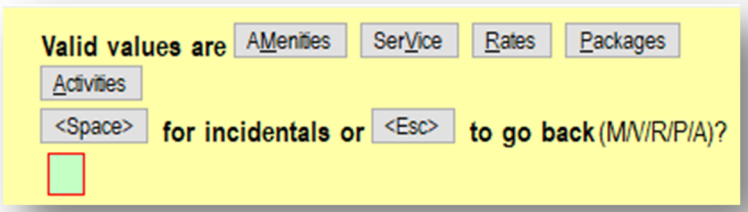
10 Day Arrival | Cottage Booking

1. If your booking involves multiple guests who will be paying for their own charges, create **all C/O Guest Tiles** and **Whose** each Guest to their appropriate **Rooms / Shares**

2. Copy the **Secondary FDB Trace** from the initial Cottage Room and paste this into new FDB Traces ono the Reservation Tiles of the 2nd and 3rd Cottage Rooms.

3. Add the **$50 Breakfast Charge** to every Cottage Room:
   Do not add this charge to the Cottage Suite. The Breakfast fee is already built into the Suite rate.

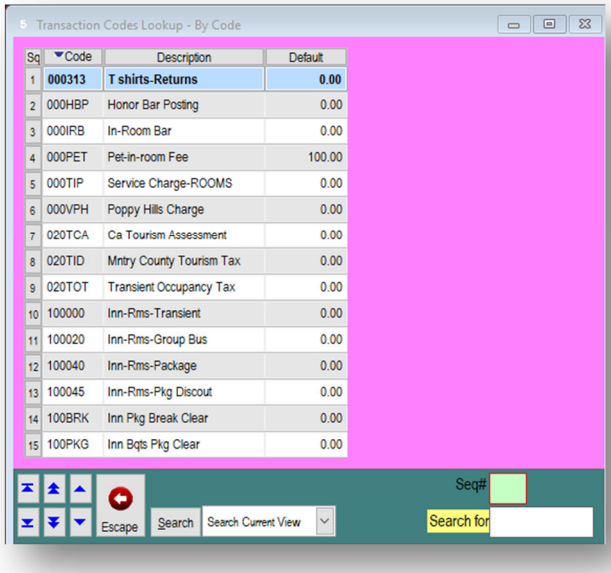
   - Open Special Billing
   - "A" for Add Charge
   - A window will pop up titled Add/Edit Scheduled Charge with the below yellow prompt. Page Down to bypass this prompt.



   - The below message will appear. Page Down to bypass.



   - A window titled Transaction Code Lookup will open:

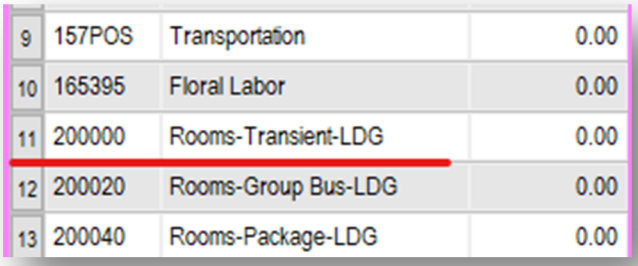


Sq	Code	Description	Default
1	000313	T shirts-Returns	0.00
2	000HBP	Honor Bar Posting	0.00
3	000IRB	In-Room Bar	0.00
4	000PET	Pet-in-room Fee	100.00
5	000TIP	Service Charge-ROOMS	0.00
6	000VPH	Poppy Hills Charge	0.00
7	020TCA	Ca Tourism Assessment	0.00
8	020TID	Mntry County Tourism Tax	0.00
9	020TOT	Transient Occupancy Tax	0.00
10	100000	Inn-Rms-Transient	0.00
11	100020	Inn-Rms-Group Bus	0.00
12	100040	Inn-Rms-Package	0.00
13	100045	Inn-Rms-Pkg Discout	0.00
14	100BRK	Inn Pkg Break Clear	0.00
15	100PKG	Inn Bqts Pkg Clear	0.00

- Click the Double Down Arrow to move one page down in the code list.

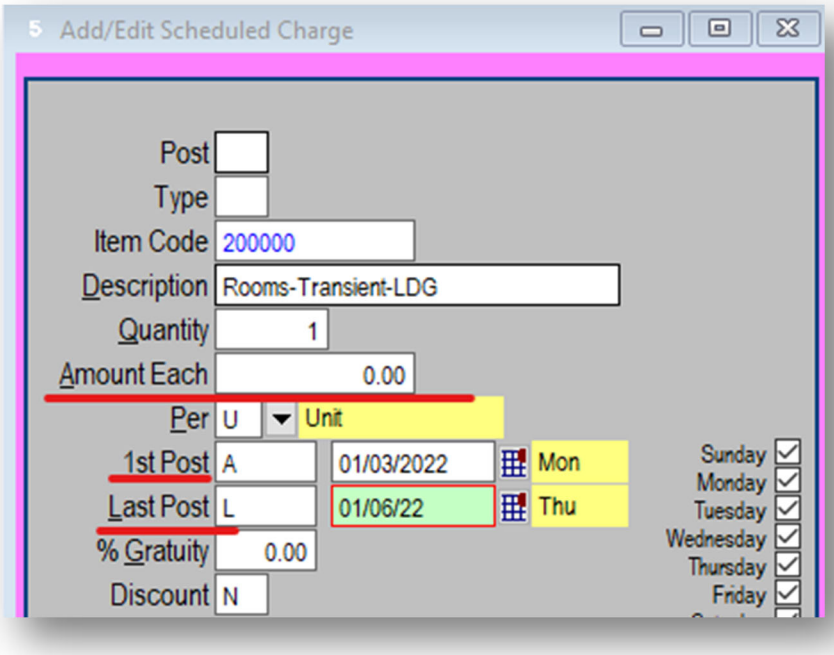


- Select Sequence Number 11: Room Transient – Lodge



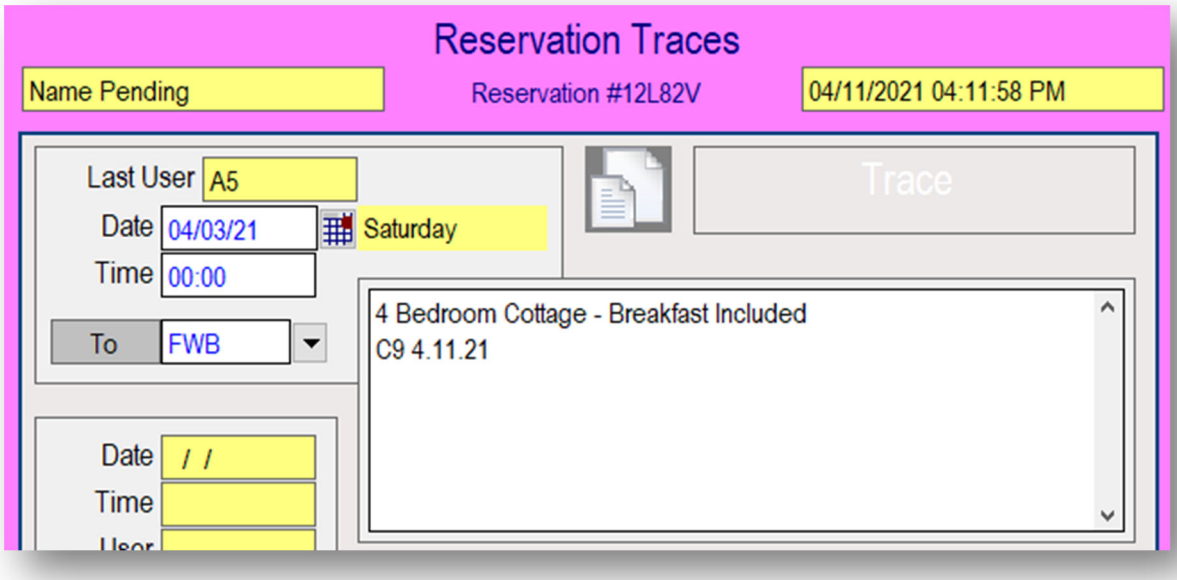
9	157POS	Transportation	0.00
10	165395	Floral Labor	0.00
11	200000	Rooms-Transient-LDG	0.00
12	200020	Rooms-Group Bus-LDG	0.00
13	200040	Rooms-Package-LDG	0.00

- A window titled **Add/Edit Scheduled Charge** will open:
  - Change the **Amount Each** field from $0.00 to **$50.00**
  - Note that the **1st Post** and **Last Post** field are set to the arrival and departure dates of the guest's reservation. This indicates that this $50 fee will apply to every day of the guest's stay.



- Page Down to Save
- Escape to exit the window.

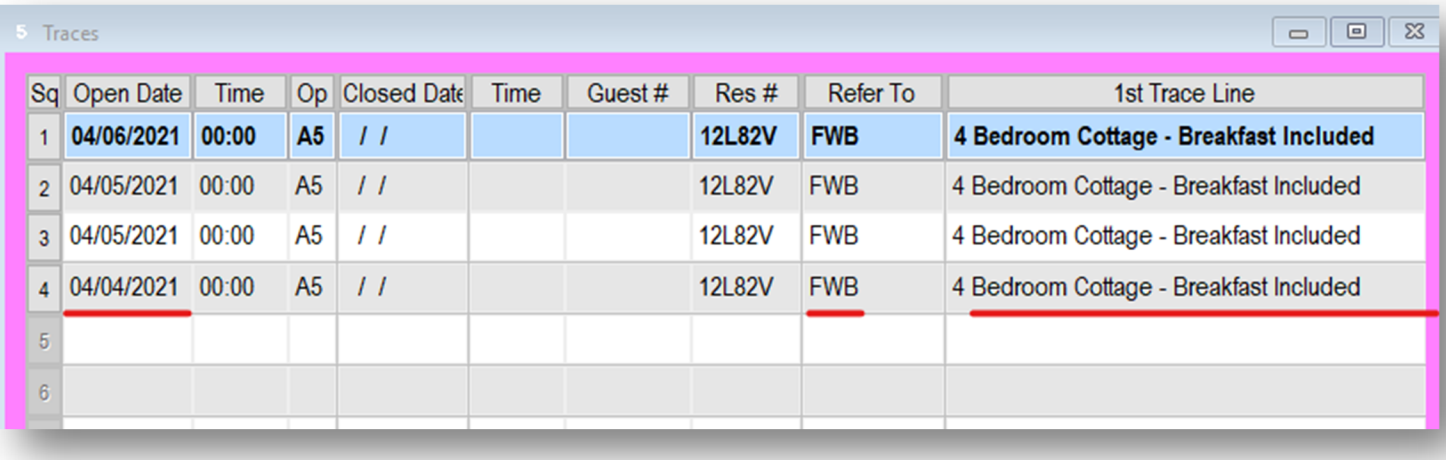
4. Add the FWB Fairway Breakfast Traces:
    - Every room, including the Suite, must have FWB Traces set on every morning that each room will have breakfast.:



Since the Breakfast Trace is dated for the first morning that the guests will eat breakfast, there will be an FWB Trace on every day starting form the second date of the guest's visit.

This differs from the $50 Breakfast Fee in Special Billing which posts on every day of their trip beginning on the Arrival Date and excluding the date the guests check out.

In this example, the guest is checking in on 1/3/21:



Sq	Open Date	Time	Op	Closed Date	Time	Guest #	Res #	Refer To	1st Trace Line
1	**04/06/2021**	**00:00**	**A5**	/ /			**12L82V**	**FWB**	**4 Bedroom Cottage - Breakfast Included**
2	04/05/2021	00:00	A5	/ /			12L82V	FWB	4 Bedroom Cottage - Breakfast Included
3	04/05/2021	00:00	A5	/ /			12L82V	FWB	4 Bedroom Cottage - Breakfast Included
4	04/04/2021	00:00	A5	/ /			12L82V	FWB	4 Bedroom Cottage - Breakfast Included
5									
6									

5. Respond to your **10 Day Arrival Email** to let your Reservations Auditor and Supervisor know that this booking is ready for arrival.

Packages



A **Pebble Beach Package** is a promotional rate that bundles the room price and golf greens fees together for an overall discounted price.

Pebble Beach only offers Packages for limited windows of time which are designed to increase business during the traditionally slower business seasons of the year, such as winter (December-March) and summer (June/July).

Pebble Beach Packages will differ from season to season, but the format follows a common structure.

The chart below is the **Inn at Spanish Bay December 2020 – March 2021 Winter Stay & Play Package**:

FEB-MAR 2020-2021 Spanish Bay WINTER Stay & Play Package

Includes: **2-night stay with Room, Tax, Service & Assessment; 2 rounds of golf (1 or 2 players, based on option selected)**
One round at Pebble Beach & One round at Spyglass Hill OR Spanish Bay
3rd & 4th nights at 25% off Rack; Comp round at SB with third night; $200 Resort Credit

Valid Dates: ***February 4, 2021 - March 31, 2021*** **- Subject to availability**

Booking Procedures: Total Package price due at time of booking; 14-day cancellation — Revised 2/3/21 - Ran
Change **Confidential Rates** in Special Billing "Y"; Package Golf booked under "**Stay & Play**" Golf Rates
Input appropriate PROMO CODE if applicable
All "converted" packages must be "zoom x'd"
If Primary will take all Resort Credit of multi-room booking enter "RC$_____" on their room and "RC$0" on all others
Only room portion commissionable at 10%

		SPANISH BAY GOLF				SPYGLASS HILL GOLF				25% OFF	
Room Category	*Room Type*	WDBB1	Savings	WDBB2	Savings	WDBH1	Savings	WDBH2	Savings	3rd/4th Nights	R/T/T/S/A
Ocean View	BRO7	$ 3,238.34	$ (547.59)	$ 3,969.60	$ (686.33)	$ 3,443.28	$ (462.65)	$ 4,231.28	$ (664.65)	$ 967.50	$1,100.98
Ocean Loft	BRL7	$ 2,998.48	$ (499.64)	$ 3,729.34	$ (638.78)	$ 3,195.88	$ (422.24)	$ 3,987.52	$ (620.60)	$ 870.00	$ 993.05
Scenic View	BRC7	$ 2,795.56	$ (459.04)	$ 3,526.08	$ (598.51)	$ 2,986.58	$ (388.02)	$ 3,781.26	$ (583.33)	$ 787.50	$ 901.73
Forest View	BRF7	$ 2,629.48	$ (425.86)	$ 3,359.78	$ (565.56)	$ 2,815.28	$ (360.06)	$ 3,612.50	$ (552.84)	$ 720.00	$ 827.00
Garden View	BRG7	$ 2,445.00	$ (388.95)	$ 3,175.00	$ (528.95)	$ 2,625.00	$ (328.95)	$ 3,425.00	$ (518.95)	$ 645.00	$ 743.99

PAST GUEST OFFER
3rd & 4th nights at 30% off Rack; Comp round at SB with third night; $300 Resort Credit

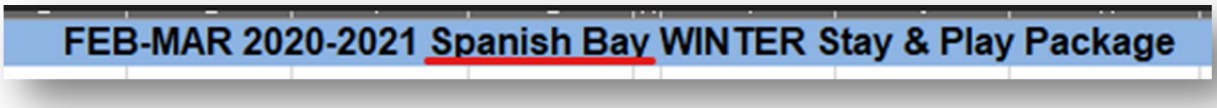
		SPANISH BAY GOLF				SPYGLASS HILL GOLF				30% OFF	
Room Category	*Room Type*	PDBB1	Savings	PDBB2	Savings	PDBH1	Savings	PDBH2	Savings	3rd/4th Nights	R/T/T/S/A
Ocean View	BRO7	$ 3,238.34	$ (547.59)	$ 3,969.60	$ (686.33)	$ 3,443.28	$ (462.65)	$ 4,231.28	$ (664.65)	$ 903.00	$1,029.58
Ocean Loft	BRL7	$ 2,998.48	$ (499.64)	$ 3,729.34	$ (638.78)	$ 3,195.88	$ (422.24)	$ 3,987.52	$ (620.60)	$ 812.00	$ 928.84
Scenic View	BRC7	$ 2,795.56	$ (459.04)	$ 3,526.08	$ (598.51)	$ 2,986.58	$ (388.02)	$ 3,781.26	$ (583.33)	$ 735.00	$ 843.61
Forest View	BRF7	$ 2,629.48	$ (425.86)	$ 3,359.78	$ (565.56)	$ 2,815.28	$ (360.06)	$ 3,612.50	$ (552.84)	$ 672.00	$ 773.87
Garden View	BRG7	$ 2,445.00	$ (388.95)	$ 3,175.00	$ (528.95)	$ 2,625.00	$ (328.95)	$ 3,425.00	$ (518.95)	$ 602.00	$ 696.38

REBOOK OFFER
Complimentary upgrade at CHECK-IN (based on availability) for guests who cancelled a reservation during the Feb 24 to Jun 15 timeframe
The guest must mention the Promo Code: ***RBK2020*** (this must be added to their Reservation).

When a Package is released, you will receive two rate sheets like the example above. One sheet will be the Package Pricing for the **Inn at Spanish Bay**. The second sheet will be for **The Lodge at Pebble Beach**.

Which Resort?

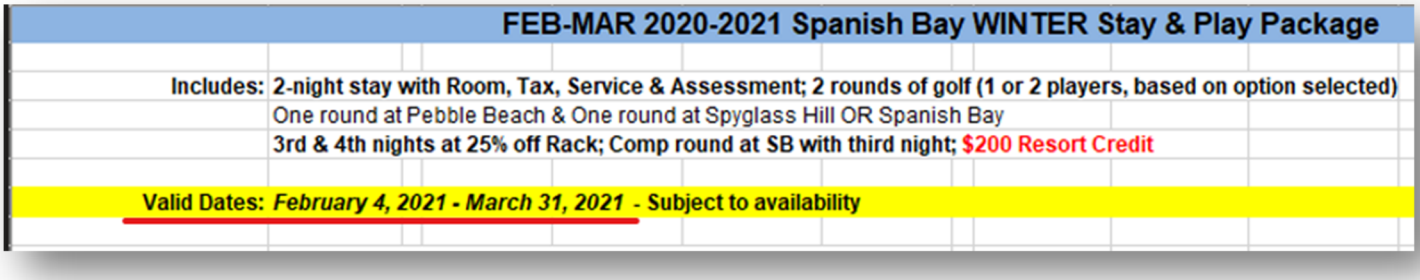
The blue bar at the top of the Package Rate Sheet is where you will see to which Resort Property this Package applies:



The pricing for a Package largely depends on the type of room in which the guest wishes to stay. As you can see in the image above, this rate sheet example will list Package Pricing for guests who wish to stay at The Inn at Spanish Bay.

When can the guest book a package?

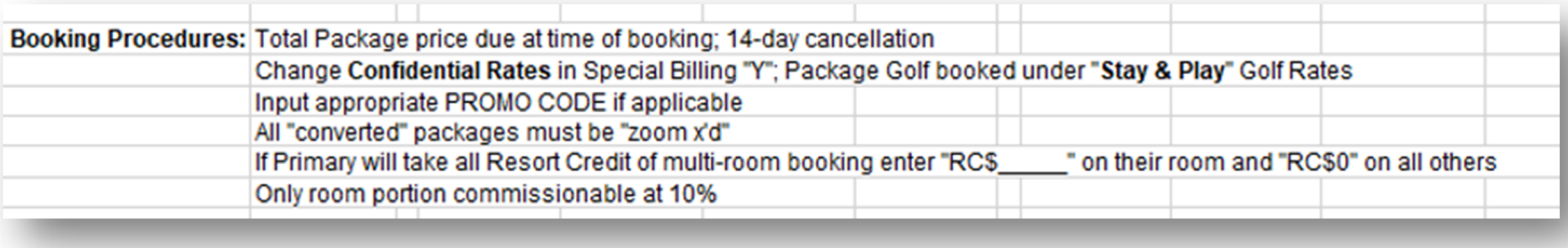
The blue header states the approximate dates during which the Package may be booked, "FEB-MAR 2020-2021," but the exact start and end dates are highlighted in yellow:



The guest's entire trip – room and all tee times – must fall within these dates.

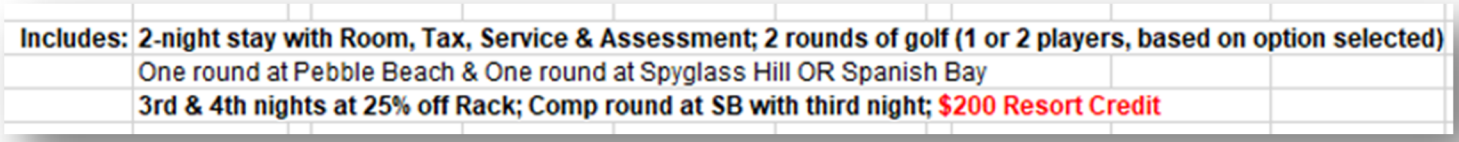
Booking Procedures

The Booking Procedures are outlined on the Package Rate Sheet. These instructions will be detailed further in the following Pages.



What Packages Include

Below the header of the Rate Sheet is a brief explanation of what is included in the Package.



Includes:	**2-night stay with Room, Tax, Service & Assessment; 2 rounds of golf (1 or 2 players, based on option selected)**
	One round at Pebble Beach & One round at Spyglass Hill OR Spanish Bay
	3rd & 4th nights at 25% off Rack; Comp round at SB with third night; $200 Resort Credit

Packages are quite customizable, so you will need to ask several probing questions to your guest before you will be able to quote a rate. The following chart is an explanation of the possible **Package Variations** that may be booked by our guests:

Package Structure:

Basic Package	• 1 **or** 2 Golfers • 1 Room for 2 Night at The Lodge **or** The Inn at Spanish Bay • 2 Golf Rounds: Pebble + Spyglass **or** Pebble + Spanish • A Resort Credit
3 Night Package	• 1 **or** 2 Golfers • 1 room for 3 Nights at The Lodge **or** The Inn at Spanish Bay • 3 Golf Rounds: Pebble + Spyglass + Spanish **or** Pebble + Spanish + Spanish • A Resort Credit
4 Night Package	• 1 **or** 2 Golfers • 1 room for 4 Nights at The Lodge **or** The Inn at Spanish Bay • 3 Golf Rounds: Pebble + Spyglass + Spanish **or** Pebble + Spanish + Spanish • A Resort Credit

A **Resort Credit** is a specific amount of money credited to the guest's room reservation that the guest may use during their stay for various purchases.

- Resort Credits may be used for Dining, Spa, purchases in Pebble Beach shops
- Credits may not be applied to Greens Fees or Room Rates
- Credits must be utilized during the stay and cannot be redeemed for cash
- The Resort Credit is issued per package, not per golfer.

Package Pricing

For a Basic Package, the first decision a guest must make is which Resort they want to stay in.

Once they have decided between The Inn at Spanish Bay and The Lodge, you can pull up the appropriate Package Rate Sheet for their desired property.

The second decision is which course the guest wants to play in addition to Pebble Beach Golf Links.

Each Package includes a round at Pebble Beach Golf Links, but the second round may be booked as Spyglass Hill or The Links at Spanish Bay.

If the guest wants their second round to be **Spanish Bay**, your price options are contained within the **left box** in the image below. If the guest wants their second round to be **Spyglass Hill**, you will quote prices from the **right box**.

		SPANISH BAY GOLF				SPYGLASS HILL GOLF			
Room Category	*Room Type*	WDBB1	Savings	WDBB2	Savings	WDBH1	Savings	WDBH2	Savings
Ocean View	BRO7	$ 3,238.34	$ (547.59)	$ 3,969.60	$ (686.33)	$ 3,443.28	$ (462.65)	$ 4,231.28	$ (664.65)
Ocean Loft	BRL7	$ 2,998.48	$ (499.64)	$ 3,729.34	$ (638.78)	$ 3,195.88	$ (422.24)	$ 3,987.52	$ (620.60)
Scenic View	BRC7	$ 2,795.56	$ (459.04)	$ 3,526.08	$ (598.51)	$ 2,986.58	$ (388.02)	$ 3,781.26	$ (583.33)
Forest View	BRF7	$ 2,629.48	$ (425.86)	$ 3,359.78	$ (565.56)	$ 2,815.28	$ (360.06)	$ 3,612.50	$ (552.84)
Garden View	BRG7	$ 2,445.00	$ (388.95)	$ 3,175.00	$ (528.95)	$ 2,625.00	$ (328.95)	$ 3,425.00	$ (518.95)

The next decision the guest must make is which type of room in which they want to stay.

The guest may only choose from the Room Types included on the Rate Sheet. You will notice that this list of rooms does not include Suites.

Room Category	*Room Type*
Ocean View	BRO7
Ocean Loft	BRL7
Scenic View	BRC7
Forest View	BRF7
Garden View	BRG7

Now, you can quote a price to this guest:

- The Ocean View Single Golfer (WDBB1) Package = **$3238.34**
- The Ocean View Double Golfer (WDBB2) Package = **$3969.60**

Both the Single Golfer & Double Golfer Packages include:

- A 2-night stay in an Ocean View Room at The Inn at Spanish Bay
- A round at Pebble Beach Golf Links
- A round at The Links at Spanish Bay
- A $200 Resort Credit

		SPANISH BAY GOLF			
Room Category	*Room Type*	WDBB1	Savings	WDBB2	Savings
Ocean View	BRO7	$ 3,238.34	$ (547.59)	$ 3,969.60	$ (686.33)
Ocean Loft	BRL7	$ 2,998.48	$ (499.64)	$ 3,729.34	$ (638.78)
Scenic View	BRC7	$ 2,795.56	$ (459.04)	$ 3,526.08	$ (598.51)
Forest View	BRF7	$ 2,629.48	$ (425.86)	$ 3,359.78	$ (565.56)
Garden View	BRG7	$ 2,445.00	$ (388.95)	$ 3,175.00	$ (528.95)

**The Pricing for the Basic Package includes taxes, service fee, and assessment charges.*

The Guest has the option to upgrade to the 3- or 4-Night Package.

Perks of Upgrading:

- Their 3rd and 4th night will be billed at 25% off the rack room rate
- They will receive a complimentary round at The Inn at Spanish Bay

**The 3rd and 4th night pricing will be the same regardless of whether the guest books the single or double golfer package.*

25% OFF	
3rd/4th Nights	R/T/T/S/A
$ 967.50	$1,100.98
$ 870.00	$ 993.05
$ 787.50	$ 901.73
$ 720.00	$ 827.00
$ 645.00	$ 743.99

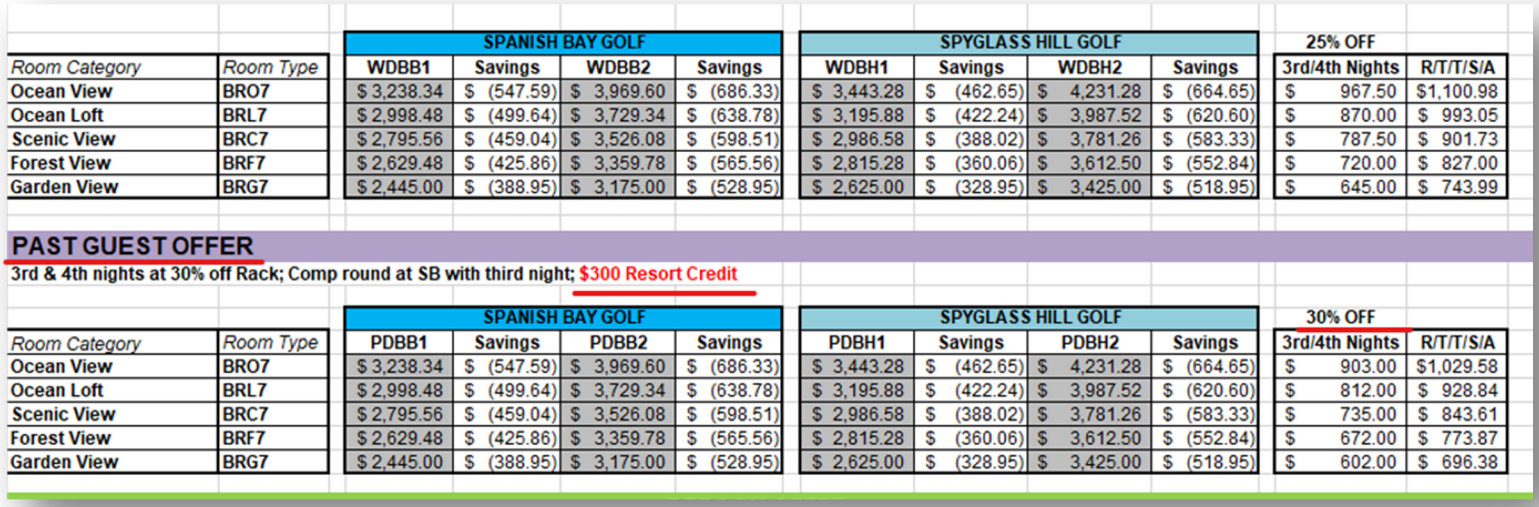
Past Guest Offer

Traditionally, Pebble Beach will offer one package to the general public and a slightly sweeter Package to guests who have stayed at our Resorts in the past.

The Package Structure will remain the same, but there are two key elements that may differ:

- Past Guests often receive a higher Resort Credit
- Past Guests often receive a larger discount on the rack rate if they book a 3rd and 4th night.

Past Guest Pricing is located on the Package Rate Sheet directly underneath the standard pricing:



		SPANISH BAY GOLF				SPYGLASS HILL GOLF				25% OFF	
Room Category	*Room Type*	WDBB1	Savings	WDBB2	Savings	WDBH1	Savings	WDBH2	Savings	3rd/4th Nights	R/T/T/S/A
Ocean View	BRO7	$ 3,238.34	$ (547.59)	$ 3,969.60	$ (686.33)	$ 3,443.28	$ (462.65)	$ 4,231.28	$ (664.65)	$ 967.50	$1,100.98
Ocean Loft	BRL7	$ 2,998.48	$ (499.64)	$ 3,729.34	$ (638.78)	$ 3,195.88	$ (422.24)	$ 3,987.52	$ (620.60)	$ 870.00	$ 993.05
Scenic View	BRC7	$ 2,795.56	$ (459.04)	$ 3,526.08	$ (598.51)	$ 2,986.58	$ (388.02)	$ 3,781.26	$ (583.33)	$ 787.50	$ 901.73
Forest View	BRF7	$ 2,629.48	$ (425.86)	$ 3,359.78	$ (565.56)	$ 2,815.28	$ (360.06)	$ 3,612.50	$ (552.84)	$ 720.00	$ 827.00
Garden View	BRG7	$ 2,445.00	$ (388.95)	$ 3,175.00	$ (528.95)	$ 2,625.00	$ (328.95)	$ 3,425.00	$ (518.95)	$ 645.00	$ 743.99

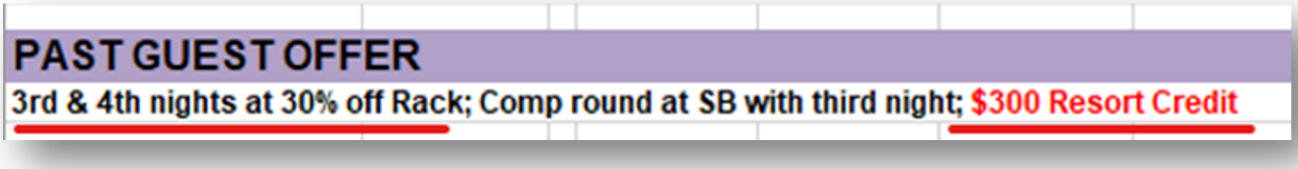
PAST GUEST OFFER

3rd & 4th nights at 30% off Rack; Comp round at SB with third night; $300 Resort Credit

		SPANISH BAY GOLF				SPYGLASS HILL GOLF				30% OFF	
Room Category	*Room Type*	PDBB1	Savings	PDBB2	Savings	PDBH1	Savings	PDBH2	Savings	3rd/4th Nights	R/T/T/S/A
Ocean View	BRO7	$ 3,238.34	$ (547.59)	$ 3,969.60	$ (686.33)	$ 3,443.28	$ (462.65)	$ 4,231.28	$ (664.65)	$ 903.00	$1,029.58
Ocean Loft	BRL7	$ 2,998.48	$ (499.64)	$ 3,729.34	$ (638.78)	$ 3,195.88	$ (422.24)	$ 3,987.52	$ (620.60)	$ 812.00	$ 928.84
Scenic View	BRC7	$ 2,795.56	$ (459.04)	$ 3,526.08	$ (598.51)	$ 2,986.58	$ (388.02)	$ 3,781.26	$ (583.33)	$ 735.00	$ 843.61
Forest View	BRF7	$ 2,629.48	$ (425.86)	$ 3,359.78	$ (565.56)	$ 2,815.28	$ (360.06)	$ 3,612.50	$ (552.84)	$ 672.00	$ 773.87
Garden View	BRG7	$ 2,445.00	$ (388.95)	$ 3,175.00	$ (528.95)	$ 2,625.00	$ (328.95)	$ 3,425.00	$ (518.95)	$ 602.00	$ 696.38

The Basic 2 Night Package Prices are identical between New and Past Guests, but for **Past Guests exclusively**:

- The Resort Credit changes from $200 to $300
- The 3rd and 4th night discount percentage changes from 25% off to 30%

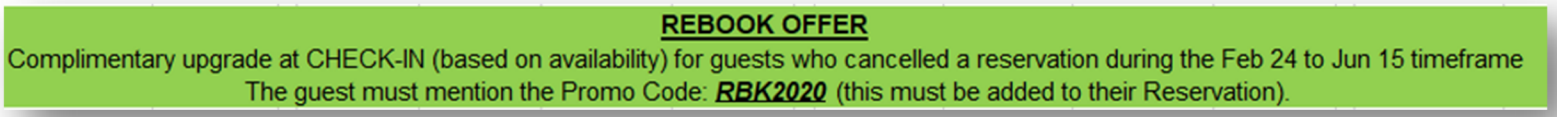


Package Promo Code

Certain guests may receive promotional emails about our packages that include a **Promo Code** that entitles the guest to a complimentary room upgrade.

These promo codes are typically intended to incentivize guests who have previously cancelled trips to Pebble Beach to rebook their trip as part of this Package.

If a Package has an associated Promo Code, you will see this code at the bottom of the Rate Sheet:



If – and only if – a guest mentions a promo code, you must enter this code (**RBK2020**) into the **Company field** of the **Reservation Tile.**

The Front Desk will upgrade the guest's room based on what rooms are available at the time of arrival. As a Reservations Agent, you simply need to book the guest into the package at one room level below their desired Room Type.

Book A Package

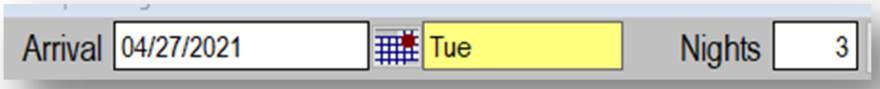
As we discussed in the previous section, there are several probing questions that must be answered by the guest before you can arrange their Package Booking.

Probing Questions

1. When would you like to visit? (Must fall within valid Package Dates)
2. How many golfers are in your party? (Maximum of 2 golfers per room)
3. Will each golfer have their own room, or will we be booking 2 golfers per room? (We will book one Package per room)
4. Have you visited Pebble Beach before? (New Guest vs. Past Guest Pricing)
5. Which course would you like to play in addition to Pebble Beach?
6. Would you like to book a 3rd or 4th night to receive a complimentary round at The Links at Spanish Bay?
7. Would you like to stay at The Inn at Spanish Bay or The Lodge at Pebble Beach?
8. Would you like an Ocean View Room?
   Sales Tip: Offer Ocean View, and let the guest negotiate down from there.

As an example, we will book one of the most commonly booked packages: **The 3-Night Stay & Play Package with rounds at all three courses.**

1. Set your **Master Data Range Calendar** to the guest's requested dates.



2. Use the Guest Room Tab to search for room availability.

   Packages will have special **Package Rate Codes** to differentiate them from the Rack Rate Rooms.

Rack Rate Codes

Rate Code	Description	Room Type	Vac
RRB	Spanish Bay Rack	BSF3	
RRL	Lodge Rack	LRCS	
RRL	Lodge Rack	LRGS	
RRL	Lodge Rack	LSO1	
RRL	Lodge Rack	LSO2	
RRL	Lodge Rack	LSO5	
RRL	Lodge Rack	LSO6	
RRL	Lodge Rack	LSO7	
RRL	Lodge Rack	LRWS	
RRL	Lodge Rack	LRCF	

Package Rate Codes

Rate Code	Description	Room Type
WABB1	Wtr SB S&P PB/SB 1pl	BRL7
WABB1	Wtr SB S&P PB/SB 1pl	BRC7
WABB1	Wtr SB S&P PB/SB 1pl	BRF7
WABB2	Wtr SB S&P PB/SB 2pl	BRO7
WABB2	Wtr SB S&P PB/SB 2pl	BRL7
WABB2	Wtr SB S&P PB/SB 2pl	BRC7
WABB2	Wtr SB S&P PB/SB 2pl	BRF7
WABH1	Wtr SB S&P PB/SG 1pl	BRO7
WABH1	Wtr SB S&P PB/SG 1pl	BRL7

The **Package Rate Code Descriptions** may appear to be a jumble of abbreviations, but once we learn to recognize them, they are simple to understand:

Wtr SB S&P PB/SB 1pl:
Wtr = Winter
SB = The Inn at Spanish Bay
S&P = Stay & Play Package
PB/SB = 1 round at Pebble Beach and 1 round at The Links at Spanish Bay
1Pl = 1 Golfer

3. Double Click on the line of the **Base Package** that you wish to book.
(The 3rd night / 3rd round information will not be included amongst these rate codes.)

For our example booking, we want:

- The Inn at Spanish Bay
- Ocean View
- Pebble Beach + Spyglass Hill Package
- For 1 golfer

The correct rate code for our Package is **WABH1 Wtr SB S&P PB/SG 1pl**

Rate Code	Description	Room Type	Vac	Avl	Grp	Unit Description	1
WABB2	Wtr SB S&P PB/SB 2pl	BRO7	24	24	0	Spanish Bay Ocean	
WABB2	Wtr SB S&P PB/SB 2pl	BRL7	8	8	0	Spanish Bay OceanL	
WABB2	Wtr SB S&P PB/SB 2pl	BRC7	7	7	0	Spanish Bay Scenic	
WABB2	Wtr SB S&P PB/SB 2pl	BRF7	44	44	0	Spanish Bay Forest	
WABH1	Wtr SB S&P PB/SG 1pl	BRO7	24	24	0	Spanish Bay Ocean	
WABH1	Wtr SB S&P PB/SG 1pl	BRL7	8	8	0	Spanish Bay OceanL	
WABH1	Wtr SB S&P PB/SG 1pl	BRC7	7	7	0	Spanish Bay Scenic	
WABH1	Wtr SB S&P PB/SG 1pl	BRF7	44	44	0	Spanish Bay Forest	
WABH2	Wtr SB S&P PB/SG 2pl	BRO7	24	24	0	Spanish Bay Ocean	
WABH2	Wtr SB S&P PB/SG 2pl	BRL7	8	8	0	Spanish Bay OceanL	

4. Now that your room has been added to your Itinerary, use the **Tee Times Tab** to find your guest the optimal tee times for their three courses.

The tee times must fall within the dates of the Package but can be booked in any order.
It is good practice to start by locating the best Pebble Beach Golf Links tee time since this course often has the most limited availability.

When selecting a tee time, you will notice that, in addition to GTF Resort Guest (our rack rate Pebble Beach Rate Code), there is a **GTF Stay & Play** rate.

Course	Date	Time	DPt	HL	Open	Specific Group Block
10PB10	04/28/21	07:40	G	01	1	
10PB10	04/28/21	06:40	G	01	2	
10PB10	04/28/21	06:20	M	01	4	
10PB10	04/28/21	15:10	N	01	4	
10PB10	04/28/21	15:20	N	01	4	

Rate Description	Per Player	Total
GTF Promotional/Donat...	575.00	575.00
GTF Stay and Play	575.00	575.00
GTF Resort Guest	575.00	575.00

5. Double click on the **Stay & Play Rate Code** to add this Package Golf tee time to your Itinerary.

6. Click the same **Stay & Play Rate Code** when selecting your Spyglass Hill tee time.

7. The Links at Spanish Bay is the only golf course for which there are two different Package Rate Codes to choose from:

Rate Description	Per Player	Total
GTF Promotional/Donation	295.00	295.00
GTF Golf VIP	295.00	295.00
GTF Resort Guest	295.00	295.00
GTF Duke's Member	170.00	170.00
GTF 4th Nt MC Comp	0.00	0.00
GTF 3rd Nt Stay & Play C	0.00	0.00
GTF Stay and Play	295.00	295.00

GTF Stay & Play	This is the code you will select for any guests who have chosen The Links at Spanish Bay as their second course within the Base Package.
GTF 3rd Nt Stay & Play Comp	This "Comp" code is selected when the guest has earned a complimentary tee time at The Links at Spanish Bay by booking a 3rd Night with their Package. Notice that this code has a $0.00 per player rate.

For our example booking, our guest has opted into the 3rd night to get a complimentary round, so double click on the **GTF 3rd Nt Stay & Play Comp** code to add this to our Itinerary.

8. Inform the guest:
   - We have a 14-day cancellation window
   - **The deposit requirement for a Package is the 2-night Base Package rate**
   - Their 3rd night will be due upon checkout, but they **can opt to pre-pay the 3rd night** now.

9. Click the Down Arrow next to the Guest button in your Booking Center to search for / create your guest's Guest Tile and collect their credit card.

10. Ask the guest if you may put them on hold so you may finalize their booking and process their deposit.

11. Return to the Booking Center and double click on the room in your Itinerary Detail to open this Reservation Tile

12. Prepare the Reservation Tile:
    - Access the Reservation Tile
    - Click **E** for **Edit** and **Page Down**.
    - Follow the prompts to select the:
        - **Media Type** – Internet
        - **Media Source** – Pebblebeach.com
        - **Incoming Phone Number** – Reservation Center
        - **Guarantee Code** – A for Advanced Deposit
        - **Escape** to return to the Booking Center

13. Re-enter the Reservation Tile to collect the Deposit:
    - Double click the room to return to the Reservation tile
    - Click **Bills**
        - Enter Transaction Code - 970PPV (M, V, A, or D for the credit card code)
        - Enter the deposit amount (Base Package + optional pre-payment of 3rd/4th nights)
        - Enter C for Charge
        - Page Down
        - Select Yes to verify that all entries are correct
        - Tab to move curser outside of the credit card number field
        - Page Down
        - Press any button to return to Bills
        - Exit to return to the Reservation Tile
        - Exit to return to the Booking Center

14. Right click on the line of your room reservation and select Complete Booking
    This will only Complete the room, leaving all recreation as incomplete.

14. Take the caller off hold and close the call:
    - Read through every booking with the guest in order to ensure accuracy
    - Reaffirm the 14-day cancellation window and the exact final date the booking can be changed/cancelled.
    - Inform the guest that their confirmation email will arrive within one hour
    - Ask if they need assistance with anything else
    - Thank Mr. Bond for calling
    - End the call.

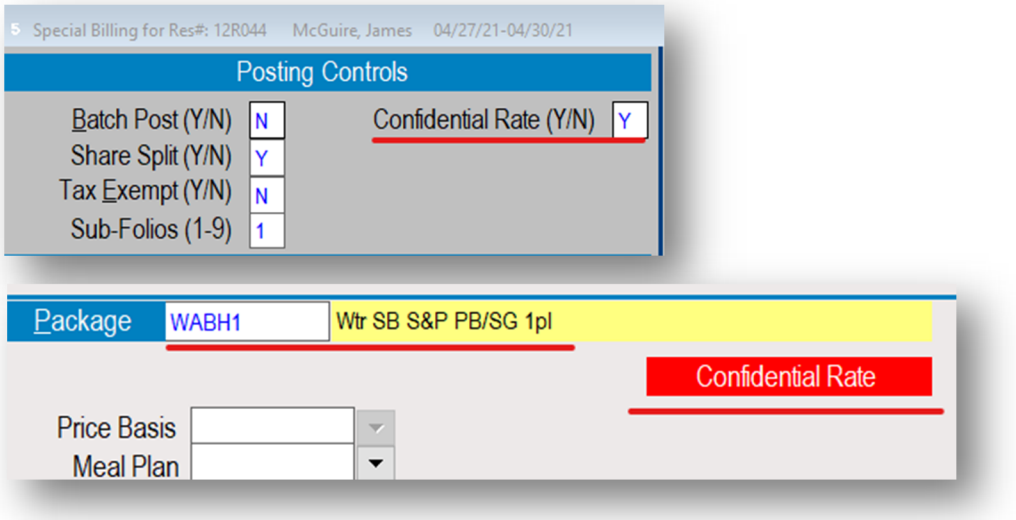
Clean Up A Package Booking

1. Access the Reservation Tile and click E to edit:
   - Add the 14 Day Cancellation window to the **Audit Line**
   - Add any requested **room features**

2. Access **Special Billing**
   - Verify that the dollar amount in the **Deposit #1** line is equal to the **Base Package** rate.

     If you book a 3-night or 4-night Package, SMS will set the Deposit #1 line as the entire package price including all additional nights.
     Even if the guest has agreed to pre-pay additional nights, the Deposit 1 line should only equal the minimum required deposit.

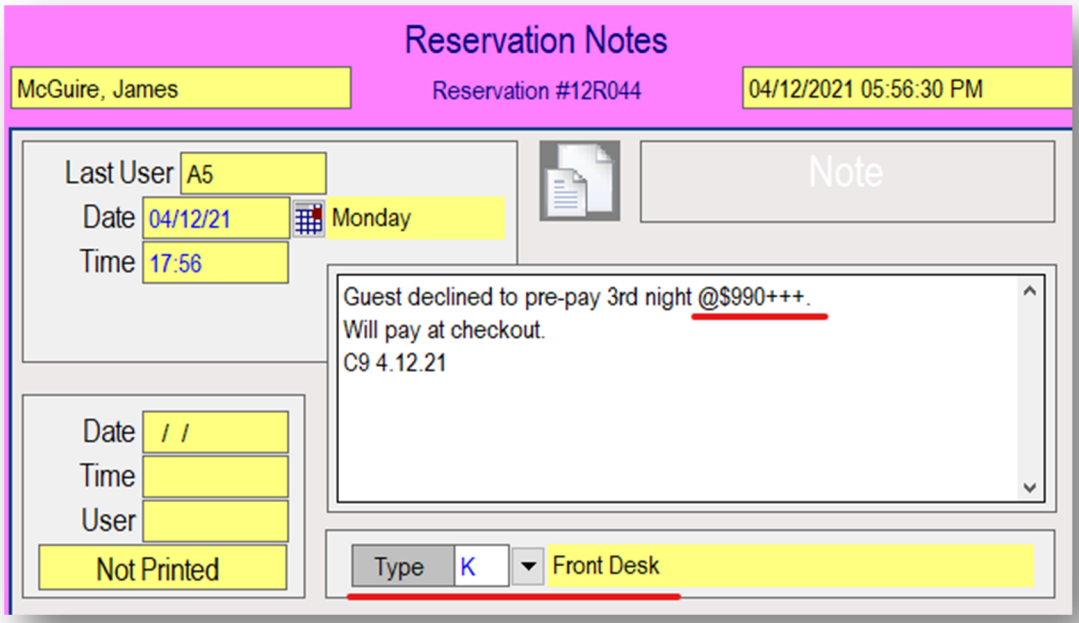
   - Change the **Confidential Rate** field from N to Y.



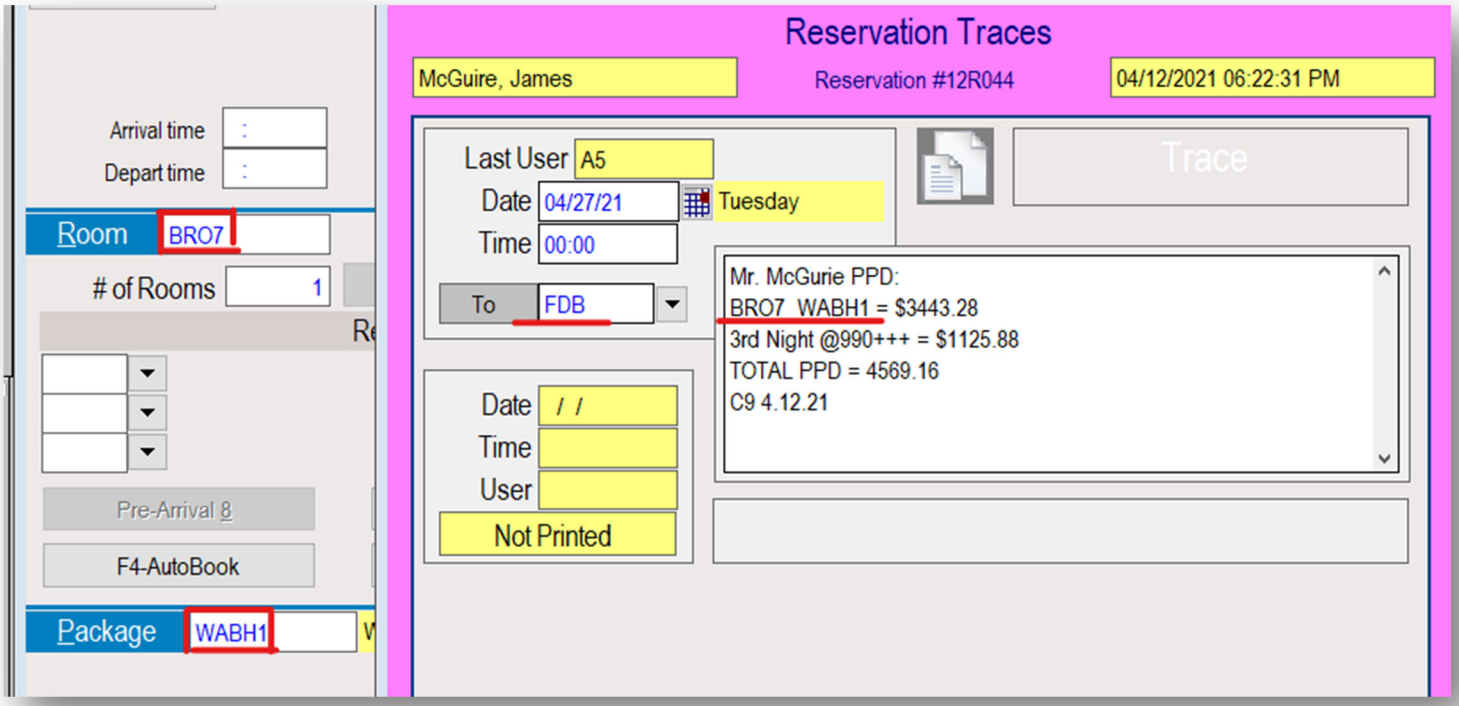
Packages must always be marked as confidential to mask the itemized pricing details of their booking on the guest's confirmation email. They will still see the overall cost of their booking, but the charges will not be itemized.

If we do not mark a package as confidential, the guest's confirmation email will show the room rate as equal to the price of the package AND list out the rack rate greens fees for each tee time. This will appear to the guest as if they are being charged the golf greens fees on top of the Package Price, which is incorrect.

3. **If the guest declined to pre-pay a 3rd/4th night**, leave a **K Note** for the **Front Desk** that:
   - Confirms that the guest is aware that the additional nights will be due at checkout.
   - Lists the rate that the guest must pay for their additional nights



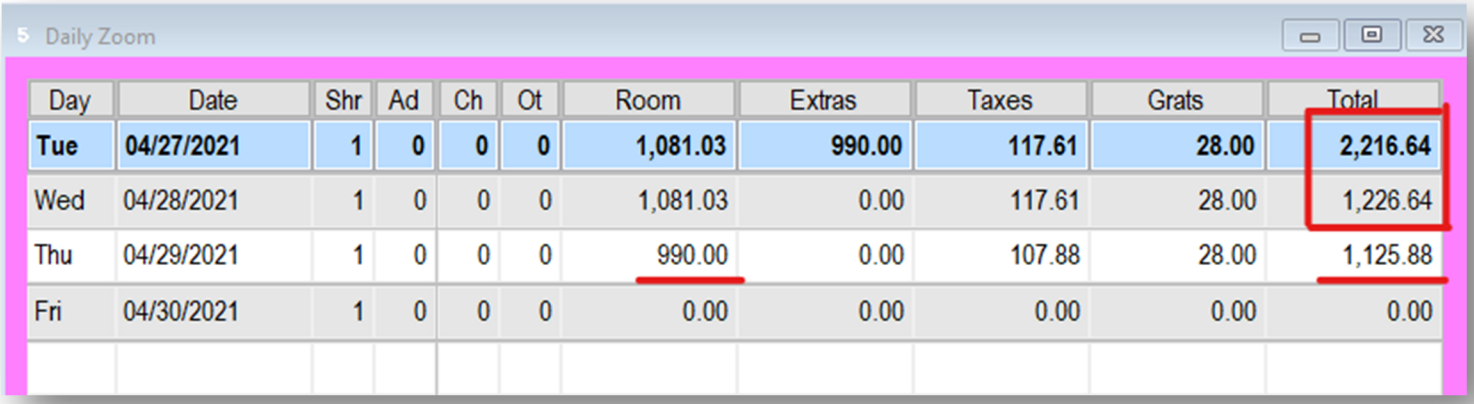
If the guest agreed to pre-pay a 3rd/4th night, set an **FDB Trace** for the **Front Desk** that:
   - Explains why the guest has paid an amount above the required deposit
   - Itemizes all charges pre-paid by the guest



4. Click **V + Z** to enter **Value Zoom**

   Verify that the total rate for all nights is equal to the price on your rate sheet. This is the total rate that your guest will see on their confirmation email.

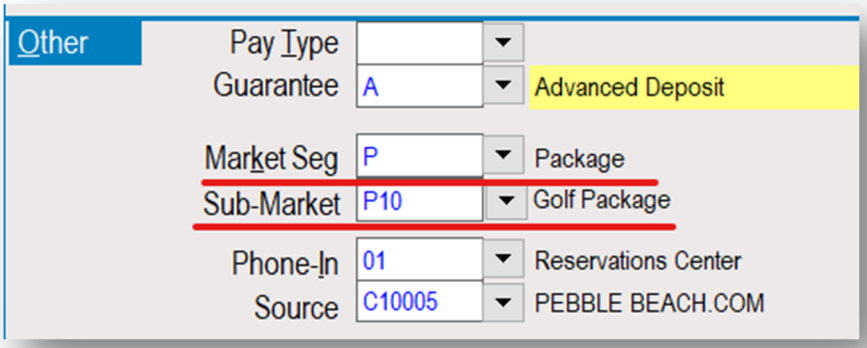
   - The first two lines should equal the guest's 2 Night Base Package / Deposit
   - The 3rd line should equal the nightly rate of the 3rd/4th night on your Rate Sheet
     **If these numbers do not add up correctly, contact a supervisor.*



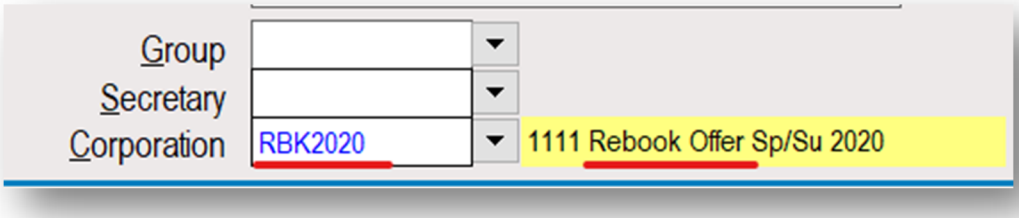
Day	Date	Shr	Ad	Ch	Ot	Room	Extras	Taxes	Grats	Total
Tue	**04/27/2021**	**1**	**0**	**0**	**0**	**1,081.03**	**990.00**	**117.61**	**28.00**	**2,216.64**
Wed	04/28/2021	1	0	0	0	1,081.03	0.00	117.61	28.00	1,226.64
Thu	04/29/2021	1	0	0	0	990.00	0.00	107.88	28.00	1,125.88
Fri	04/30/2021	1	0	0	0	0.00	0.00	0.00	0.00	0.00

5. Double check the Other section of your Reservation Tile.

   Verify that the Market Segment and Sub-Market are set to the correct Package Codes instead of Rack Rate:

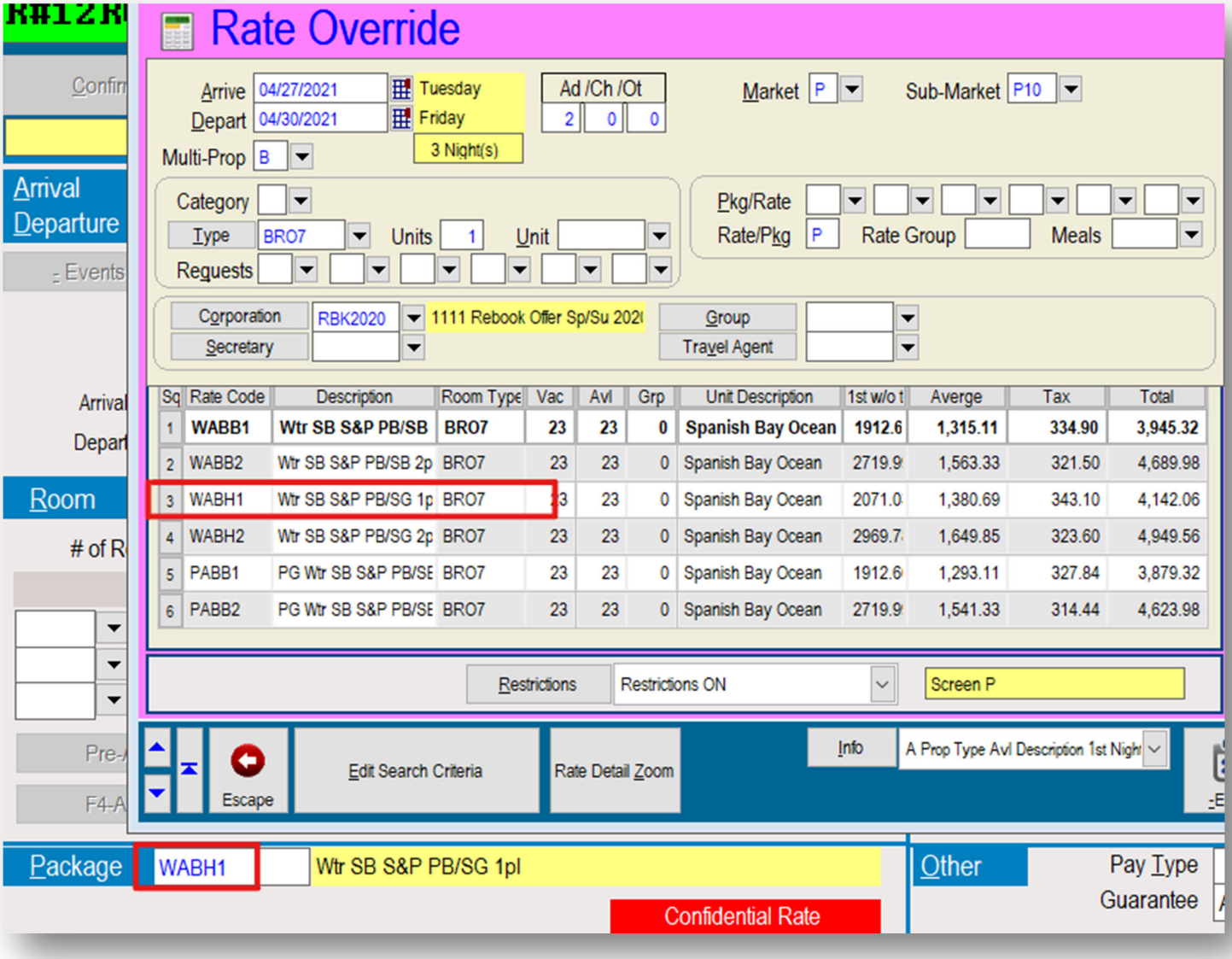


6. If your guest provided you with a **Promo Code**, enter this code into the **Corporate** field.

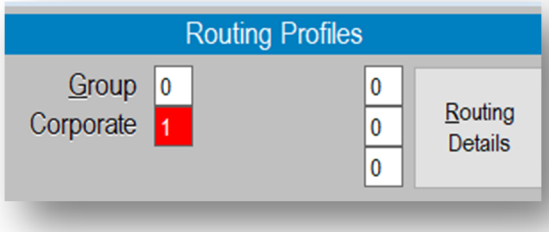


Upon saving the Promo Code, you will be prompted to update the **Rate Value**.

- We do not want to change the rate, so click **R** for **Reservation**.
- The **Rate Override** window will open.
- Select the Sequence Number of the Package that matches your current reservation.
  **This is where you need to be very careful. Unlike Rack Rate bookings, the rate your current booking will not necessarily be at the top of this list.*

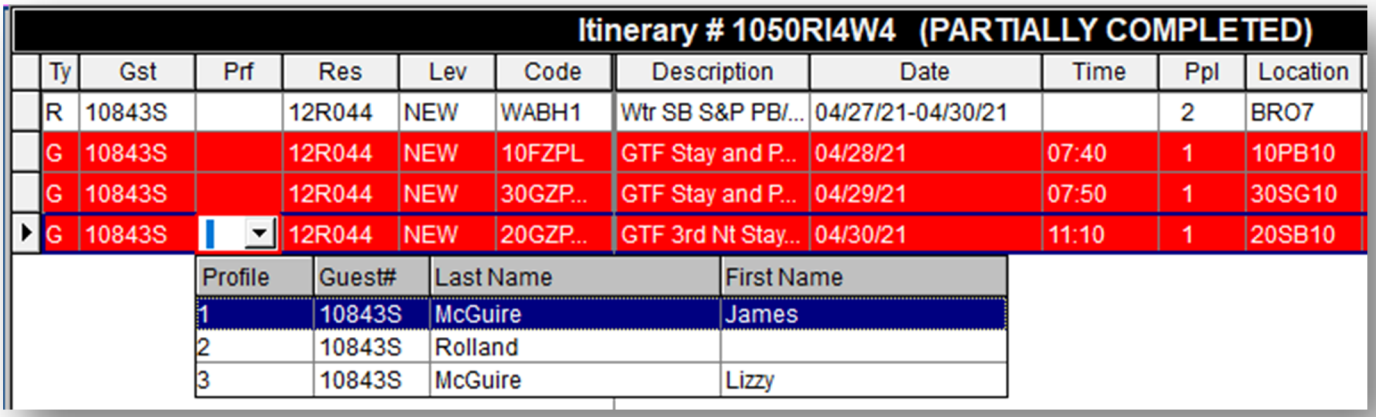


- Access Special Billing to remove the Red 1 that will have populated into the **Corporate** field when your **Promo Code** was entered.



7. Escape until you return to the Booking Center.

8. Assign a Profile to each of the tee times on your Itinerary.



9. Open up each **Golf Tile** to add any:
   - Rental Clubs
   - Caddies / Forecaddies

10. Click **Complete**, then **Confirm**

11. Send an **IEMAIL**

12. Complete and Save your **NAVIS Booked Lead**

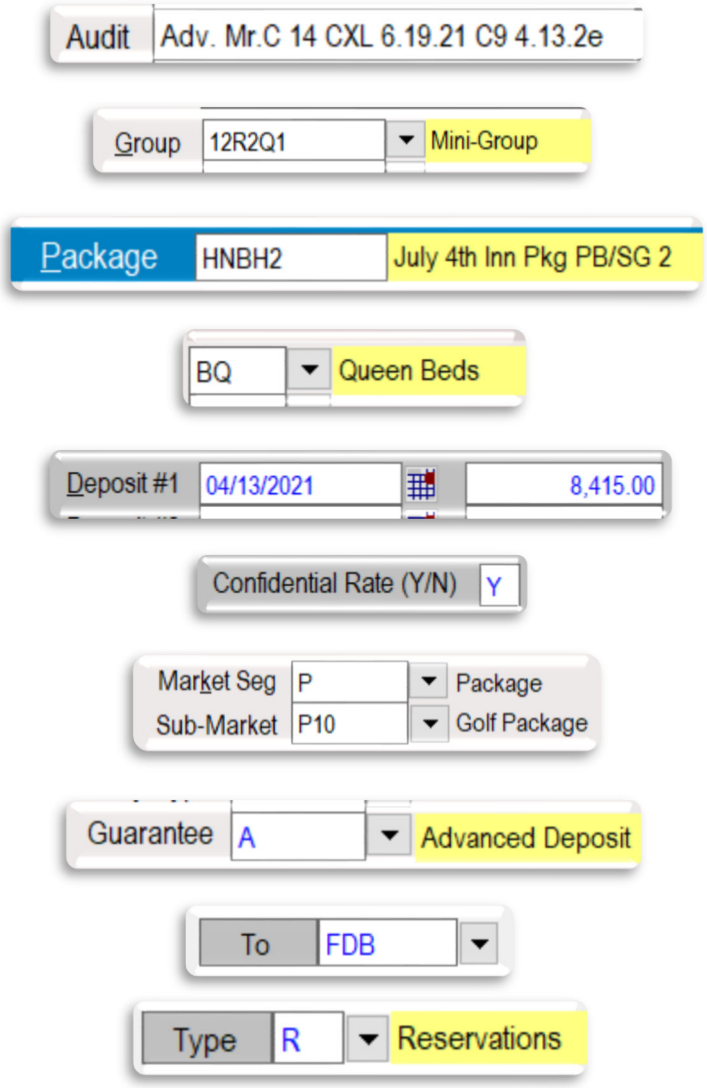
Book Multiple Packages

When booking multiple packages on the same Itinerary:

- All **Packages must be split** out into separate Reservation Tiles
- All **Golf must be split and Whosed** to the Reservation Tile of the Package to which they pertain, regardless of the Billing Scenario.

Multiple Package Checklist:

- ✓ All Rooms and Shares are Duplicated into separate Reservation Tiles
- ✓ The **Audit** line on the primary's reservation tile contains the quoted **cancellation period**
- ✓ All three rooms are **Mini Grouped** together
- ✓ The **Package Codes** are accurate
- ✓ **Room Feature Request** are entered
- ✓ The **Deposit #1** is accurate
- ✓ Each package reservation is marked as **Confidential**
- ✓ The **Market Segment** and **Sub-Market** are set to Package
- ✓ The **FDB Traces** are set on each Room and Share
- ✓ **Guarantee Codes** are set appropriately as **A** or **J**
- ✓ All golf tee times are **Split** and **Whosed**
- ✓ An **R Note** has been entered on the Primary Guest's Reservation Tile



Split Golf

Splitting Golf is essentially the same concept as Duplicating a Room Reservation.

Golf Reservations for more than one golfer can be split into smaller groups to allow certain guests to pay for only certain golfers Greens Fees.

Example:
Two friends book two rooms at The Lodge and a twosome at Pebble Beach Golf Links.
Each friend plans to play for their own charges, so we duplicate their room to create separate room tiles and whose a guest tile for each friend to their individual rooms.
Because they have booked a twosome at Pebble Beach, in order for each friend to pay their own Greens Fees, we need to Split their twosome into two singles. We then Whose one single to each of the two friends' Reservation Tiles.

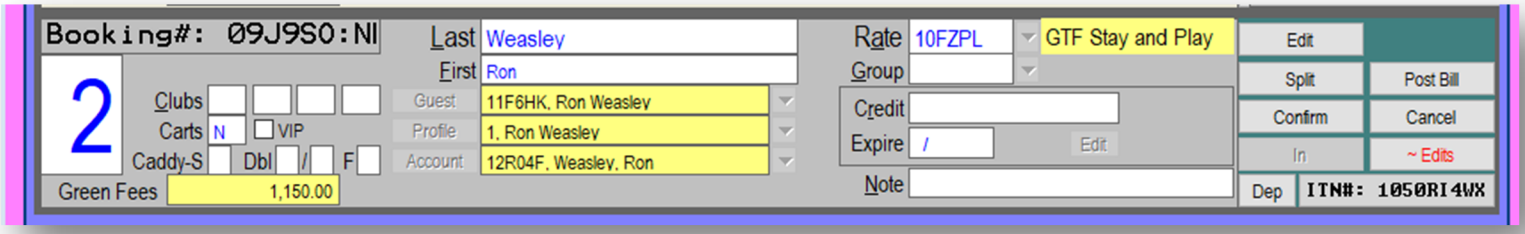
If the Primary Guest in a group plans to cover all golf charges, the tee times do not need to be split. It is only if the golf charges will be split up that we will need to split and Whose the tee times to individual rooms.

However, specifically when it comes to **Packages**, all tee times must be split and Whosed to the appropriate Reservation Tile regardless of the Billing Scenario.

To Split A Round of Golf:

1. Double click on the Tee Time in the Booking Center to open the **Golf Tile**.

   The following tee time is currently Whosed to Mr. Ron Weasley, but we want to split this twosome into two singles so Mr. Potter can pay for himself.

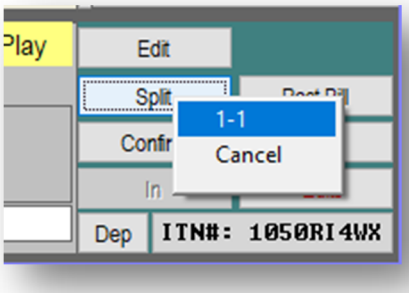


2. Click the **Split** Button on the right side of the Golf Tile.



3. A small box will open with all possible options of how to break up this tee time.

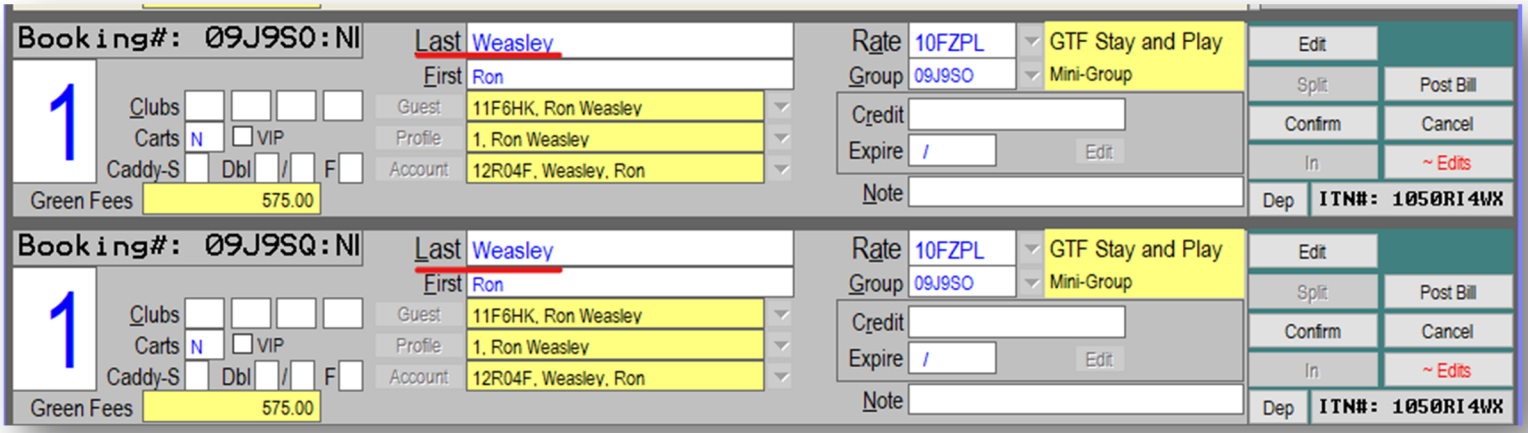
The twosome can only be split 1-1, but a foursome can be split 3-1, 2-2, or 1-1-1-1.



Click on the option you wish to select. Beware, this cannot be undone once the tee time is split.

Your Golf Tee Time will now be split into smaller groups.

As you can see on our example, though we have split the twosome into two singles, both tee times are still Whosed to Ron Weasley. We need to **Whose** one of these to Harry Potter.



4. Click the Edit button on the right side of one of the Golf Tiles.

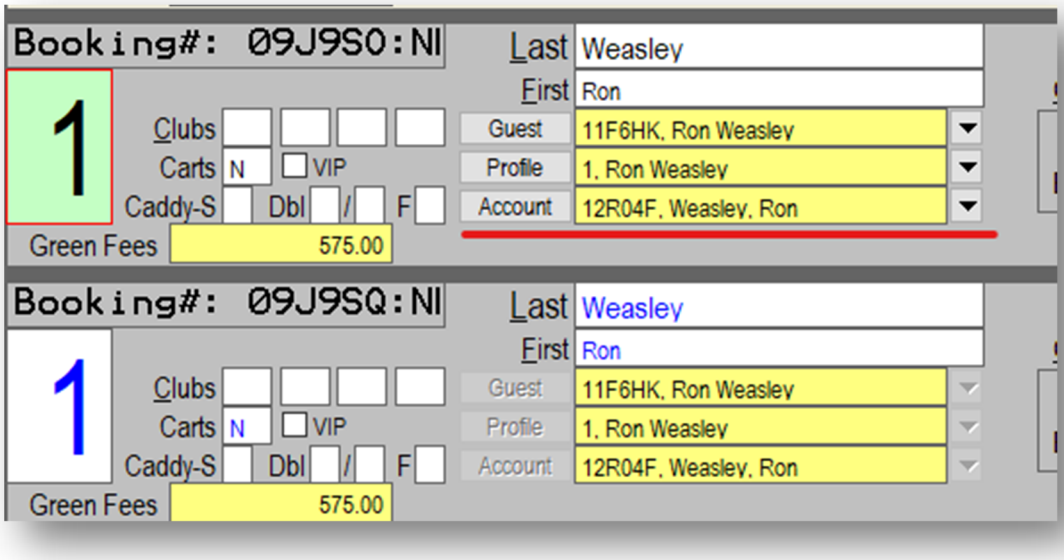


5. This has enabled us to edit the Guest, Profile, and Account buttons of the Golf Tile.

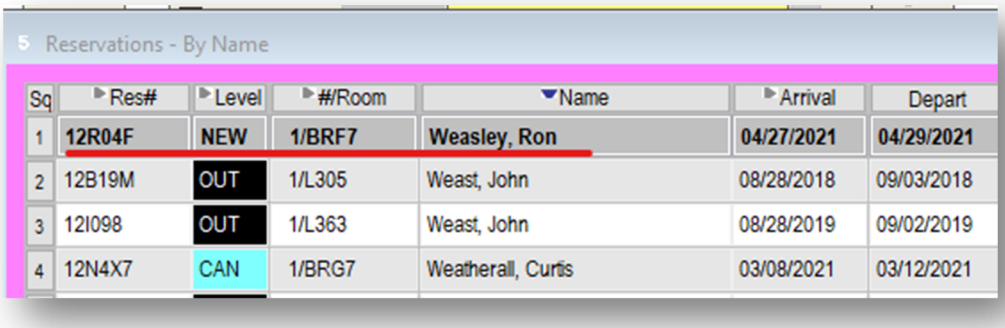
   As you know, for Outside Guest Golf, we would click the Down Arrow next to Guest which would attach the guest's credit card.

   For a Resort Guest Golf Reservation, we don't need to attach the guest's credit card because they have guaranteed their tee time by putting down a room deposit.
   Therefore, instead of Whosing the Guest Tile, we want to Whose their Room Reservation.

   To **Whose a Room Reservation Tile to a Golf Tile**, click the **Down Arrow** next to **Account.**

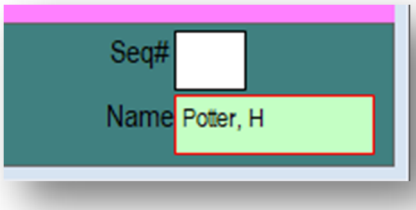


   This will open a Reservations Search window.
   Ron Weasley's room, which is currently Whosed to the Golf Tile, is at the top of the list.

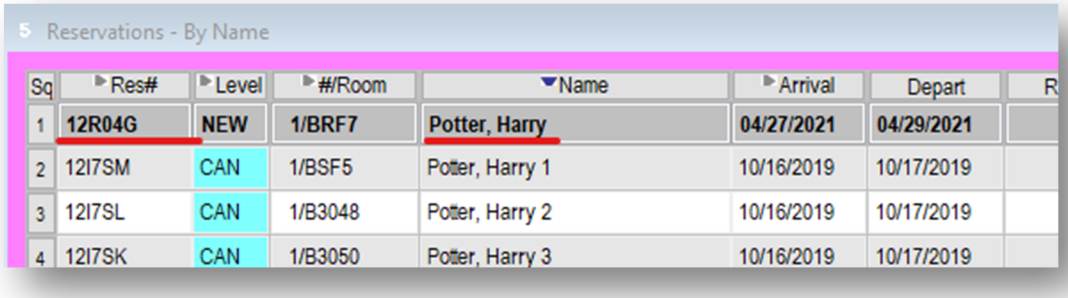


Sq	Res#	Level	#/Room	Name	Arrival	Depart
1	12R04F	NEW	1/BRF7	Weasley, Ron	04/27/2021	04/29/2021
2	12B19M	OUT	1/L305	Weast, John	08/28/2018	09/03/2018
3	12I098	OUT	1/L363	Weast, John	08/28/2019	09/02/2019
4	12N4X7	CAN	1/BRG7	Weatherall, Curtis	03/08/2021	03/12/2021

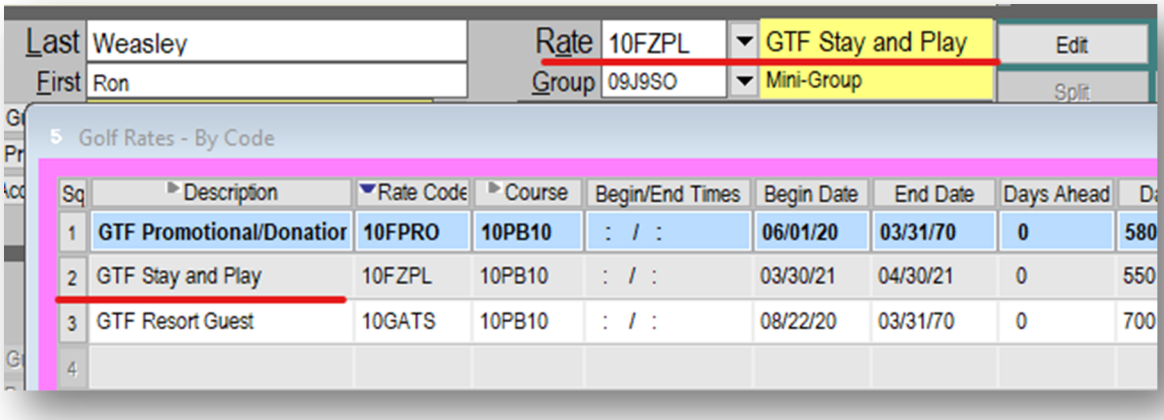
6. Use the Name field in the bottom right corner of this window to search (last name first) for the Room Reservation of the guest who will be paying for this round. Page Down to search.



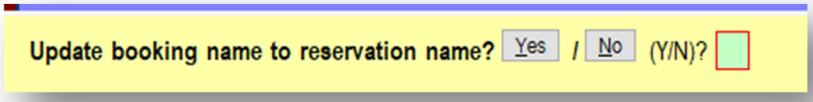
7. Select the Sequence Number of your guest's Room Reservation



8. A **Golf Rates** window will appear, prompting you to confirm the correct **Rate Code** for this tee time. We want to keep the Rate Code the same, so we select GTF Stay & Play.

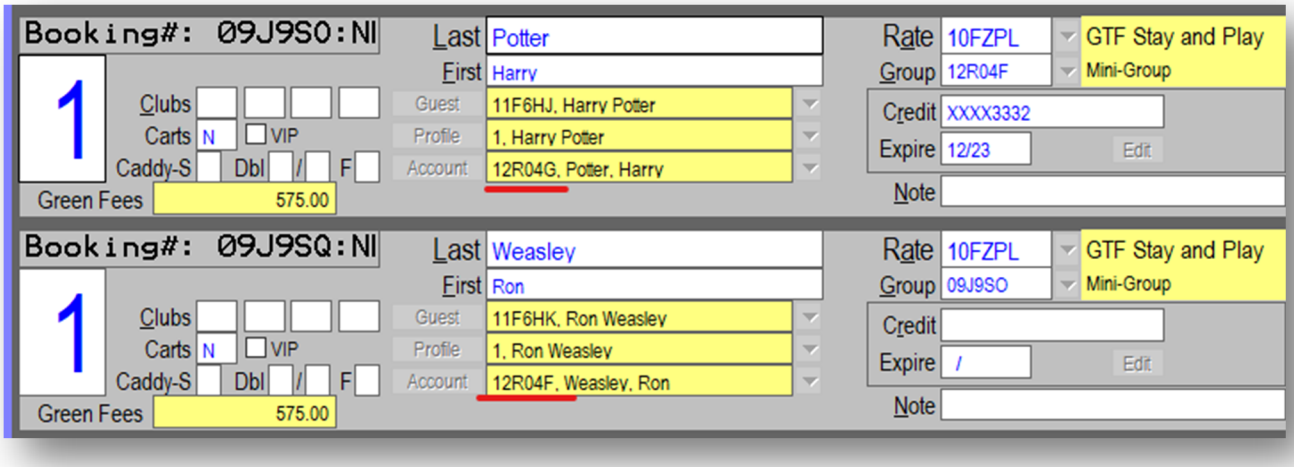


9. Click **Yes** to complete the Whosing



10. **Page Down** to Save.

You can now see that one single is Whosed to Harry Potters Reservation Tile on R#12R04G and the other single is Whosed to Ron Weasley's Reservation Tile on R#12R04F



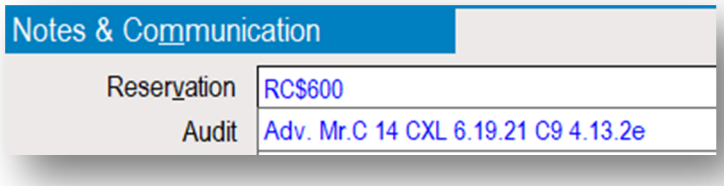
Multiple Package Resort Credit

When one guest is booking multiple packages and will be paying for everyone's room and golf, that guest may ask for all Resort Credits for every package to be applied to their own room.

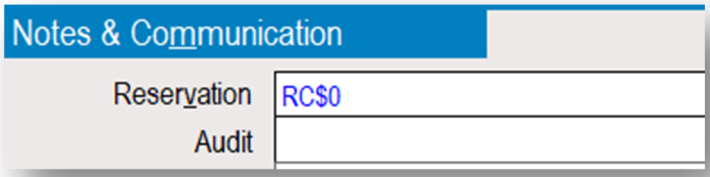
To arrange this, you must leave a note in the Reservations Line of every Package on the reservation that instructs the Front Desk of how to distribute the credit at checkout.

The following example is for a guest booking 3 packages with a $200 credit.

Primary Guest:



Secondary Guests:



Package Conversion

Whenever Pebble Beach announces a new Stay & Play Package offer to the public, the Reservations Center inevitably receives calls from guests who have already booked trips during the dates in which the Packages are available.

These guests will want us to **convert their Resort Stay from Rack Rate to the Package Pricing**. This is perfectly ok as long as we are at least 14 days away from the guest's arrival date.

Before you begin the process of converting a booking from Rack Rate to a Package, you must first make sure the guest fully understands what will be modified to make this change.

Review the **Package Guidelines** thoroughly to make sure that the guest's current Rack Rate reservation fits the required structure of the Stay & Play Package.

- If a guest's booking contains less than the required room or golf nights for the package, they may want to keep their reservation as-is.
- If the guest's booking contains more golf than the package includes, the tee times outside the package should be set up as Rack Rate.
- If the guest's resort stay is longer than the Package Stay (typically Packages cap at a 4-night stay), the guest's additional nights will be billed at Rack Rate.

Inform the guest that the **Deposit Requirement for a Package** is the entire **2 Night Base Package** Rate.

- In order to convert a reservation from Rack Rate to a Package, we will have to collect the difference between the Rack 2-night Deposit and the Package Deposit.
- This can be a deal breaker for some guests, so they should be informed before any changes are made.

Zoom + X



Zoom + X is the keyboard shortcut to update the **Time Stamp** of a **Rate Code**.
The Time Stamp refers to the Rate Code's **Date**.

Rate Codes for Packages, like **WNBH1** for example, are re-used year after year.

Though the Rate Code is identical, the pricing of WNBH1 in the year 2020 will be a different price than the WNBH1 package in 2021.

The way that SMS can determine which price to apply (the 2020 rate or the 2021 rate) is by the **Date** of the **Time Stamp.**

For example,

A guest calls in **August of 2020 to book a trip for December of 2021** (18 months in advance).

This guest knows that, most years, Pebble Beach will offer a **Winter Stay & Play Package** that is valid for stays in December, but these Packages are not available to book until we are much closer to the trip dates – usually no more than 3 months out.

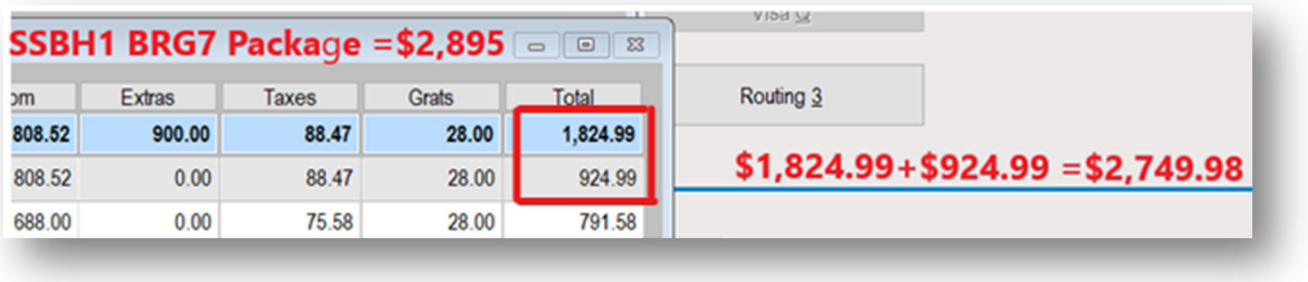
The guest does not want to risk their room and tee times being booked by another guest while they wait for the Package to be released, so they decide to book right away at **Rack Rate.**

In October of 2021, this guest receives an email announcing that our Packages are now available for the Winter of 2021. The guest calls into our Reservation Center right away to **convert their stay from the Rack Rate to the Package Rate.**

As a Reservations Agent, you receive this call and convert the guest's reservation from Rack to Package.

If you do not press **Zoom + X** to time stamp the package to the current date in October of 2021, the Package rate will be distored which may result in the rate running much higher or much lower.

The following example is a screenshot taken by an **Reservations Auditor** to explain to an Agent why they should have clicked **Zoom + X** when they **converted** this guest's reservaiton from **Rack to Package**:



The left side of the above image is the Reservation Tile's **Value Zoom** screen.

The auditor has notated at the top of the Value Zoom window that the **SSBH1 BRG7 Base Package** should be running at the rate of $2895.00.

However, when you add up the total of the first two nights of this reservation, you get $2749.98.

This inconsistency is due to the Reservations Agent failing to click **Zoom + X** to update the **Rate Code Time Stamp**. As a result, **this guest is incorrectly receiving a $145.02 discount.**

Convert from Rack to Package

Earlier this year, this guest booked a 2-night stay with 2 rounds of golf at **Rack Rate**. They just found out that a **Stay & Play Package** was released that could save them some money.

We need to **convert** this reservation from **Rack to Package**.

Itinerary # 1050RI4WY (COMPLETED)

Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location	Amount
R	11F6HJ		12R04H	CNF	RRB	Spanish Bay Rack ...	04/27/21-04/29/21		2	BRO7	2,982.34
G	11F6HJ	1	12R04H	CNF	10NATS	NGTF Resort Guest ...	04/28/21	15:10	1	10PB10	575.00
G	11F6HJ	1	12R04H	CNF	30GATP	GTF Resort Guest ...	04/29/21	13:20	1	30SG10	415.00

1. Once the guest has agreed to the Package terms, access the Reservation Tile and use **Bills** to charge the additional deposit.

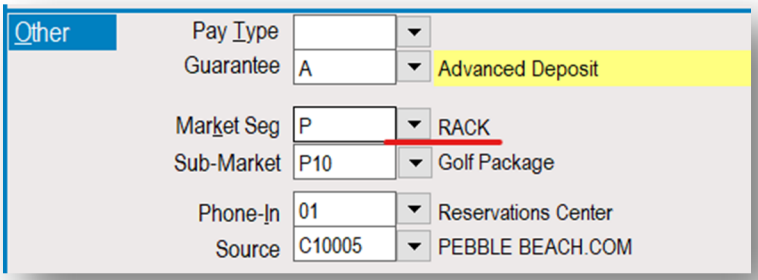
2. Once the additional payment has been confirmed:
   - Review the booking with the guest
   - Thank the guest for calling
   - Close the call

3. If the Package the guest has now booked includes a **3rd/4th night stay**:
   - If the guest agreed to pre-pay an additional 3rd/4th night of the package, leave an **FDB Trace** that itemizes everything that they have pre-paid.
   - If the guest declined to pre-pay an additional 3rd/4th night, leave a **K Note** explaining that the guest understands that these nights will be due at checkout.

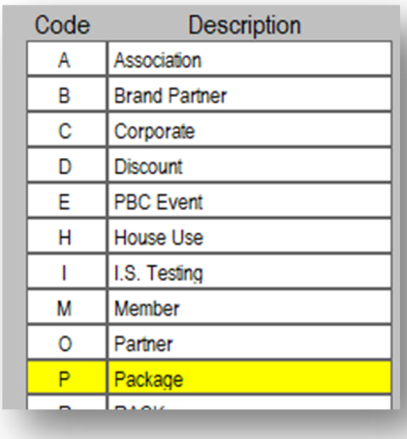
4. Access **Special Billing**:
   - Update the **Deposit 1** Line to the new amount required for the Package Deposit.
   - Mark the reservation as **Confidential**

5. Click Edit on the Reservation Tile

6. In the **Other** section of the Reservation Tile, click the **Down Arrow** to the right of **Market Segment.**

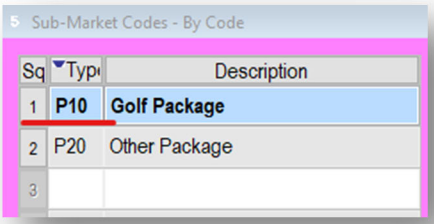


7. The **Market Code Menu** will open
   Select the **P** for **Package**
   Page Down to Save

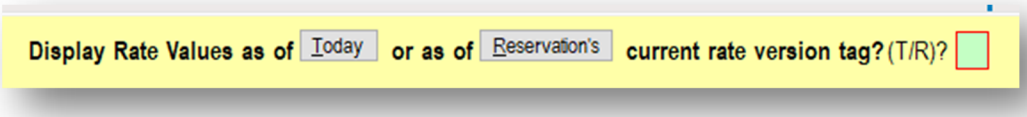


Code	Description
A	Association
B	Brand Partner
C	Corporate
D	Discount
E	PBC Event
H	House Use
I	I.S. Testing
M	Member
O	Partner
P	Package

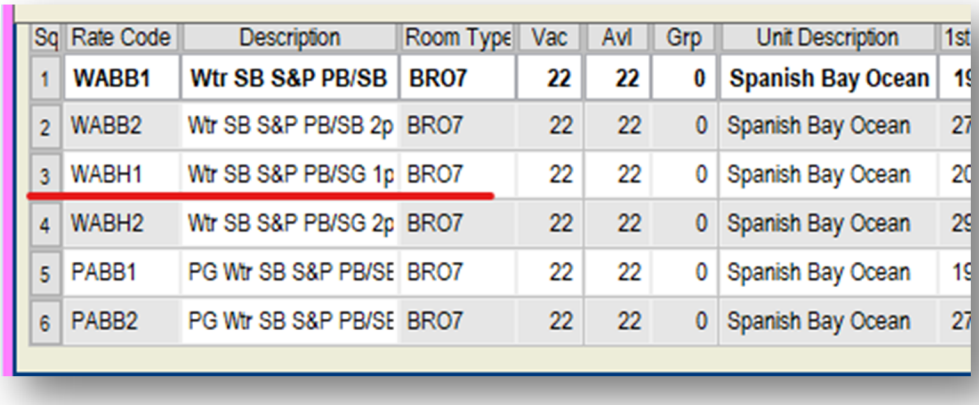
8. The **Sub-Market Code Menu** will open
   Select the **P10** for **Golf Package**



9. Click **Today** to access the list of currently available **Package Rate Codes**

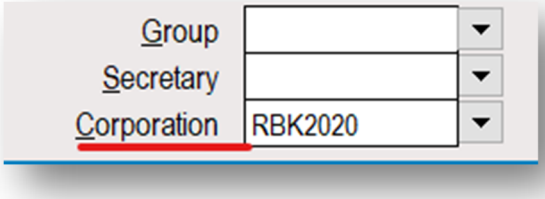


10. The **Rate Override** window will open.
    Click the **Sequence Number** of the appropriate **Package Code**

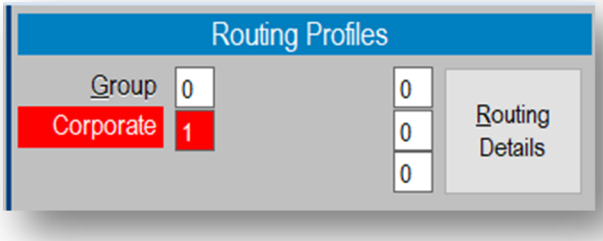


Sq	Rate Code	Description	Room Type	Vac	Avl	Grp	Unit Description	1st
1	**WABB1**	**Wtr SB S&P PB/SB**	**BRO7**	**22**	**22**	**0**	**Spanish Bay Ocean**	**19**
2	WABB2	Wtr SB S&P PB/SB 2p	BRO7	22	22	0	Spanish Bay Ocean	27
3	WABH1	Wtr SB S&P PB/SG 1p	BRO7	22	22	0	Spanish Bay Ocean	20
4	WABH2	Wtr SB S&P PB/SG 2p	BRO7	22	22	0	Spanish Bay Ocean	29
5	PABB1	PG Wtr SB S&P PB/SE	BRO7	22	22	0	Spanish Bay Ocean	19
6	PABB2	PG Wtr SB S&P PB/SE	BRO7	22	22	0	Spanish Bay Ocean	27

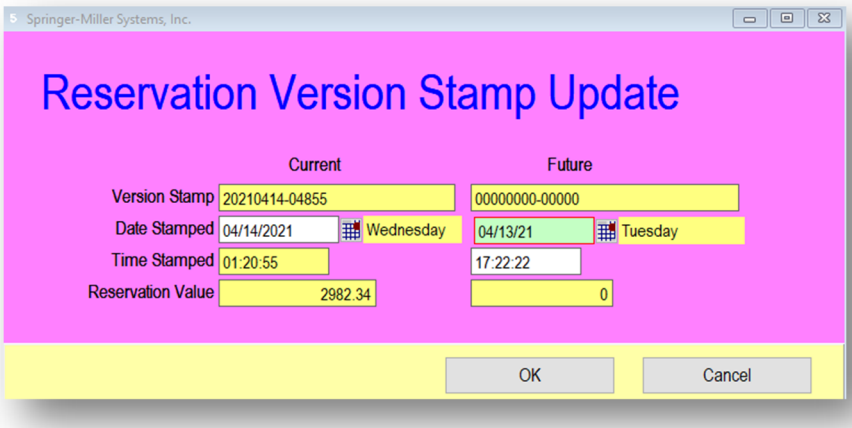
11. When applicable, add the guest's **Promo Code** into the **Corporate** field of the Reservation Tile



You will need to then access **Special Billing** to remove the Red 1 that will appear in the Corporate field.



12. On the Reservation Tile, click **Zoom + X** to open the Rate Stamp window
    Page Down to Stamp the reservation with today's date.

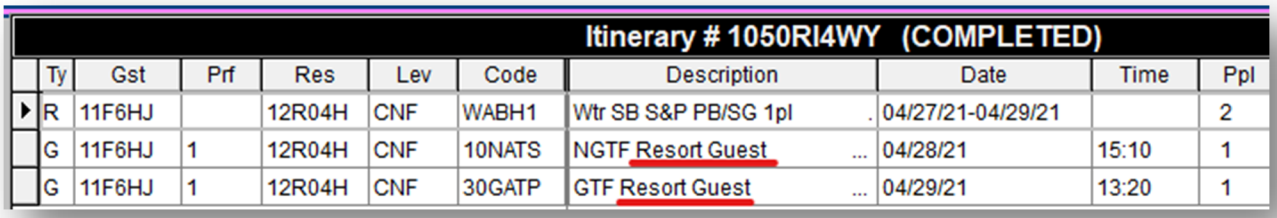


13. **Escape** to return to the Reservation Tile

14. If there are multiple packages and they are splitting the **Resort Credit** unevenly, mark the Reservation fields with the amounts for each guest.



15. **Escape** to return to the Booking Center
    The Room Reservation will now reflect the Stay & Play Package, but the Tee Times are still set to Resort Guest

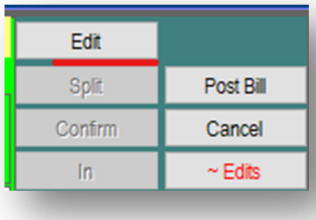


Itinerary # 1050RI4WY (COMPLETED)

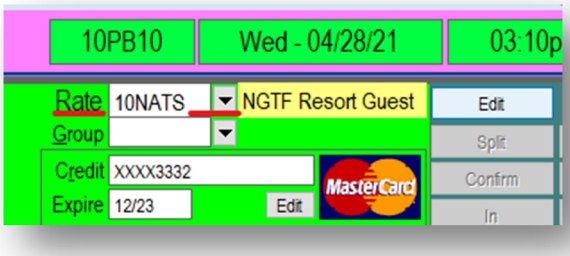
	Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl
▶	R	11F6HJ		12R04H	CNF	WABH1	Wtr SB S&P PB/SG 1pl	04/27/21-04/29/21		2
	G	11F6HJ	1	12R04H	CNF	10NATS	NGTF Resort Guest ...	04/28/21	15:10	1
	G	11F6HJ	1	12R04H	CNF	30GATP	GTF Resort Guest ...	04/29/21	13:20	1

16. Double click on the first tee time to open the Golf Tile

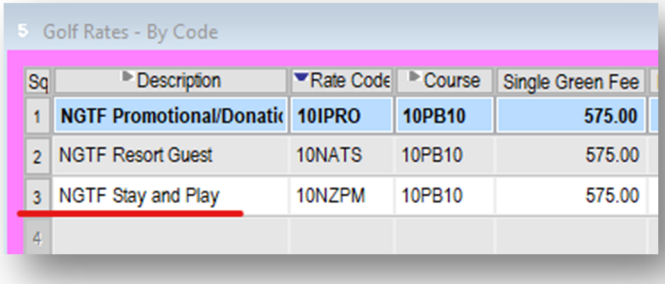
- Click **Edit** on the right side of the Golf Tile



- Click the **Down Arrow** to the right of the **Rate** Field



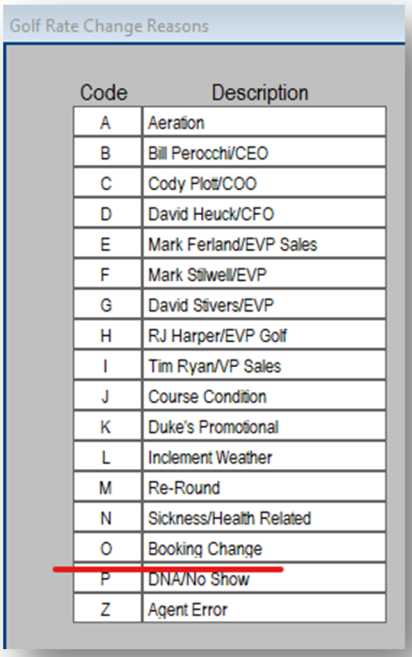
- Select the **Stay & Play Rate Code**



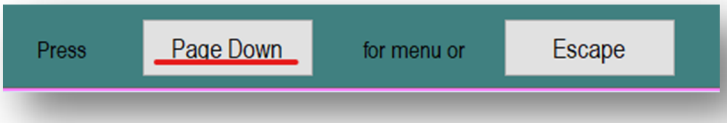
Golf Rates - By Code

Sq	Description	Rate Code	Course	Single Green Fee
1	NGTF Promotional/Donati	10IPRO	10PB10	575.00
2	NGTF Resort Guest	10NATS	10PB10	575.00
3	NGTF Stay and Play	10NZPM	10PB10	575.00
4				

- A window will open prompting you to select the **Reason** for your change.
  Select **O** for **Booking Change**



- Page Down to save.



Note: The Golf Rate Code update must be done after the Room is converted to the Package, otherwise the Stay & Play golf rate codes will not be available to select.

17. Repeat the Golf Rate Code update on the remaining Golf Tiles included within the Package

    If the guest has any additional golf that does not fit into the Package structure, those tee times should remain as **Resort Guest Rack Rate.**

18. Leave a detailed **R Note** that explains everything you have updated.

19. Access **Letters** and send a new **IEMAIL**

20. Copy your R Note to your **NAVIS Lead** and save the lead as **Change/Revise**.

Upgrade Package Golf

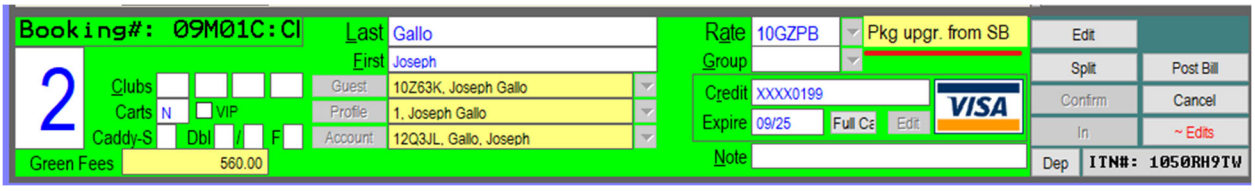
Upgrade the second or third round of package golf to PB once you are within 1 day.

ITN 1050RH9TW

Have a supervisor change the rate code:

Course	Date	Time	DPt	HL	Open	Specific Group Block
10PB10	04/21/21	07:40	G	01	2	
10PB10	04/21/21	14:50	N	01	4	
10PB10	04/21/21	15:00	N	01	4	
10PB10	04/21/21	15:10	N	01	4	
10PB10	04/21/21	15:20	N	01	4	
10PB10	04/21/21	15:30	N	01	4	
10PB10	04/21/21	15:40	N	01	4	
10PB10	04/21/21	15:50	N	01	4	

Rate Description	Per Player	Total
GTF $425 Special Individ	425.00	850.00
GTF Resort Guest	575.00	1,150.00
GTF Charity 22	430.00	860.00
GTF Charity 21	430.00	860.00
GTF Charity 20	415.00	830.00
GTF No Show $395	395.00	790.00
GTF No Show $575	575.00	1,150.00
GTF No Show $550	550.00	1,100.00
GTF Lexus LCFC	575.00	1,150.00
GTF Management Bloc...	0.00	0.00
GTF Inspirato	575.00	1,150.00
GTF Re-Round	345.00	690.00
GTF VIP7 Comp	0.00	0.00
GTF Other Comp	0.00	0.00
GTF PGA Comp	0.00	0.00
GTF Superintendent Co...	0.00	0.00
GTF Tournament Comp...	0.00	0.00
Pkg upgr. from Spy	160.00	320.00
Testing	1.00	2.00



City Ledgers



A **City Ledger** is a House Account in which a guest's money can be stored.

City Ledger Money is on hold with Pebble Beach until it can be applied to a stay or service.

Each City Ledger will include information about what the funds are allocated for and amount of the time guest has been given to use these funds.

Pebble Beach does not store money indefinitely, so each City Ledger will have an expiration date. If a guest's money is not used by this date, the funds will be forfeited.

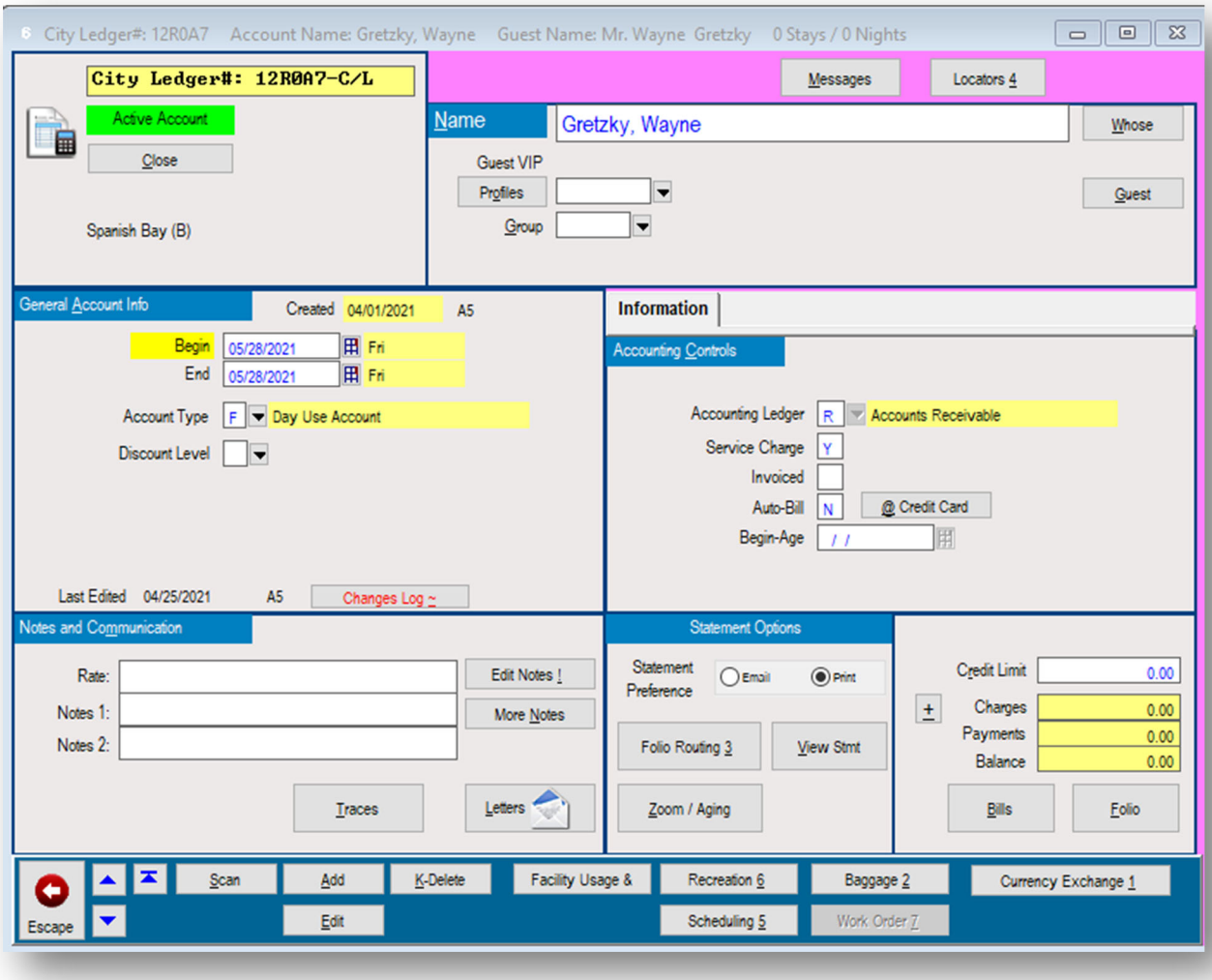
Reasons A Guest May Have A City Ledger:

- A 3rd Party wants to pre-pay Outside Guest Recreation
  The 3rd Party's pre-payment will be stored in City Ledger on the attending guest's Guest Tile until the date of play at which time the pro-shop will apply those funds to the Golf Tile.

- A guest wants to pre-pay their Outside Guest Golf Greens Fees
  This is usually done when a guest wants to eliminate their fellow golfers' option to pay for themselves upon arrival. Funds for the Greens Fees will be stored on a City Ledger until the date of play at which time the pro-shop will apply those funds to the Golf Tile.

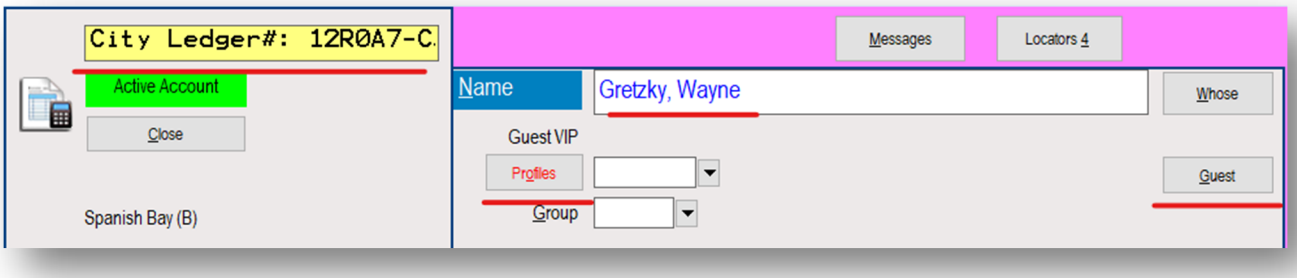
- A guest has cancelled a room reservation while within the No-Cancellation window and has negotiated to keep their funds on file to rebook at a later time.
  This is only done upon supervisor approval and under extenuating circumstances. These guests will be given a firm time limit in which they must rebook and complete their stay, otherwise the funds will be forfeited.

City Ledger Tile Walk-Through



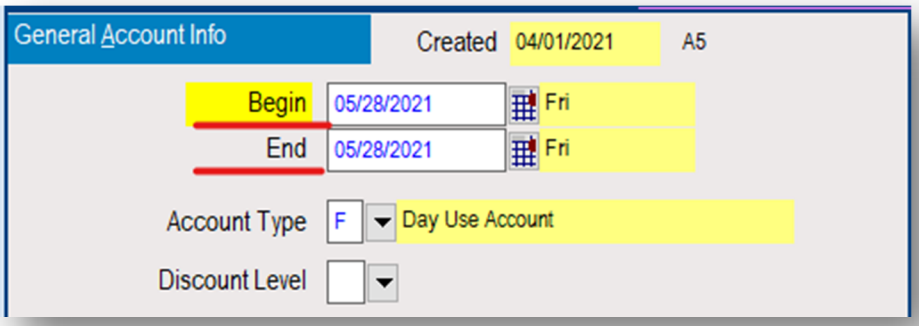
At the top of the City Ledger, you will find:

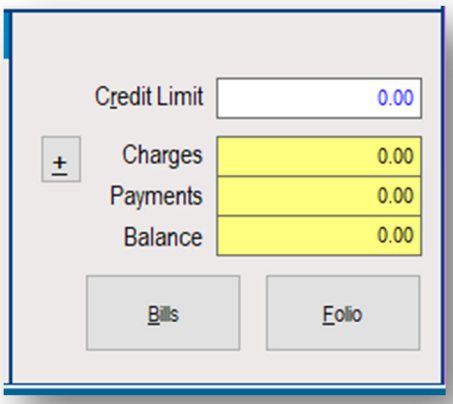
- The City Ledger number
- The name of the guest to whom the City Ledger belongs
- A link to the guest's Guest Tile
- A link to the guest's Profile



In the **General Account Info** section, you will see the dates in which the City Ledger is valid.

This will typically be set to the final date in which the guest may use their City Ledger funds, or in the case of a prepayment, the date of the guest's prepaid tee times.



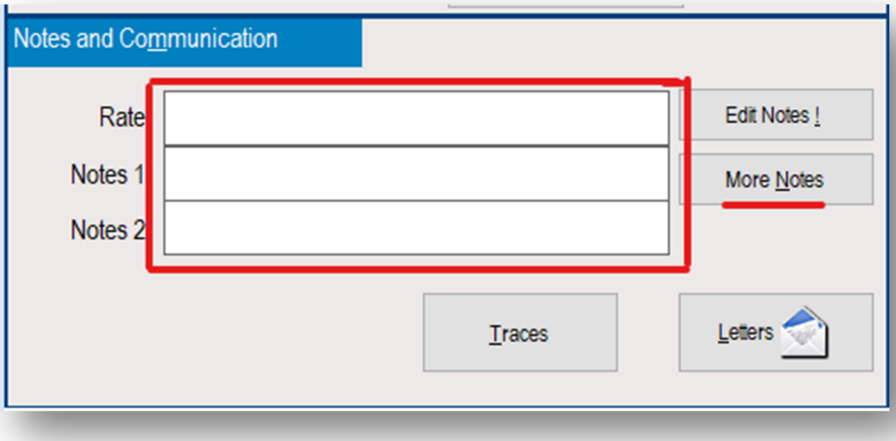


The bottom right corner of the City Ledger Tile is where you will see how much money is being stored.

This area is also used to charge funds to the city ledger via credit card.

The **Notes and Communications** box is where you will see an explanation of what the City Ledger funds are allocated for, how long the guest has to use the funds, and any additional instruction.

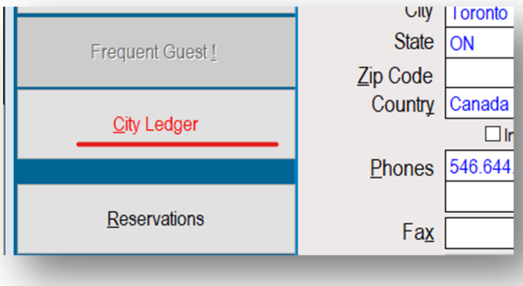
You will also see a link to **More Notes** which is where additional information may be stored if it exceeds the space on the three lines of the City Ledger Tile.



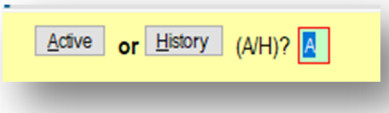
Locate A City Ledger

Access via the Guest Tile

If a guest has a City Ledger (Active or Closed), the City Ledger button will be red:



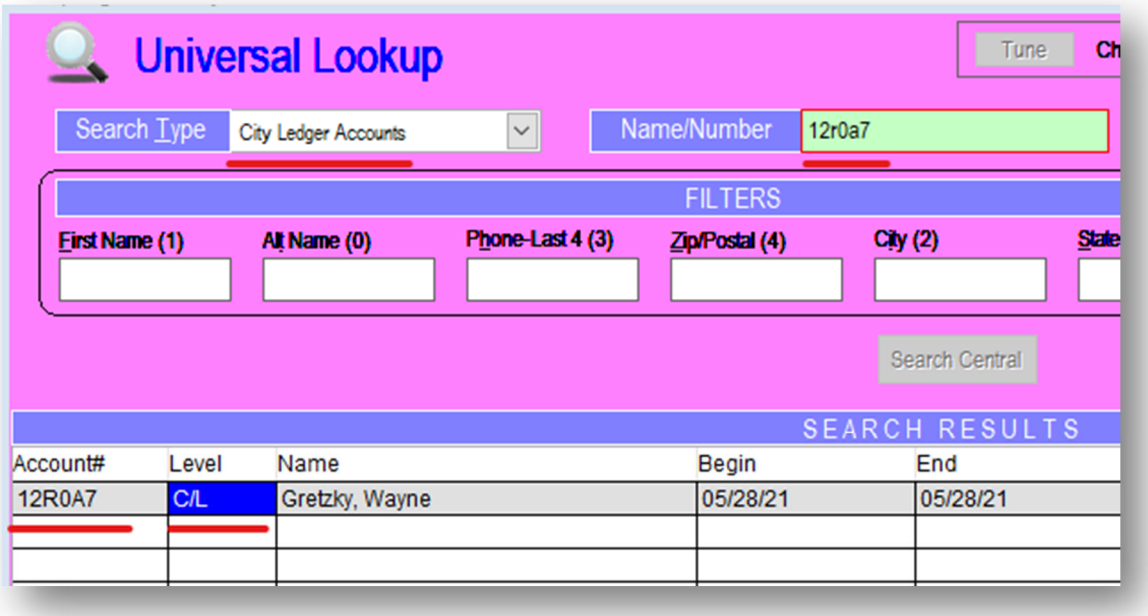
- Click the red **City Ledger** button.
- Type **A** to open all **Active City Ledgers**



- If the guest has multiple City Ledgers, you will be prompted to select the one you want to see from a **Pick List**. Otherwise, you will be directed straight to the City Ledger.

Access via Universal Lookup:

- Adjust your **Search Type** to **City Ledger Accounts**.
- This allows you to locate the account either by the guest's name or City Ledger Number.
- Double click to open the City Ledger



Create A City Ledger for a Cancellation Within 14 Days

If a guest has an extenuating circumstance that requires them to cancel their reservation at Pebble Beach Resorts within 14 days, a supervisor may approve an exception to hold the guest's deposit on a City Ledger for future use instead of the guest forfeiting the deposit entirely.

Before seeking approval for this exception:

1. Politely inform the guest that a cancellation at this time will result in the forfeiture of their deposit.
    - If they object, do your best to be compassionate with the guest while still reaffirming that this policy was agreed to upon booking.
    - Let the guest know that they can transfer their stay to a friend or family member who may be able to visit in their stead.

2. If the guest protests further:
    - Gather additional information about the reason behind their cancellation to determine if it is the result of an unavoidable circumstance.
    - Ask the guest if they would potentially be able to rebook their trip right now for future dates.
    - If they cannot rebook their trip right now, ask if they will be able to rebook within 6 months.
    - Typically, City Ledger funds are held for either 6 months, 12 months, or at most 18 months. We will always start by offering the smallest length of time.

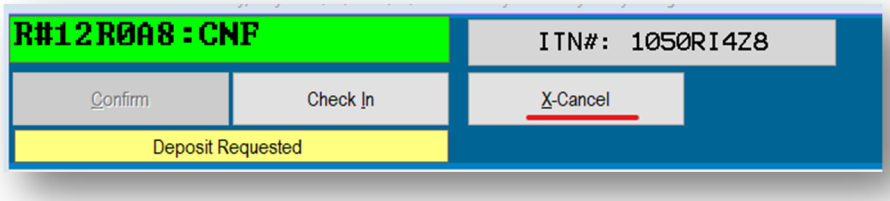
- Say, "let me see if there is anything else, I can do," then place the guest on hold so you can contact your supervisor.
    - Do not offer the guest an exception, or even explain the City Ledger option, until after you speak with the supervisor.

3. If approved:
    - Clearly explain that this is a one-time exception to our cancellation policy that we are granting due to the guest's extenuating circumstance.
    - Inform the guest of the exact expiration date by which the guest will need to complete their entire stay.
    - Clearly explain that, when the guest rebooks their trip, their new booking will be non-cancellable.

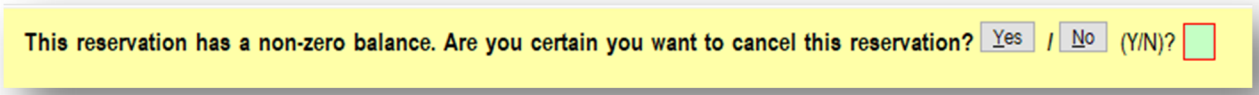
Cancel the Room Reservation:

1. Access the Reservation Tile.

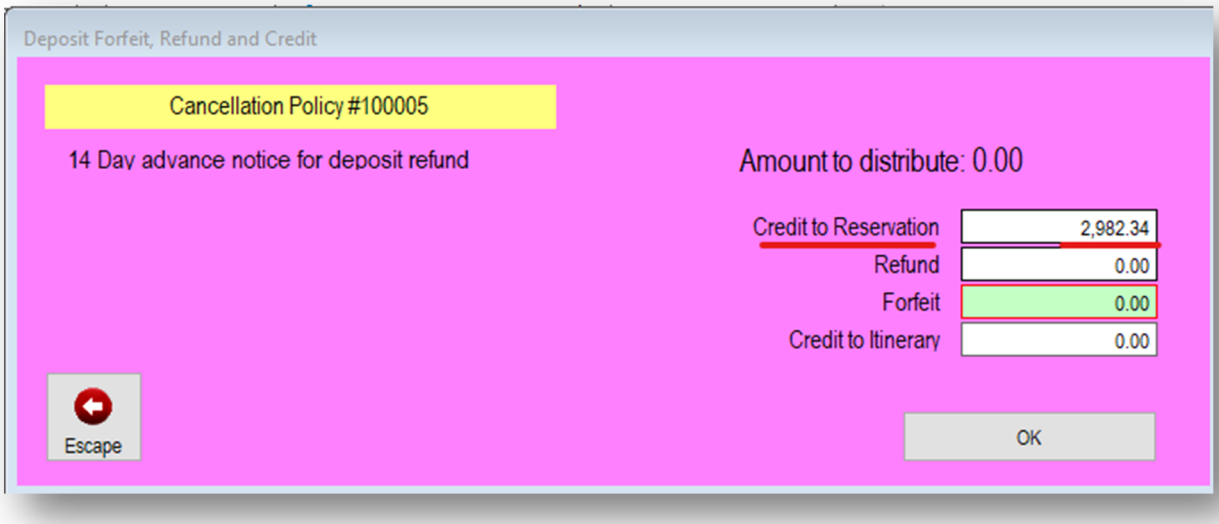
2. Click X-Cancel to cancel the room reservation.



3. Type Y for Yes to continue



4. A Refund Window will open.
   By default, the guest's funds will appear in the Refund field.
   You must move these funds into the field labeled Credit to Reservation

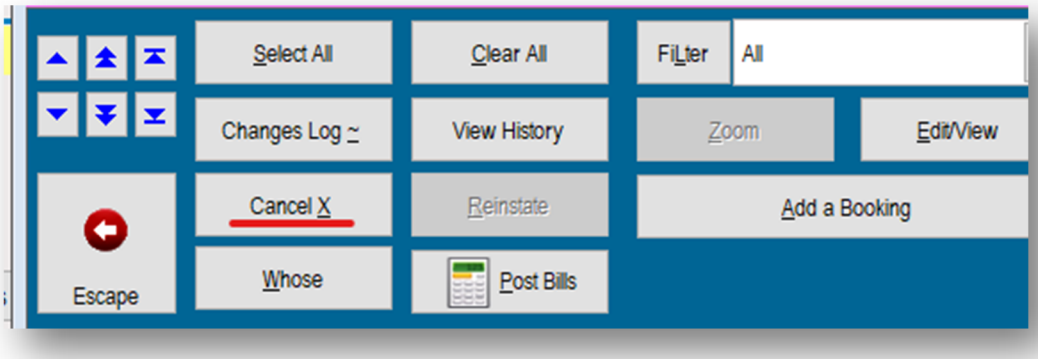


5. Click Ok to finalize.

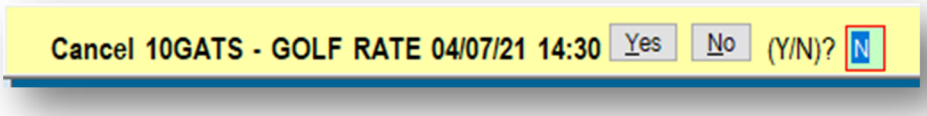
6. The Active Schedule with all recreation attached to the room reservation will open.
   Click the sequence number of each activity that needs to be cancelled along with the room reservation.



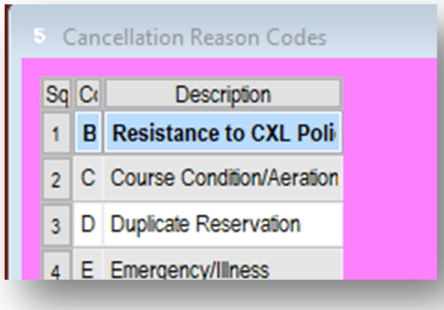
7. Click Cancel X to cancel all chosen activities at once.



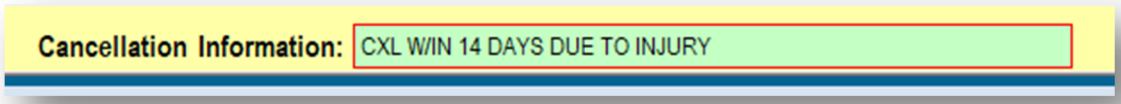
8. Type Y for Yes to confirm the cancellation



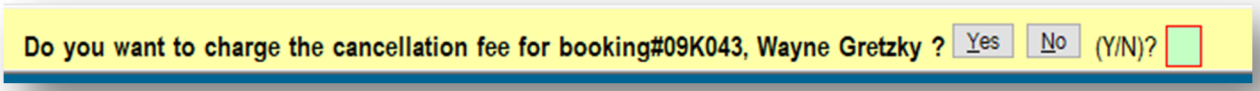
9. Select the appropriate Cancellation Reason from the window.
   Note: This cancellation reason pertains specifically to the cancellation of recreation.



10. Type a brief note with additional detail of the cancellation.

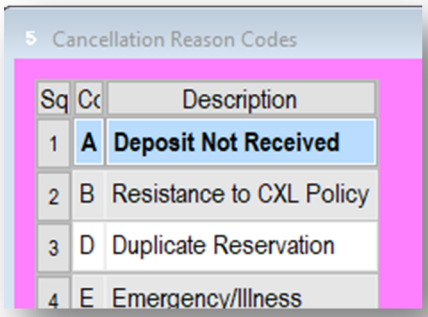


11. Type N for No.
Note: Even if the guest is forfeiting their deposit or greens fees, the answer to this question is always No.

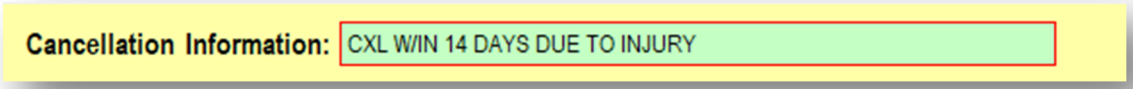


12. Escape to exit the Active Schedule

13. A second Cancellation Reason Pick List will open. Select the appropriate Reason Code
Note: This cancellation window refers to the cancellation of the room.



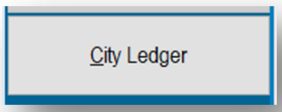
14. Type a brief note with additional detail of the room cancellation.



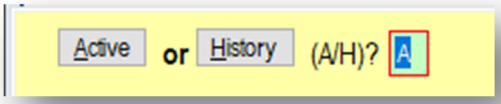
Create the City Ledger:

1. Access your guest's Guest Tile

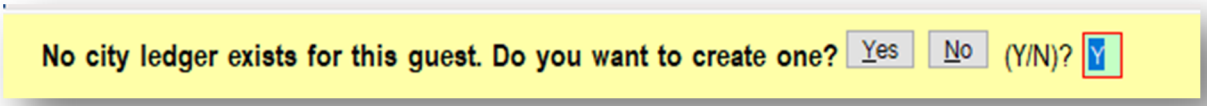
2. Click the **City Ledger** button (or hit C on your keyboard) in the left menu bar of the Guest Tile.



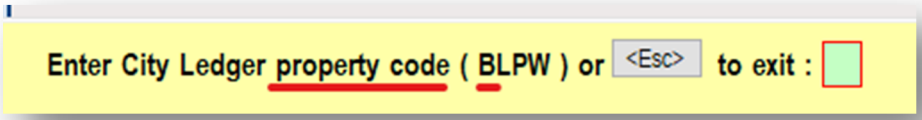
3. Type **A** for **Active**



4. Type **Y** for **Yes** to create a new City Ledger

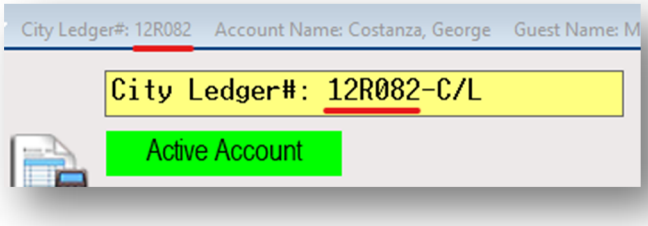


5. Type **B** to select **The Inn at Spanish Bay** as the Property Code
(We select the Inn at Spanish Bay because that is where our Accounting Department is located.)

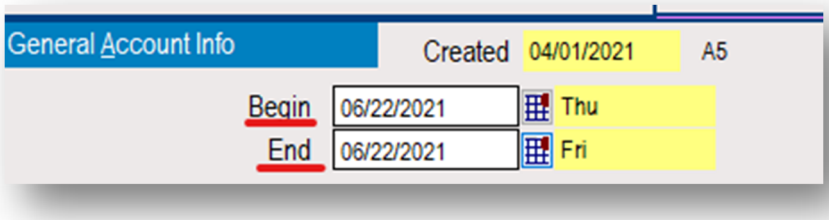


Your new City Ledger will now open.

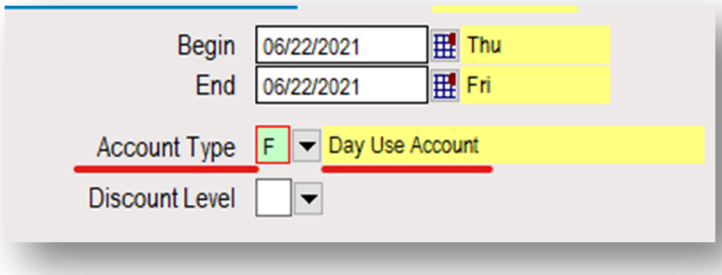
6. Make a note of the **City Ledger Number** at the top of the window. You will need this information for your Notes and Traces.



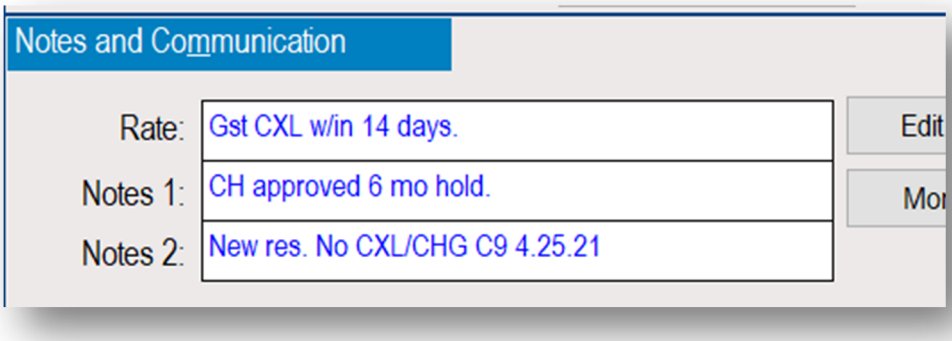
7. Set the **Begin** and **End Dates** as the final date in which the guest may use the funds. Both the Begin and End dates should be identical, not a range. Our policy maintains that the guest must STAY by this last date. All rebooked reservations are non-cancelable.



8. Click the Down Arrow to the right of the **Account Type** field and select **F** for **Day Use Account**



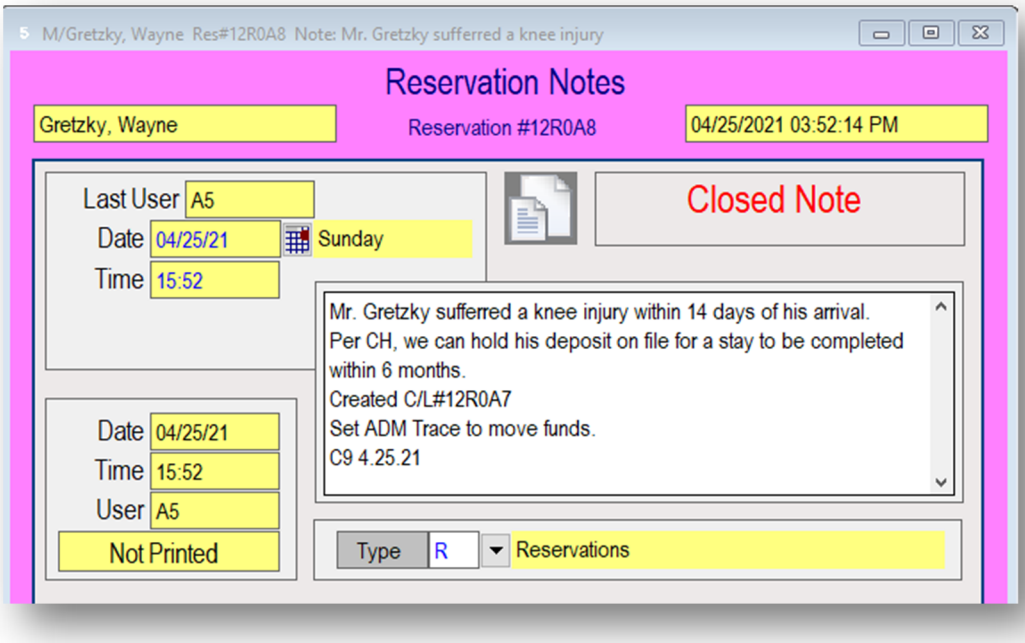
9. In the **Notes and Communication** section, type out clear notes that explain why the City Ledger has been created, who approved the hold and the length of time allowed.



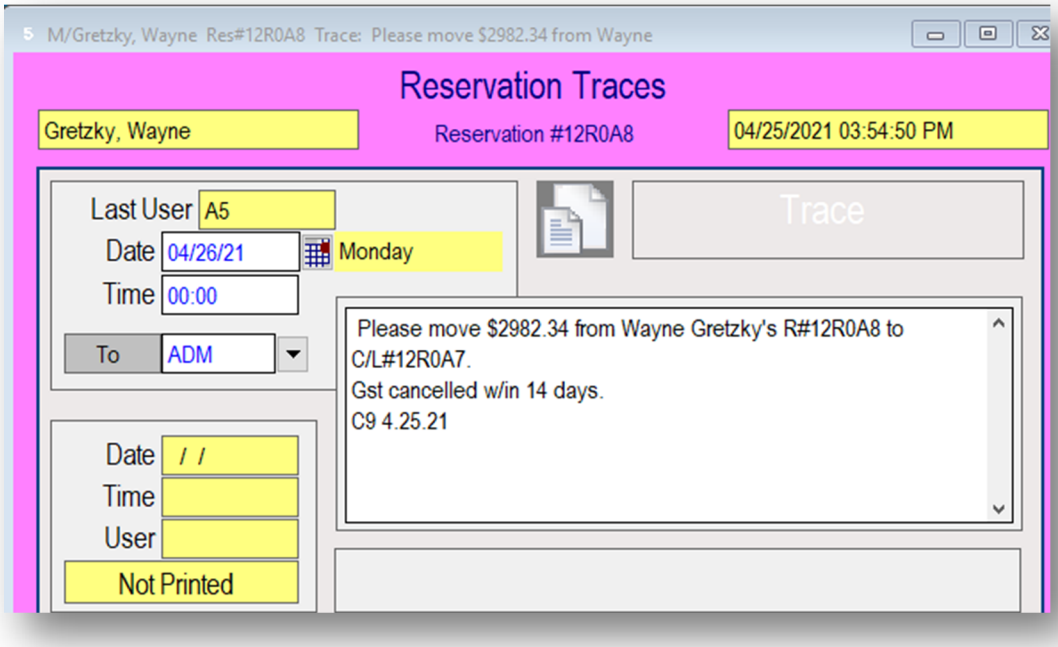
10. **Escape** to return to the Booking Center

Return to the Reservation Tile:

1. Create a **Closed R Note** that thoroughly explains the cancellation.



2. Set an **Accounting ADM Trace** *for the next business day with a request to move the deposit* from the Reservation Tile into the newly created City Ledger account.



3. Copy your R Note into your NAVIS Lead.

4. Mark the NAVIS Lead as cancelled.

Apply City Ledger Funds to A New Booking

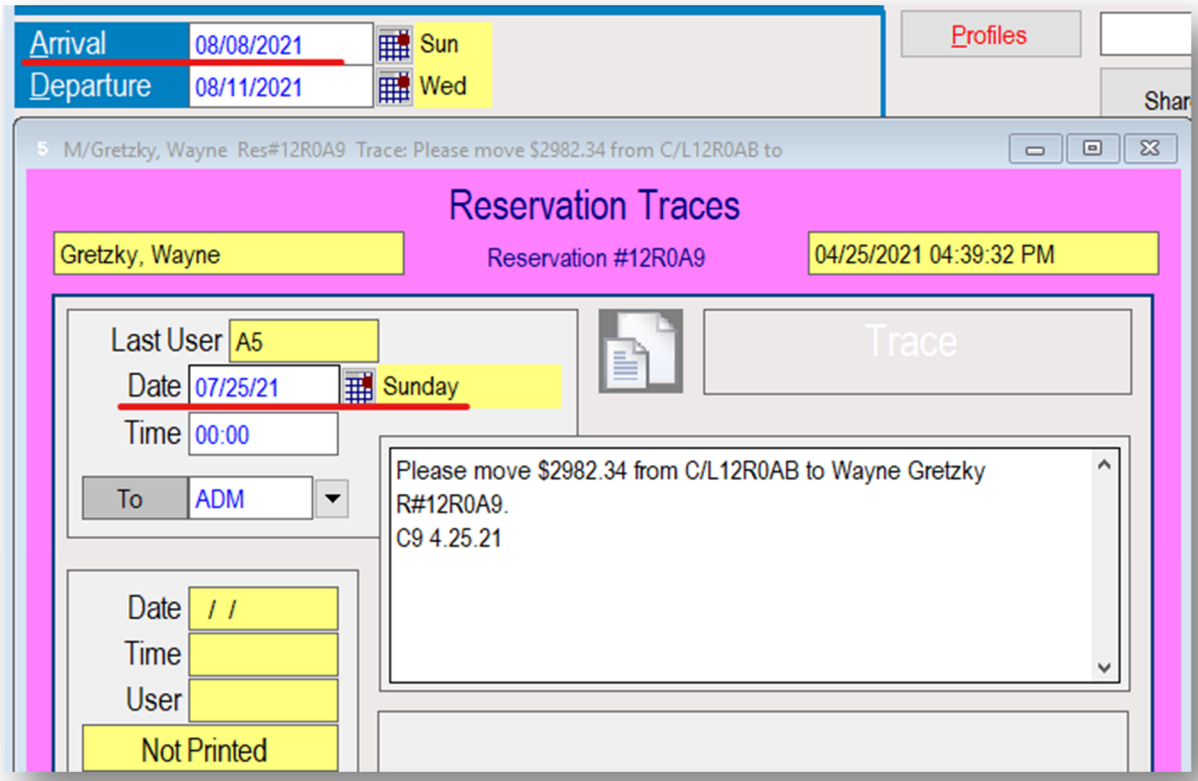
- Access the City Ledger and review the Notes and Communications section.
  - Is the guest's new booking within the eligible dates of the City Ledger?
  - Should the new booking be non-cancellable / non-changeable?

- Once you have verified that these funds are eligible to be used for the new stay, create the new booking in your Booking Center.

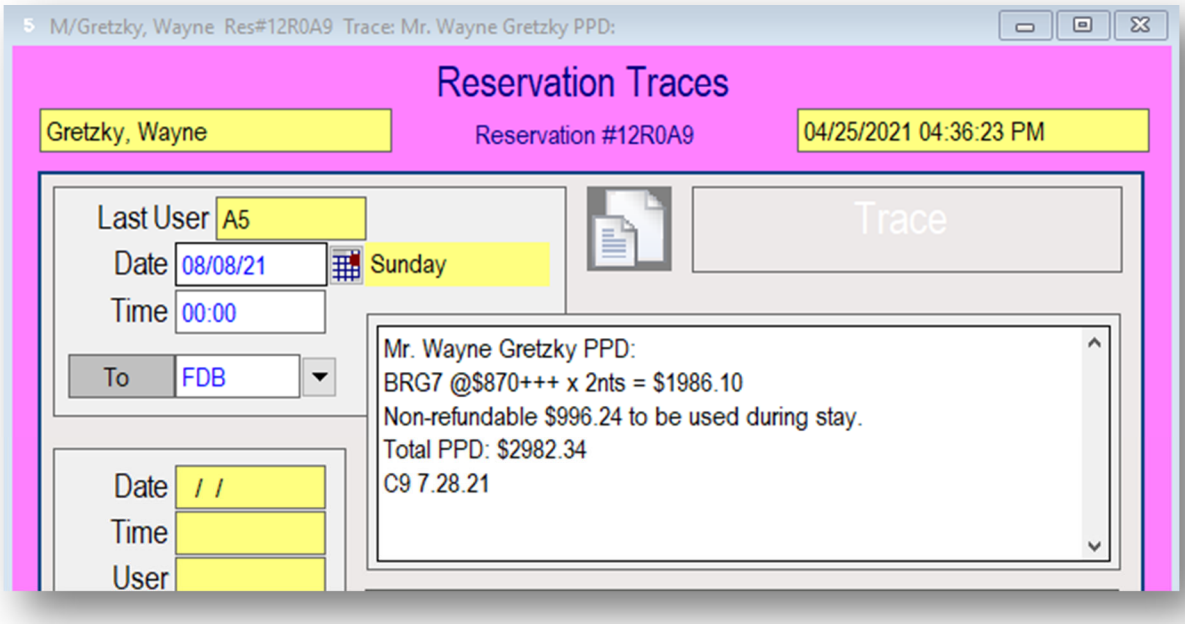
- If the City Ledger does not cover the entire 2-night deposit, collect the difference from the guest at the time of booking. If the City Ledger will cover the entire deposit, you just need to collect a credit card to store on file.

- Complete the call and booking like usual and quote the appropriate cancellation policy per the City Ledger notes.

- Create an **ADM Trace** set 2 weeks prior to the Arrival Date with a request to move the City Ledger funds to the Reservation Tile:

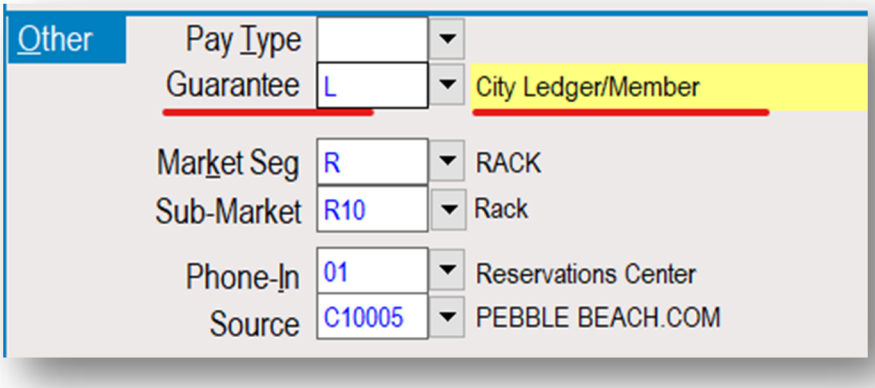


- If the City Ledger covers more than the required deposit, create an FDB Trace that explains that the amount above the deposit is non-refundable.



- The Deposit #1 line in special billing should reflect the amount of money that will be forfeited if the guest cancels their reservation.
    - If the guest had to pay additional money at the time of booking to meet the 2-night deposit, the amount of their 2-night deposit should be entered into the Deposit #1 field.
    - If the guest's non-refundable City Ledger funds cover more than the required the 2-night deposit, enter the entire amount of non-refundable City Ledger funds into the Deposit #1 field.

- Set the Reservation's Guarantee Code to L for City Ledger/Member.
  Once accounting moves the funds to Reservations Tile, they will change this code to A.



Third Party Bookings



A **Third-Party Booking** is a reservation that is being paid for by someone who will not be present during the trip.

Most Common 3rd Parties

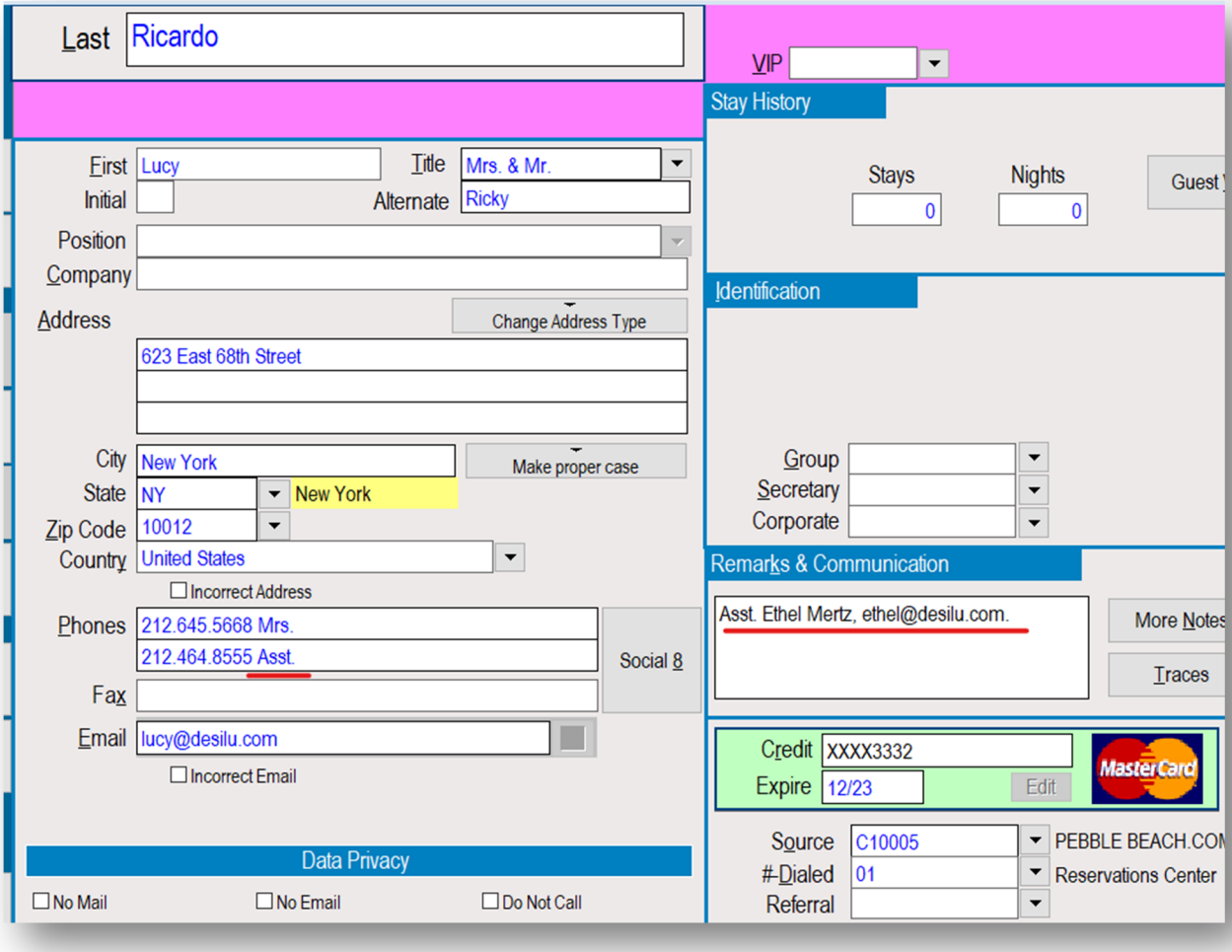
Assistants	It is common for our guests to have an assistant call to book a trip on their behalf. Assistants will be able to provide all of the guest's information for their Guest Tile as well as the Guest's credit card. Since all of the information provided to us is that of the guest who will be attending the trip, we will not need a Letter of Authorization.
Gift-Givers	Some people choose to give a Pebble Beach experience to a friend or family member as a gift. Since the gift-giver will not be present for the trip, we may need a Letter of Authorization to be able to charge their credit card without them being present. See the **Letter of Authorization (LOA)** section of this manual for details.
Companies	Some companies will book trips to Pebble Beach for their employees, such as a retirement gift. It is also common for companies to book trips to Pebble Beach for their clients. An employee will typically be attending the trip with a client, but that employee's name may or may not be on the credit card used to pay for the trip, so we may need a letter of authorization to be on file.

Assistants

If an **Assistant** is calling on behalf of a guest to book a tee time or trip, you will still create the entire booking as if the guest themselves is on the phone with you.

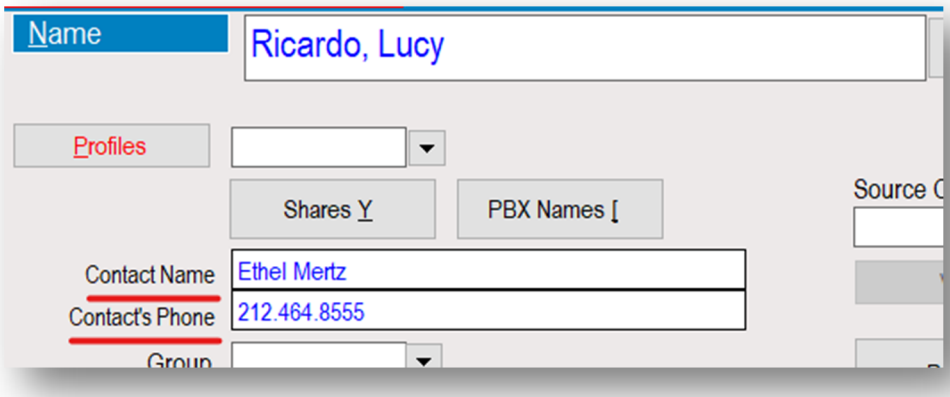
Guest Information	Assistant Email Address	Assistant Phone Number
An assistant will almost always be able to provide you with the guest's: • Full Name • Phone Number • Address • Email Address • Credit Card Information.	Confirmation Emails will usually be sent to the Assistant either in addition to or instead of the guest. • The assistant's email address must be documented on the Housekeeping Line of the Reservation Tile. • You can also document the assistant's name and email address in the Remarks field of the Guest Tile.	You must document the Assistant's phone number in addition to the Guest's: • This must be entered on the Reservation Tile. • It can also be saved onto the Guest Tile, but you must distinguish the phone number, so it is clear to whom the number belongs.

Guest Tile with Assistant:

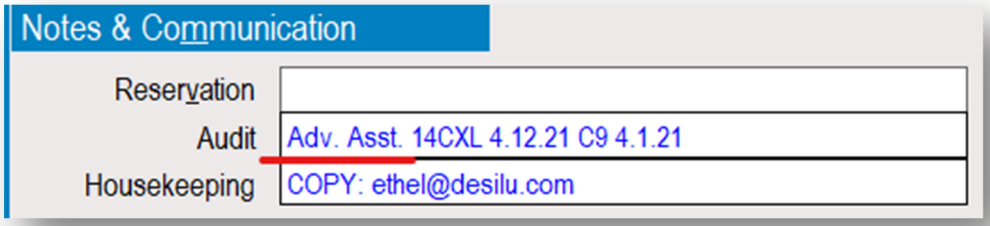


Assistant Booking Reservation Tile:

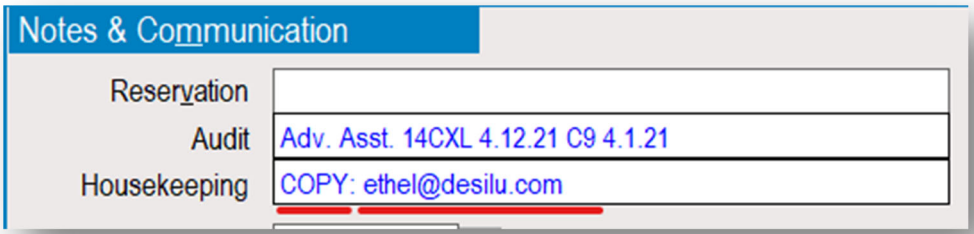
1. The **Contact name** and **Contact Number** Fields should be the name and phone number of the Assistant.
    - Do not write "Assistant" or any other remarks aside from the guest's name. This field will be visible to the assistant and guest on the confirmation email.



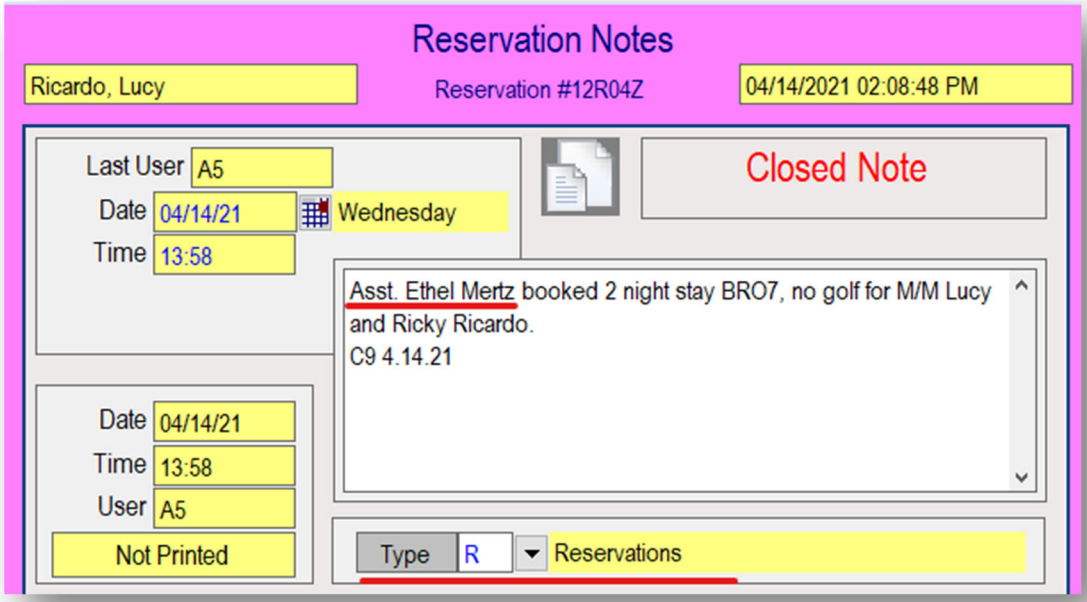
2. The **Audit** line should state that you informed the Assistant, *not the guest, of the 14-day* **cancellation window**.



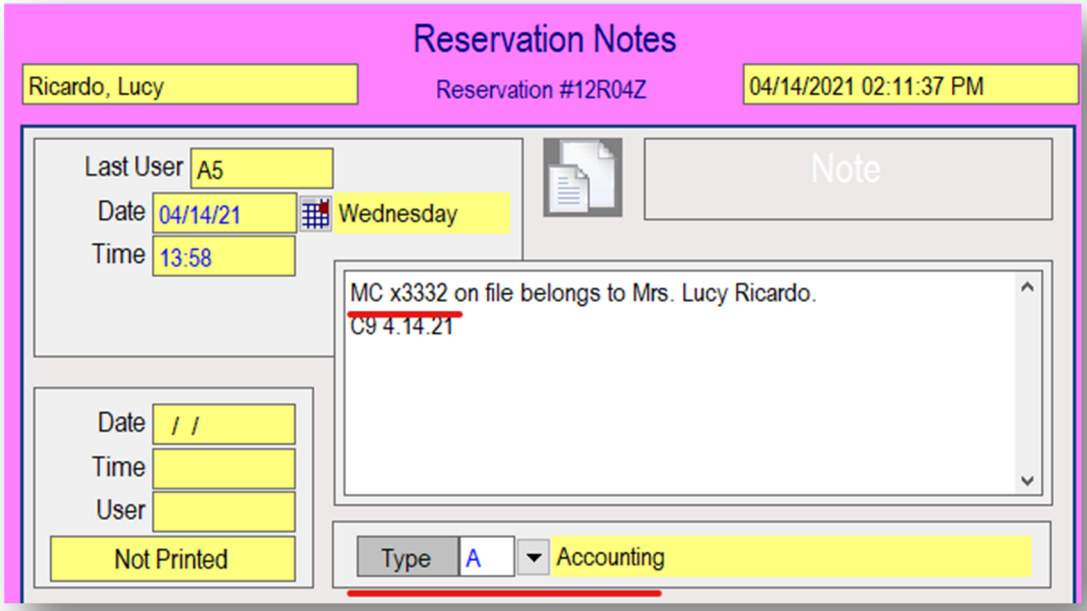
3. The **Housekeeping** line should contain the **email address of the assistant**.
    - This field will override the email address field in the guest tile, meaning only the assistant will receive confirmation emails about this reservation.
    - If you want both the guest and the assistant to receive a confirmation email, write "COPY:" before the email address.



4. An **R Note** should reflect who you spoke to and what was booked:



5. Any time we have a 3rd Party Booking, an **A Note** should be left for the **Accounting** department to explain to whom the credit card on file belongs:



Letter of Authorization (LOA)



A **Letter of Authorization** is a form that give Pebble Beach Resorts approval to charge a credit card without the owner of the card being present.

A **Letter of Authorization** is required any time a 3rd Party is paying with their own credit card (not the Guest's) and therefore will not be present to sign for charges on the date(s) of stay/play.

The only instance for which we do not need an LOA:

- The Dates of Stay are more than 30 Days out
- AND the 3rd Party is Pre-Paying a finite dollar amount at the time of booking.
- All incidentals during the trip will be paid for by the guest at checkout.

3rd Party w/LOA Booking Guidelines:

Pre-Payment	• If a 3rd Party credit card is being used for a booking, instead of just collecting the deposit, we need to collect all finite charges at the time of booking. • Finite charges include the entire room stay, Golf Greens Fees, and any Rental Clubs/Caddies for which the 3rd Party agrees to cover. • 3rd Party Guests may also pre-pay finite amounts allotted to the guest for incidentals. For example, a 3rd party may wish to pay for room, golf, and $300 worth of dining charges.
Guest Tiles	• All information within the Guest Tile on a 3rd Party Booking should exclusively pertain to the guest who will be attending the trip. • If the 3rd Party cannot provide the Guest's contact information, this Guest Tile should be set up as a C/O Guest Tile. • All contact information for the 3rd Party will be entered on the Reservation Tile.
Booking A Stay Within 30 Days	• If a 3rd Party is booking a trip that will occur within 30 days, we need to have the 3rd Party sign the LOA form before charging anything to their credit card. • You will need to get Supervisor Approval to Hold the room if the 3rd Party cannot sign the LOA by the end of the same day.
Booking A Stay Outside 30 Days	• If a 3rd Party is booking a trip that will occur more than 30 days out, the 3rd Party's credit card can be charged right away • We still need the LOA on file before the guest arrives.

Book A 3rd Party Reservation (w/LOA)

1. Add all room, golf, and recreation to your Itinerary via the Booking Center

Itinerary # 1050RI4X7

Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location	Amount	Duration	Booking#
R			12R050	NEW	RRB	Spanish Bay R...	08/01/21-08/04/21		2	BRO7	4,473.51	0	
G			12R050	NEW	10GA3...	GTF Resort 3nt...	08/02/21	09:00	2	10PB10	1,150.00	300	09J9TW
G			12R050	NEW	30GATP	GTF Resort Gu...	08/03/21	08:30	2	30SG10	830.00	300	09J9TX
D			12R050	NEW	24DR0...	Peppoli Dinner ...	08/03/21	18:00	2		0.00	120	09J9TZ

2. In form the 3rd Party Payee:
   - We will require a **Letter of Authorization** since they will not be present to sign for these charges. This well be sent to them electronically via email through the service Sertifi
   - We will collect pre-payment of all finite charges up front.

3. Clarify with the 3rd Party Payee exactly which charges they will cover with their own credit card:
   - Room charges?
   - Golf Greens Fees?
   - Caddies / Rental Clubs?
   - Incidentals?
   - Any finite dollar amounts to be used by the guest during their stay?

4. Click the Down Arrow next to the Guest Field in the Booking Center to search for or create the Guest Tile of the attending Guest.
   - Collect the attending Guest's full name
   - Ask the 3rd Party if they can provide the guest's phone number, email, or address.
     If the Payer cannot provide this:
     - write "C/O (3rd Party name)" in the Company line
     - Put a dot in the phone number field.
     - Fill in the City/State/Zip
   - Add the 3rd Party's credit card information to the attending Guest's Guest Tile
   - Save the Guest Tile and complete the Profile(s)

5. Collect the 3rd Party Payer's:
   - Full Name
   - Billing Address of the Credit Card
   - Phone Number
   - Email Address

   Set this information aside for your **A Note*

6. Let the 3rd Party Payer know that the guest will not see any pricing at check in or checkout, but the **confirmation email** will contain the total cost of the reservation.
   For 3rd Party Bookings, we send the confirmation email to the 3rd Party Payer who booked the trip, not the guest, unless otherwise requested.

7. Put the caller on hold while you prepare the Guest Tile and collect the payment for all finite charges on the booking.
   - If we are **within 30 days** of the reservation dates, do not charge anything to the payer's credit card until after the LOA is signed.
   - Put a hold on the reservation (with supervisor approval if we are holding beyond end of same day) to allow the 3rd Party Payer time to sign the LOA.

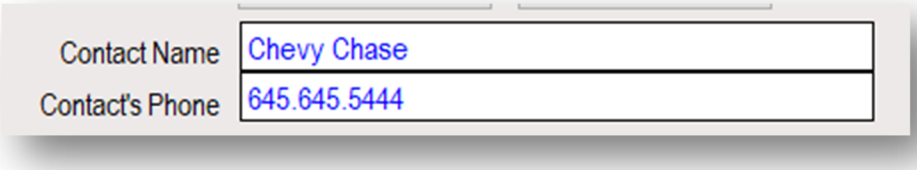
8. Take the caller off hold and Close the call:
   - Read through every booking with the guest in order to ensure accuracy
   - Reaffirm the 14-day cancellation window and the exact final date the booking can be changed/cancelled.
   - Advise that they will soon receive an email from **Sertifi** that they must sign electronically to approve all charges.
   - Inform the guest that their confirmation email will arrive within one hour
   - Ask if they need assistance with anything else
   - Thank the guest for calling
   - End the call.

Clean Up A 3rd Party Booking (w/LOA)

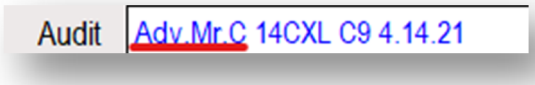
1. Open the Guest Tile and **delete the 3rd Party's credit card** from the Guest Tile

2. In the Booking Center, Assign the correct **profiles** to each recreation booking

3. Enter the 3rd Party Payer's name and phone number into the **Contact name** and **Contact Number** Fields.



4. The **Audit** line should state that you informed the 3rd Party Payer, not the guest, of the 14-day **cancellation window**.

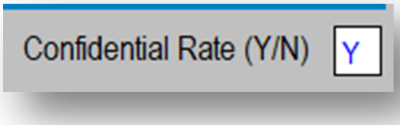


6. Type the 3rd Party's email address into the Housekeeping field so they can receive the confirmation email instead of the guest.

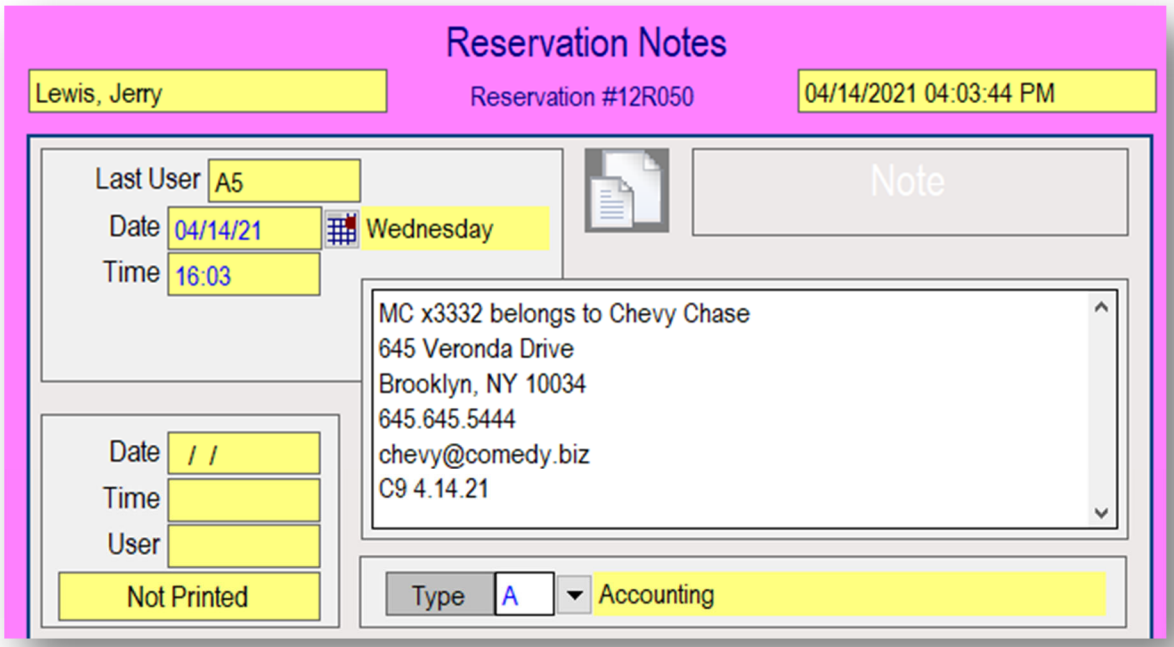


If the 3rd Party Payer wants the guest to receive the confirm as well, type **COPY:** before the 3rd Party's email address in Housekeeping.

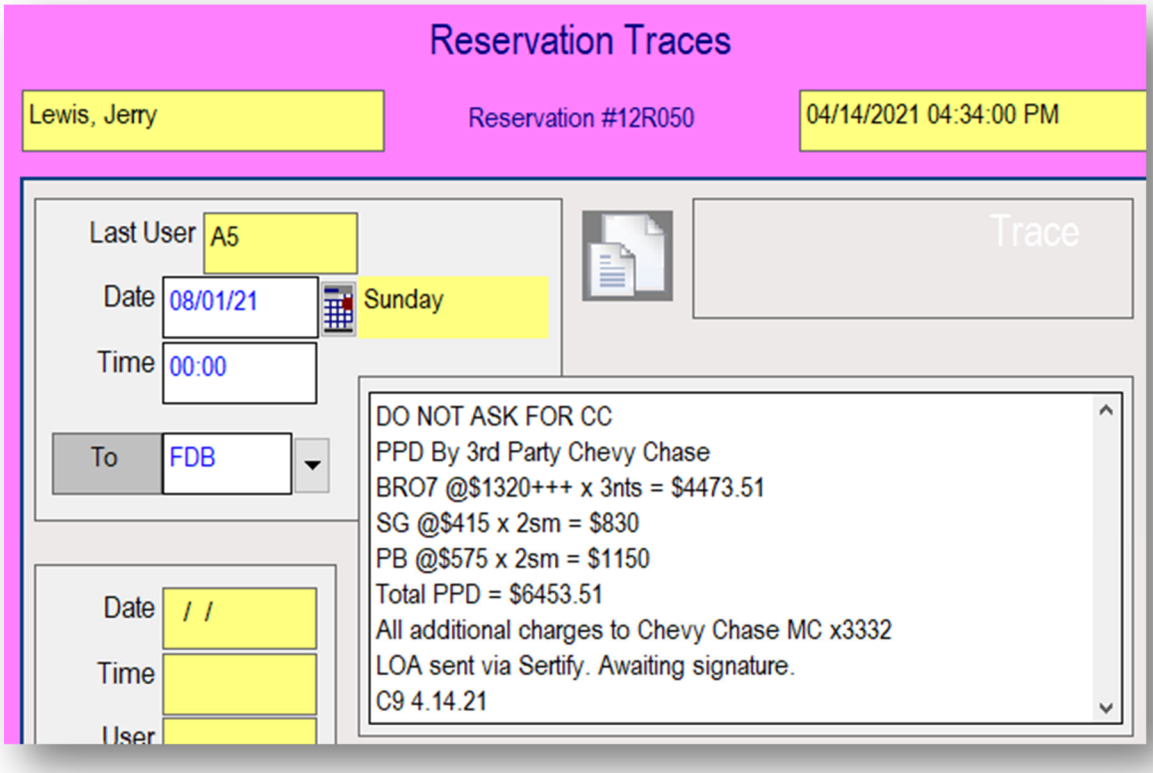
7. Access Special Billing and mark the Reservation as Confidential



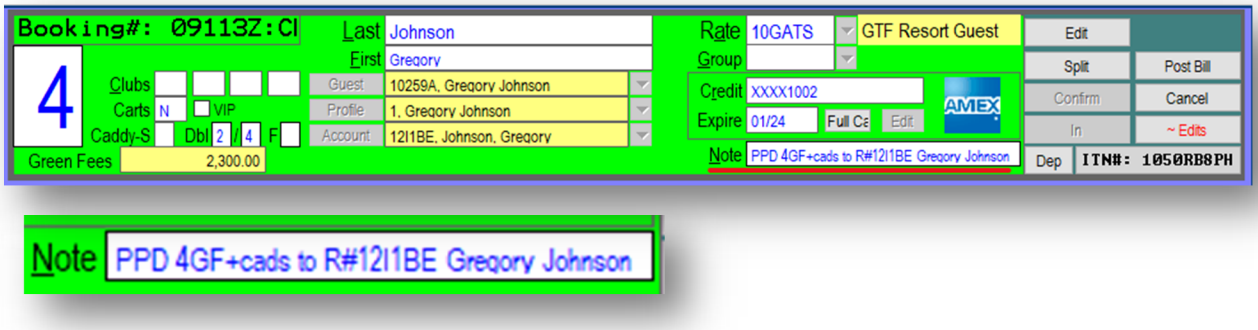
8. Leave an **A Note** for **Accounting** will all of the 3rd Party Payer's information:



9. Leave an **FDB Trace** for the Front Desk.
   - Since the LOA has not yet been signed, clearly state that the LOA is in-process.



10. If your 3rd Party is pre-paying for any recreation, you must leave **Baby Notes** on the recreation bookings with instruction to charge the pre-paid portions to the **Reservation Tile**.



11. Click **Confirm** on the Itinerary and send an **IEMAIL**

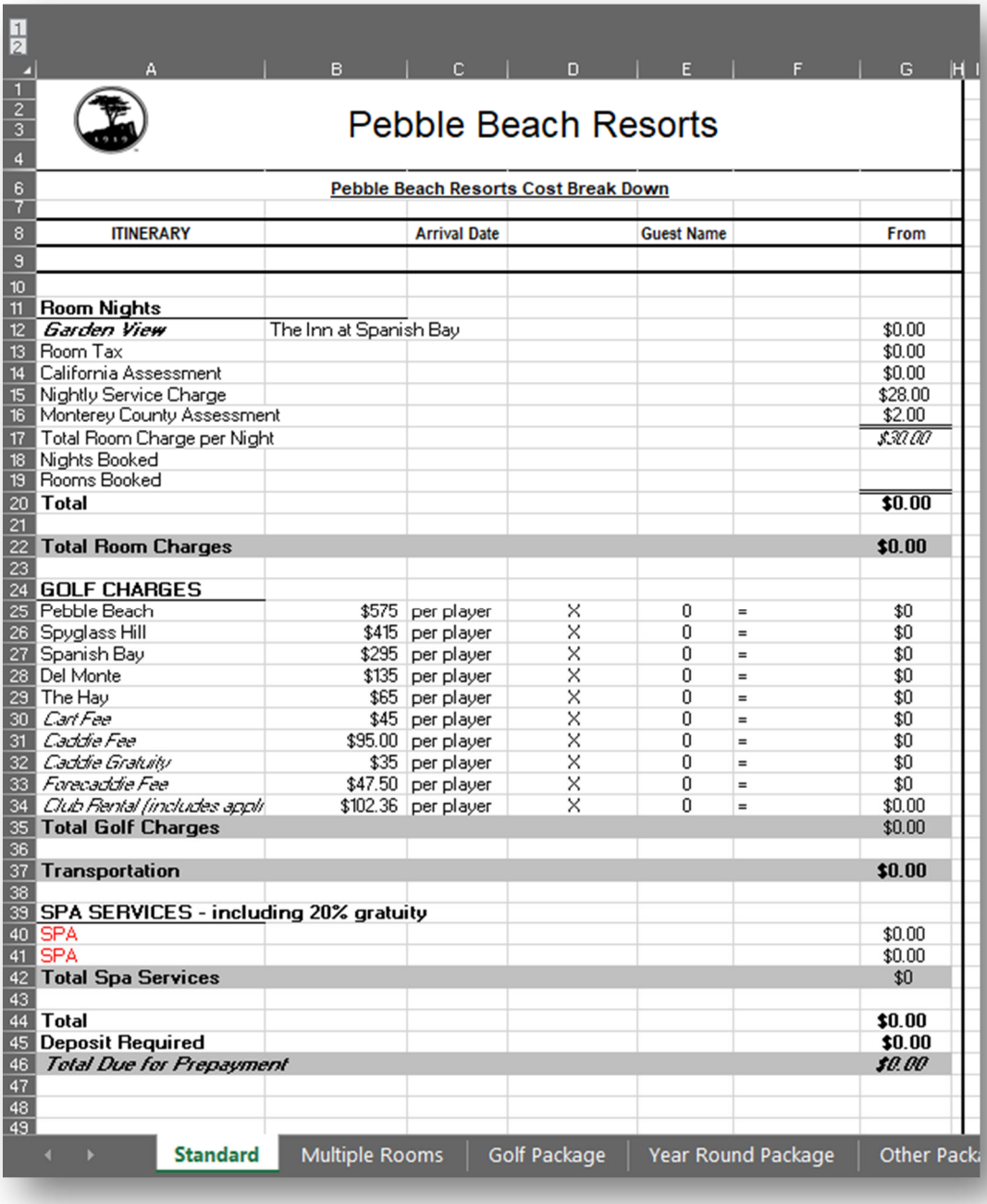
12. Complete your **NAVIS Booked Lead**

Complete A Cost Breakdown

Before you access **Sertifi** to send the LOA, you need to Prepare your **Cost Breakdown**.

- Open File Explorer
- Access the L Drive
- Open the RESORT RESERVATIONS folder
- Open the Forms folder
- Click on the LOA Template Excel Sheet

This is the **Cost Breakdown** Excel Sheet:



Pebble Beach Resorts

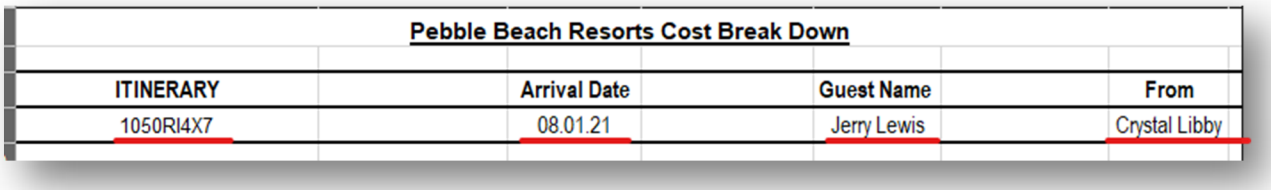
Pebble Beach Resorts Cost Break Down

ITINERARY		Arrival Date		Guest Name		From
Room Nights						
Garden View	The Inn at Spanish Bay					$0.00
Room Tax						$0.00
California Assessment						$0.00
Nightly Service Charge						$28.00
Monterey County Assessment						$2.00
Total Room Charge per Night						$30.00
Nights Booked						
Rooms Booked						
Total						**$0.00**
Total Room Charges						**$0.00**
GOLF CHARGES						
Pebble Beach	$575	per player	X	0	=	$0
Spyglass Hill	$415	per player	X	0	=	$0
Spanish Bay	$295	per player	X	0	=	$0
Del Monte	$135	per player	X	0	=	$0
The Hay	$65	per player	X	0	=	$0
Cart Fee	$45	per player	X	0	=	$0
Caddie Fee	$95.00	per player	X	0	=	$0
Caddie Gratuity	$35	per player	X	0	=	$0
Forecaddie Fee	$47.50	per player	X	0	=	$0
Club Rental (includes appli	$102.36	per player	X	0	=	$0.00
Total Golf Charges						$0.00
Transportation						**$0.00**
SPA SERVICES - including 20% gratuity						
SPA						$0.00
SPA						$0.00
Total Spa Services						$0
Total						**$0.00**
Deposit Required						**$0.00**
Total Due for Prepayment						***$0.00***

Standard | Multiple Rooms | Golf Package | Year Round Package | Other Pack

This Excel Sheet is pre-set with formulas of Pebble Beach Room, Golf, and Spa rates so Reservations Agents can easily create accurate Cost Breakdowns for guests.

1. Begin by filling in the fields in the Header:

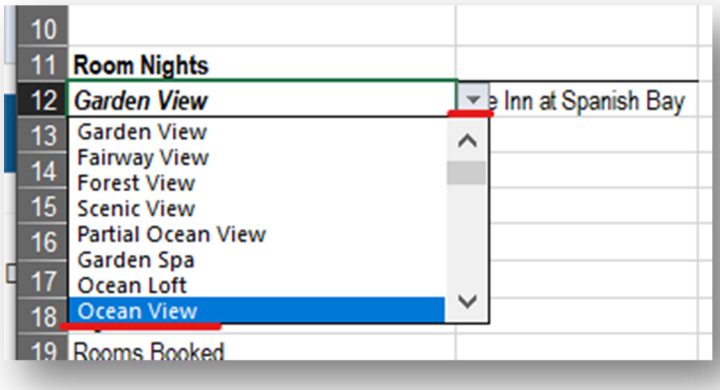


Pebble Beach Resorts Cost Break Down			
ITINERARY	Arrival Date	Guest Name	From
1050RI4X7	08.01.21	Jerry Lewis	Crystal Libby

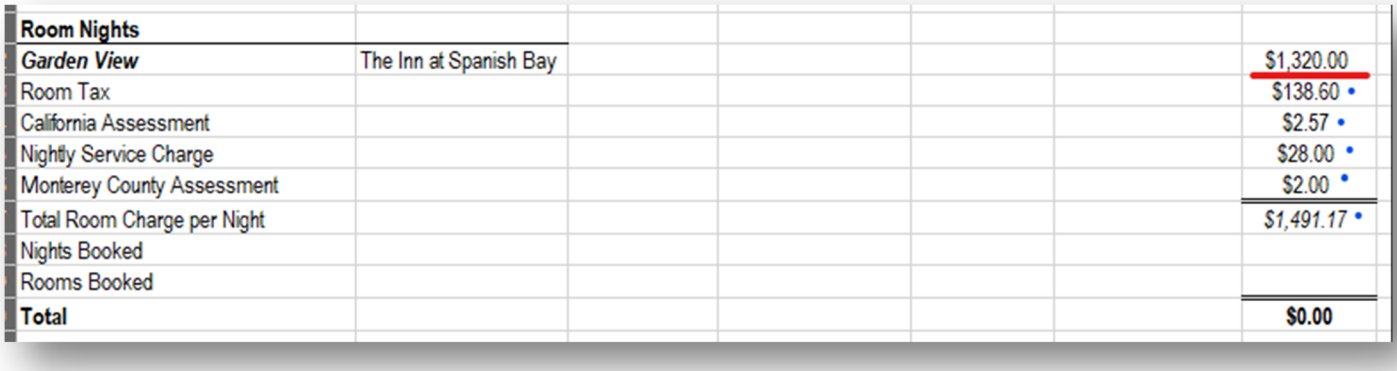
2. Select the correct resort in which your guest will be staying:



3. Select the Room Type:

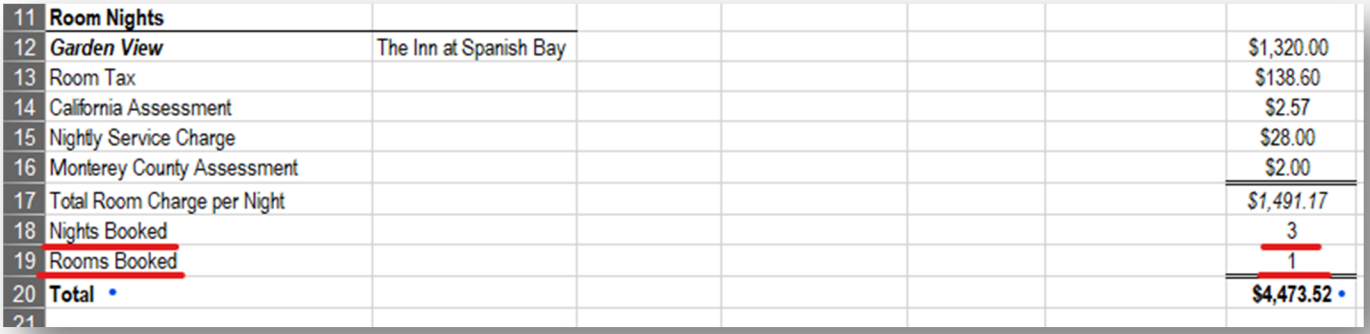


4. Type the Base Rate of your selected room type into the top Rate field:
   The Tax, Assessment, and Service Fee fields will auto-populate when you exit the cell.



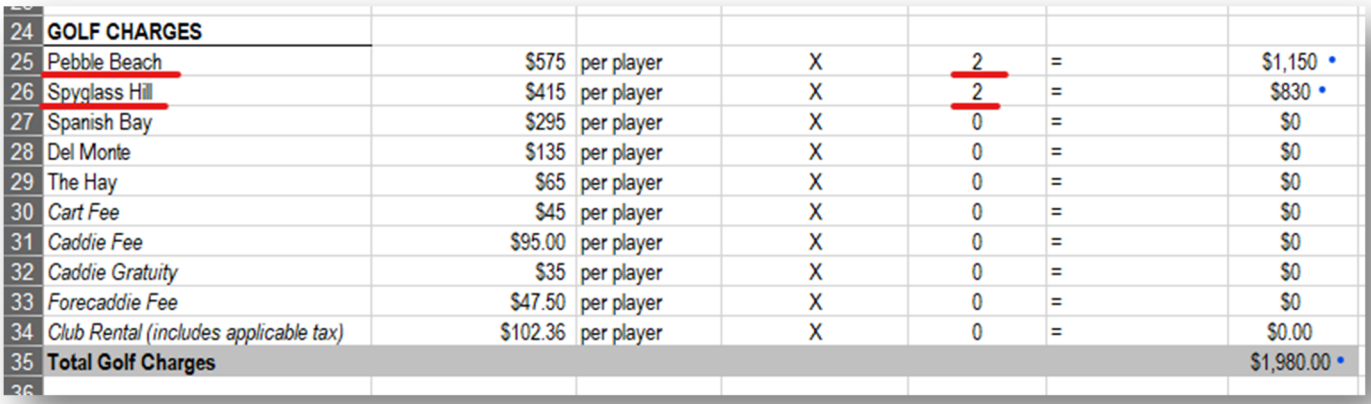
Room Nights						
Garden View	The Inn at Spanish Bay					$1,320.00
Room Tax						$138.60 •
California Assessment						$2.57 •
Nightly Service Charge						$28.00 •
Monterey County Assessment						$2.00 •
Total Room Charge per Night						*$1,491.17* •
Nights Booked						
Rooms Booked						
Total						**$0.00**

5. Enter the number of nights in the right column of the Nights Booked row
   Enter the number of rooms into the right column of the Rooms Booked row
   The Total will auto-populate



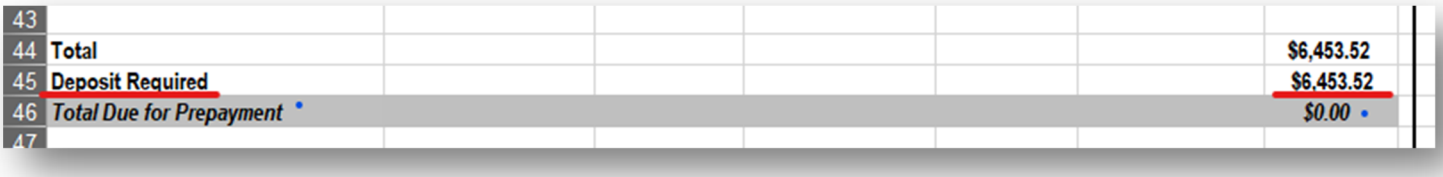
11	**Room Nights**		
12	***Garden View***	The Inn at Spanish Bay	$1,320.00
13	Room Tax		$138.60
14	California Assessment		$2.57
15	Nightly Service Charge		$28.00
16	Monterey County Assessment		$2.00
17	Total Room Charge per Night		*$1,491.17*
18	Nights Booked		3
19	Rooms Booked		1
20	**Total**		**$4,473.52**

6. In the GOLF CHARGES section, enter the number of players in the row for each golf round that the guest will be playing
   (If your 3rd Party has pre-paid for any caddies or rental clubs, you can add that here as well.)
   The Total Greens Fees for each course and the Total Golf Charges field will auto-populate.



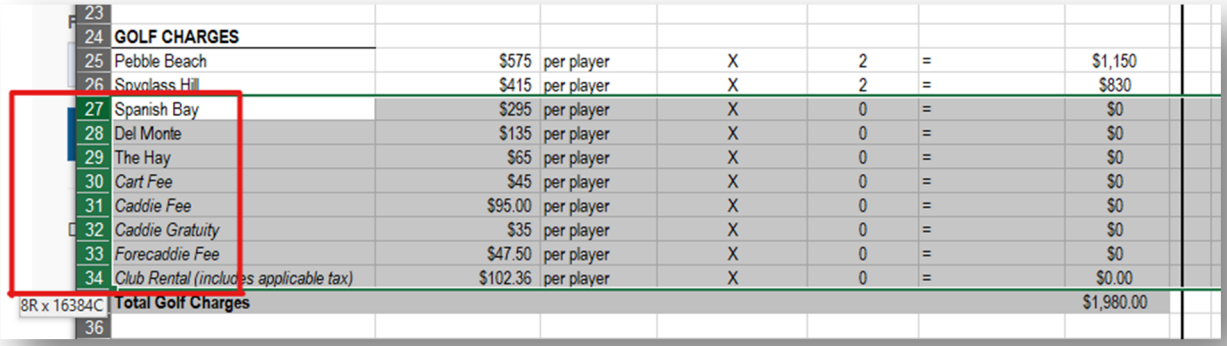
24	**GOLF CHARGES**						
25	Pebble Beach	$575	per player	X	2	=	$1,150
26	Spyglass Hill	$415	per player	X	2	=	$830
27	Spanish Bay	$295	per player	X	0	=	$0
28	Del Monte	$135	per player	X	0	=	$0
29	The Hay	$65	per player	X	0	=	$0
30	*Cart Fee*	$45	per player	X	0	=	$0
31	*Caddie Fee*	$95.00	per player	X	0	=	$0
32	*Caddie Gratuity*	$35	per player	X	0	=	$0
33	*Forecaddie Fee*	$47.50	per player	X	0	=	$0
34	*Club Rental (includes applicable tax)*	$102.36	per player	X	0	=	$0.00
35	**Total Golf Charges**						$1,980.00

7. Enter the amount of money you charged to the 3rd Party Payer's credit card at the time of booking.
   The Total Due for Prepayment will adjust automatically.
   (If your booking is within 30 days of the visit date, this field should be left at $0.00 because you should not charge the credit card until the LOA is signed.)



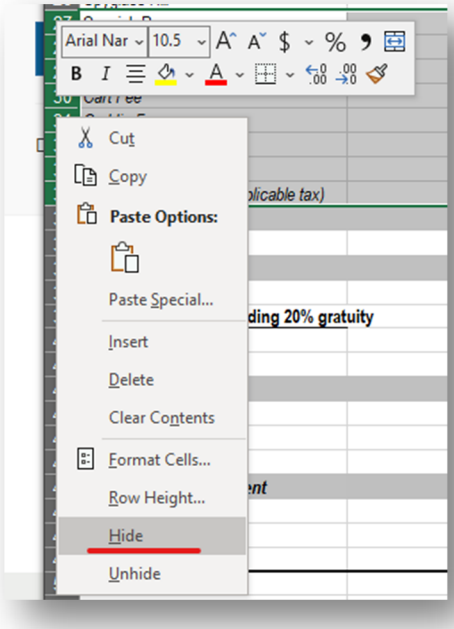
43		
44	**Total**	**$6,453.52**
45	**Deposit Required**	**$6,453.52**
46	***Total Due for Prepayment***	***$0.00***

8. Hide any unnecessary rows on the spreadsheet.
    - Click the number of the first column you want to hide, then drag your curser until you have highlighted the entire section you want hidden.

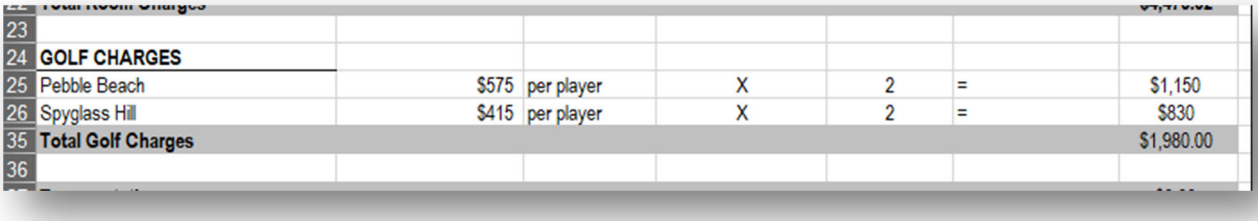


23								
24	**GOLF CHARGES**							
25	Pebble Beach	$575	per player	X	2	=	$1,150	
26	Spyglass Hill	$415	per player	X	2	=	$830	
27	Spanish Bay	$295	per player	X	0	=	$0	
28	Del Monte	$135	per player	X	0	=	$0	
29	The Hay	$65	per player	X	0	=	$0	
30	*Cart Fee*	$45	per player	X	0	=	$0	
31	*Caddie Fee*	$95.00	per player	X	0	=	$0	
32	*Caddie Gratuity*	$35	per player	X	0	=	$0	
33	*Forecaddie Fee*	$47.50	per player	X	0	=	$0	
34	*Club Rental (includes applicable tax)*	$102.36	per player	X	0	=	$0.00	
8R x 16384C	**Total Golf Charges**						$1,980.00	
36								

    - Right Click on the green area and select Hide (or type "H") from the Menu



These sections will now be hidden from view:



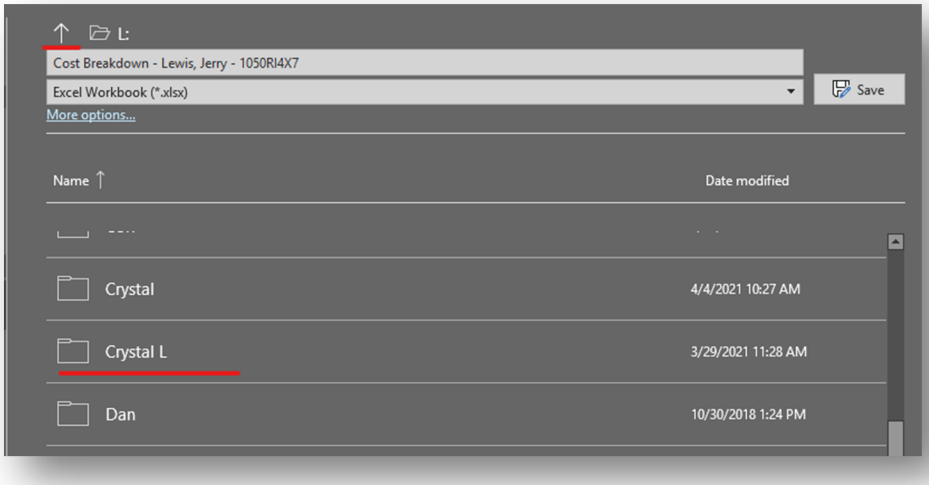
23							
24	**GOLF CHARGES**						
25	Pebble Beach	$575	per player	X	2	=	$1,150
26	Spyglass Hill	$415	per player	X	2	=	$830
35	**Total Golf Charges**						$1,980.00
36							

    - Repeat this step on any additional unnecessary rows.
      Be sure to keep all rows that include Totals.

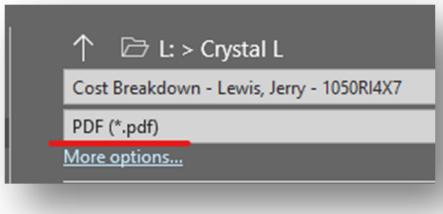
9. Now that your Cost Breakdown is complete, you must save it to your L Drive Folder
    - Click File, then Save As
    - Change the name of the excel sheet to:
      Cost Breakdown – (Last name, First Name) (Itinerary Number)



    - Change the location from the Forms folder to your own personal L drive folder by clicking the arrow above the file name field twice, then double click your name from the list of folders below.



    - Click Save. Your Cost Breakdown is now saved as an Excel Sheet in your L Drive Folder.
    - Click File, then Save As again
    - Change the File Type from Excel Workbook to PDF



    - Click Save again.

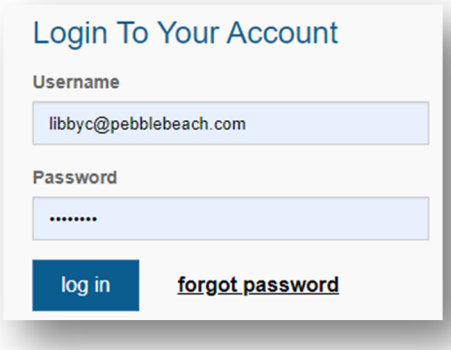
We always send Cost Breakdowns to guests as a PDF. The reason we save both a PDF and an Excel sheet of the same document is in the event we need to adjust the values later on. Instead of re-creating the entire Cost Breakdown, we simply edit the Excel version and save it as an updated PDF.



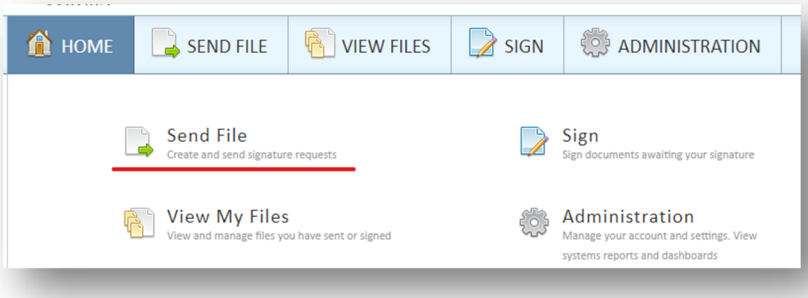
Send A Letter of Authorization via Sertifi

1. Access Sertifi via their login page: https://www.sertifi.com/sertifists/account/login

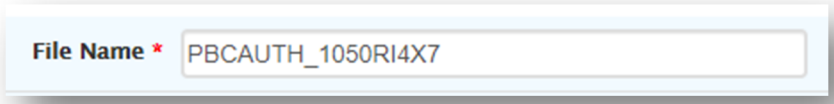
2. Log in with your Sertifi username and password



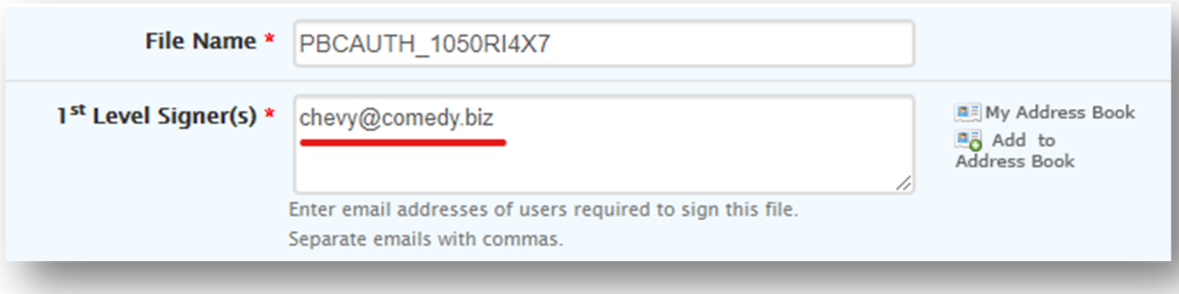
3. Click Send File



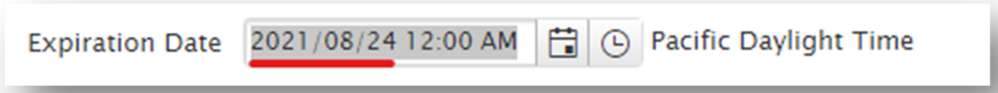
4. For an LOA file, use the following formula for your File Name: PBCAUTH_(Itinerary Number)



5. Enter the 3rd Party Payer's email address into the 1st Level Signer field



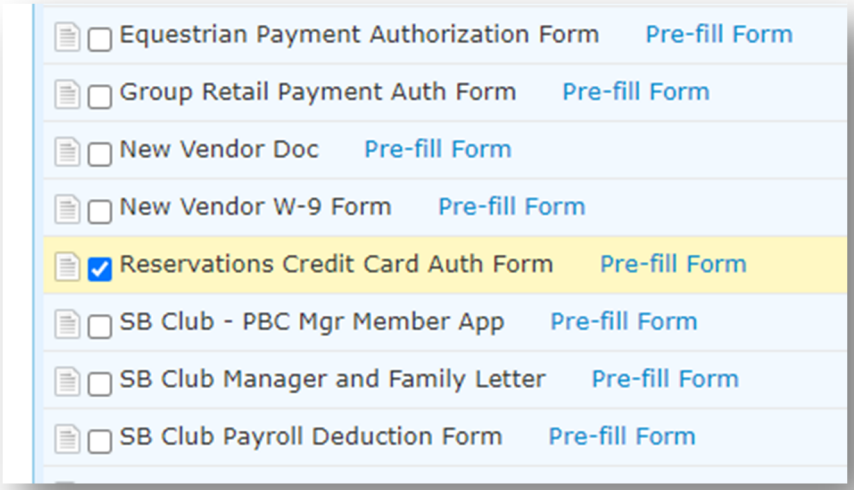
6. Set the Expiration Date for the checkout date of the Itinerary



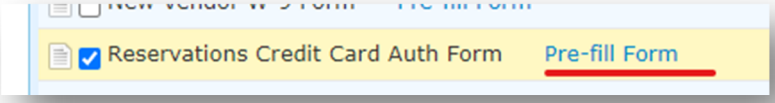
7. Click Next



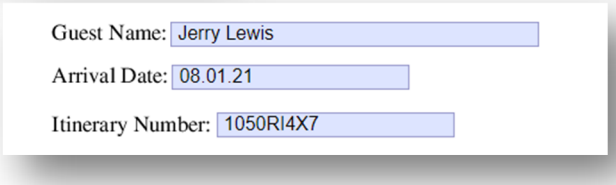
8. A new page will open with a list of possible documents.
Check the box labeled Reservations Credit Card Auth Form



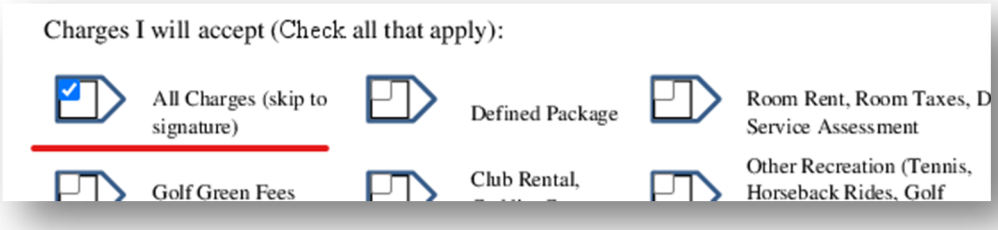
9. Click Pre-fill Form



10. Enter the following fields on the LOA form:
    - Guest Name
    - Arrival Date
    - Itinerary Number



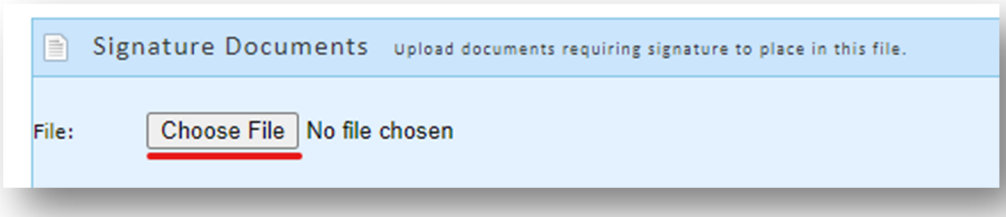
11. Check the appropriate boxes in the charges section:



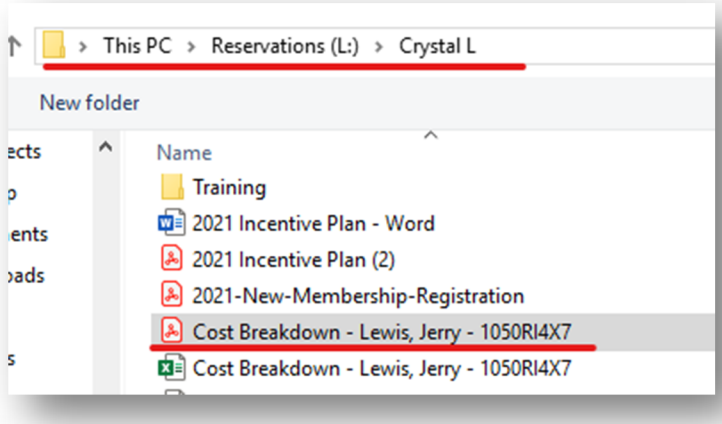
12. Click the Save Button in the top right corner, then the Exit button to return to the previous page.



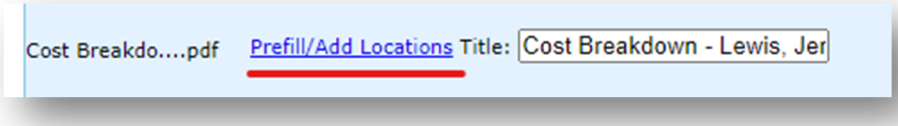
13. Scroll down to the Signature Documents section and click Choose File



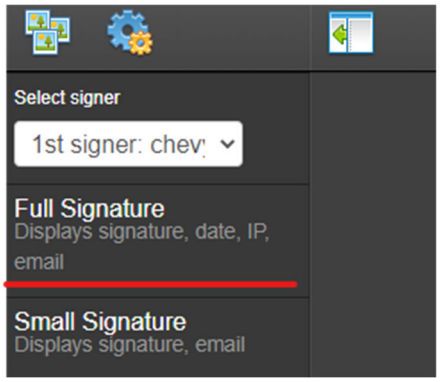
14. Attach the PDF version of your Cost Breakdown that you have saved in your L Drive folder



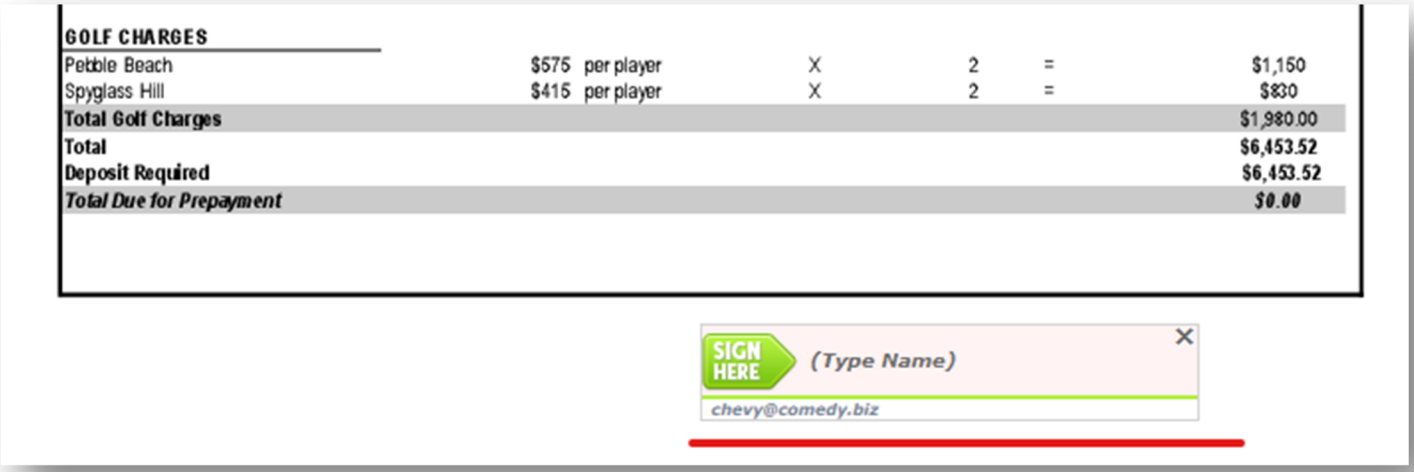
15. Once the document is uploaded, click Prefill/Add Locations



16. A new page will open with a preview of your Cost Breakdown. Click Full Signature from the left sidebar menu



17. A Signature field will appear on your document. Drag this signature field underneath the Cost Breakdown.

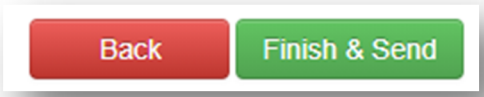


GOLF CHARGES					
Pebble Beach	$575 per player	X	2	=	$1,150
Spyglass Hill	$415 per player	X	2	=	$830
Total Golf Charges					$1,980.00
Total					$6,453.52
Deposit Required					$6,453.52
Total Due for Prepayment					***$0.00***

18. Click the **Save** button in the top right corner, then the Exit button to return to the previous page.



19. Click **Finish & Send**



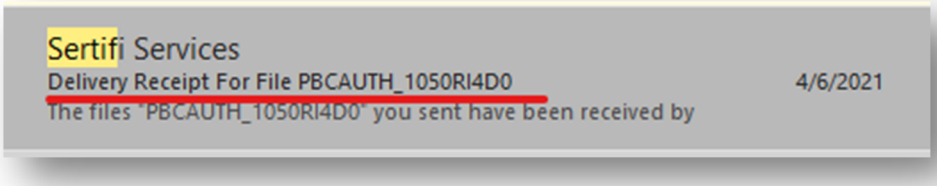
20. Set a **Reminder** on your **NAVIS Lead** to follow up with the 3rd Party if the LOA has not been signed.

    - If the guest's visit dates are within 30 days, set this reminder for the final date you are allowed to hold the reservation.
    - If the guest's visit dates are outside 30 days and you have charged the credit card, this reminder may be set further in the future, but we must still give the 3rd Party a finite deadline.

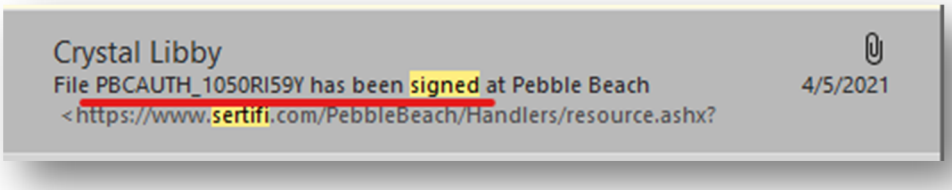
LOA Follow Up

After you send an LOA through Sertify, you will receive two email updates via **Outlook**:

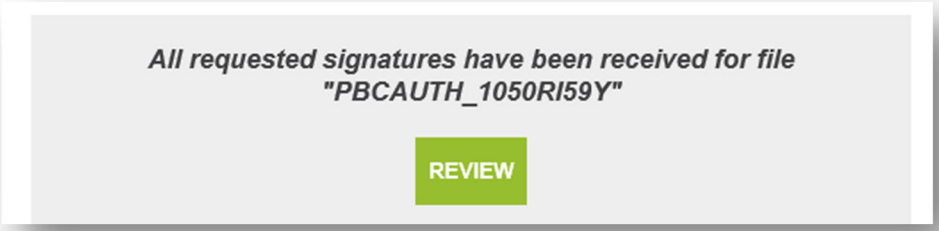
1. A **Delivery Receipt** confirming that your guest has received the LOA email from Sertifi



2. A **Signature Confirmation** indicating that the guest has signed the LOA

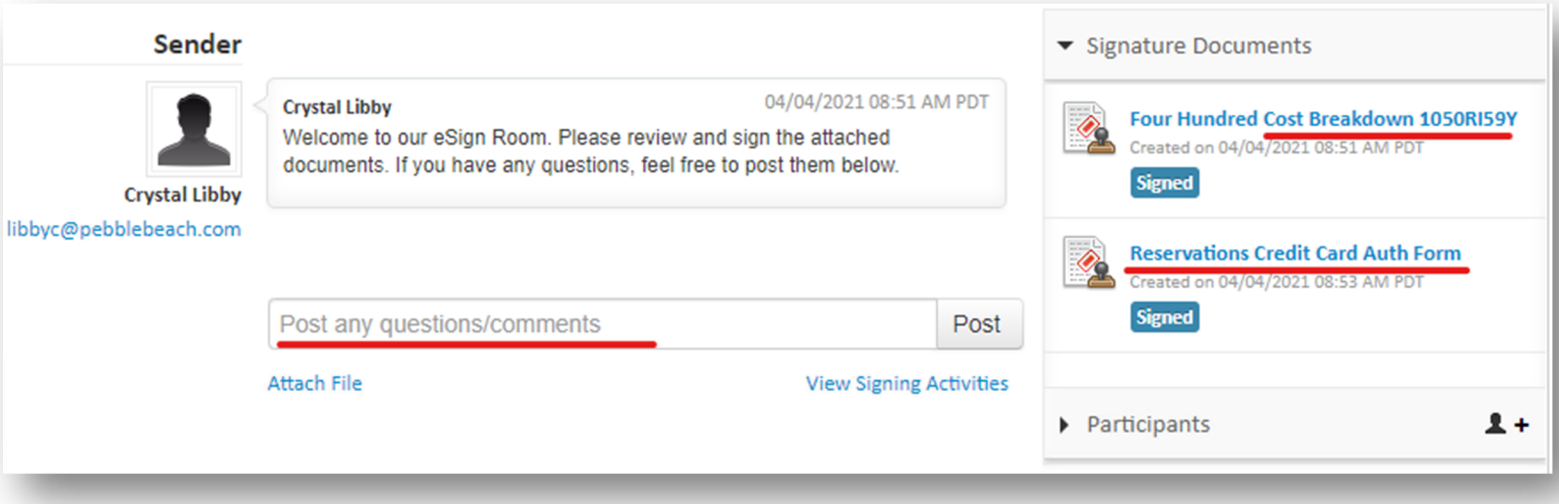


When you receive the signature confirmation, click the **Review** button in the body of the email:

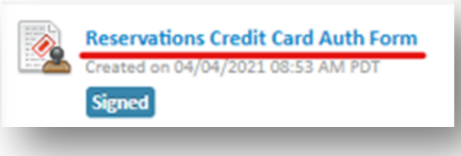


This will launch the **Sertifi E-Sign** webpage. This is what the guest sees when they sign Sertifi documents.

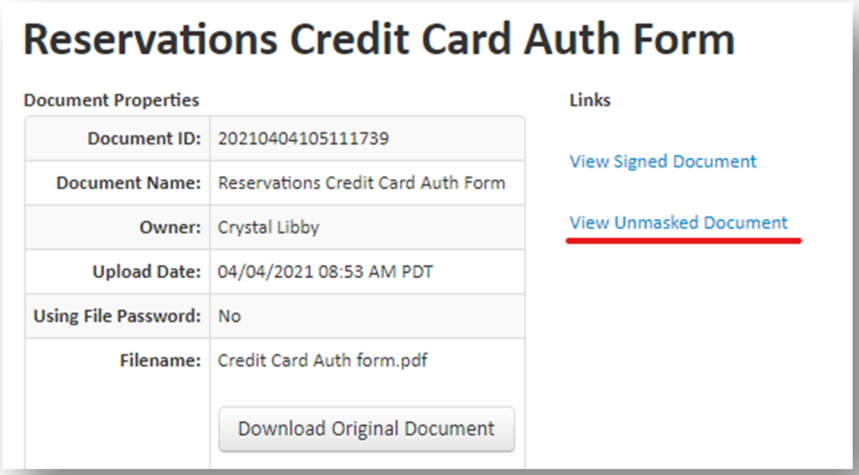
- Your Cost Breakdown and Letter of Authorization will be hyperlinked on the right side of the window.
- If the guest has any questions, they can post a comment in the chat feature of the E-Sign Room. Any comments/questions posted by the guest within this chat feature will generate a notification email to your Outlook.



Click on the Reservations Credit Card Authorization form hyperlink.



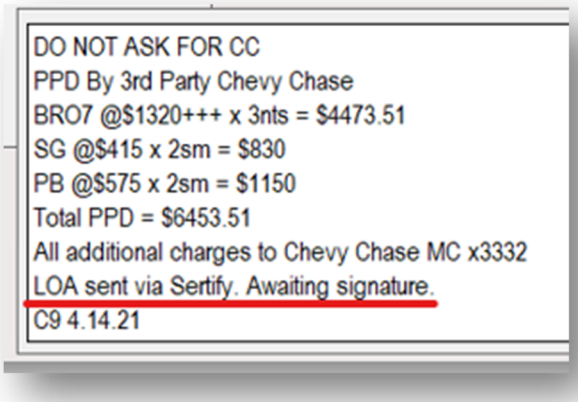
This will open a new page with information about the document.
Click the **View Unmasked Document** hyperlink.

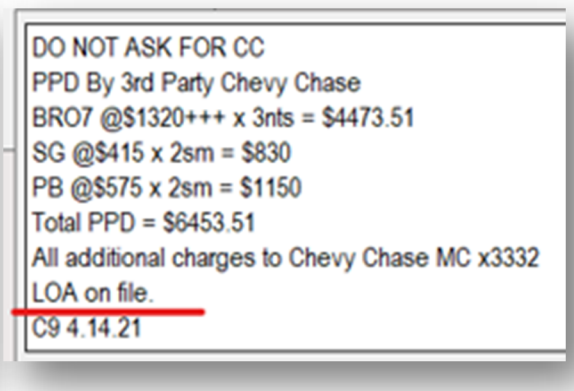


This will open the **Letter of Authorization form**.

In **SMS**, open the **Itinerary** for this guest and review the **FDB Trace** to verify that the Letter of Authorization was completed accurately.

Update the final line of your **FDB Trace** to say, "**LOA on file**".





Open your **A Note** in SMS to verify that the billing information of the credit card matches the billing information on the LOA form.

If your guest's reservation was booked within 30 days of the visit date, you must now charge the 3rd party's credit card for all finite charges on the reservation.

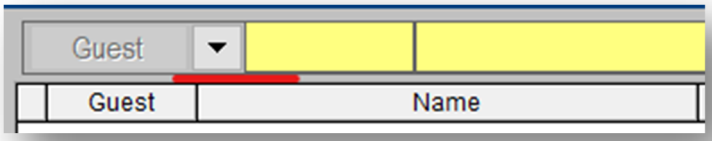
Third Party Outside Guest Golf

If a 3rd Party would like to cover golf charges for a guest who is not staying at our Resort, the 3rd Party must pre-pay all finite charges.

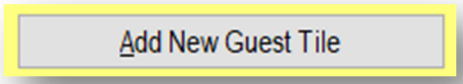
Since we will not have a Reservation Tile onto which we can charge and store the 3rd Party's prepaid funds, we must create a City Ledger on the attending guest's Guest Tile.

11. Add the guest's tee times to your Booking Center

12. Click the down arrow next to the Guest button in the Booking Center to launch Universal Lookup

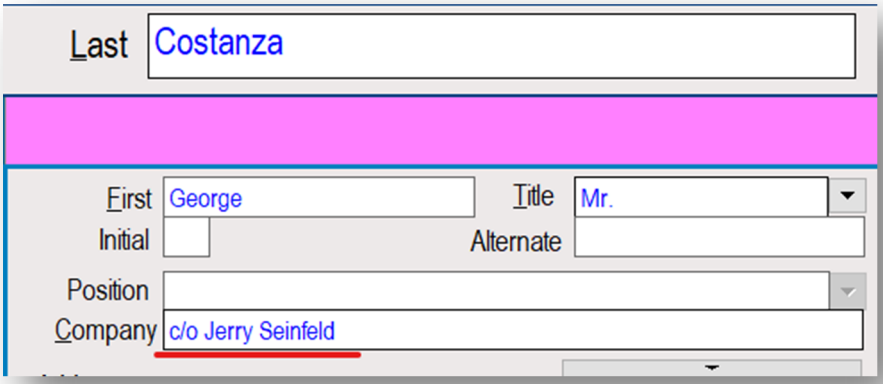


13. Search for any pre-existing Guest Tiles for the attending guest. If they do not have a Guest Tile, click Add New Guest to create a new Guest Tile.

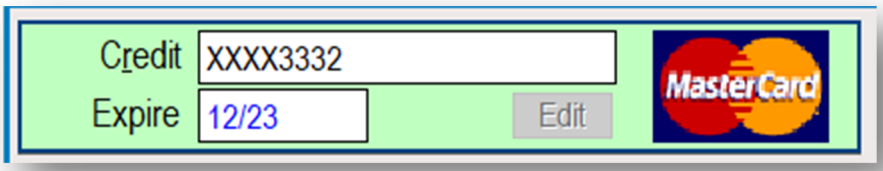


14. All contact information on the Guest Tile must belong to the Attending Guest (not the 3rd Party).

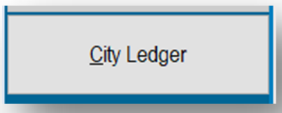
    If the 3rd Party cannot provide all required contact information for the guest, add what you can, and write "C/O (3rd Party name)" in the Company field.



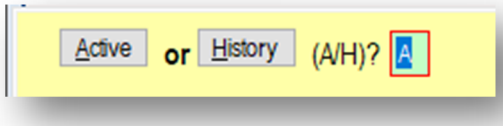
15. Add the 3rd Party's credit card information to the Guest Tile.



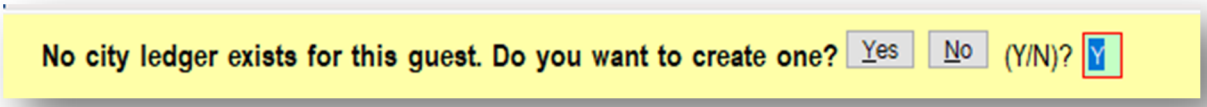
16. Click the **City Ledger** button (or hit C on your keyboard) in the left menu bar of the Guest Tile.



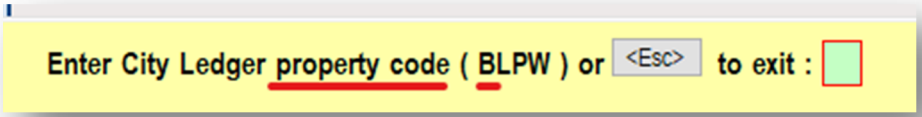
17. Type **A** for **Active**



18. Type **Y** for **Yes** to create a new City Ledger

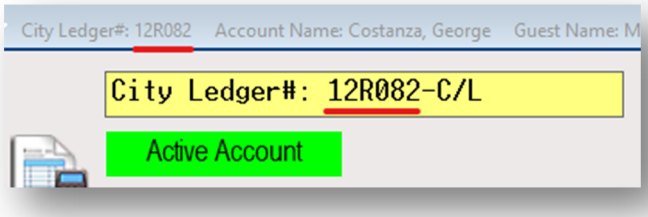


19. Type **B** to select **The Inn at Spanish Bay** as the Property Code
(We select the Inn at Spanish Bay because that is where our Accounting Department is located.)

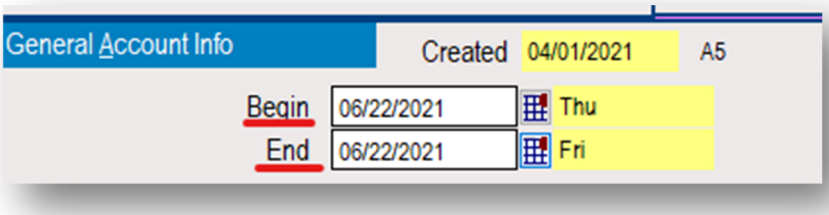


Your new City Ledger will now open.

20. Make a note of the **City Ledger Number** at the top of the window.

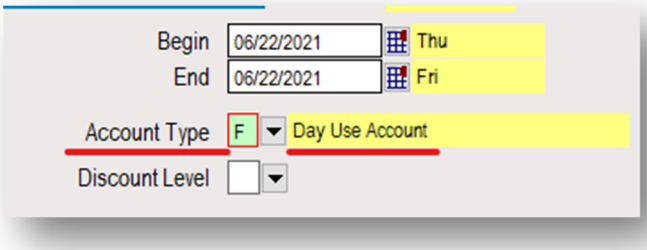


21. Set the **Begin** and **End Dates** as the date of the Guest's Tee Time

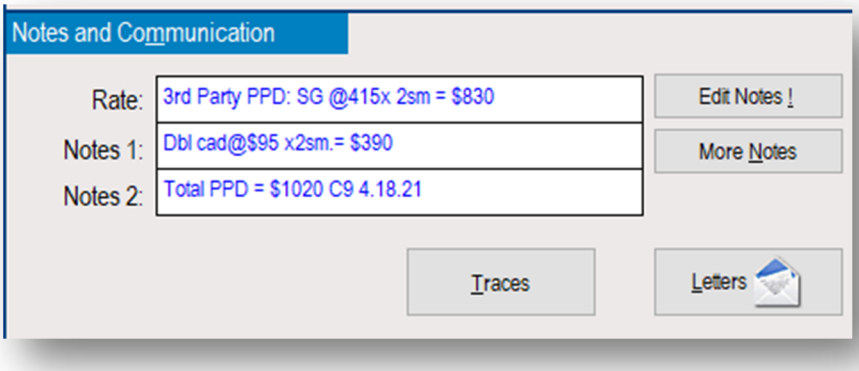


Note from Your Reservations Auditor: This is the most overlooked step by Reservations Agents, but it is very important. The Begin/End Dates of the City Ledger time from during which the City Ledger may be billed. If you do not set this date for the date of the guest's tee time, the Pro Shop will not be able to charge the City Ledger on the date of play.

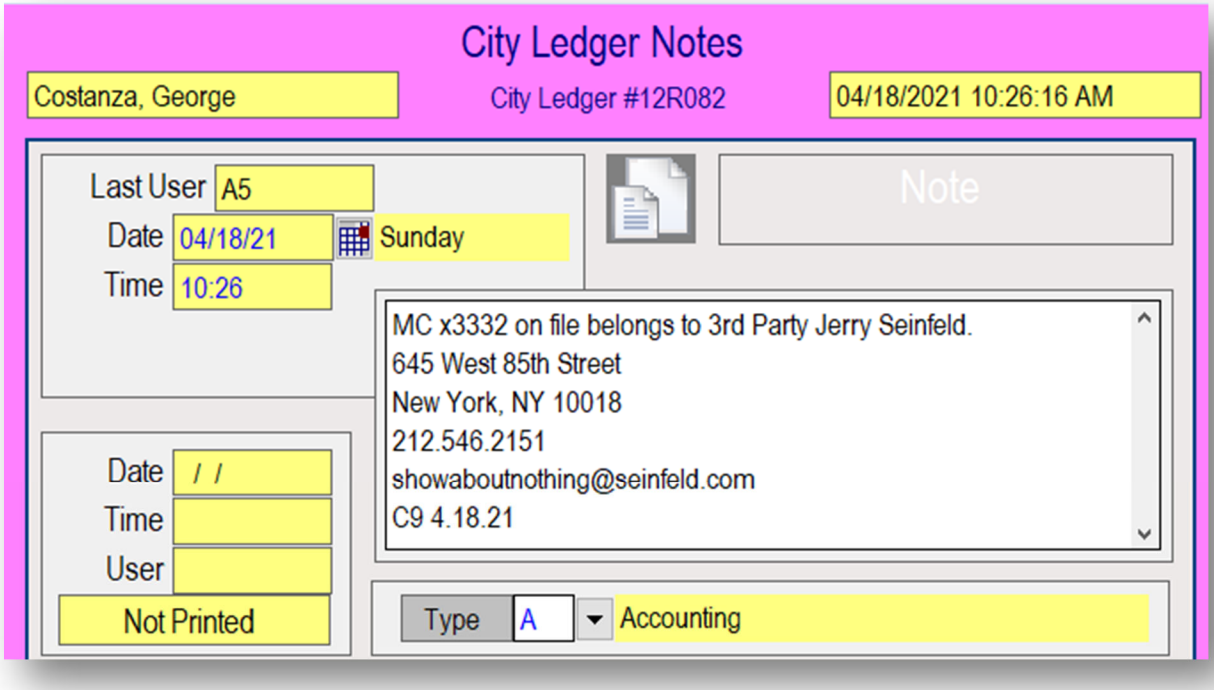
22. Click the Down Arrow to the right of the **Account Type** field and select **F** for **Day Use Account**



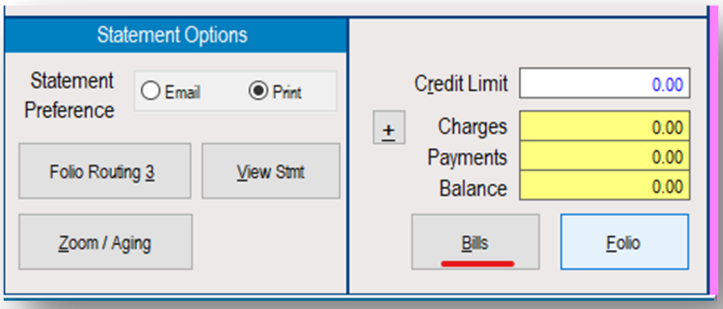
23. In the **Notes and Communication** section, type out clear notes that explain exactly what is being pre-paid on this City Ledger.



24. Add an **A Note** to the City Ledger with all billing information for the 3rd Party Payer
(If the guest's date of play is within 30 days, write "Sent LOA via Sertify / Awaiting Signature" at the end of your **A Note**.)



25. To charge the prepayment directly to the City Ledger, click the **Bills** Button in the bottom right corner of the City Ledger window:



Date of Play within 30 Days:

- Send LOA via Sertify
- Do not charge the Prepayment until after the LOA is signed.
- Write "LOA on File" at the end of your A Note

Date of Play 30+ Days Out:

- Charge the prepayment at the time of booking.
- No LOA is needed.

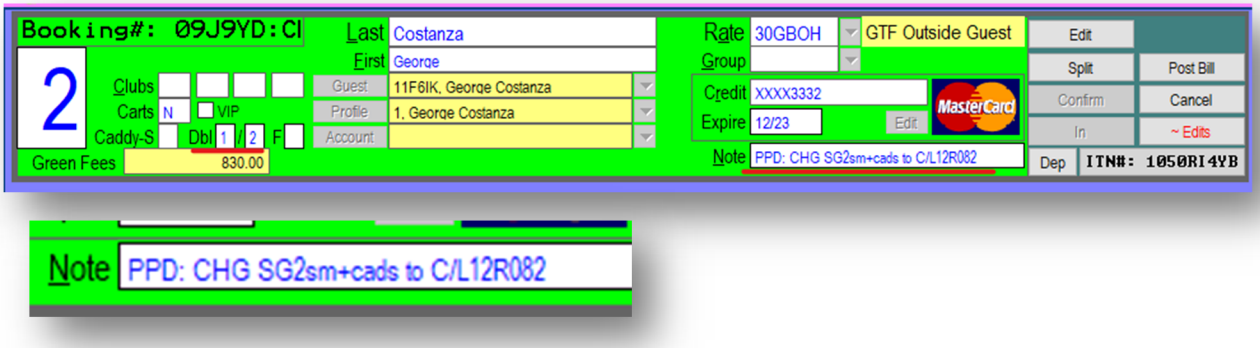
26. Once the credit card is charged to the City Ledger, delete the credit card from the **Guest Tile**

27. **Escape** to return to the Booking Center

28. Assign the appropriate **Profile** to the tee time(s)

29. **Complete** and **Confirm** your booking.

30. Open each **Golf Tile** and add a **Baby Note** with billing instruction for the Pro Shop:



31. If the 3rd Party requests a confirmation email, you may add their email address to the Guest Tile and send a **VEMAIL**. Otherwise, no confirmation is needed.

32. Complete and Save your **NAVIS Booked Lead.**

Travel Agents



A **Travel Agent** is a person engaged in selling and arranging transportation, accommodations, tours, or trips for travelers.

A **Travel Agent Booking** is similar to a booking made by a guest's assistant:

- The Travel Agent will often pay using the guest's credit card (thus no LOA is needed since the guest will be present to sign for charges at checkout.)
- The Guest Tile should only contain contact information for the guest who will be attending the trip. If the Travel Agent cannot provide guest contact information (which is common), the Guest Tile will be set up as a C/O Guest Tile
- All Travel Agent information will be documented on the room Reservation Tile.

Why Guests Book through Travel Agents

A guest who books through a travel agent likely will not receive any discount on their Pebble Beach Resorts booking. The primary benefit they garner by booking through a Travel Agent is that the Agent will make all phone calls on their behalf and can arrange multiple aspects of their trip, including air fare and additional activities or destinations outside of Pebble Beach Resorts.

Why Travel Agents Book Pebble Beach

The Travel Agent will receive a **10% commission** from Pebble Beach on the Base Rate of all rooms.

Commission FAQs:

- Recreation is not eligible for commission
- Commission checks (or wire transfers) will be cut within 30 days of the guest's departure.
- Commission checks are cut to the owner of the agency and sent each company's primary headquarters to which the Agency is federally registered. Headquarters will then disperse payment to the individual agents.
- New Travel Agents are approved through the Travel Desk at TravelDesk@PebbleBeach.com. The Agency must have a current IATA, ARC, or CLIA registration.
- Commissions checks and any commission issues are handled by Accounting at APTravelGroup@pebblebeach.com

Tour Operators / Wholesalers / IAGTO agents may be transferred to the Travel Desk.
These agents do not receive a 10% commission. Instead, they pay contracted Net Rates.
The agent will use their own Agency credit card to book their guest's trip at their contracted discount, then charge the guest a higher rate which is how they make their profit.

Book A Travel Agent Reservation

1. Ask the **Travel Agent** for their **IATA Number.** Set this information aside.

2. Create your booking in the Booking Center at **Rack Rate**

3. Quote our standard cancellation timeframe and advise the Travel Agent of the required deposit.

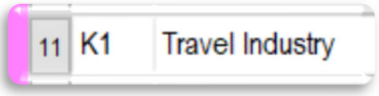
4. Click the down arrow next to the **Guest** button in the Booking Center to search/create a Guest Tile and Profile.
   - A Travel Agent will typically be able to provide all guest contact information.
   - If the agent cannot provide this, add everything the can provide, then type "C/O (Travel Agency)" into the Company field.
   - Do not add the Travel Agent's contact information to the Guest Tile

5. Add the credit card provided by the Travel Agent to the Guest Tile
   - Ask the Travel Agent to whom the credit card belongs.
     (Most Travel Agents will use the guest's credit card to pay for the reservation.)
   - If the Travel Agent is using their Agency credit card instead of the guest's, consult your LOA guidelines to see if we need to have an LOA on file.

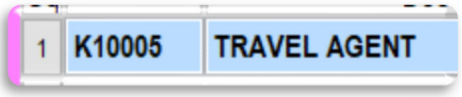
6. Escape to return to the Booking Center.

7. Ask the Travel Agent if you may place them on hold while you finalize the reservation and process the deposit.

8. Prepare the Reservation Tile:
   - Access the Reservation Tile
   - Click **E** for **Edit** and **Page Down**.
   - Follow the prompts to select the:
     - **Media Type** – Travel Industry

     - **Media Source** – Travel Agent

     - **Incoming Phone Number** – Reservation Center
     - **Guarantee Code** – A for Advanced Deposit
     - **Escape** to return to the Booking Center

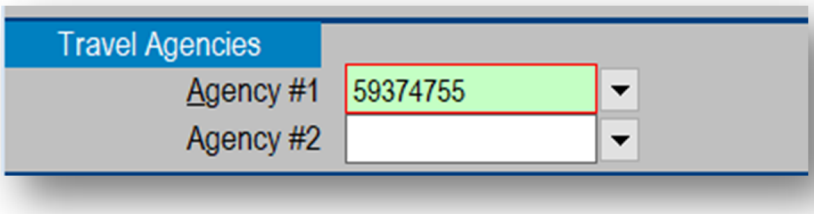
9. Right click on the line of your room reservation and select Complete Booking
   This will only Complete the room, leaving all recreation as incomplete.

10. Re-Enter the Reservation Tile

11. Collect the Deposit:
    - Double click the room to return to the Reservation tile
    - Click **Bills**
      - Enter Transaction Code - 970PPV (M, V, A, or D for the credit card code)
      - Enter the deposit amount (Base Package + optional pre-payment of 3rd/4th nights)
      - Enter C for Charge
      - Page Down
      - Select Yes to verify that all entries are correct
      - Tab to move curser outside of the credit card number field
      - Page Down
      - Press any button to return to Bills
      - Exit to return to the Reservation Tile

12. Access **Special Billing**

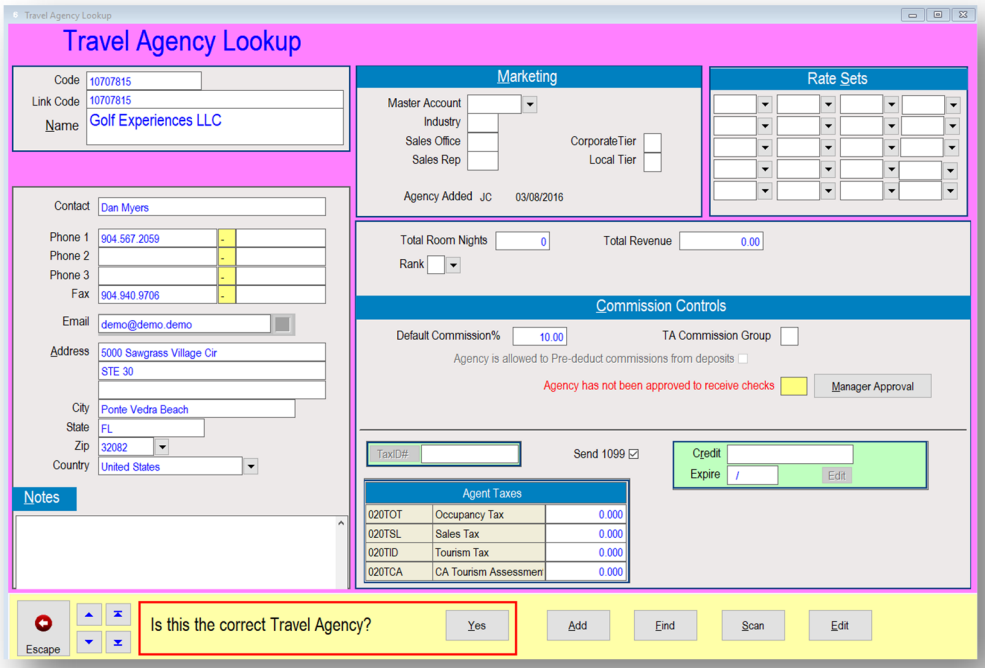
13. Enter the Travel Agent's IATA Number into the Agency #1 field



14. Page Down to save.

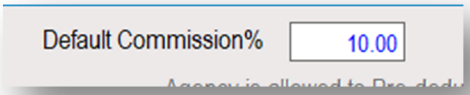
Note: If your booking includes more than one room, the Travel Agency must be added into Special Billing on every Reservation Tile.

15. The Travel Agency Tile will open.

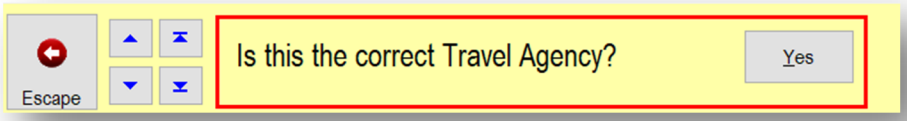


- Verify that this is the correct Agency
  The commission check for this booking will be sent to the Headquarters address on this Travel Agency Tile

- Verify that the Default Commission is set to 10%.
  If not, see a supervisor or contact the Travel Desk



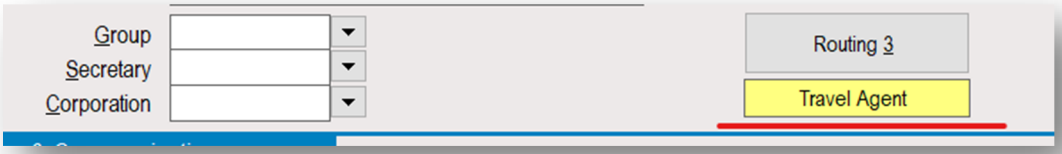
16. Type Y for Yes to confirm this Travel Agency



The name of the Travel Agency will now be next to the IATA number in Special Billing



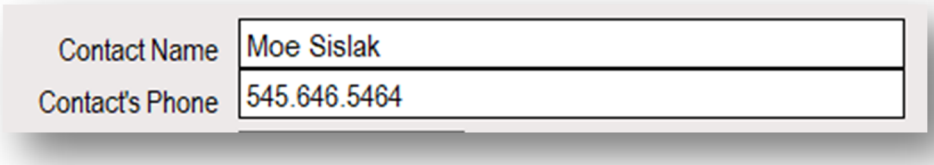
The Reservation Tile will now have a Travel Agent stamp



17. Take the Travel Agent off Hold

18. As the Travel Agent to confirm their phone number and email address.

19. Type the Travel Agent's name and phone number into the Contact fields of the Reservation Tile



20. Type the Travel Agent's email address into the Housekeeping line of the Reservation Tile



21. Close the Call:
    - Read through each item on the Itinerary to ensure accuracy
    - Reaffirm the 14-day cancellation window and the exact final date the booking can be changed/cancelled.
    - Inform the Travel Agent that their confirmation email will arrive within one hour
    - Ask if they need assistance with anything else
    - Thank the Travel Agent for calling.
    - End the call.

Clean Up A Travel Agent Reservation

1. Click Complete and Confirm in the Booking Center

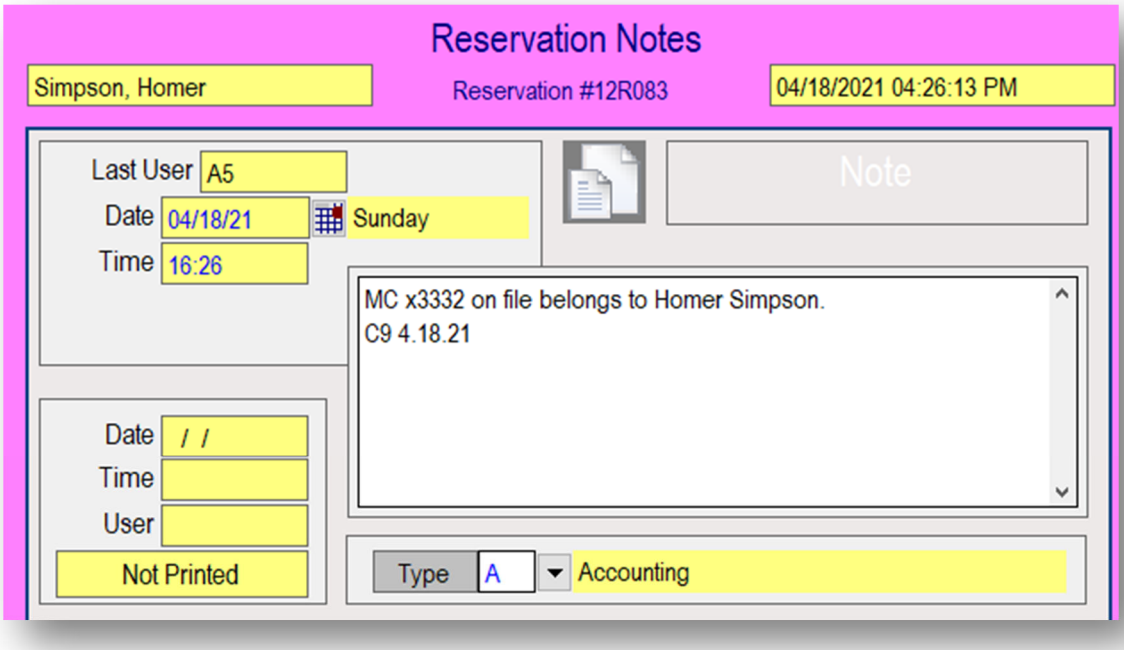
2. Send a TAIEMAILI confirmation via Letters

3. Enter the Reservation Tile

4. Add your cancellation quote to the Audit Line
   Specify that you quoted this cancellation window to the Travel Agent, not the Guest:



5. Add an **A Note** that species to whom the credit card on file belongs.
   Since most Travel Agents will use the guest's credit card, the note can be simple:



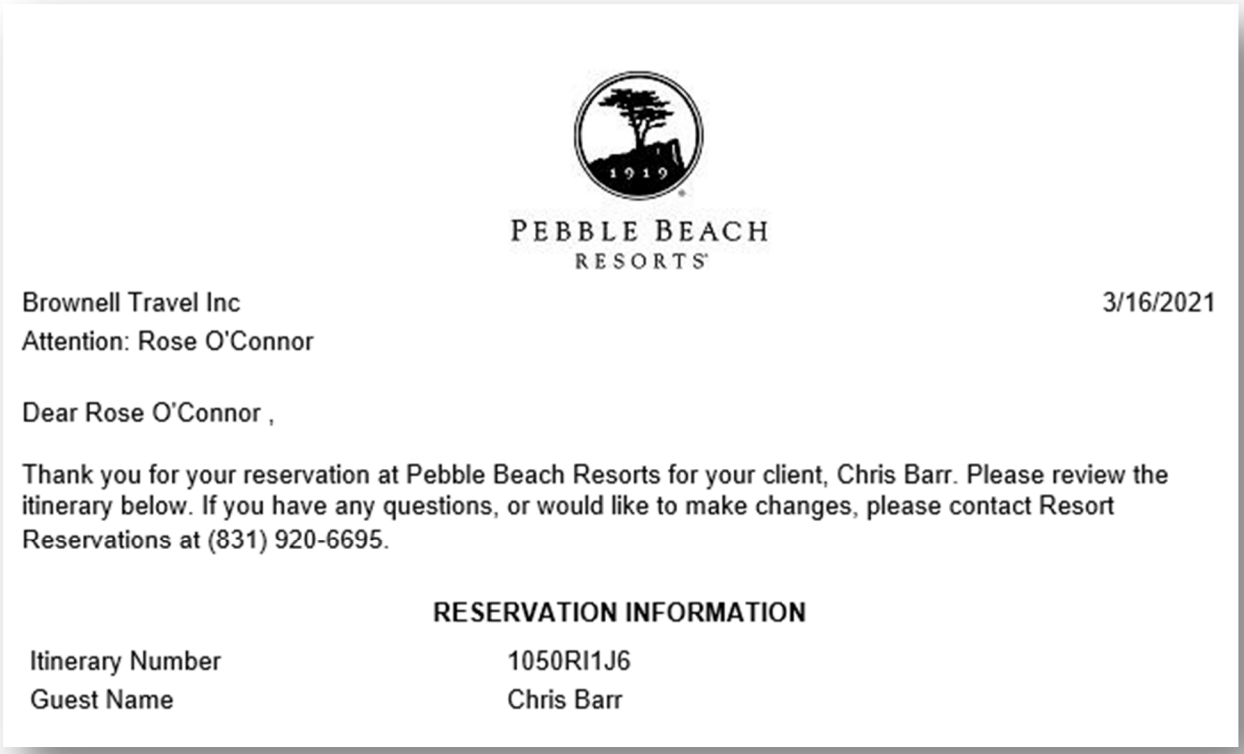
   If the credit card belongs to the Travel Agency, this should be treated as a 3rd Party Booking. See the 3rd Party section of this manual for instruction on how to handle payment.

6. Leave an R Note that summarizes who you spoke to and what was booked.

7. Complete and Save your NAVIS Booked Lead

Travel Agent Confirmation Email

The image below is an example of what the TAIEMAIL confirmation email looks like to the Travel Agent. Notice that email is addressed to the Travel Agent, not the guest.



PEBBLE BEACH RESORTS

Brownell Travel Inc 3/16/2021
Attention: Rose O'Connor

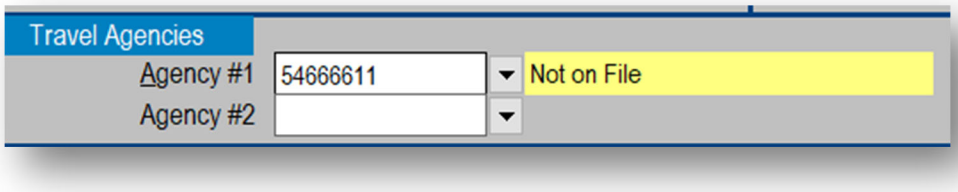
Dear Rose O'Connor ,

Thank you for your reservation at Pebble Beach Resorts for your client, Chris Barr. Please review the itinerary below. If you have any questions, or would like to make changes, please contact Resort Reservations at (831) 920-6695.

RESERVATION INFORMATION

Itinerary Number	1050RI1J6
Guest Name	Chris Barr

Set Up A New Travel Agent in SMS



If You Cannot Locate the Travel Agency in Special Billing

- Use the search function to search by the agency name
- Ask the agent if they are a division of a larger agency that we may have on file instead
- If the agent has booked with us previously, you can look up their previous booking to see what IATA number they previously used.
- If you still cannot locate the agency, it is likely that they have never booked with Pebble Beach before. Proceed to the instructions to **Create A Travel Agent Tile**.

If the Travel Agent Cannot Provide an IATA Number or Agent Number

- You must ask them to provide their EIN or SSN.
- Do not create a Travel Agent Guest Tile for the agency at the time of booking.
- Proceed to the instructions to **Send A New Travel Agent Form**
    - Once the paperwork is complete, the agent will be auto-assigned an identification number that the agent will not know.
    - The Travel Desk will then work with Revenue Management and Accounting to arrange the agent's commission.

Create A Travel Agent Tile

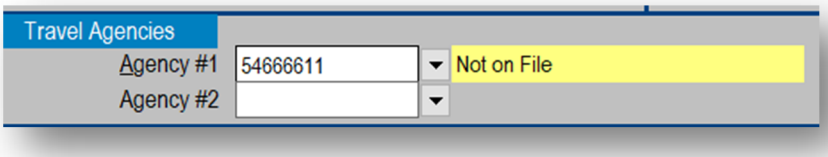
For Travel Agents with existing IATA numbers, you must create the **Travel Agent Tile** at the time of booking. If the Travel Agent is unable to provide you with an IATA Number, skip this step and proceed directly to the instructions to Send A New Travel Agent Form.

On the phone call with the agent, you must obtain:

- The IATA or Agent number
- The Agency Name
- The Agency Billing Address
- The Agency Phone number
- The Agency Email Address

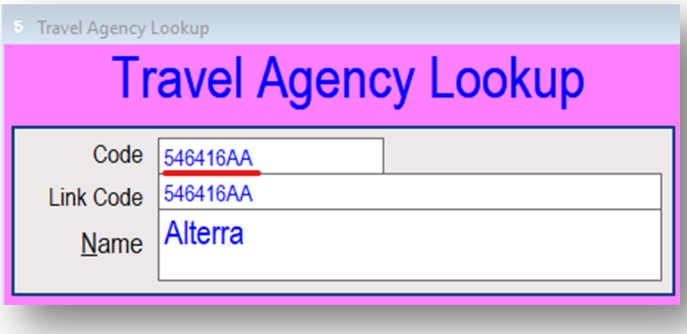
**This information will be verified by the Travel Desk.*

1. When the **IATA** is entered into the **Agency** field within Special Billing, you will see the words "Not on File" next to the number.

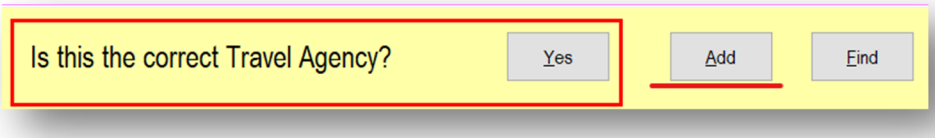


Page Down to save this IATA number.

2. A Travel Agent Tile will open, but you will see that this tile does not actually match the IATA that was "Not on File." SMS will open the next closest IATA number to your entry.

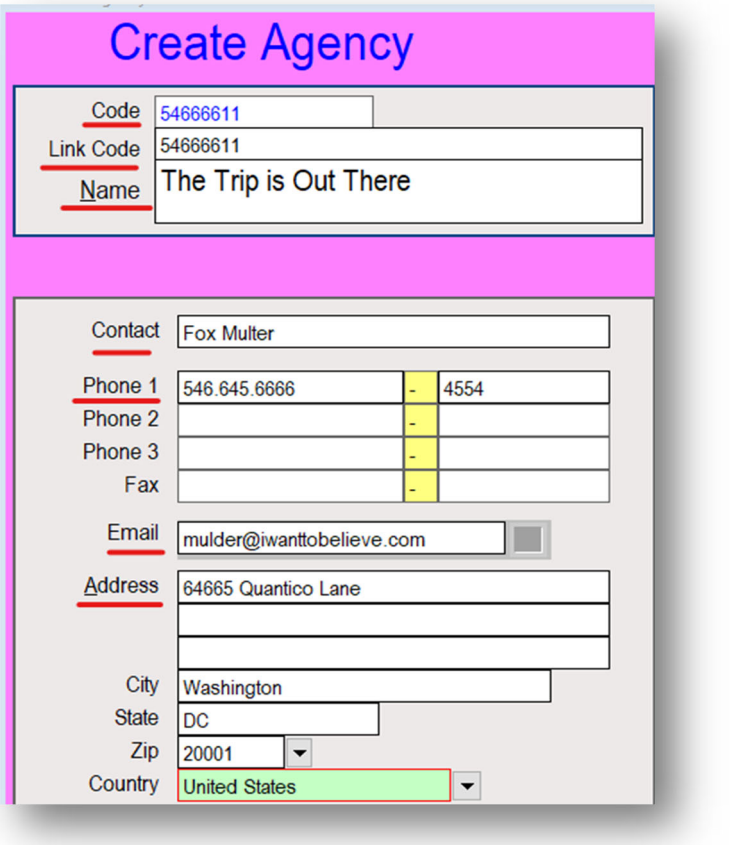


At the bottom of the window, click Add to Add a new Travel Agent Tile.



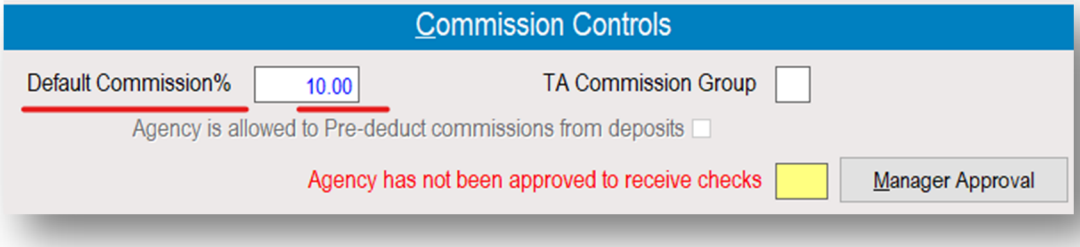
3. A new Travel Agent Tile will open with all fields blank except for the **Code** and **Link Code**.

   These fields will be auto filled with the **IATA number** you entered into **Special Billing**.



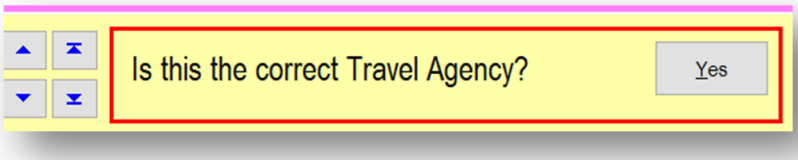
4. Enter into the Travel Agent Tile:
   - The Agency Name
   - Contact name
   - Billing Address
   - Phone Number
   - Email Address

5. Review the **Commission Controls** section of the Travel Agent Tile to verify that the Default Commission% is set to 10%.
   (If it is not set at 10%, see a supervisor to have this corrected)



6. Page Down to save

7. Type Y for Yes to confirm that you want to apply your new Travel Agent Tile to your booking.



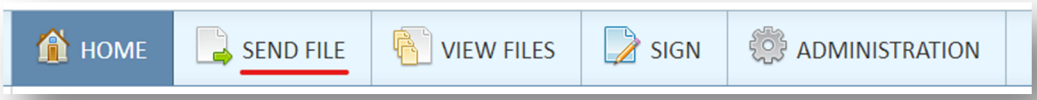
8. We still need the agency to fill out a **New Travel Agent From via Sertifi**. Proceed to the following page for Sertifi instruction.

Send A New Travel Agent Form

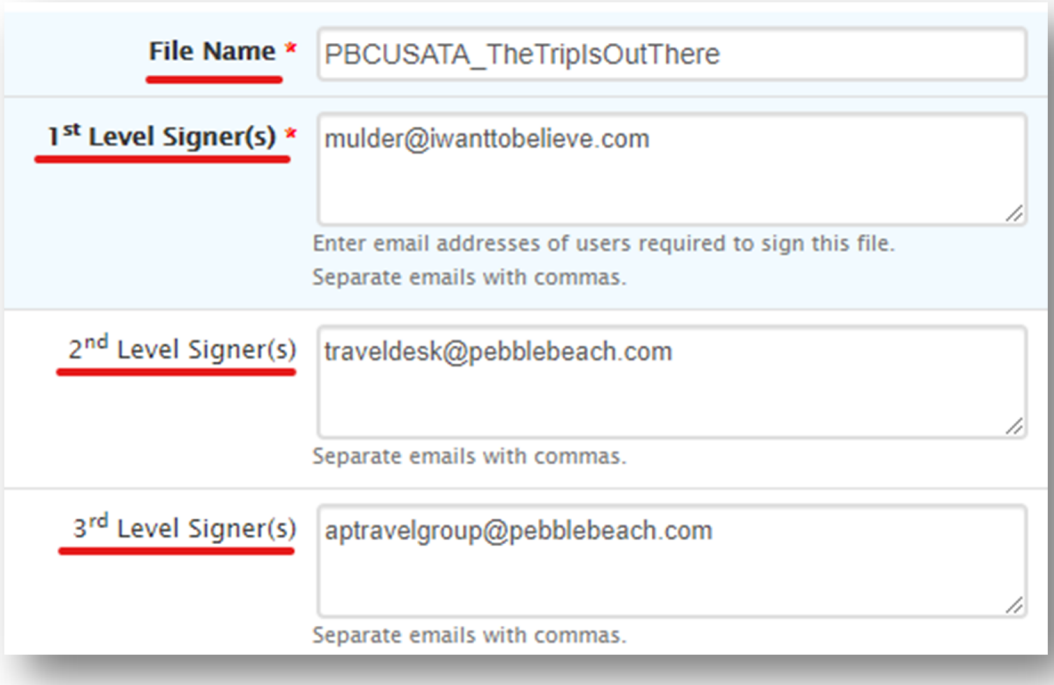
Travel Agents will need to fill out a **New Travel Agent Form** when:

- They have never booked with Pebble Beach before and need to set up their commission account
- They need to make a change to their existing Travel Agent Tile

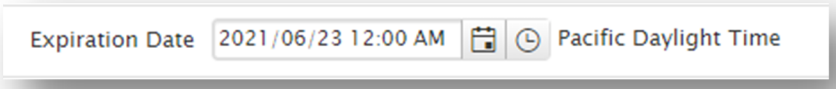
1. Access the Sertifi website: https://www.sertifi.com/sertifists/account/login
2. Log in with your Username and password
3. Click Send File in the toolbar



4. Fill in the following fields:
    - The File Name should be PBCUSATA_ (Agency Name)
    - 1st Level Signer should be the travel agent's email address
    - 2nd Level Signer should be the Travel Desk: traveldesk@pebblebeach.com
    - 3rd Level Signer should be Travel Group Accounting: aptravelgroup@pebblebeach.com



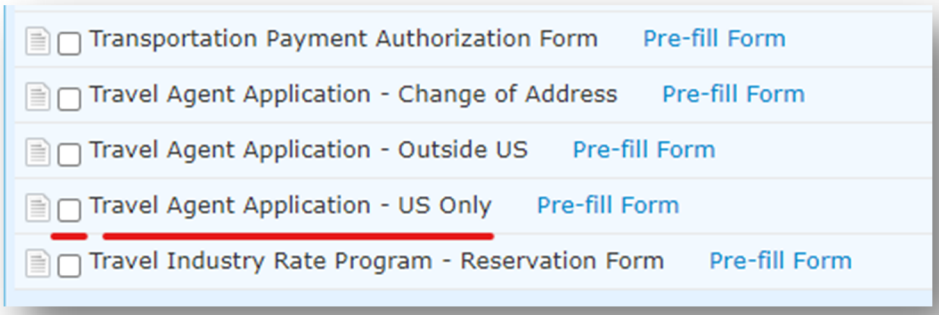
5. Set the expiration date to the guest's date of arrival



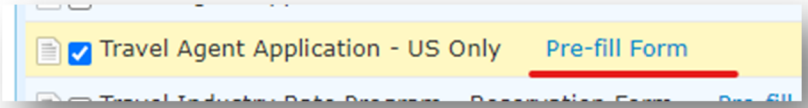
6. Click Next



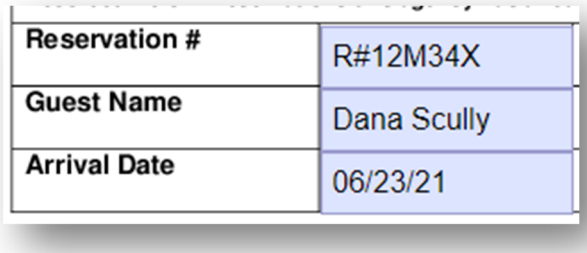
7. On the new page, check the box of the Travel Agent Application – US Only
(If the Agency is just making a change to their address, you can check the Travel Agent Application – Change of Address form)



8. Click the Pre-fill Form hyperlink



9. Only fill in the following fields on the *Travel Agent form*:
   - **Reservation Number**
     If the booking includes more than one room, write a note such as (4 rooms) next to the Reservation Number
   - **Guest Name**
   - **Arrival Date**



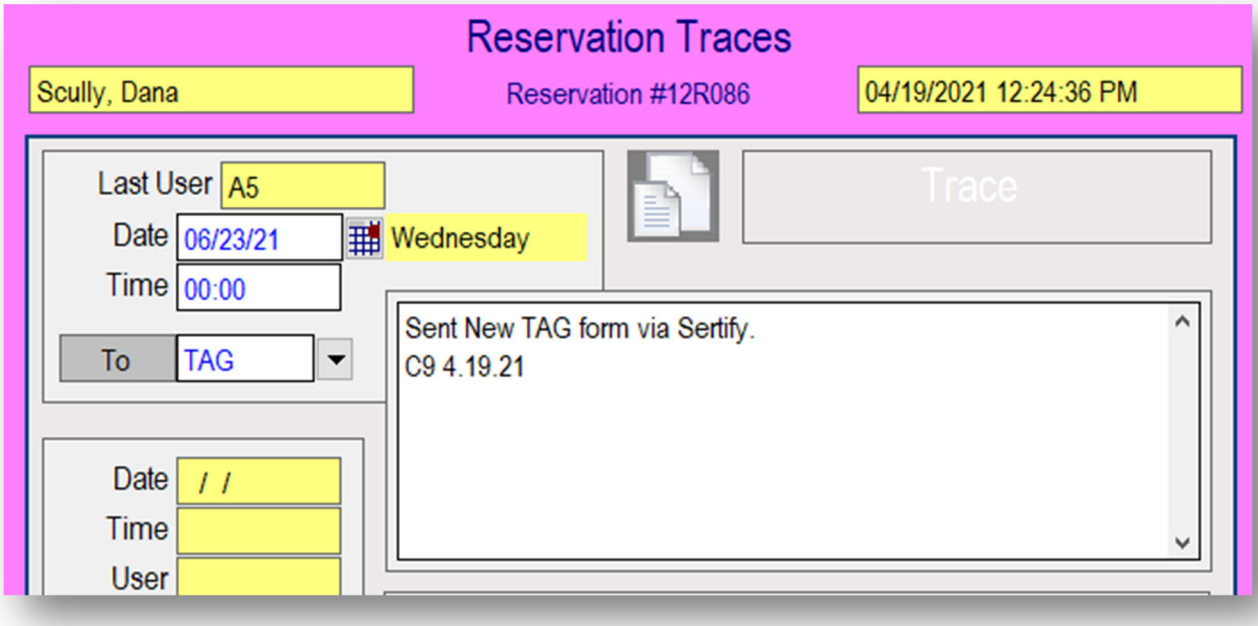
10. Click Save, then Exit in the top right corner to return to your previous page



11. Click Finish & Send to send the form to the Travel Agent



12. In the Reservation Tile in SMS, set a **TAG Trace** indicating that you have sent the Travel Agent Form via Sertify. The Date on the TAG Trace should be set to the **Date of Arrival**.



Once the Travel Agent paperwork is fully processed, the **Travel Desk** will close this trace.

13. Set a **Reminder** in your **NAVIS Lead** to check in on this reservation to ensure that the Travel Agent Form has been returned and processed.

Virtuoso

The below chart is in the Digital Binder

2021 Luxury Travel Agent Programs (edited by Ran 11/27/20)
Virtuoso only applies to Casa Palmero

2021 Luxury Travel Agent Programs

TAGs will either book on-line through the GDS system or by calling into the queue and will identify themselves as a member of one of the Travel Networks below. All of the below programs will receive an individual welcome note from the hotel management to their guests.

Valid Dates: ***January 1, 2021 – December 31, 2021*** Subject to availability

Casa Palmero - RACK RATE ONLY	Rate Code	Resort Credit(1)	Comp Upgrade	Comp Breakfast	Early Check-in/Late Check-out	Source Code	Promo Code	Special Bill
Virtuoso	VTP	$100	1 level based on availability	Continental up to 2 persons	Yes	K10020	VIRTUOSO	IATA#
Preferred Platinum Partner	PPP	$100	1 level based on availability	Continental up to 2 persons	Yes	K10040	PREFPLAT	IATA#
Signature Travel	STP	$100	1 level based on availability	Continental up to 2 persons	Yes	K10050	SIGTRVL	IATA#
Travel Leaders Select	TZE	$100	1 level based on availability	Continental up to 2 persons	Yes	K10060	TRVLLEAD	IATA#
Altour Select	AHC	$100	1 level based on availability	Continental up to 2 persons	Yes	K10060	TRVLLEAD	IATA#
Traveller Made	TMP	$100	1 level based on availability	Continental up to 2 persons	Yes	K10070	TRVLRMADE	IATA#

(1) Resort Credit per stay (Credit cannot be used for Room or Golf at Pebble Beach Golf Links/Spyglass Hill Golf Course). Create FDB Trace for date of departure: ***"Pls apply [$Amount] Resort Credit at checkout."***

Trip Advisor

Trip Advisor

These bookings will come through to the Travel Desk via email which Angie and Vita check and input manually every day.

The confirmation number the guests receive will start with a "2"

Trip Advisor will usually be booked through Preferred Hotels

We can look up the TA confirmation number via Universal Lookup with the Search Type "3rd Party Conf#"

Include how to search third part confirmations in Universal Lookup.

IAGTO

IAGTO is the **International Association of Golf Travel Operators**. It is the global trade organization of the golf tourism industry.

Most IAGTO Agencies correspond with Pebble Beach Resort Reservations via email directed to our **Travel Desk**. We have a special team of agents who handle the Travel Desk emails and bookings, but if an IAGTO agent is in a rush, they may call to the general Reservations Center phone line.

As a Reservations Agent, you are welcome to book an IAGTO reservation, but once it is complete, you should always send the Itinerary number to traveldesk@pebblebeach.com so the Travel Desk team can insure everything is set up correctly.

Difference between Travel Agent and IAGTO Bookings:

Travel Agents	IAGTO
Pay the same rate as Resort Guests	Pay 15% off rack rates
Collect a 10% commission from Pebble Beach on rooms, but not golf or recreation	They do not collect a commission from Pebble Beach. Their profits come directly from their clients who pay the agency a higher rate than the agency pays us.
Usually pay with their client's credit card	Usually pay with their Agency's credit card which is kept on file in Sertifi via an annually updated Letter of Authorization
Pay 2-night deposit just like Resort Guests, then the remainder is due at checkout	Pay 2-night deposit at booking, then prepay all room and golf 14 days prior to arrival date
Can book any available room types	Cannot book suites - typically will book Garden View rooms
Travel Agents will book Rack Rate rooms with rate codes such as RRL, RRB	The room Rate Codes in the Booking Center begin with an I, such as IRRL, IRRB.

Booking IAGTO Reservations

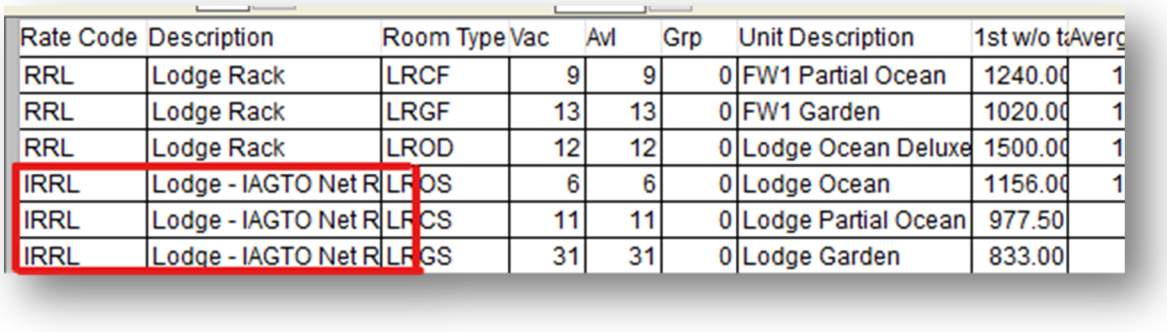
Search IAGTO Availability

IAGTO Agents tend to be very flexible with their booking requests by providing a range of dates for their client's stay and will let the Reservations Agent take more control over details such as tee times and the order in which courses are played.

- When booking golf for an IAGTO agent, if the agent is not specific, a good rule of thumb is to look for 10am tee times and book the order of the courses based around the best availability at Pebble Beach Golf Links

- When booking rooms, be sure to select the rate codes that begin with an I such as IRRL instead or RRL for Lodge Rack Rate. This special "I" rate code ensures that the IAGTO agent will be billed the IAGTO 15% discount.

  You can conduct your availability search as normal, but when you are ready to select your room, scroll down to the IAGTO Rate Codes which are just underneath the Rack Rate Codes:



Rate Code	Description	Room Type	Vac	Avl	Grp	Unit Description	1st w/o t	Averg
RRL	Lodge Rack	LRCF	9	9	0	FW1 Partial Ocean	1240.00	1
RRL	Lodge Rack	LRGF	13	13	0	FW1 Garden	1020.00	1
RRL	Lodge Rack	LROD	12	12	0	Lodge Ocean Deluxe	1500.00	1
IRRL	Lodge - IAGTO Net R	LROS	6	6	0	Lodge Ocean	1156.00	1
IRRL	Lodge - IAGTO Net R	LRCS	11	11	0	Lodge Partial Ocean	977.50	
IRRL	Lodge - IAGTO Net R	LRGS	31	31	0	Lodge Garden	833.00	

Sending IAGTO Availability Quotes

- We do not need to provide room rates because they already have their IAGTO rates.

- If they say please book and have a card on file, put it together and say does this look good?

- We can place IAGTO bookings on holds - usually 48 hours - without permission.
  - Always use S hold code to make sure this hold pulls up on the Travel Desk's IAGTO Hold reports.
  - Deposit on hold IAGTO report is pulled every day and is based off of reservation IAGTO codes

  Room and golf look good over these dates / we're full. Can I hold something for you? / Do you want me to put something together. We can hold it for a couple days.
  Anything longer than 48 hours: "This is good until EOD Wednesday."

IAGTO Rates

To Access the IAGTO Discounted Rate Sheets:

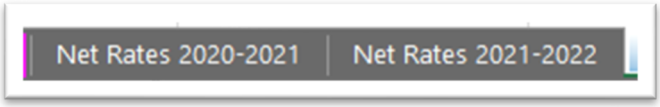
- Access the L Drive
- Open the RESORT RESERVATIONS folder
- Open the Resort Knowledge Folder
- Click on the Digital Binder with the most recent date
- These pink tabs has IAGTO Stay & Play Package rates:



- This blue tabs holds IAGTO Winter rates:



- The tabs titled Net Rates hold the standard 15% off Rack Rates for IAGTO bookings.



Net Rates will be the most common rates you will book for IAGTO agencies.

IAGTO Agencies can only book the room types listed on the Net Rates sheets.

As you can see from this rate sheet, IAGTO agencies cannot book suites.

PEBBLE BEACH COMPANY - Net Rate Programs
April 1, 2021 - March 31, 2022

The Inn at Spanish Bay	Category	Net Rate IAGTO (15%): IRRB	1 Night
Garden View	BRG7	$ 739.50	$ 848.59
Forest View	BRF7	$ 833.00	$ 952.09
Scenic View	BRC7	$ 909.50	$ 1,036.77
Ocean Loft	BRL7	$ 1,003.00	$ 1,140.27
Ocean View	BRO7	$ 1,122.00	$ 1,272.00

The Lodge at Pebble Beach	Category	Net Rate IAGTO (15%): IRRL	1 Night
Garden View	LRGS	$ 841.50	$ 958.50
FWY1 Garden View	LRGF	$ 884.00	$ 1,005.54
Fairway View	LRWS	$ 918.00	$ 1,043.18
Partial Ocean View	LRCS	$ 1,003.00	$ 1,137.27
FWY1 Partial Ocean View	LRCF	$ 1,071.00	$ 1,212.54
Garden Spa	LRG7J	$ 1,088.00	$ 1,231.36
Ocean View	LROS	$ 1,181.50	$ 1,334.86

Casa Palmero	Category	Net Rate IAGTO (15%): IRRP	1 Night
Estate Room	PRX5	$ 977.50	$ 1,109.04
Estate Studio	PDX4	$ 1,079.50	$ 1,221.95
Spa Room	PRX3J	$ 1,164.50	$ 1,316.04
Deluxe Spa Room	PRX1J	$ 1,300.50	$ 1,466.59

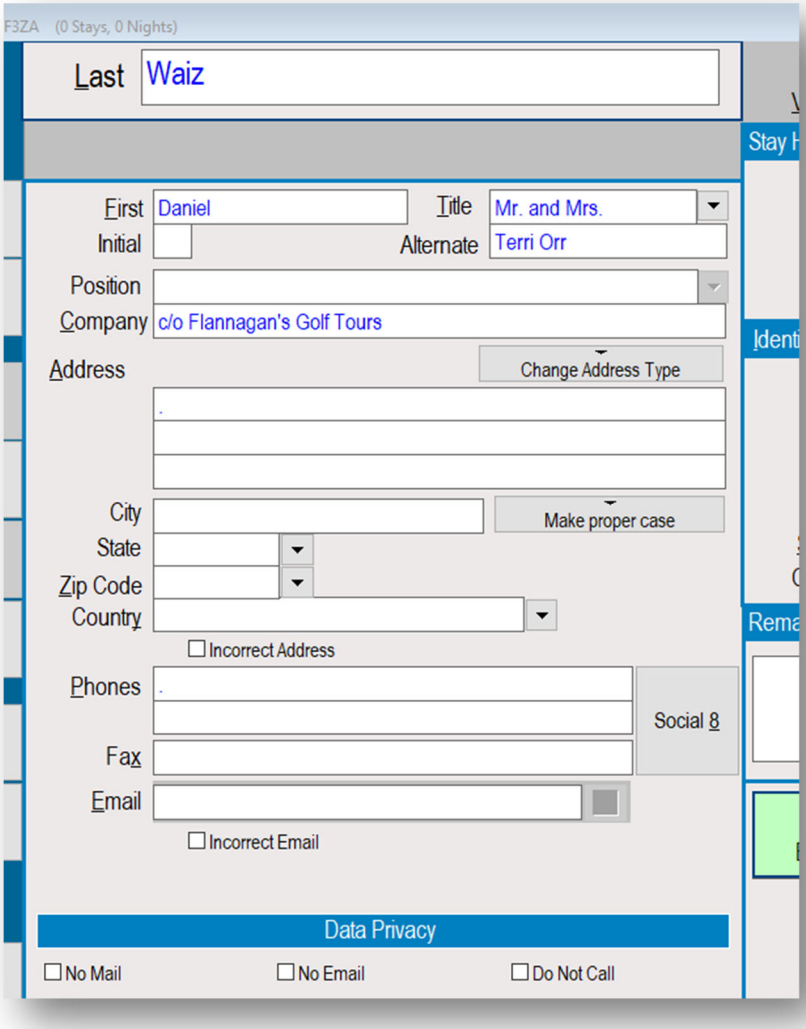
IAGTO Guest Tiles

The Guest Tile should be set up with only the client's information.

Since the payment is being made by the IAGTO agency, we do not need as much information about the guest as you would for a standard guest booking.

Required fields:

- Guest's Name
- Guest's Title
- The company field should be c/o (IAGTO Agency Name)
- Put a dot in the phone number filed
- Dialed # = 01 Reservations
- Source Code = K1 Travel Industry
- Source Scan = K10015 IAGTO



IAGTO Payment

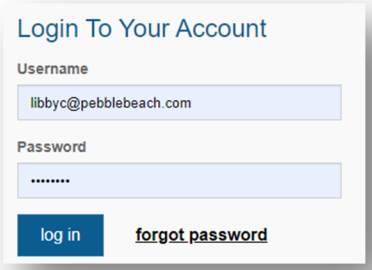
IAGTO Agencies will usually pay with their agency's credit card. Each year, the agency will fill out a new Letter of Authorization that they sign via Sertifi. Access their most recent LOA form in Sertifi to find all billing information needed to process the deposit.

If the Agency does not have a credit card on file in Sertifi

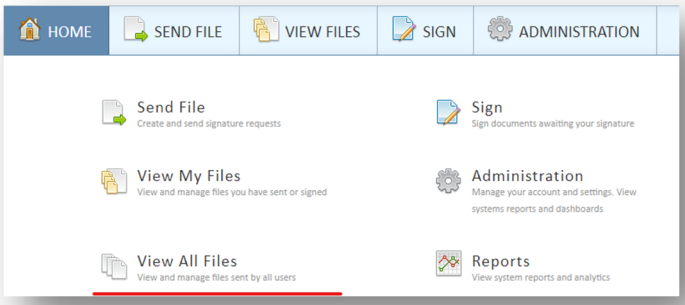
- Send the Agency a Cost Breakdown just for this one reservation via Sertifi
- Include a Cost Breakdown with the LOA as a Signature Required document
- After your booking is complete, let the Travel Desk know that they do not have an annual credit card on file so they can reach out to set that up.

Find an IAGTO LOA in Sertifi

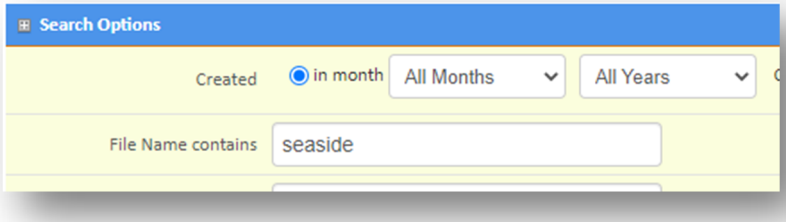
- Log into your Sertifi Account



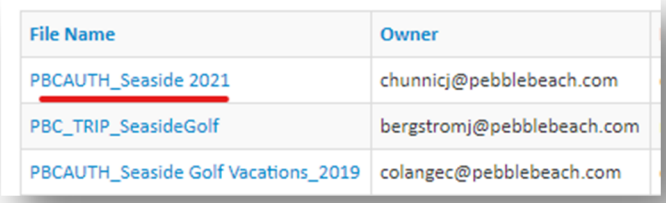
- Click View All Files



- Set the Search Fields to All Months and All Years, then type a key word in the agency's title into the File Name Contains field. The example search below is for Seaside Golf:



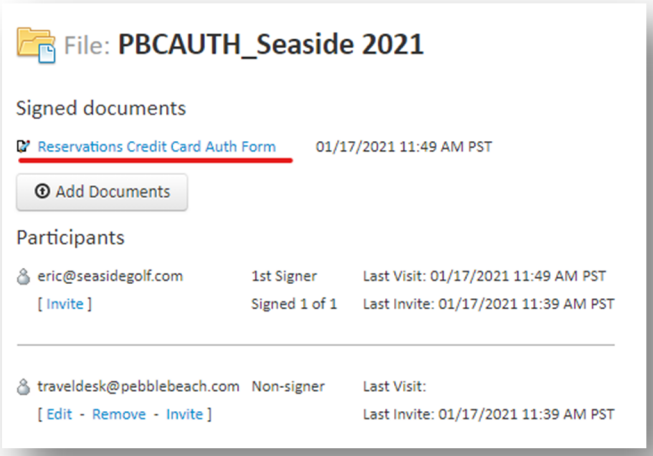
- Authorization Forms will always have a title beginning with PBCAUTH_
  Locate the most recent Authorization Form and click the hyperlink



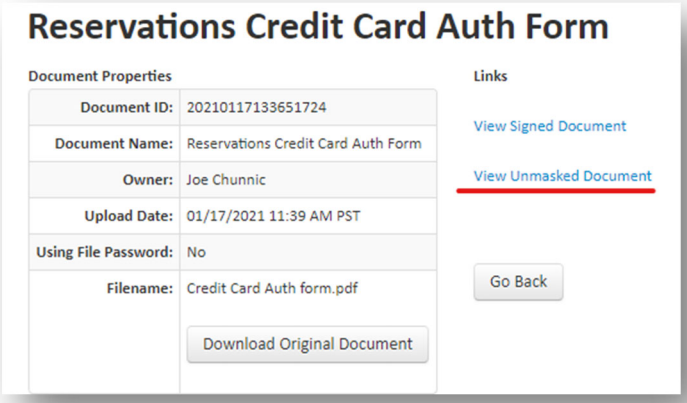
- A new page will open with details about the document such as when it was signed, who it was sent to, and from whom it was initially sent.

  In the example image below, this authorization form was sent from traveldesk@pebblebeach.com to eric@seasidegolf.com and it was signed on 1/17/2021.

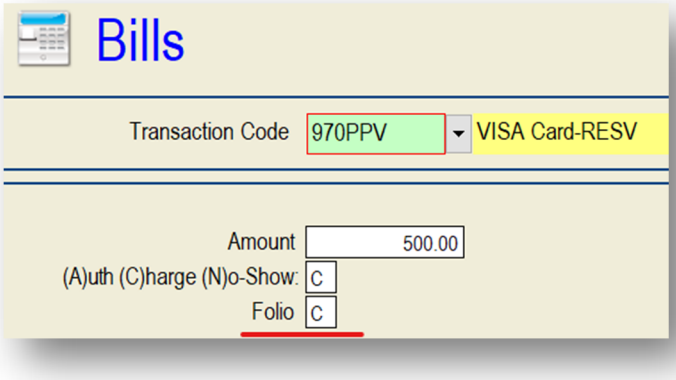
  Click the hyperlink under Signed Documents



- Click "View Unmasked Document to see the Authorization Form. Unmasked means that the credit card numbers on the form will not be hidden.



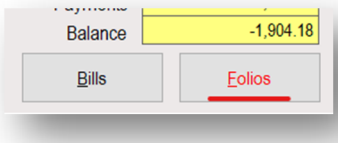
- Enter the Credit Card information on this form into the Guest Tile you created.
- Make a note of the address, phone number, and email address of the agency from this authorization form. You will need this information to write your A Note.
- Process the Payment:
    - On the Reservations Tile, click the Bills section to open the payment screen
    - Type the appropriate billing code to charge the agency's credit card
    - The Folio field defaults to 1. IAGTO charges need to be charged to the C Folio, so change the 1 to a C.
    - Proceed as usual to complete the deposit payment



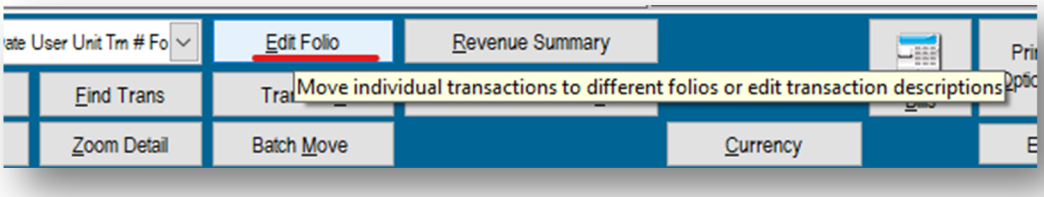
- Review all items on your booking with the agent, then close your call.
- Delete the agency's credit card from the Guest Tile you created. The card will still be saved to the Folio for the final payment that will be collected 14 days prior to the arrival date.

If you accidentally charge the CC to Folio 1 instead of Folio C:

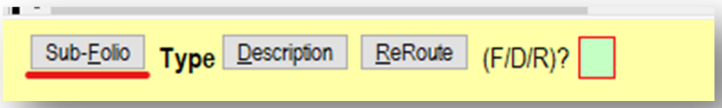
Click the Folios button from the Reservation Tile.



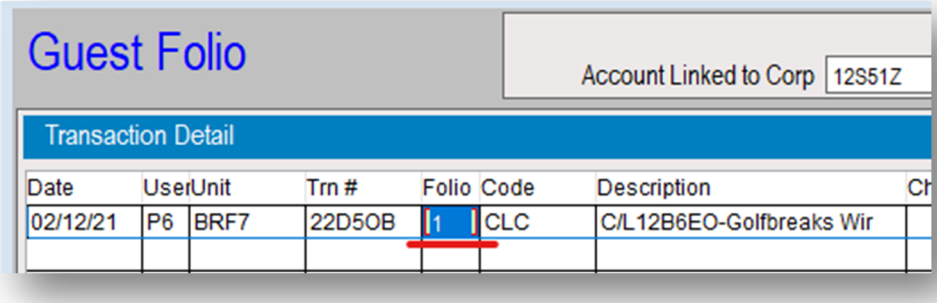
Click Edit Folio button toward the bottom of the window.



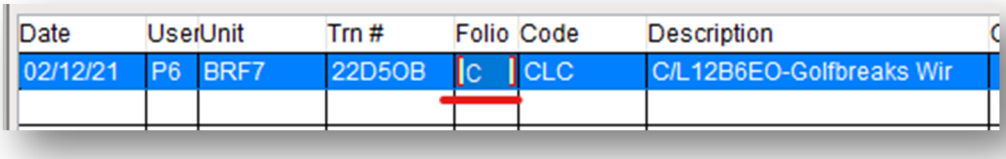
Select Sub-Folio



The Folio Field of all historical transactions will now be editable.



Type the code for the Folio to which you want to move the transaction.



Click Save. The move will be instantaneous.



Clean Up an IAGTO Reservation

- Enter the Travel Agent's name and phone number into the **Contact** fields

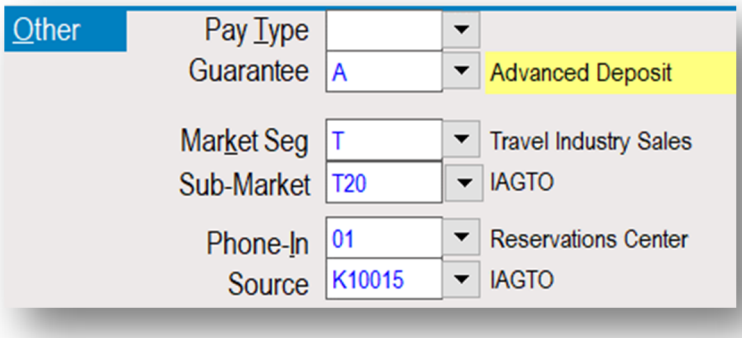


- In the **Notes & Communications** Tab
  - Type the IAGTO disclaimer into the Reservations Field
  - Type the 14-day cancellation quote into the audit line
  - Enter the IAGTO agent's email address into the Housekeeping line

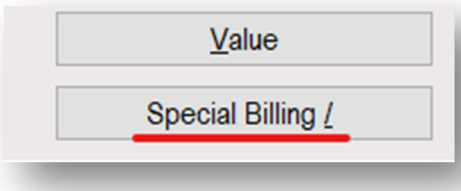


- In the Other section of the Reservation *Tile, make sure all codes are set to IAGTO settings*:

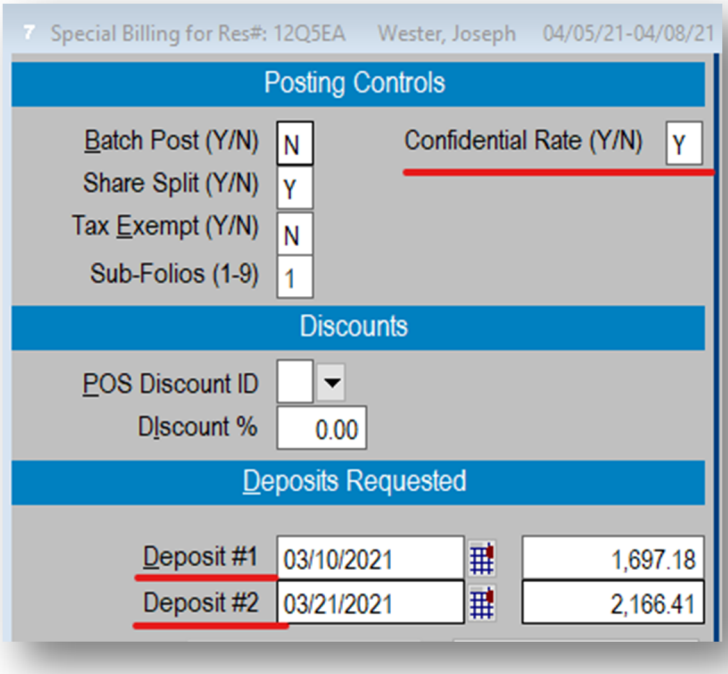
  The **Source code** is particularly crucial because this allows the Travel Desk to pull this reservation onto a report that alerts them when the final payment is due 14 days prior to this guest's arrival.



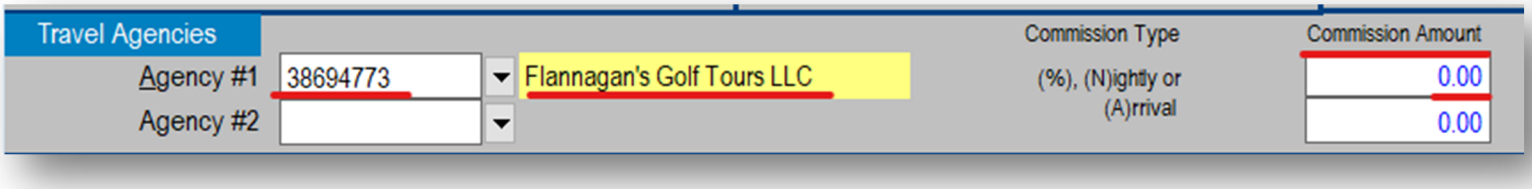
- Open **Special Billing**



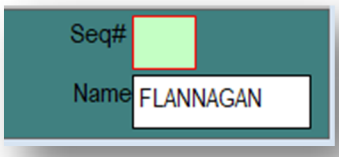
- Mark the rate **confidential** with a **Y**
  Make sure **Deposit #1** is set to the 2-night deposit you collected today
  Set **Deposit #2** as the amount that will be due 14 days prior to arrival

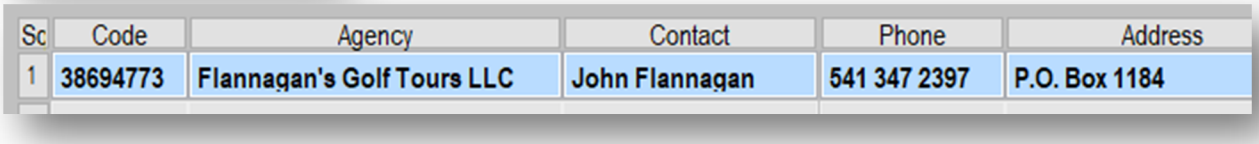


- Type the Agency's **IATA** number into the **Agency #1** field.
  - The name of the agency will automatically appear once the IATA is entered
  - Make sure the Commission amount is 0 which confirms that this is an IATA Agency.
  - If it were a regular travel agency, you would see 10.00 for the 10% commission.



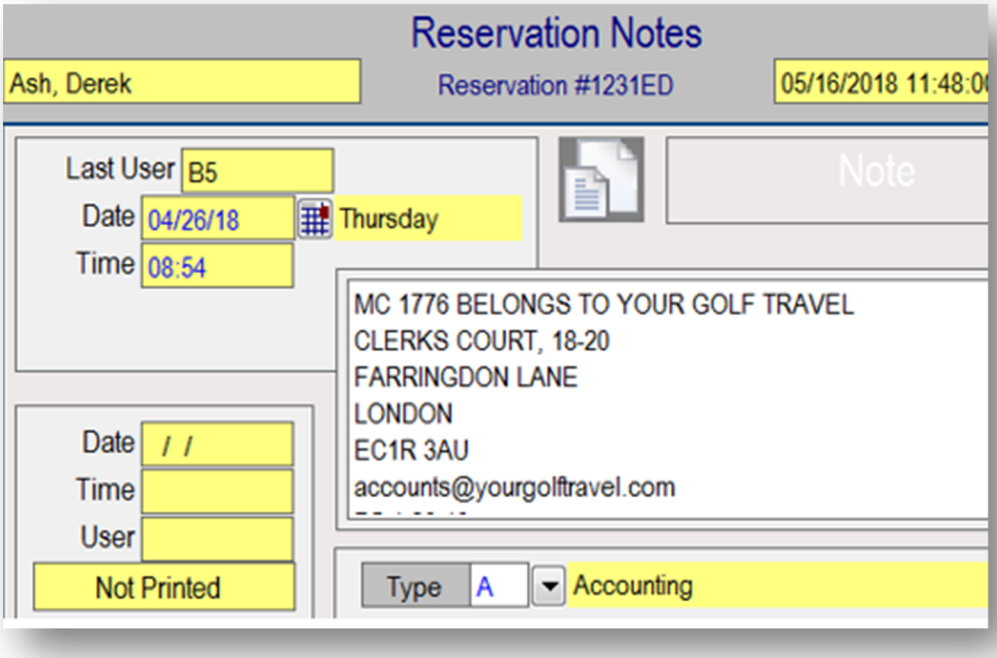
If you do not have the IATA number, you hit the down arrow next to Agency #1 field to pull up the search screen. From there, you can search for the IATA by name.





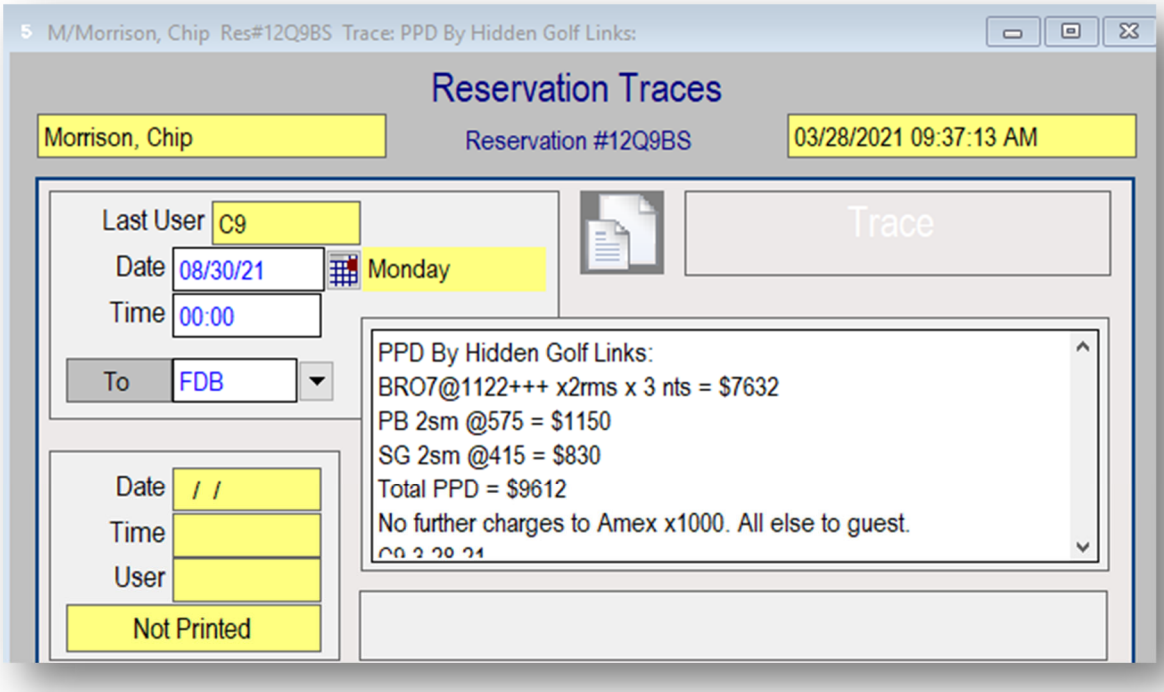
Sc	Code	Agency	Contact	Phone	Address
1	38694773	Flannagan's Golf Tours LLC	John Flannagan	541 347 2397	P.O. Box 1184

- Access the More Notes button and click A to add you're **A Note** using the contact information you pulled from the Sertifi Letter of Authorization.

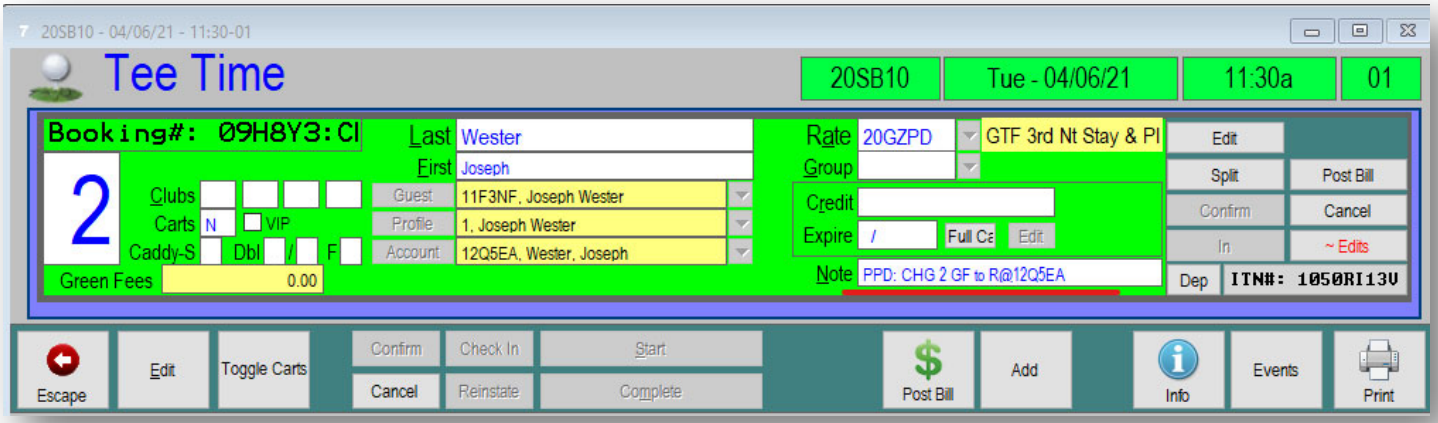


- Access the Traces button and click A to add your **FDB Trace** detailing exactly what is being pre-paid by the agency and at what rates.

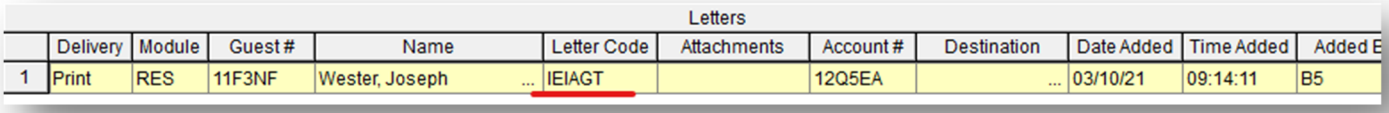
  This Trace should be written from the point of view of the arrival date, meaning that the Total Prepaid should reflect everything that will be prepaid by the time the guest checks in, not just the deposit that is prepaid at the time of booking.



- Add **Baby Notes** to all recreation advising to bill the pre-paid charges to the Reservation Tile



- Confirm your booking in the Booking Center and send the **IEIAGT** confirmation email



- Email your Itinerary number to the Travel Desk so they can take over with their additional processes.

- Create a Booked Lead Form only once the reservation is finalized. In your notes on the lead, begin with the following: ***IAGTO – DO NOT DISCLOSE RATES TO GUEST***

- Set a reminder in your NAVIS Lead Form for 14 day prior to the guest's arrival. It will be your responsibility to collect the final payment on this reservation at this time.

Travel Desk Documentation

Inn addition to sending the IEIAGT confirmation email via SMS, you must send an **Email via Outlook**:

Mr. Bob Butera's reservation is fully confirmed!

I have attached the Cost Breakdown and Receipt for this reservation. You should receive the confirmation email within approximately one hour.

Best,
Crystal Libby

- Attach a Cost Breakdown PDF
- Attach the C-Folio Receipt
- Send to the Travel Agent and CC traveldesk@pebblebeach.com

Include in the Subject Line:

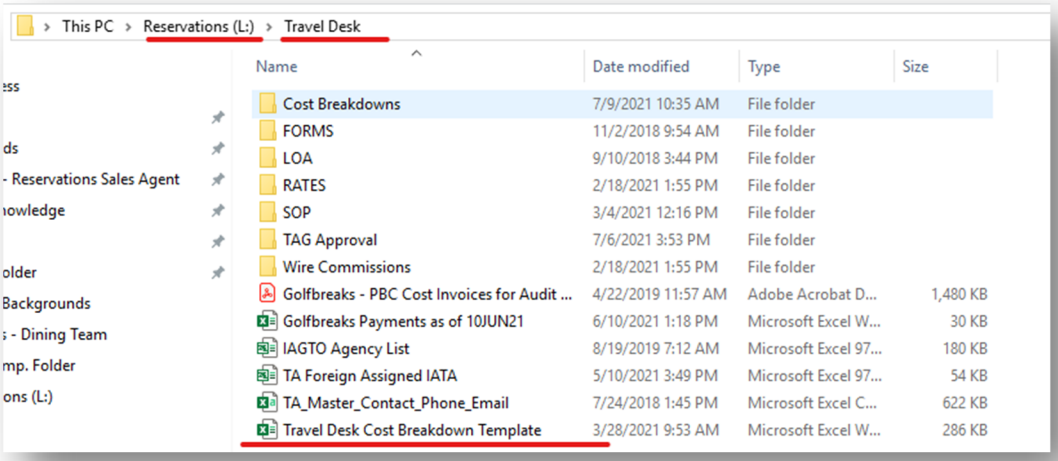
- The guest's name,
- Itinerary Number
- Dates of Stay

Once this email has been sent, create a **Lead** for your Booking in **NAVIS.**

- Copy/Paste entire email thread from Outlook into the Notes.
- Set an NAVIS email reminder for 14 days prior to the arrival date so you can reach out to the Travel Agency about collecting the final payment.

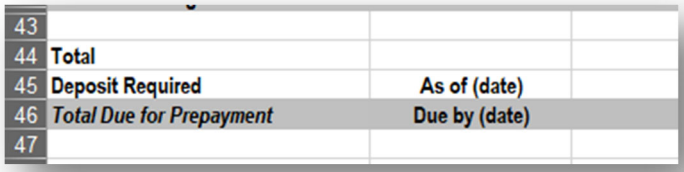
Create A Travel Desk Cost Breakdown

Access the **Travel Desk** folder in the L Drive and open the "Travel Desk Cost Breakdown Template"



Create the Cost Breakdown for the booking as normal.

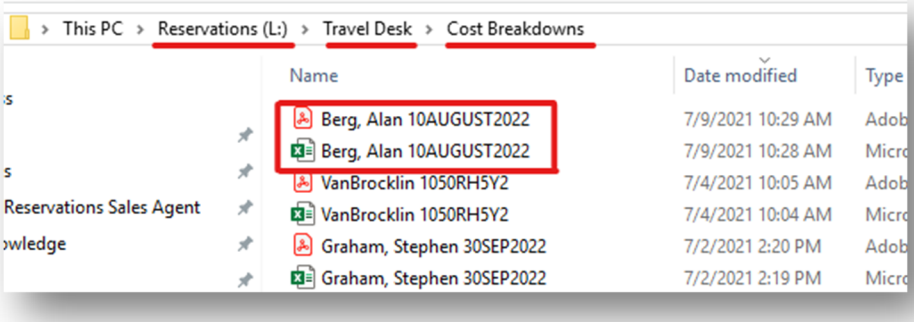
The primary difference between this Template and our standard LOA template is the section at the bottom regarding deposits.



In the Travel Desk Cost Breakdown, you must indicate what is being paid as of today's date and what is due at the 14-day point:

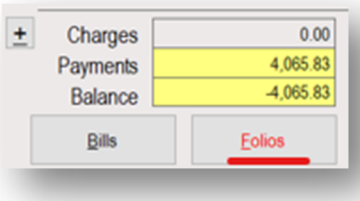
Save your Cost Breakdown as both a PDF and an Excel Sheet (so you can easily make corrections if needed) to the Cost Breakdowns Sub-Folder.

The file name should follow the following format:

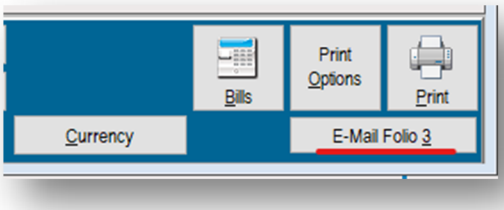


Generate A C-Folio Receipt

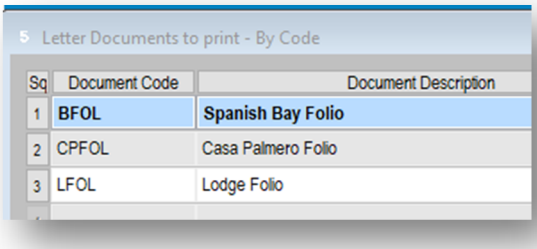
Open the Reservation Tile of your booking in SMS and click the Folio button



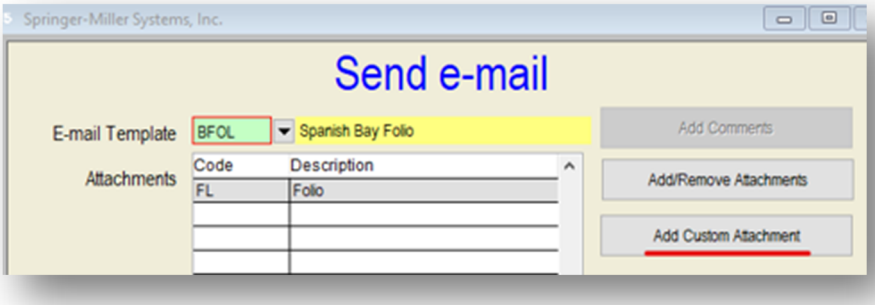
A new window will open. Click the "E-Mail Folio 3" button in the bottom left corner.



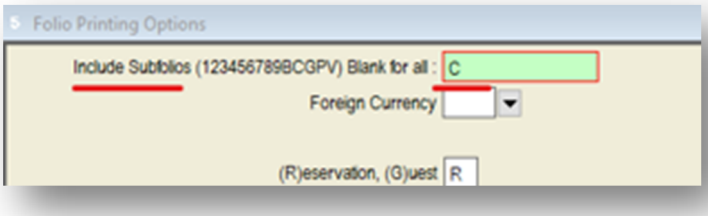
In the new pop-up window, select option 1 for Spanish Bay Folio.



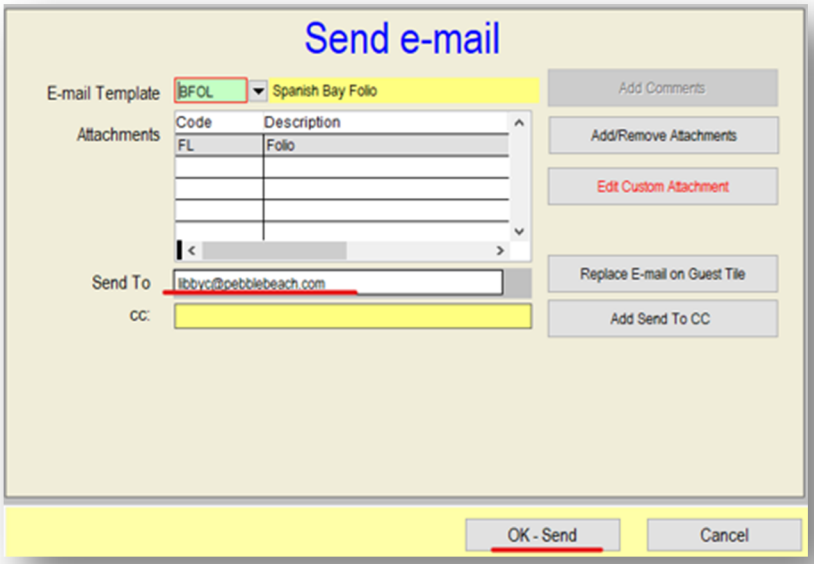
In the new window, click "Add Custom Attachment.



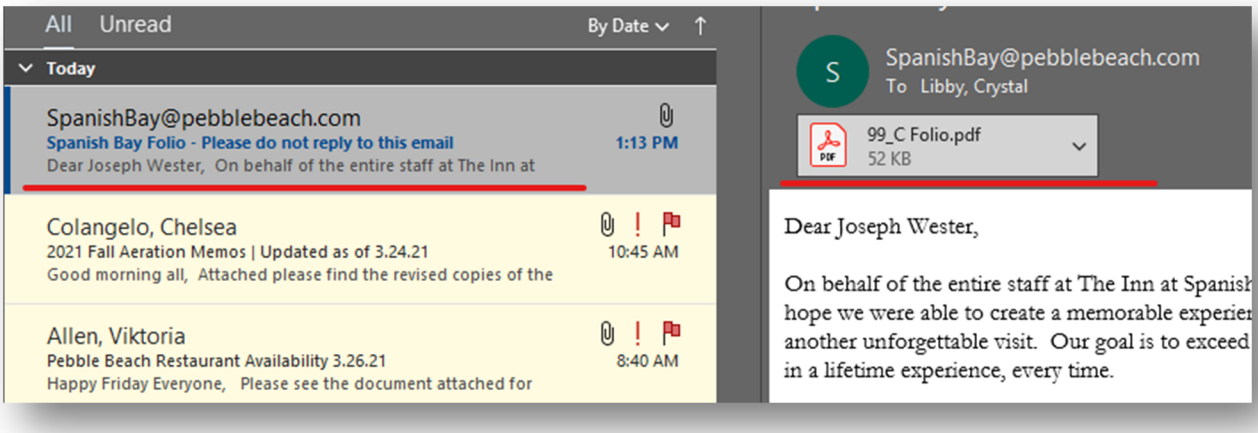
Edit the first field to "C" to request a C-Folio receipt, then click "OK" to return to the previous window.



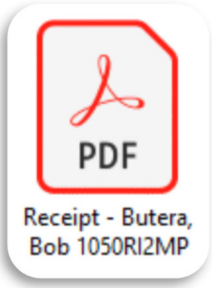
Edit the Send To field to your own personal outlook email address, then click OK-Send.



You should receive the email in your inbox within a minute or two.



Save the Folio as a PDF Attachment, but rename the file per the following example:

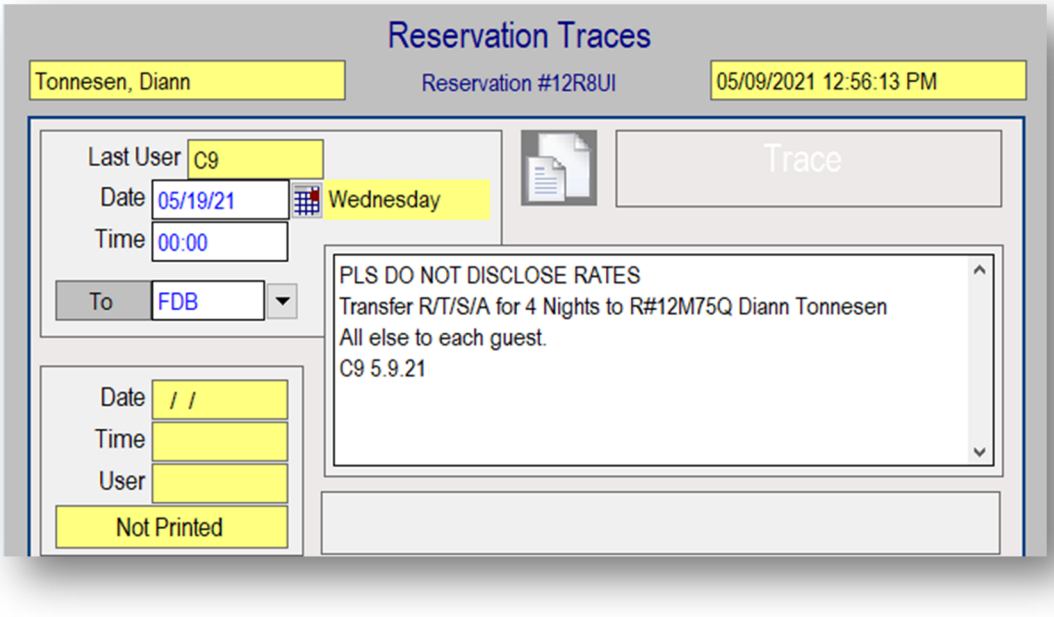


IAGTO 14 Day Final Payment

Send an email to the agency asking for permission to collect the remaining payment for the booking. If the Agency is Flannagan's Golf Tours, you can charge the CC without contacting the agency (as long as it is less than $15,000) and send a Folio C receipt to the agency.

Prepare the reservation per our usual practices. Since golf is pre-paid, you don't need to split this out.

Add a Non-Disclosure message to any Secondary FDB Traces:



IAGTO Golfbreaks Direct Billing

Golfbreaks is the only IAGTO agency that does not pre-pay for its bookings. Pebble Beach instead **direct-bills** Golfbreaks after each stay is complete.

Golfbreaks bookings are still subject to the standard booking guidelines and 14-day cancellation policy.

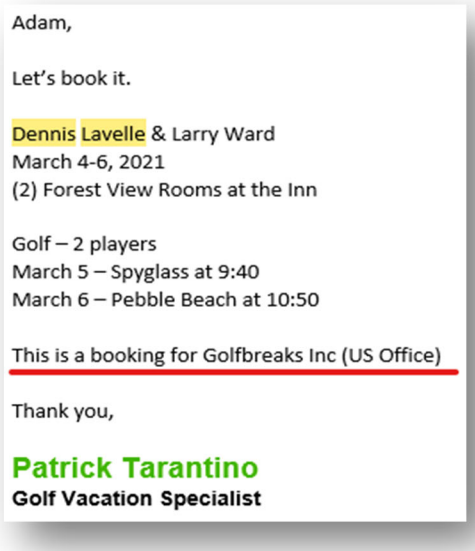
Book Golfbreaks Room & Golf

A Golfbreaks agent will email the **Travel Desk** for availability.

Once a quote is agreed upon, the Golfbreaks agent will ask us to confirm the reservation and provide us with the location of their office.

Golfbreaks has three different **City Ledgers** to which reservations may be charged:

- Golfbreaks UK – C/L# 12S51V
- Golfbreaks USA – C/L# 12S51Z
- Golfbreaks Scandinavia – C/L# 12S520


Adam,

Let's book it.

Dennis Lavelle & Larry Ward
March 4-6, 2021
(2) Forest View Rooms at the Inn

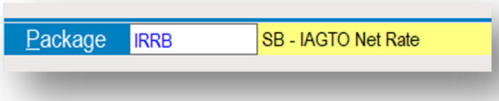
Golf – 2 players
March 5 – Spyglass at 9:40
March 6 – Pebble Beach at 10:50

This is a booking for Golfbreaks Inc (US Office)

Thank you,

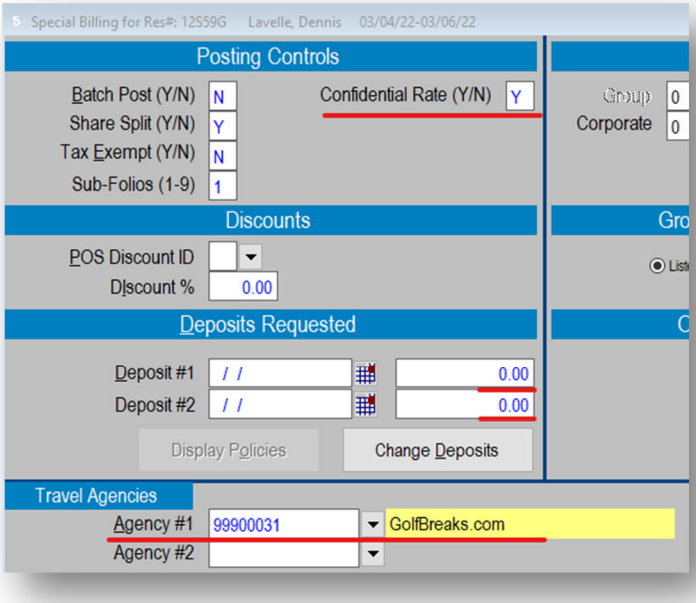
Patrick Tarantino
Golf Vacation Specialist

The reservation itself should be created using the standard IAGTO room rates.

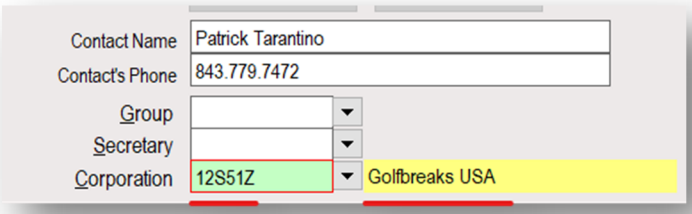


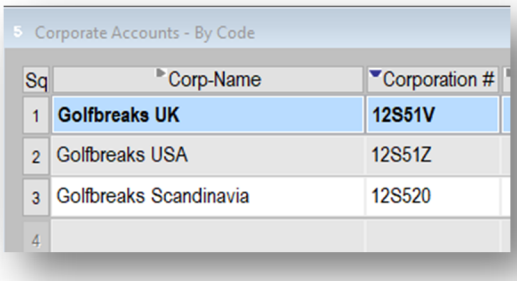
In **Special Billing**:

- Deposit #1 and #2 should be set to $0.00 since we do not require prepayment.
- The Golfbreaks IATA number should also be added to the Agency #1 field.
- The reservation should be marked as Y for Confidential



The **Corporation** field must have the Golfbreaks Corporate Account code entered.
This code will be one of three options, depending on which Golfbreaks office is booking the reservation.





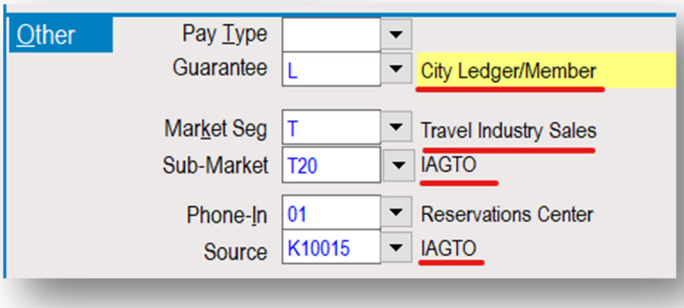
The **Notes and Communications** fields should be entered as follows:



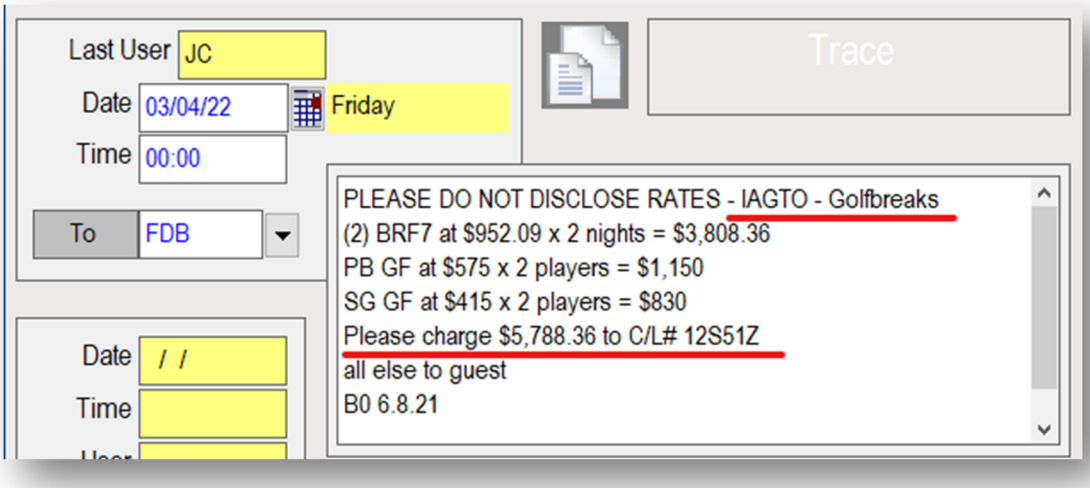
Mark the **Guarantee Code** as L for City Ledger

The **Market Code** is Travel Industry

The **Sub-Market** is IAGTO



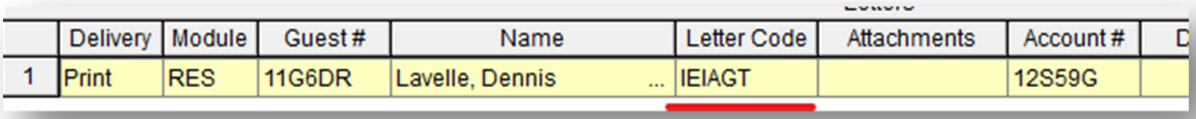
Create an **FDB Trace** set for the date of arrival that includes a full Cost-Breakdown and instruction to charge all items on the reservation to the appropriate City Ledger:



Add **Chargeback Notes** to each golf tee time with instruction to bill to the primary reservation number:



Confirm the reservation and send an **IEIAGT** email to the booking agent.



	Delivery	Module	Guest #	Name	Letter Code	Attachments	Account #	D
1	Print	RES	11G6DR	Lavelle, Dennis ...	IEIAGT		12S59G	

Use the Excel template in the L Drive to create a **Cost Breakdown** of the reservation:

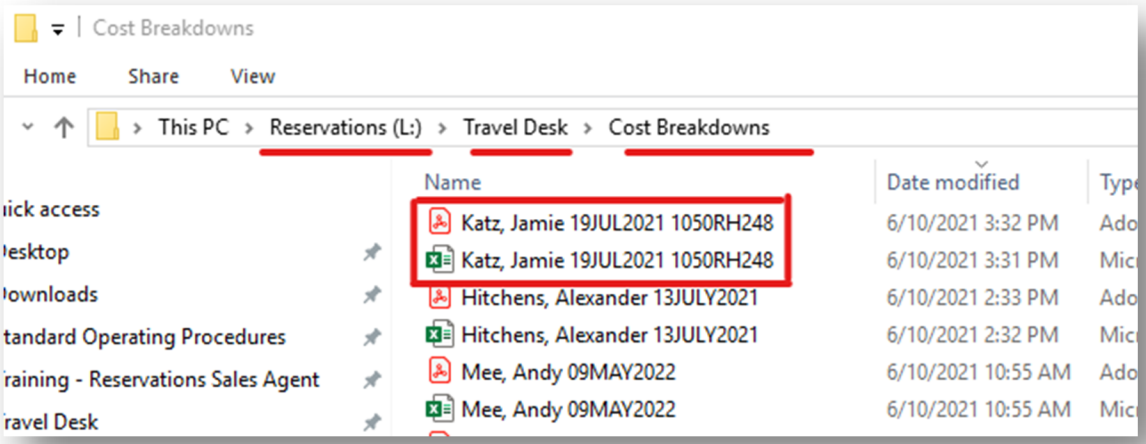
Pebble Beach Resorts

Pebble Beach Resorts Cost Break Down

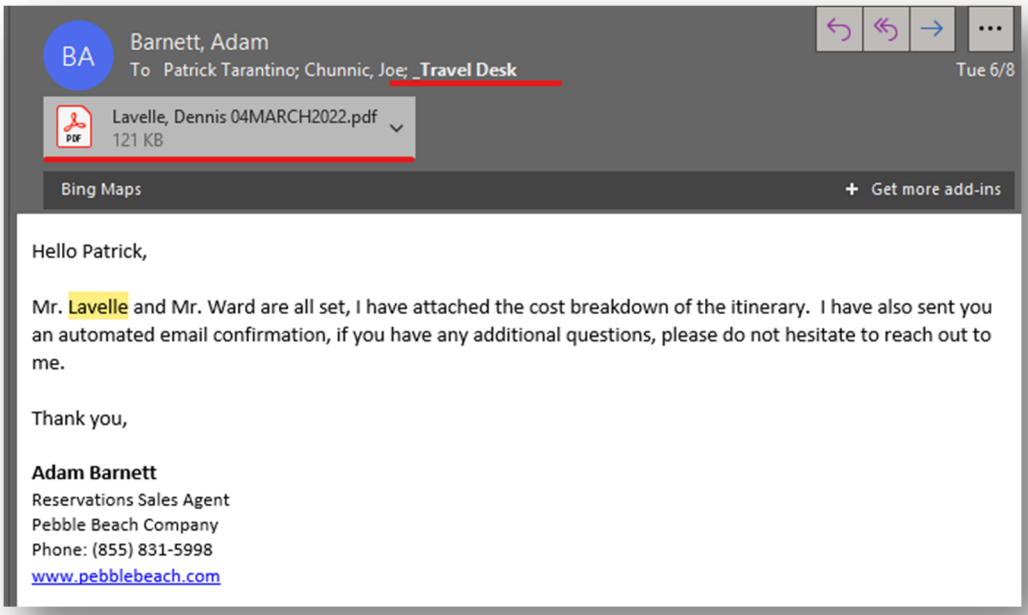
ITINERARY	Arrival Date	Guest Name	From
1050RJ41K	3/4/2022	D. Lavelle	Adam Barnett

Room Nights						
Forest View	The Inn at Spanish Bay					$833.00
Room Tax						$87.47
California Assessment						$1.62
Nightly Service Charge						$28.00
Monterey County Assessment						$2.00
Total Room Charge per Night						*$952.09*
Nights Booked						2
Rooms Booked						2
Total						**$3,808.36**
Total Room Charges						**$3,808.36**
GOLF CHARGES						
Pebble Beach	$575	per player	X	2	=	$1,150
Spyglass Hill	$415	per player	X	2	=	$830
Total Golf Charges						$1,980.00
Total						**$5,788.36**
Deposit Required						**$3,808.36**
Total Due for Prepayment						*$5,788.36*

Save the breakdown as both an Excel Sheet and a PDF to the **Travel Desk's Cost Breakdown Folder** with the title format: Last Name, First Name [Date of arrival]



Email the PDF of this Cost Breakdown to the Golfbreaks agent with a CC to the Travel Desk.



Accounting will bill Golfbreaks for the reservation after the trip has been completed.

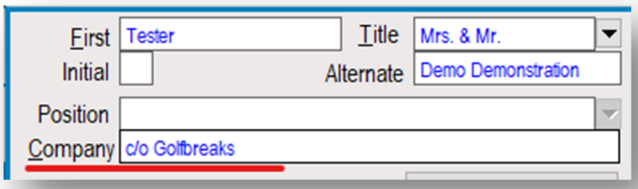
Book Golfbreaks Day Guest Golf

IAGTO agencies may book Day Guest Golf for their clients, but do not receive a discount.

Note: Be sure to ask exactly which charges the agent intends to cover. It is common for IAGTO agents to pay for caddies/carts/rental clubs as well as greens fees then bill the guest directly.

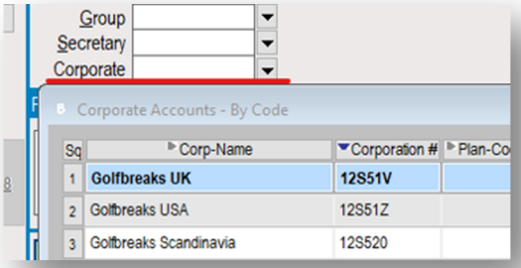
Find or Create a **Guest Tile** for the client:

- If you are creating a new Guest Tile, the **Company** line should say *C/O Golfbreaks*:



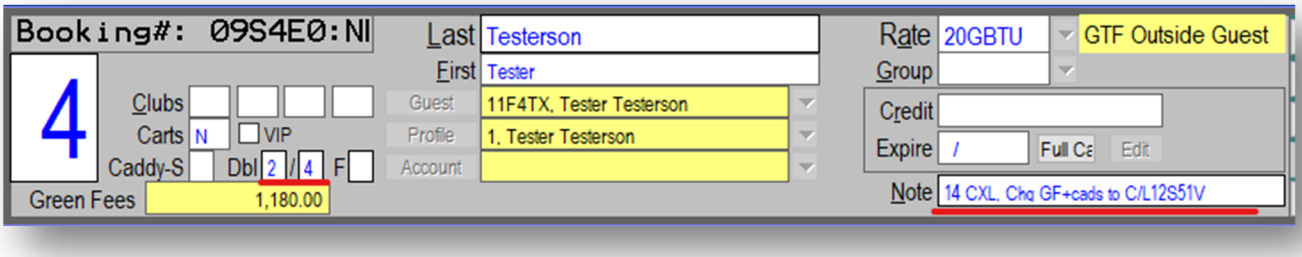
- The **Email** field should contain the email address of the Golfbreaks Agent

- Select the appropriate Golfbreaks code in the **Corporate** field depending on the location of the Golfbreaks office.



In the **Golf Tile**, add a **baby note** instructing the pro shop to charge the Greens Fees (as well as any carts/caddies/rental clubs that the IAGTO agent plans to cover) to the appropriate **City Ledger**:

- Golfbreaks UK – C/L# 12S51V
- Golfbreaks USA – C/L# 12S51Z
- Golfbreaks Scandinavia – C/L# 12S520



Send a **VEMAIL** confirmation to the Golfbreaks agent.

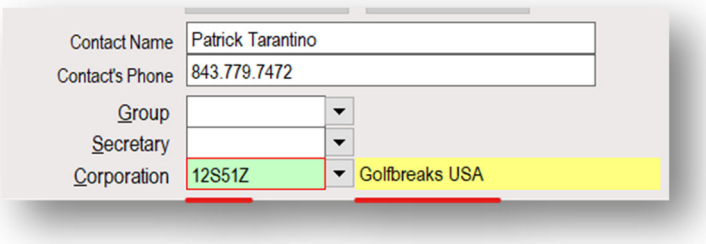
Golfbreaks Cancellations Prior to Direct Billing

Golfbreaks Direct Billing has been implemented as of **June 2021**.

All bookings created prior to June 2021 will have deposits on file. If a cancellation is made on one of these bookings (outside of 14 days), that deposit must be moved to the appropriate **City Ledger** based on the location of the Golfbreaks office:

- Golfbreaks UK – C/L# 12S51V
- Golfbreaks USA – C/L# 12S51Z
- Golfbreaks Scandinavia – C/L# 12S520

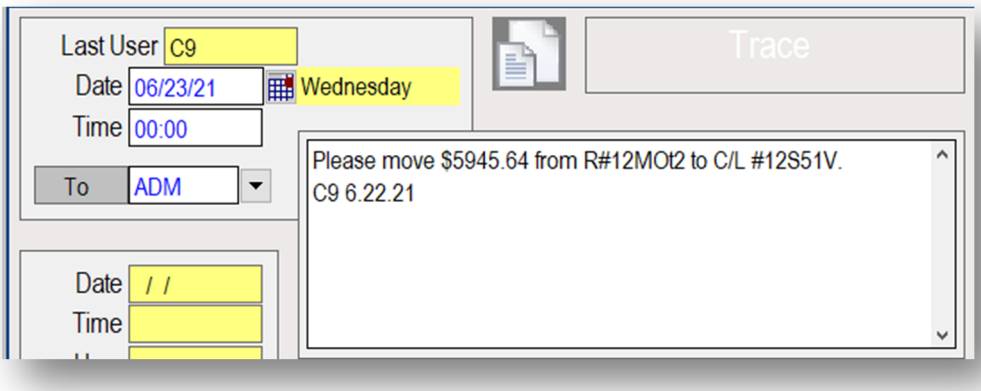
You can determine which City Ledger to move the funds into by viewing the **Corporate** field of the **Reservation Tile**:



*If the Corporate field is blank, the **Travel Desk** has access to spreadsheets on which the office location is documented for each booking.

Cancel the reservation and recreation per our normal process.

Set an **ADM Trace** for the following day instructing accounting to move the funds to the City Ledger instead of refunding the credit card on file:



IAGTO Bookings without IAGTO Rates

- For any IAGTO reservations without a net rate, such as this, we provide a 15% commission.
- Ran and Chelsea have access to update these bookings for commission.

IAGTO Changes and Cancellations

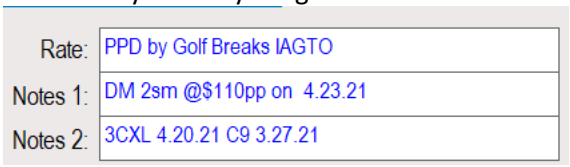
- If a guest calls in to add golf, even The Hay, you must direct them back to the operator that booked their trip.
- The operator is prepaying The Hay green fees, just like they would any other course, please let me know if you have any questions.

IAGTO Packages

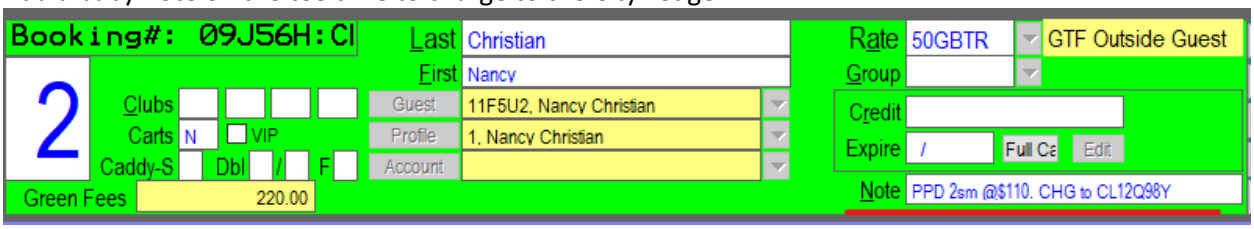
- We still charge rack rate as deposit since these agents want to play smallest amount possible at time of booking, but full package is due at 14 days.
- Package rates for IAGTO are in Digital Binder

IAGTO Day Guest Golf

- IAGTO Agencies can book golf only, but do not get any discount
- They need to pay for everything including carts/caddies/rental clubs at the time of booking. Even with Resort Guests, DM charges the $25 cart.
- Make the guest tile and make sure it says c/o (Agency name)
- Put the Agency's email address in the email field on the guest tile
  This is usually not done, but for golf only, we make an exception.
  The c/o lets us know that the tile needs to be updated with guest info.
- Make a Day Use City Ledger



- Create a Cost Breakdown
- Send a Receipt via the City Ledger Bills button
- Add a baby note on the tee time to charge to the City Ledger



- Send a VEMAIL from the Guest Tile?

VIP Guests



Certain guests of Pebble Beach Resorts are classified as **VIP**s. There are many categories of VIPs, all of which are indicated in the chart on the following page.

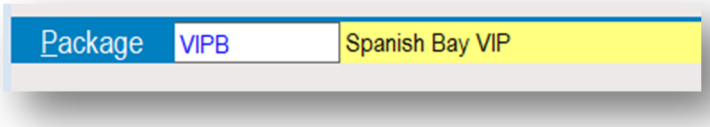
When you receive a caller from a VIP Guest, it is crucial that you read the notes in the Guest Tile or Reservation Tile before disclosing any information to the caller.

Identify A VIP Guest:

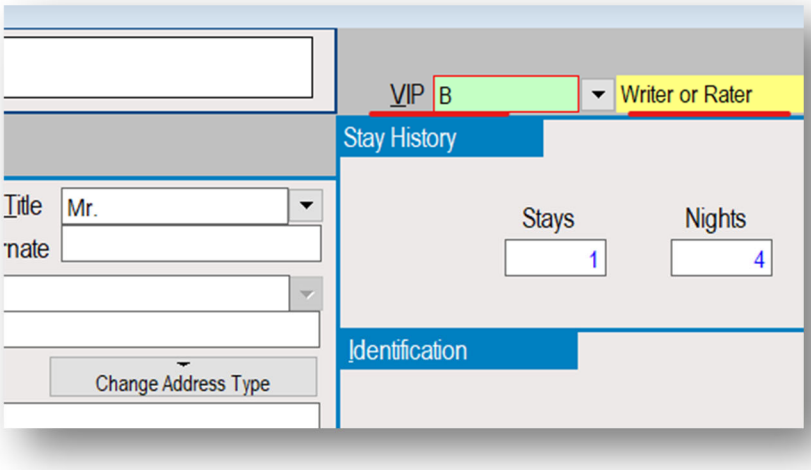
- The Reservation Line of the Notes & Communication Section may state the VIP level of the guest:



- The Rate Code in the Package Field will include "VIP":



- The Guest Tile will include a VIP Code:



Identifying VIP Reservation Codes

V1/ V2	Owner / Guest of Owner Our ownership group and their guests are handled specifically by our CEO's executive assistant, Lee Ann Seber. Do not change, cancel, book, or discuss anything about the reservation with these guests; they must be transferred to Lee Ann Seber ext. 8505. If you cannot reach Lee Ann by phone, please email her with guest info. She will respond with further instructions.
V3	Special Guest of Senior Management Do not change or cancel the reservation; they must be transferred to original requestor in note.
V4	Writer or Rater (Usually Golf Only – Rooms check Source Code) Do not change or cancel the reservation; they must be transferred to original requestor in note. Margo Daniels, Joyce Hiura, or Diana Diaz are guest contacts.
V5	Site Inspection (Golf - Rooms check Source Code) Please direct guest to Sales Assistant referenced in note. Ok to book day guest activities (non-resort booking guidelines for golf).
V6	Special Attention (Dissatisfied Guest) See note. Please assist guest as much as possible. Please see the VIP Desk or Supervisor before making any changes or canceling. Guest contact is usually Sara Higman or Trisha Cox.
V7	Golf VIPs Guest of Golf Executive Office. Please direct all calls to Joyce Hiura x8752.
V8	Brand Partner These guests are either representatives of our brand partners or their guests. The following are the most frequent brand partners: Coca-Cola IBM Fed-Ex XOJet Lexus TaylorMade Mastercard EZGo Do not change, cancel, or add golf to these reservations. Please transfer calls to Diana Diaz x7466.
V10	Celebrities See Note
V10	Golf Academy Lesson Please see the note on the guest tile or reservation. Any changes or questions transfer the guest to the Golf Academy.

How to Handle / Refer VIP Callers

- If a VIP Guest is inside 14 Days of Arrival, get approval from the VIP Desk or a Supervisor to change or cancel.
- Always read notes in the Guest Tile or Reservation Tile before confirming any information
- For assistance, seek help from the VIP/Travel Desk or a Supervisor

	Disclose Rates to Guest	*Disclose Rates to TAG or Tour Operator*	*Change Room*	*Cancel Room*	*Send IEMAIL or TAIEMAIL*	*Send VEMAIL*	*Book Golf*	*Book Dining/Spa*
Bonotel	NO	NO	NO	NO	NO	YES	YES; Collect CC & Guest info	YES
GDS	YES	YES	NO	NO*	YES	N/A	YES; Collect CC & Guest info	YES
PBTOUR	NO	YES	YES; TAG only makes changes	YES; TAG only can cancel	YES; send to TAG only	N/A	YES; TAG only can book	YES; TAG only can book
IAGTO	NO	YES	YES; TAG only makes changes	YES; TAG only can cancel	YES; send to TAG only	N/A	YES; TAG only can book	YES; TAG only can book
VIP (V1 & V2)		N/A	NO; refer to Lee Ann Seber x8505	NO; refer to Lee Ann Seber x8505	YES; only to Lee Ann	Yes; Only to Lee Ann	NO; refer to Lee Ann	YES
VIP (V3 & V8)		N/A	NO; refer to requestor	NO; refer to requestor	YES; only to requestor	YES	NO; refer to requestor	YES

Groups



The Reservations Department of Pebble Beach Resorts may book reservations for groups up to a certain size.

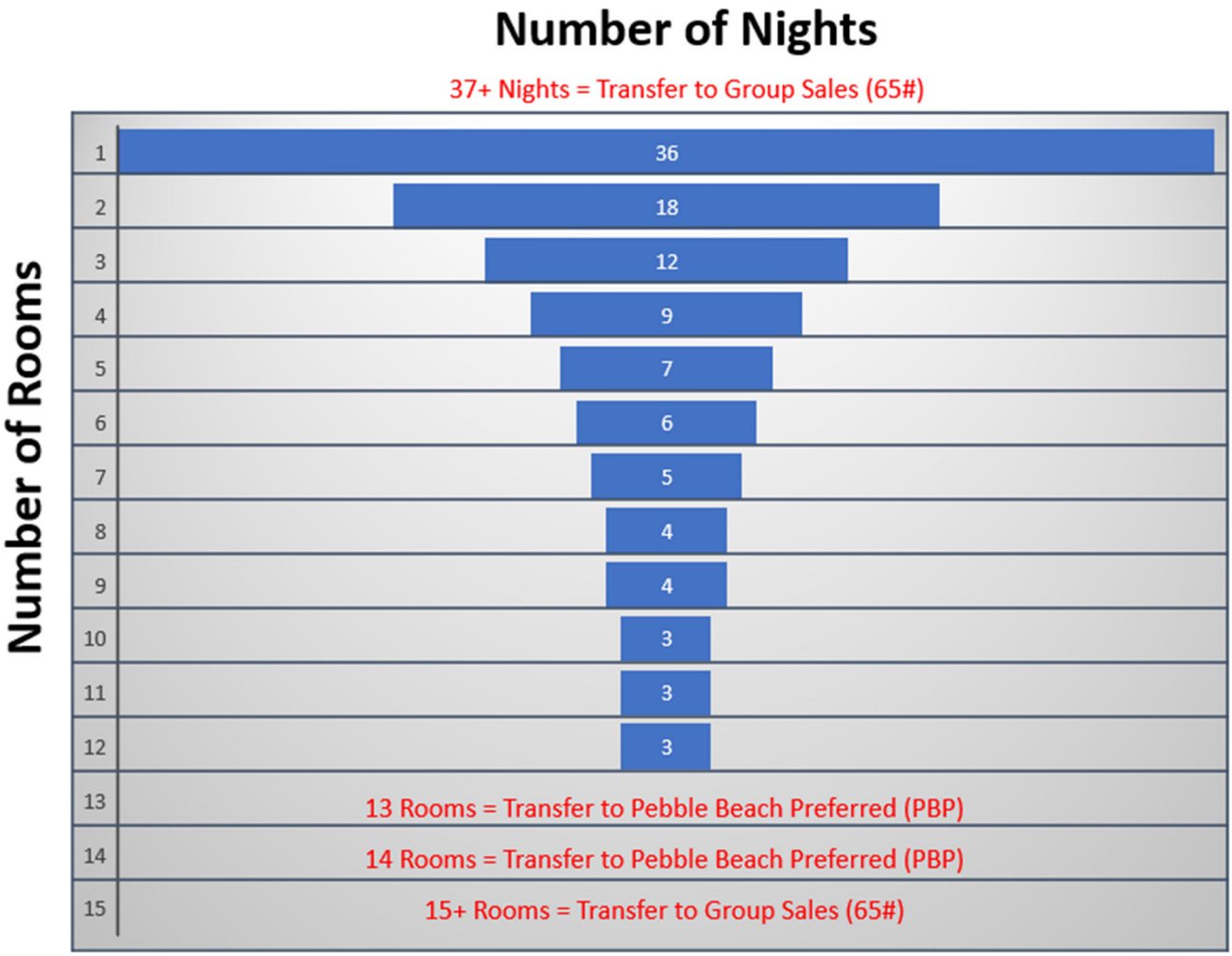
If a booking exceeds the maximum size we are permitted to process, we must connect the guest to the Group Sales Department.

Maximum Reservation Center Booking Guidelines

As A Reservations Agent, we can book a maximum of **36 Total Room Nights**.

The Total number of Room Nights is calculated by adding up the number of nights a guest is booking for every room on the reservation. For example, if a guest books two rooms for three nights, the total number of room nights is six.

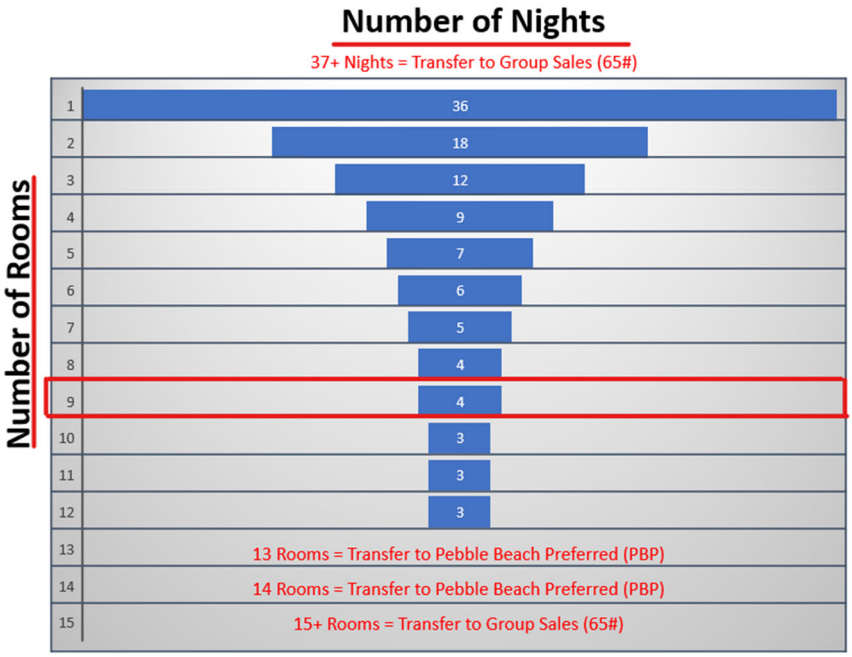
The following chart illustrates the maximum number of Total Room Nights that may be booked by Reservations Agents:



As an example of how to use this chart, let's say a guest wants to book **9 rooms**. You can see per the chart below that the maximum number of Nights you may book for this guest is **4 nights** per room.

- If the guest wants to add a 5th night for each of their 4 rooms, that will result in **45 Total Room Nights**
- If the guest wants to add a 10th room to their 4-night stay, that will result in **40 Total Room Nights.**

Both cases **exceed our 36 Room Night limit** and must be transferred to **Group Sales.**



Meeting Space

If a guest wants to book a Meeting Space for their group, their entire reservation must be transferred, even if the number of Total Room Nights is less than the 36 threshold.

- If the guest is booking 1-14 rooms, connect to **Pebble Beach Preferred**.
- If the guest is booking 15+ rooms, connect to **Group Sales**

Pebble Beach Preferred	Group Sales
Specializes in Small Scale Group Events such as weddings, board meetings, smaller company retreats.	Specializes in large group events such as conferences and large corporate retreats.

Day Guest Group Golf

If a Day Guest wants to book more than 12 Golfers:

- Pebble Beach Golf Links / Spyglass Hill Golf Course / The Links at Spanish Bay - **Transfer to Group Sales**
- Del Monte Golf Course - **Transfer to the Del Monte Pro Shop**

Identify A Group Reservation

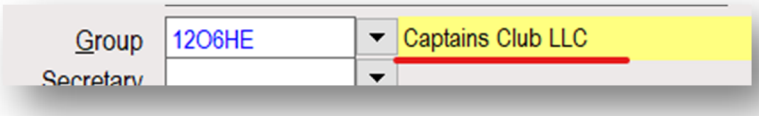
Do not Edit Group Sales Reservation Tiles:

- All changes go through group coordinator
- Follow the Locate the Group Coordinator instructions in this manual to direct the guest to their appropriate contact.

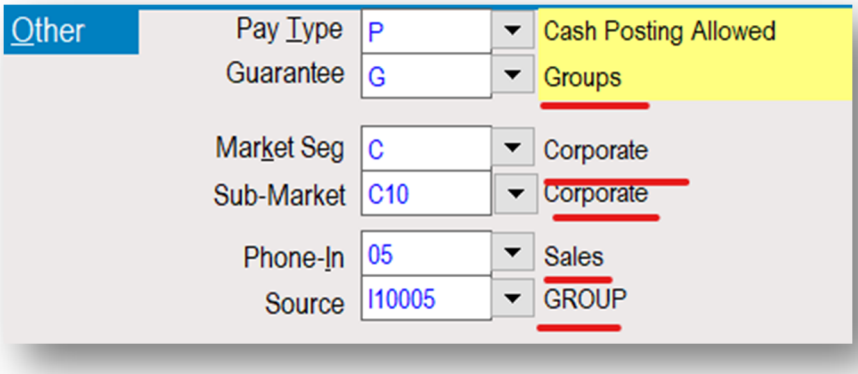
Do not disclose Group Sales Rates or Room Types:

- Groups are typically booked as "Run of House" which means the rooms on each reservation are placeholders until the house is set.

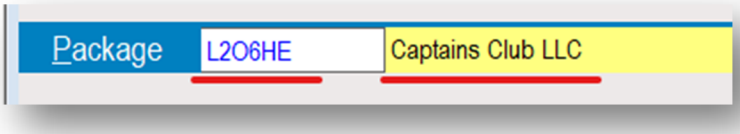
The Group's Name will be in the Group field of the **Reservation Tile**:



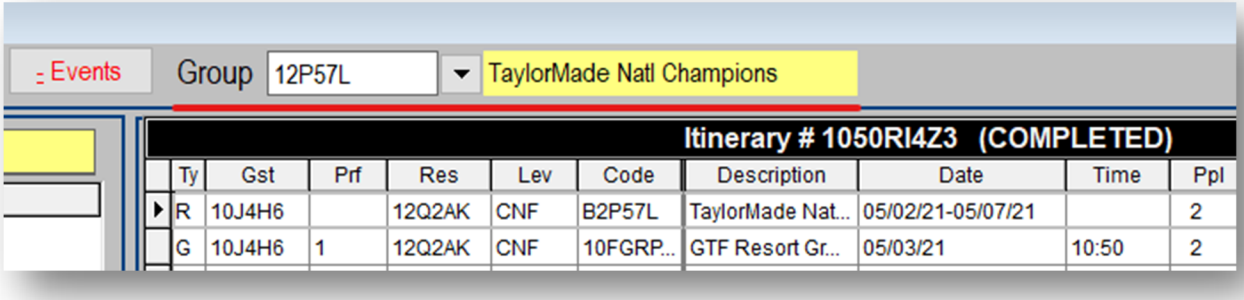
The **Other** section of the Reservation Tile will be set to all-Group categories:



The **Package Code** will include the name of the group, which indicates that the group is receiving a specific rate based on their contract with Group Sales

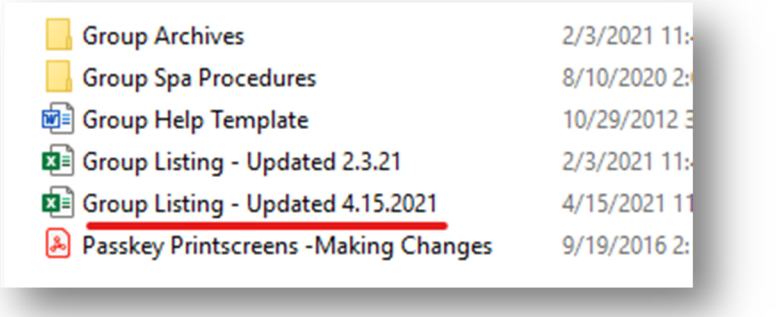


The Header of the of the **Booking Center**: will state the Group Number and name:

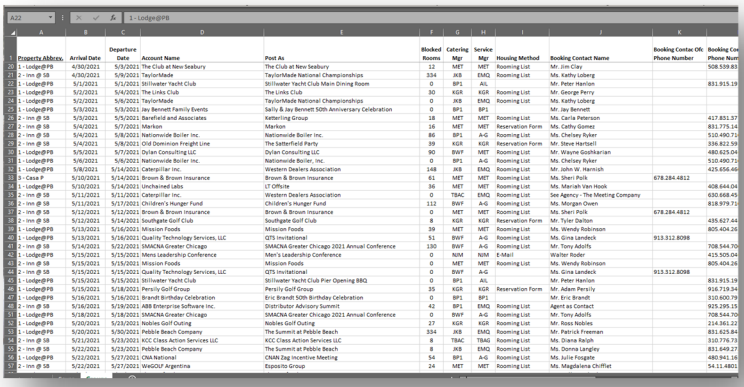


Find the Group Coordinator Contact

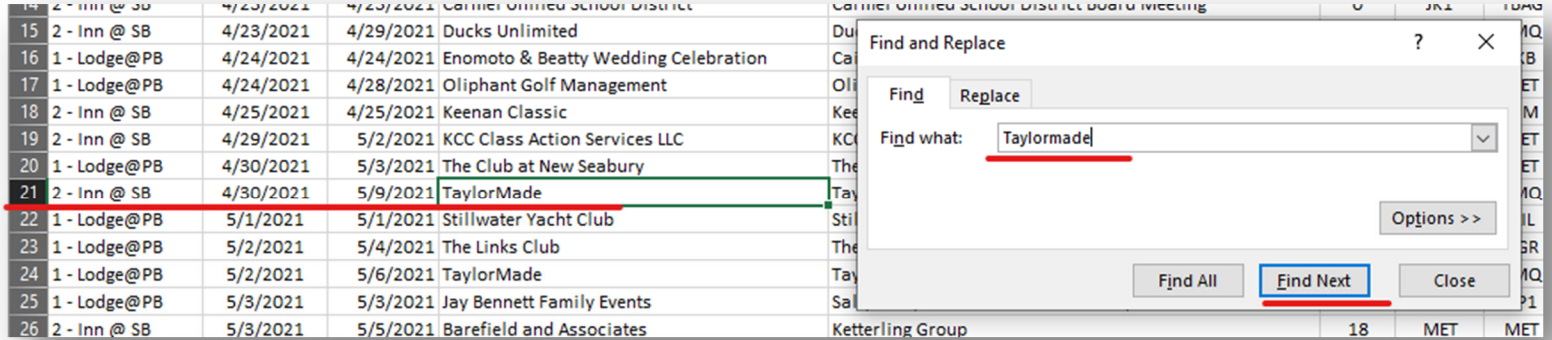
1. Access your **File Explorer**
2. Open the **L Drive**
3. Open the **RESORT RESERVATIONS** Folder
4. Open the **Future Group Listings** folder
5. Click on the document labeled "Group Listing" with the most recent Update Date



This will open an Excel Sheet of all incoming **Group Reservations**.

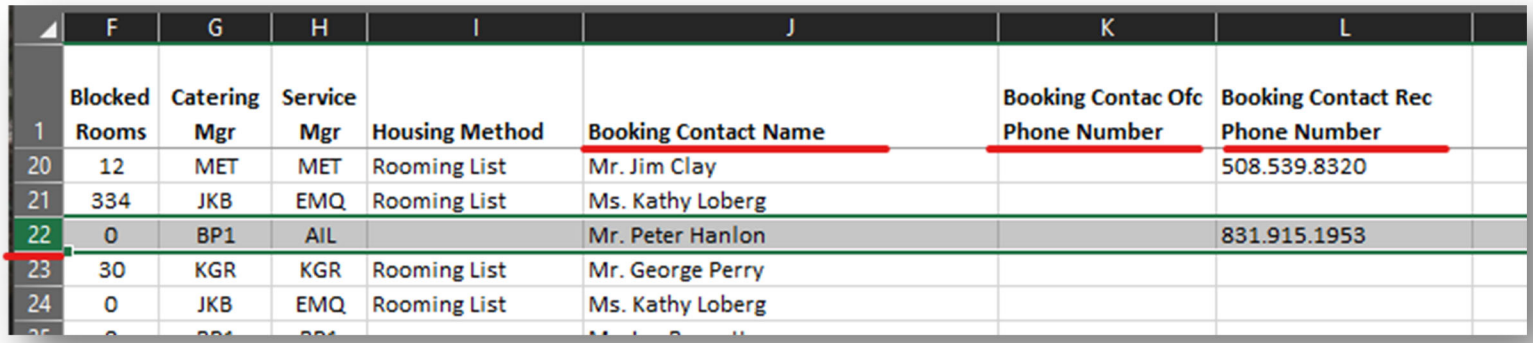


6. **CTRL+F** to open a search box. Type the name of your guest's group and click **Find Next**.



7. Once you locate the Group Listing on the excel sheet, follow that row to the **Booking Contact Name** column.

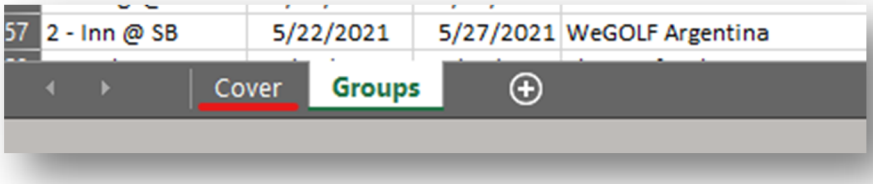
   This is the contact you can provide to the guest if they wish to make changes to their Room Reservation. The phone number of the Group Contact will be in the columns to the right of the Contact name.



	F	G	H	I	J	K	L
1	Blocked Rooms	Catering Mgr	Service Mgr	Housing Method	Booking Contact Name	Booking Contac Ofc Phone Number	Booking Contact Rec Phone Number
20	12	MET	MET	Rooming List	Mr. Jim Clay		508.539.8320
21	334	JKB	EMQ	Rooming List	Ms. Kathy Loberg		
22	0	BP1	AIL		Mr. Peter Hanlon		831.915.1953
23	30	KGR	KGR	Rooming List	Mr. George Perry		
24	0	JKB	EMQ	Rooming List	Ms. Kathy Loberg		

Internal Group Sales Contacts

The Group Listings Excel Document will automatically open to the Groups tab, but you can see along the bottom of the sheet that there is a second tab titled Cover.



The **Cover Tab** is where you will find internal **Group Sales Contact Information**, which includes:

- Sales Managers
- Group Reservations Managers and Coordinators
- Pebble Beach Preferred
- Group Golf and Spa Coordinators

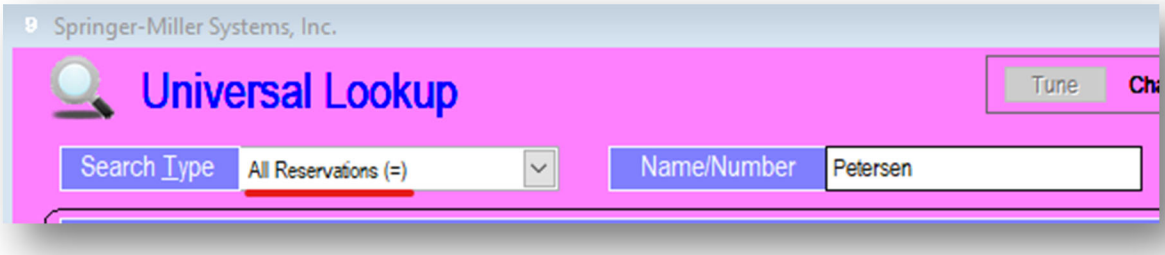
Locate A Group Sales Reservation

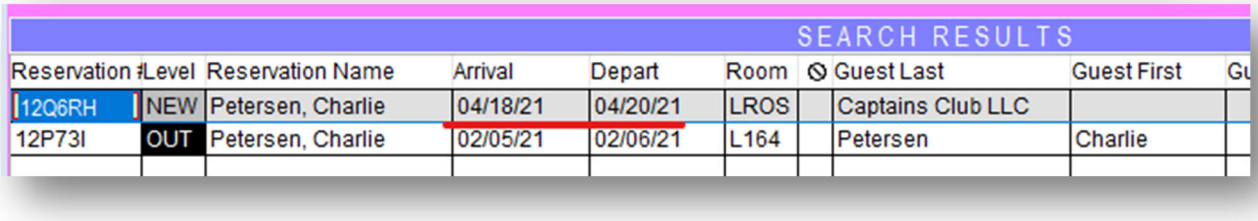
Search by Reservation Tile

Group Sales Room Reservations are not created as part of an **Itinerary**.

To locate a Group Sales Room Reservation, the best practice is to begin by searching the guest's name in **Universal Lookup** using the Search Type: **All Reservations.**

Ask your guest for the dates of their stay to verify that you are selecting the correct booking.





If you cannot locate the guest's **Reservation Tile**, proceed to the following page to search by **City Ledger**.

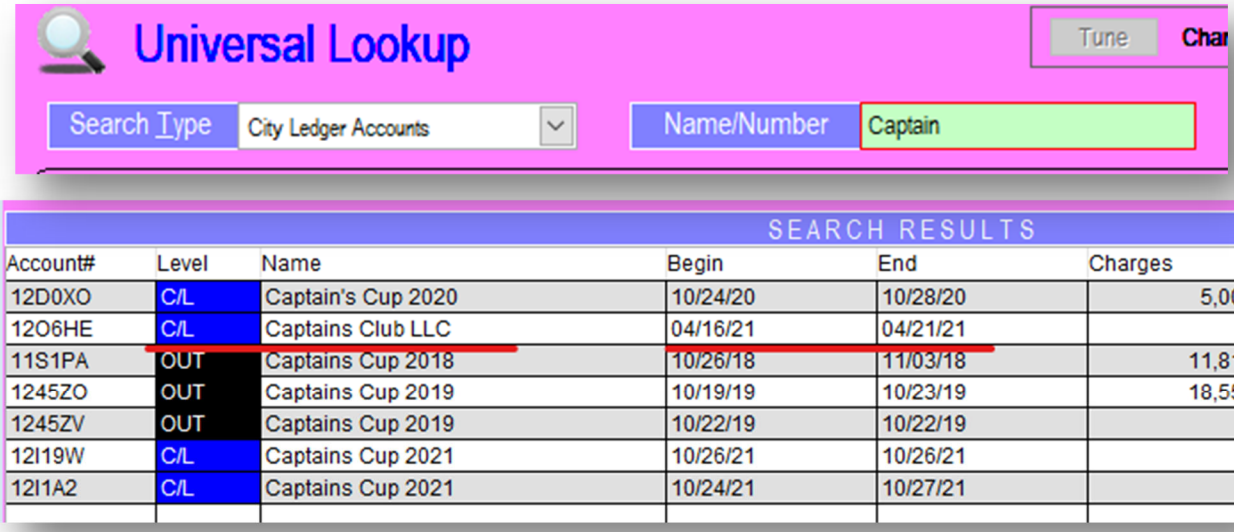
Search by City Ledger

Each new Group Sales booking is created with a **City Ledger**.

For example, as you can see on the Future Group Listings Excel Sheet, the Captains Club will be visiting April16th-18th, 2021.

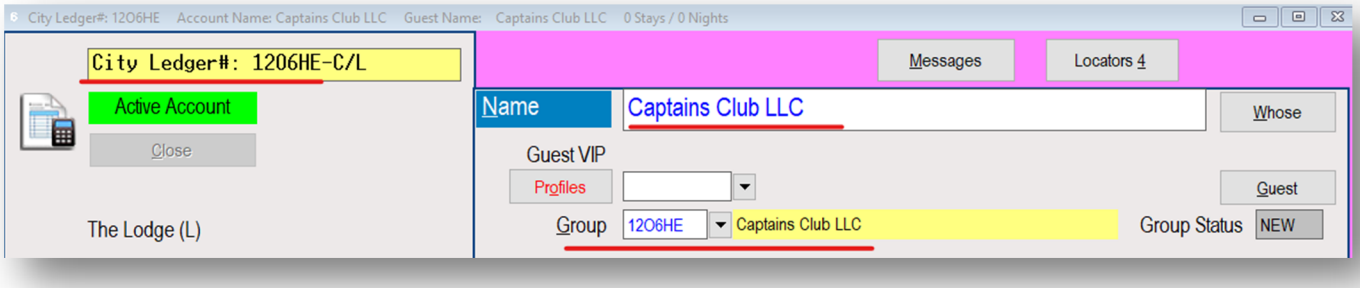
Property Abbrev.	Arrival Date	Departure Date	Account Name	Post As
2 - Inn @ SB	4/16/2021	4/17/2021	Poladian & Kazarian Wedding Celebration	Alicia Poladian & Michael Kazari
1 - Lodge@PB	4/16/2021	4/21/2021	Captains Club LLC	Captains Club LLC
2 - Inn @ SB	4/17/2021	4/23/2021	BUILT National	BUILT National - NKF 2021 Rebook
2 - Inn @ SB	4/18/2021	4/21/2021	Arrow Exterminators	Arrow Exterminators

Set your **Search Type** in **Universal Lookup** to **City Ledger Accounts** to locate the City Ledger for this group.

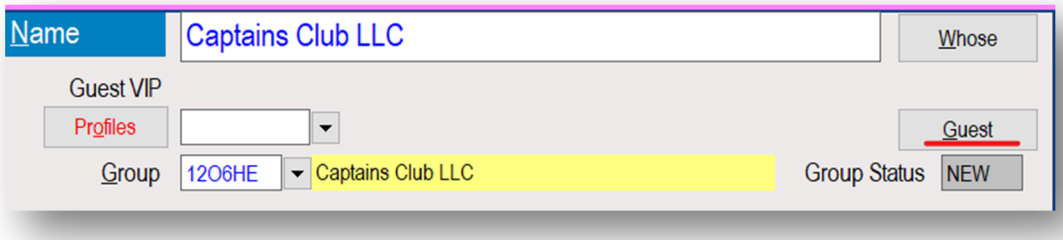


Account#	Level	Name	Begin	End	Charges
12D0XO	C/L	Captain's Cup 2020	10/24/20	10/28/20	5,000
12O6HE	C/L	Captains Club LLC	04/16/21	04/21/21	
11S1PA	OUT	Captains Cup 2018	10/26/18	11/03/18	11,81
1245ZO	OUT	Captains Cup 2019	10/19/19	10/23/19	18,55
1245ZV	OUT	Captains Cup 2019	10/22/19	10/22/19	
12I19W	C/L	Captains Cup 2021	10/26/21	10/26/21	
12I1A2	C/L	Captains Cup 2021	10/24/21	10/27/21	

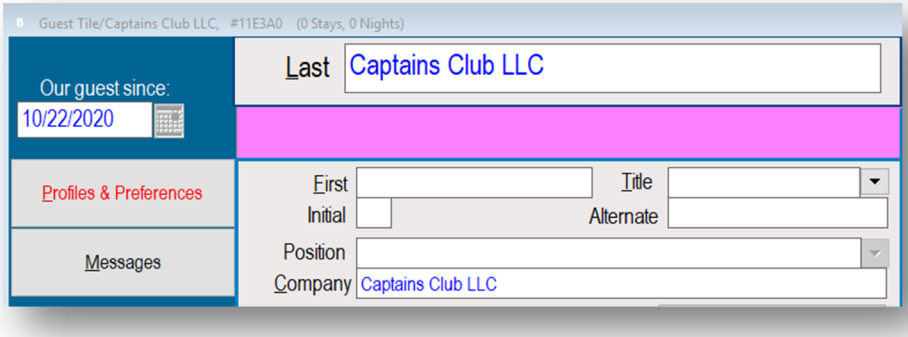
Double click on the correct group to open the group's **City Ledger**.



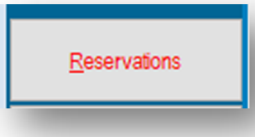
Click the **Guest** button on the **City Ledger** to open the Group's **Guest Tile**



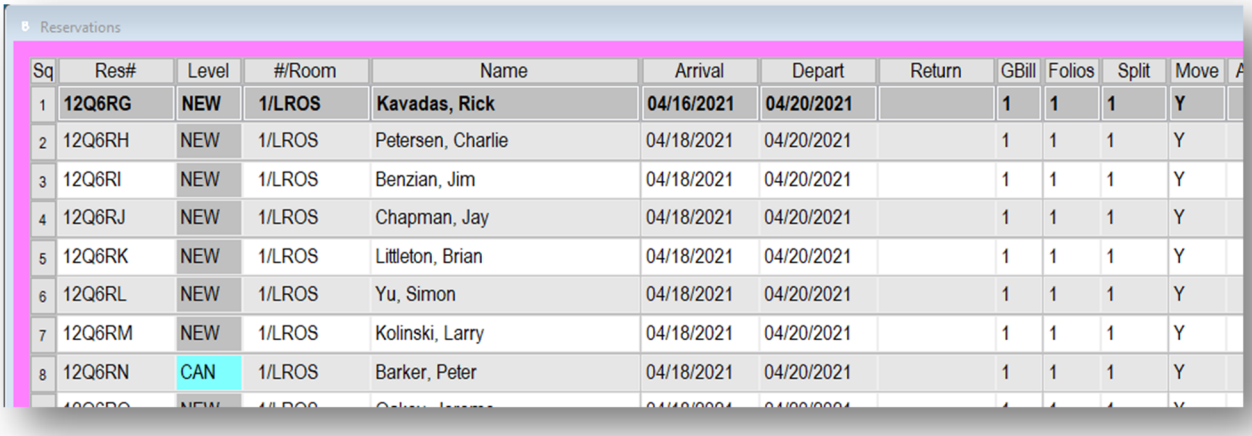
As you can see, instead of the Guest Tile being dedicated to one person, this Guest Tile is utilized for the entire Group.



Click the **Reservations** button in the left side Button Bar to open the list of all Reservations associated with this Group Guest Tile.



You can see in this example that every room associated with this **Group Guest Tile** has been assigned to a specific person's name within the Captains Club group.



Sq	Res#	Level	#/Room	Name	Arrival	Depart	Return	GBill	Folios	Split	Move
1	**12Q6RG**	**NEW**	**1/LROS**	**Kavadas, Rick**	**04/16/2021**	**04/20/2021**		**1**	**1**	**1**	**Y**
2	12Q6RH	NEW	1/LROS	Petersen, Charlie	04/18/2021	04/20/2021		1	1	1	Y
3	12Q6RI	NEW	1/LROS	Benzian, Jim	04/18/2021	04/20/2021		1	1	1	Y
4	12Q6RJ	NEW	1/LROS	Chapman, Jay	04/18/2021	04/20/2021		1	1	1	Y
5	12Q6RK	NEW	1/LROS	Littleton, Brian	04/18/2021	04/20/2021		1	1	1	Y
6	12Q6RL	NEW	1/LROS	Yu, Simon	04/18/2021	04/20/2021		1	1	1	Y
7	12Q6RM	NEW	1/LROS	Kolinski, Larry	04/18/2021	04/20/2021		1	1	1	Y
8	12Q6RN	CAN	1/LROS	Barker, Peter	04/18/2021	04/20/2021		1	1	1	Y

If the rooms associated with this Group Guest Tile are not labeled with individual guest names, it is likely that the **Group Coordinator** has not yet sent their **Rooming List** to Group Sales.

Rooming Lists may not be sent Group Sales until we are within approximately one to two months of the arrival date.

Book Recreation for a Group Attendee

Many of our group attendees will book additional recreation – such as dining, golf, and spa – outside of the recreation planned and paid for by their group.

- Additional recreation will be booked at Rack Rate.
- You will not find a Booked Lead Form saved in NAVIS for a Group Sales Booking
- You will not save lead when booking recreation for a Group Guest.

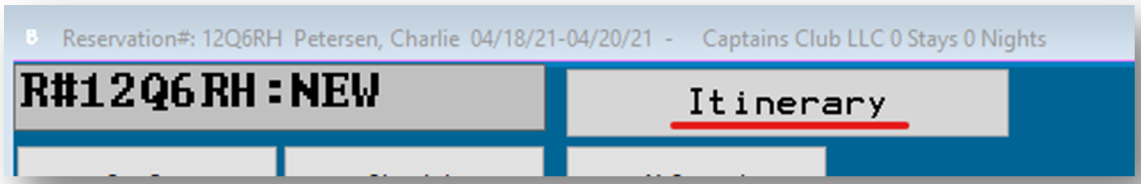
1. Locate the guest's **Reservation Tile**

   If you do not locate the Group Sales Reservation Tile for your guest:

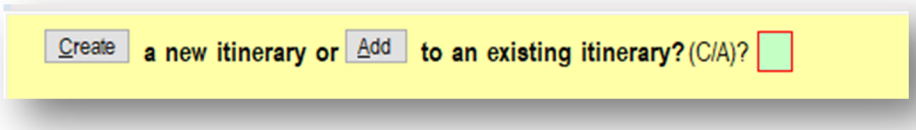
Dining	It is okay to book dining as a Day Guest.
Golf	Do not book the guest's tee times as Day Guest Golf. • All recreation should be associated with the Group Sales Reservation Tile to ensure that the Group Sales Agent receives commission credit. • Group Attendees should only be booked as Resort Guests because they are entitled to complimentary golf carts. inform the caller we cannot book their recreation until their Group Coordinator provides us with the Rooming List.

2. Group Sales Bookings will not be associated with Itinerary Numbers, so you must create an Itinerary in order to associate additional recreation to the booking.

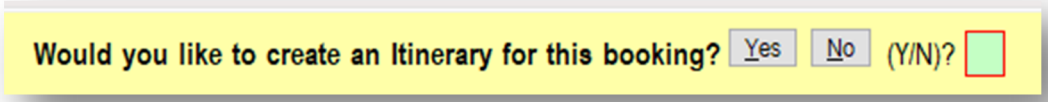
   Do this by clicking the **Itinerary** button at the top of the Reservation Tile.



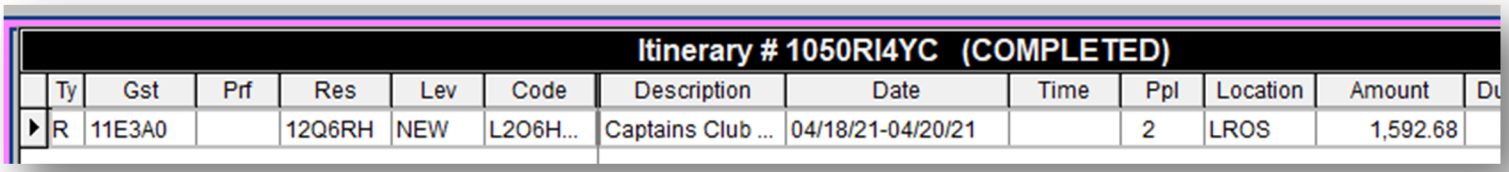
3. Type **C** for **Create**



4. Type **Y** for **Yes**

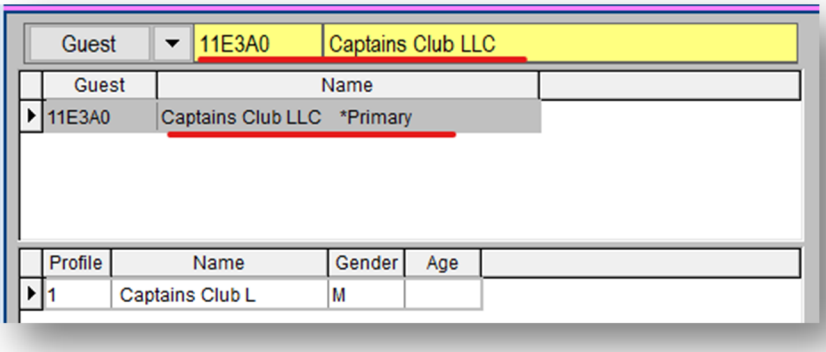


The Itinerary will open in a new window with the guest's Room Reservation in the Itinerary Detail box:

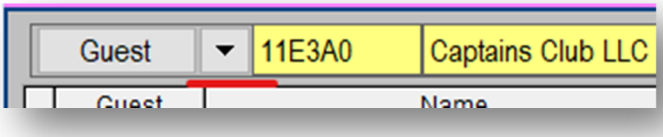


5. Use the **Booking Center Search Tabs** to add the guest's recreation to the Itinerary.
   (Keep in mind that all Resort Guest booking guidelines apply.)

You can see in the **Guest** section of the Booking Center that the associate **Guest Tile** belongs to the group, not the guest themselves.



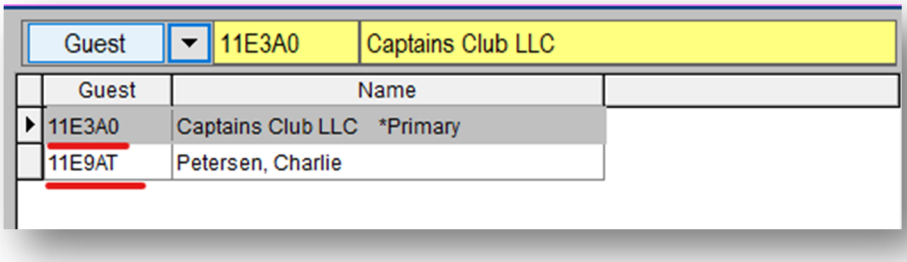
6. Click the down arrow next to the **Guest** field to add/create a **Guest Tile** for the attending guest.



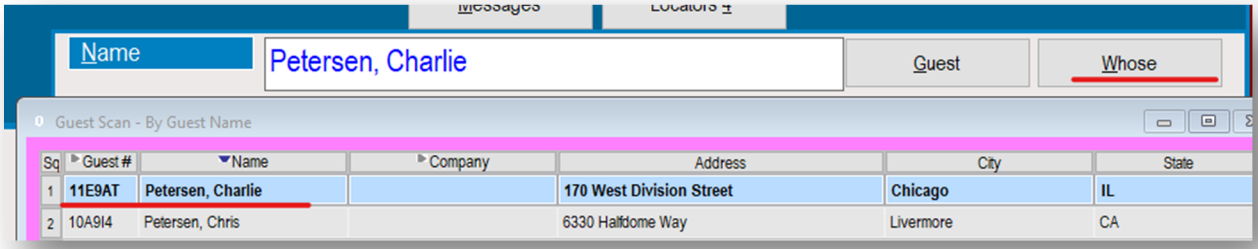
7. Collect a **credit card** from the guest.
   (Even though the guest's recreation is being booked as "Resort Guest," we cannot guarantee the guest's tee time based on the room because the room is being paid for by the Group.)

8. Escape to return to the **Booking Center**.

   You will now see both the Group's Guest Tile and the guest's personal Guest Tile in the Booking Center.



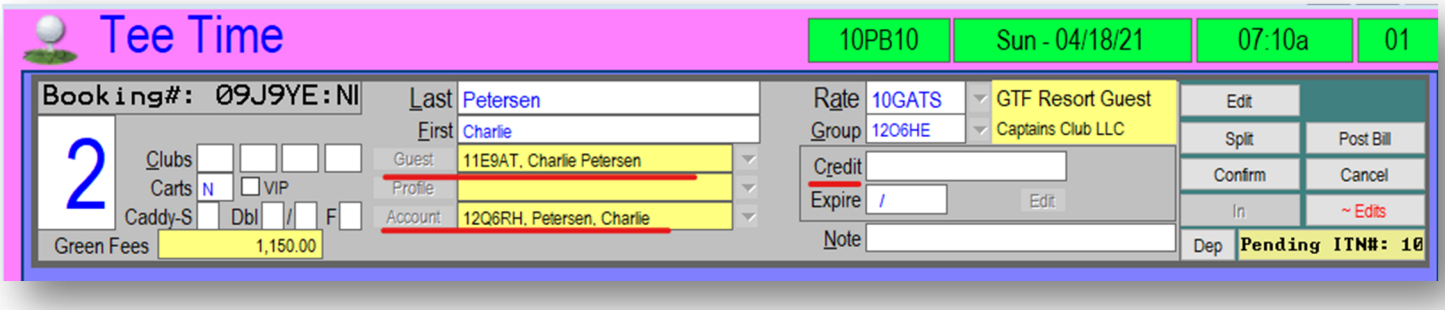
9. Enter the **Reservation Tile** and **Whose** the guest's personal **Guest Tile** to the room reservation. (This guest will still be linked to their group via the Mini-Group code)



10. Escape to return to the **Booking Center**

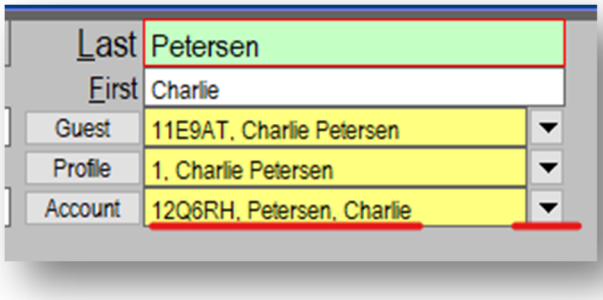
11. Open the guest's **Golf Tile**

    You will see that the **Guest** is now set to the attending guest's personal **Guest Tile**, but the credit card is not yet attached.



12. Click **Edit**, then click the down arrow next to the **Account** section to **Re-Whose** the guest's **Reservation Tile** to this golf booking.

    This will associate the credit card to the **Golf Tile**.



13. Quote our standard cancellation window to the guest and enter this information as a baby note on the **Golf Tile**.

14. **Complete** and **Confirm** the Itinerary

15. Send the guest a **VEMAIL** confirmation from the Guest Tile.
    (Do not send an IEMAIL from the Reservation Tile.)

16. Add an **R Note** to the Reservation Tile with details of what you booked.

17. Save your Call Disposition as **Group Attendee - Booking Rec.**

    You will not save a lead for this booking.

How to Book Golf for Group Attendee Directly on the Tee Sheet

- Verify via Universal Lookup that they have a room reservation and note the R#.
- Open the tee sheet to the course they want
- Scroll to find smart-booking space in white
- On chosen time slot, click and drag your mouse across how many players you want to book
- Select "F" for Find which opens Universal Lookup
- Locate the guest's name and double click to select
- Click "S" to use Selected guest
- Choose the "Resort Guest" rate option
- Page Down when golf bookings pop up
- Click on Universal Lookup and change the dropdown to "Guest Tiles" to search for possible pre-existing guest tile. If not found, create one.
- Click on "Account" to whose your guest tile to the golf reservation
- Hit escape to save
- You can hit confirm in the booking window, but we don't get credit for these anyway, so it doesn't matter. All this will change is turning the booking on the tee sheet from grey to green
- Send VEMAIL from Room Reservation
    - Never send IEMAIL from the room reservation because the confirmation will show information about the Group's contract, which typically includes contracted "run of house" rates and possibly the wrong room types than the guest will be assigned.

F7 General Availability for Groups

Groups:

Sometimes a room will have a Stop Sell note even if the Room Category has positive numbers. This can be because a group is holding those rooms but has not yet signed their contract to officially book them.

- Hit "Query" to pull up the "Group Activity" screen and see if a group plans to be in-house
- Managers can see the pending contracts in Delphi
- If this is the case, you can reach out to the Group Coordinator to ask if it is likely the Group will sign the contract for that entire allotment of rooms, or if they will potentially release some of them to be booked by transient guests.
- Only contact Group Coordinators if the guests press hard or are returning guests.
- If it is likely that rooms will be released, put the guest on a waitlist for those rooms.
- Do not waitlist people under false hope.
- Ran can override Group Stop Sells

Itinerary Holds

As a Reservations Agent, you should strive to complete each room booking within the first phone call. There are some circumstances, however, in which a **very Hot Lead** is committed to booking, but a small issue is preventing them from confirming the reservation and paying the deposit on your first call. In these circumstances, a **Temporary Hold** may be a good option for the guest.

However, we should agree to a hold right away for a guest. If we end the call with a guest without obtaining the deposit, the likelihood that they will book with us decreases drastically. Instead, we should ask probing questions to discover why the guest is hesitant and try our best to address those issues.

How to Ward Off A Hold Request

1. Reinforce the flexibility of the 14 Day Cancellation Policy:

   Certainly. I'm happy to hold this reservation for you. We just need to collect a two-night deposit which will allow us to hold all items.

   You are free to make any changes or cancel up until 14 days prior to your arrival date.

2. Create a sense of urgency:

   I am not able to hold this for you without the deposit. If you would like to give us a call back, I will need to release the rooms and tee times.

   Considering the popularity of this (room / time of year / etc.), I cannot guarantee this will still be available when you call back.

Itinerary Hold Authority

Reservations Agents are authorized to offer holds to guests as long as guest agrees to confirm the reservation that same day. Any holds beyond the Same Day need to be approved by a Supervisor.

This rule is outlined on the **Exception Calendar**:

Itinerary Holds	
Same Day	5pm Weekdays/4pm Weekends
	You are responsible to cancel
	All RBT traces and Deposit lines must be accurate All other holds must be approved

For a Same Day Hold on a **Weekday**, the deadline you must provide to the guest is **5PM**

For a Same Day Hold on a **Weekend**, the deadline you must provide to the guest is **4pm**.

These timeframes allow us a buffer of time after the deadline to wrap up the reservation before the close of business day.

Place an Itinerary on Hold

In the following example, our guest has agreed to book their room and golf reservation, but she has left her credit card at home.

Tee times are very minimal on her selected dates and she is afraid to lose them if she has to call back later. To ease her mind, we have agreed to place a Same Day Hold on the reservation to allow her to give us a call back once she is home from work without her risking her selected tee times.

1. On the call:

- Add all rooms and tee times to the Itinerary in the Booking Center
- Add or Create a Guest Tile and associate it with the Booking
    - The Guest must provide all contact information required to save the guest tile.
- (Ideally) Set up a callback appointment for today to confirm the reservation.

2. Set Up Your NAVIS Lead:

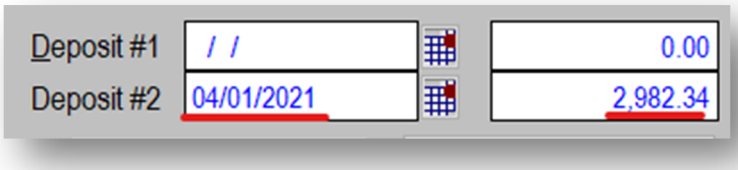
- Leave detailed notes that explain the reason that the reservation is on hold and instruction for when the guest calls back
- Input the Itinerary Number into your Lead Form
- Set an Email Reminder for today at least 15 minutes prior to the time you agreed to call the guest back
- Set your Lead Status to "In-Process" because you have not yet collected any money.
- You Call Result should be Hot Lead

3. Clean Up the Reservation:

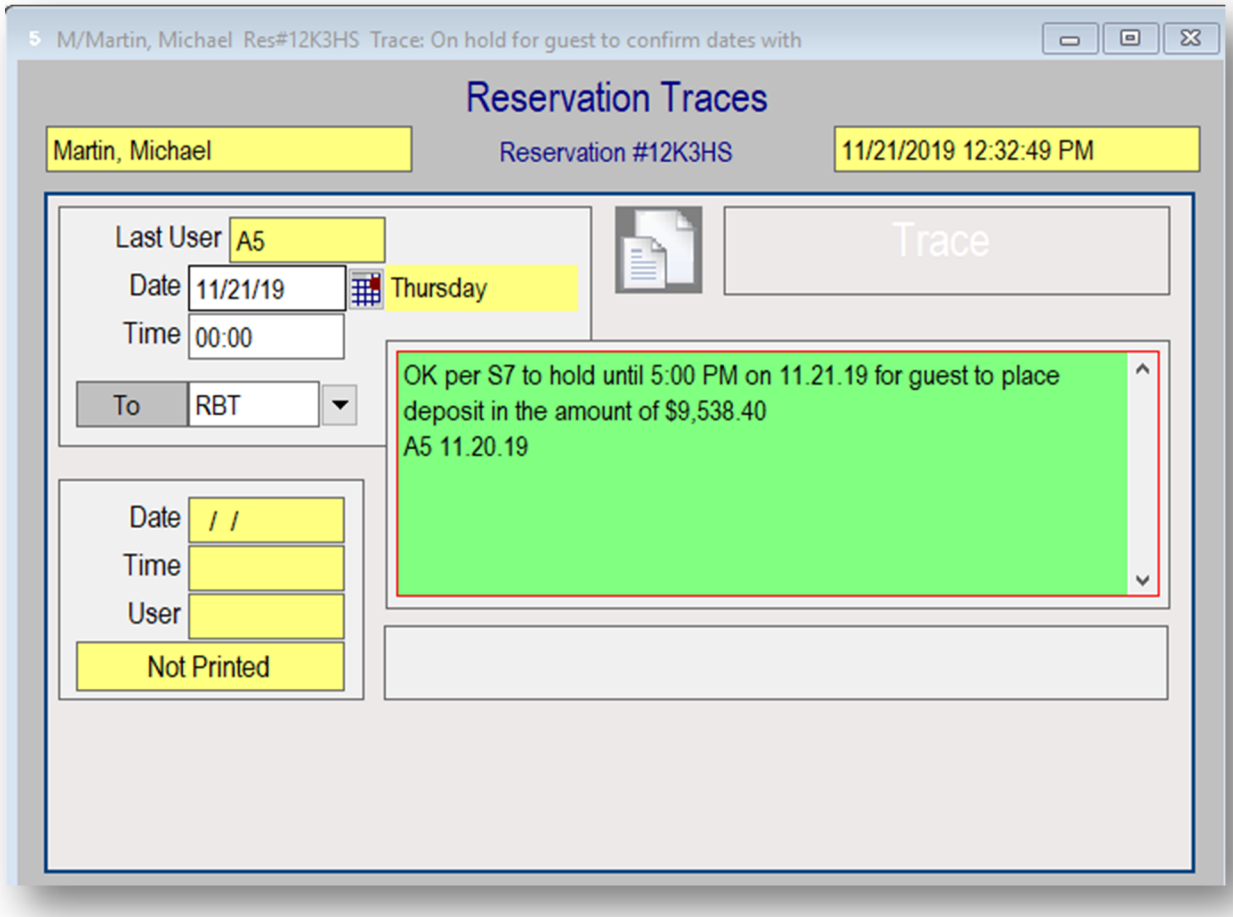
- Set the Guarantee Code to F for Exception Hold



- Access Special Billing to edit the deposit:
    - Move the two-night deposit from the Deposit #1 line to Deposit #2
    - Set the Deposit #2 Due Date for the day the Hold Expires
      (For example, if you are setting a 48-hour hold (approved by a supervisor), your Deposit Due Date would be two days from today.)



- Access Traces to set an RBT (Reservations Billing Trace:
  - Set the date to the final date that the deposit will be due
  - If you received approval because this is longer than a Same Day Trace, document who approved your extended hold
  - Document the time deadline that you quoted to the guest
  - Document the deposit amount that will need to be collected when the guest calls back to confirm the reservation.



4. Follow Up with Your Guest

- You alone are responsible for following up with your guest to either confirm the reservation or release the room and golf once the deadline is reached. Only mark the Lead as Booked once the full deposit is on file.

- If you contact the guest and they state that they need more time, consult a supervisor to see if an extension on the hold can be approved.

- If the guest ultimately declines to book:
  - Cancel the reservation using the Reason Code Deposit Not Received.
  - Change the In-Process Lead Status in NAVIS to Not Booked.
  - Document the reason the guest decided against booking in both an R Note and a NAVIS note

Multiple Deposit Itinerary Holds

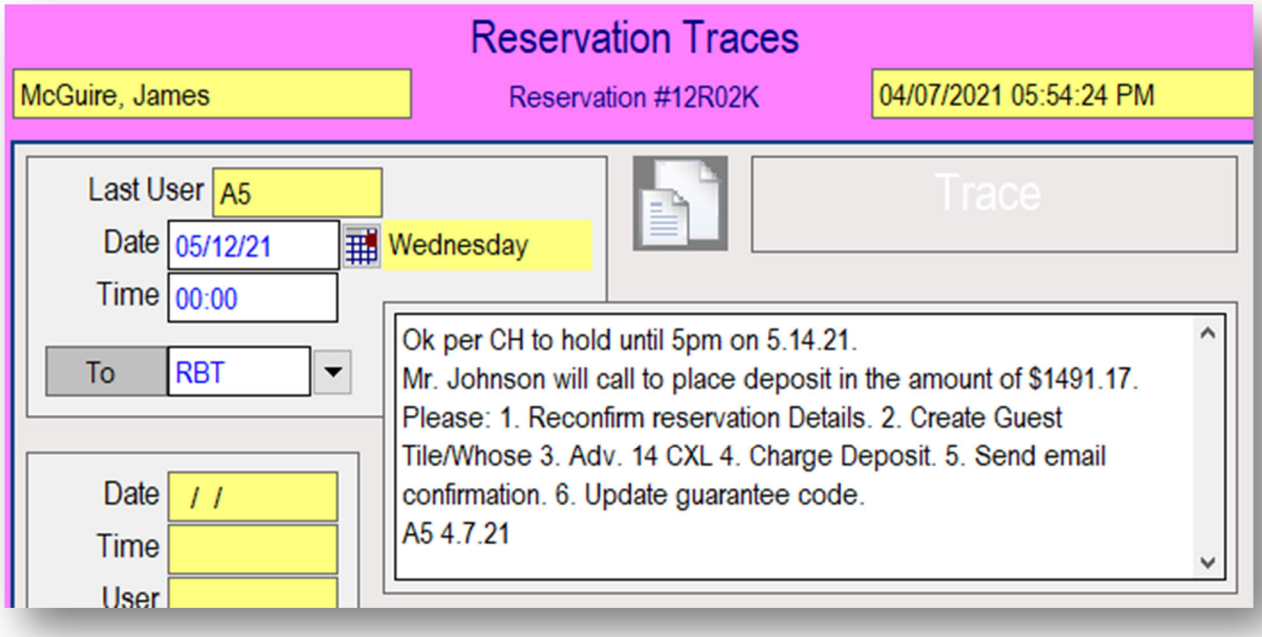
1. Collect the deposit from the original caller

2. Ask the initial caller if the guests who will be calling have been here before.
    - If definitive yes, we can search for their names and see if we can pre-whose them to the reservations
    - If definitive no, we can create a C/O guest tile and pre-whose those to the appropriate reservations
    - If unsure, leave a note in the RBT trace asking reservation agents to search for GTs when the guests call in to pay deposits
    - Gathering this information up front reduces the chances of us accidentally charging the original guest's CC more than once in the event a Reservation Agent neglects to whose the other guest's GTs.

2. Mark the Reservation Tile of the original caller who has already paid as "Confirmed"
    (As other guests call in, the reservations agents will mark those tiles as confirmed individually.)

3. Split Out All Rooms and Shares

3. On the Reservation Tile of each caller who has NOT paid yet:
    - Enter the required deposit amount on the Deposit 2 line within Special Billing of each reservation/share
    - Change the guarantee code on the Reservation Tile to L: Exception Hold
    - Write in Audit Line: See RBT Trace 4 Dep Info
    - Set RBT trace for the date and time of the end of their hold



Waitlists

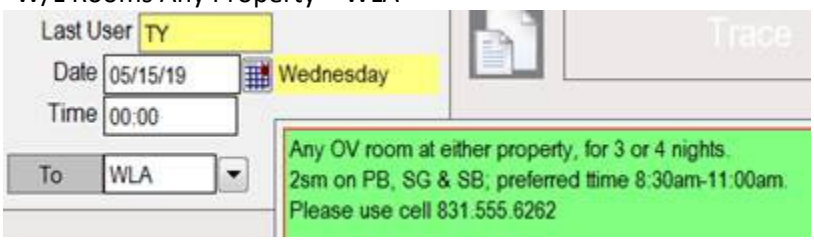
SMS Waitlist vs. NAVIS Waitlist.

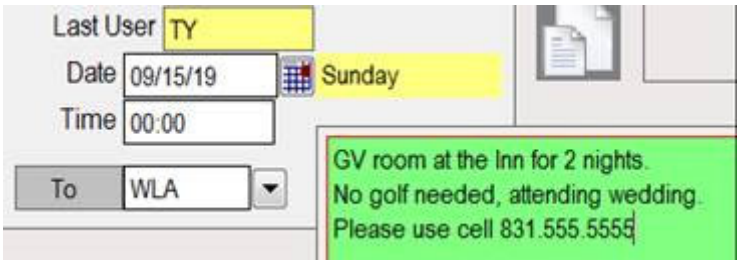
Not Booked Guest – Wants to be Waitlisted for Rooms or Room/Golf

- This guest must have a Not-Booked Lead in NAVIS with the appropriate fields entered:
  - Add the Guest Name
  - Enter the guest's email address or select DNA or RTG
  - Add their desired Dates of Stay
  - Select Reason for Stay – See List
  - Enter the appropriate Country
  - Choose Lead Status – "Not Booked"
  - Choose the Not-Booked Reason – See List
  - Enter the Requested Itinerary items
  - Add a Detailed note, what happened on the call – focus on their reason for visit and what exactly you offered, why they did not book. Indicate that they wanted to be waitlisted

- Create or find their Guest Tile and activate a Trace. Input the date of arrival for a room waitlist in the "Date" field; enter 00:00 under time. Find the appropriate Waitlist selection:

- WLA W/L Rooms Any Property
  - In the Text Field: Always include what the guest is looking for; be as specific as possible. If golf is also needed indicate which courses, how many players and what time frame would be desired. If no golf is needed, enter that in the note. Indicate the best contact number

  - Examples:
- "W/L Rooms Any Property – WLA"
- 

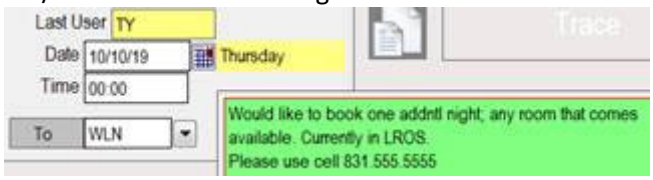
- 

Booked Guest – Wants to be Waitlisted for Nights, Another Property or Additional Golf

- Create or find their Reservation Tile and activate a Trace. Input the date waitlisted in the "Date" field; enter 00:00 under time. Find the appropriate Waitlist selection:
WLC	W/L Chg/Move Casa Palmero
WLI	W/L Chg/Move Inn
WLL	W/L Chg/Move Lodge
WLN	W/L Rooms Additional Nights

- In the Text Field: Be as specific as possible with what the guest needs and include what they are currently holding. If golf is also needed indicate which courses, how many players and what time frame would be desired. Indicate the best contact number.

  Examples:
  - "W/L Chg/Move Inn – WLI"
  - 

  - "W/L Rooms Additional Nights – WLN"
  - 

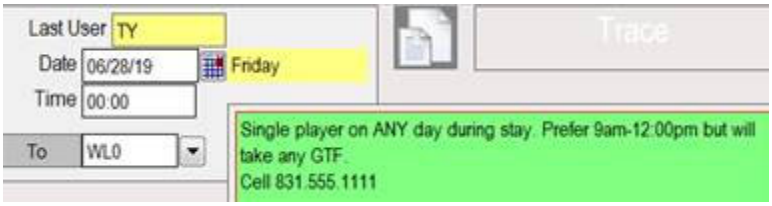
Booked Guest – Wants to be Waitlisted for Golf

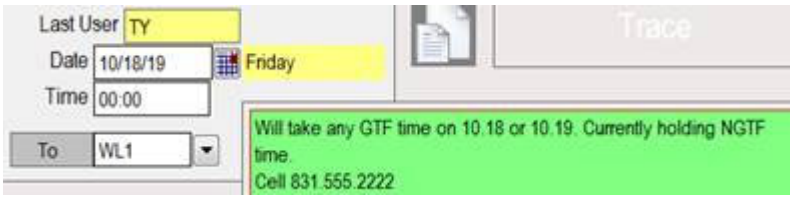
- Create or find their Reservation Tile and activate a Trace. Input the date waitlisted in the "Date" field; enter 00:00 under time. Find the appropriate Waitlist selection:

WL0	W/L Golf PBGL - NO PB GOLF
WL1	W/L Golf PBGL - HOLDING PB GOL
WL2	W/L Golf Spanish Bay
WL3	W/L Golf Spyglass Hill
WL5	W/L Golf Del Monte

- In the Text Field: If this guest is looking for additional golf only pick the code that best fits the guest's needs.
    - For example there are two selections for Pebble Beach golf; a guest holding a time already or holding no times at all. If you need to waitlist more than one course, select the most popular course in the "To" field and in the text field indicate what the guest is holding and all the courses and date ranges desired.

    - You must also indicate the specifics of tee off time desired. Ex. "only times between 9-11am" or "if ANY time opens up."

    - Examples:
- "W/L Golf PBGL – NO PB GOLF – WL0"
- 

- "W/L Golf PBGL – HOLDING PB GOLF – WL1"
- 

Special Events

- For a Special Event waitlist, choose the selection for the appropriate event. Be sure to indicate in the text field the desired nights of stay (there may be a minimum requirement) and property preferences. This will most likely require the trace be made in the guest tile as usually transient guests are not holding reservations during our special events.
- Be sure your Not-Booked Lead in NAVIS is also complete with all the required fields.

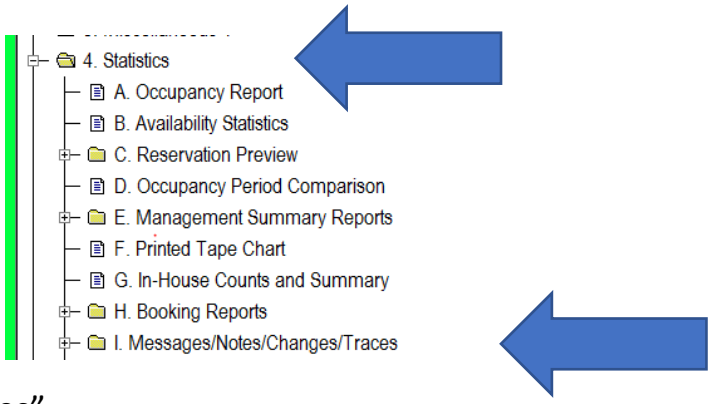
WLW	Waitlist New Year's Eve
WLX	Waitlist AT&T
WLY	Waitlist Concours
WLZ	Waitlist US Open
WLF	Waitlist Food & Wine

Editing and Closing Waitlists

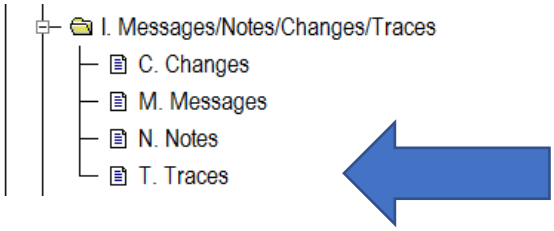
- It is always advisable to reconfirm the information in a waitlist trace with the guest if/when they call back in to check on it. If anything changes you must update the text in the trace, leaving your initials and the date. We must be able to clearly define by date and agent when and who worked with the guest to change any waitlist parameters.
- When a waitlist has been cleared or the guest has asked to be removed, Close the trace. Canceled reservations should have their traces closed if no longer relevant.

How to Run a Waitlist Report

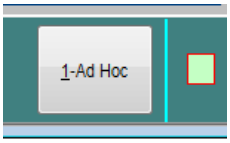
1. Go to the SMS Main Menu and select "Reports"
2. Click on the plus sign next to "4. Statistics", then click on "I. Messages/Notes/Changes/Traces"



3. Double click on "T. Traces"



4. Select the first Report on the list to bring up the report criteria box. At the very bottom right hand corner of the box, click on "1-Ad Hoc."



5. Select the date range applicable. Choose open traces only and those connected to both guest and reservation tiles. Enter though the next two fields, choose your waitlist code, and enter through the next three fields. This will have to be done for each of the waitlist codes.
   Example: WLA – Waitlist Any Property – looking at the next 18 months:

Parameter	Value(s)
Period Begin	02/15/19
Period End	08/31/20
INCLUDE (A)ll Traces, (O)pen ONLY, or (C)losed ONLY	O
Traces connected to (R)eservations only, (G)uest tiles only, or (B)oth	B
Traces connected to reservations in History? (Y)es (N)o	N
Enter property code for report, blank for ALL	
Enter REFER TO code, blank for all	WLA
Print a blank line between Traces? (Y)es (N)o	Y
Filter for a specific IP Address (Y)es (N)o ?	N
Include the IP Address on report (Y)es (N)o ?	

Payment Methods

Credit Cards

Transaction Codes

To charge a credit card, you must first enter a **Transaction Code** into the SMS **Bills** window.
The **Transaction Code** is made up of three parts:

The Department Code	**970** = Reservations Department
The Payment Code	**PP** = Pre-payment
The Credit Card Type Code	**M**astercard **A**merican express **V**isa Di**S**cover **Y** ...Gift Card

Tokenization

Tokenization is the process of turning a meaningful piece of data, into a random string of characters called a token that has no meaningful value if breached. This is how SMS disguises credit card information to protect our guest's private data.

SMS can only save the tokenization of a credit card for a limited time – usually 90 days. Once that time limit is up, the credit card on file can no longer be charged.

Due to this time limit, we need to re-collect credit cards from guests each time they book with us. Doing so re-tokenizes the card, allowing us to continue charging it.

Is the Credit Card Continuously Declining?

- Make sure the name on your Guest Tile exactly matches with the name on your Reservation Tile
- Run the card for a smaller amount such as $1000 or less; repeat until total payment is taken
- When you reach the final window in the Bills screen, delete the zip code before submitting the charge (particularly for international addresses)

Check

- Must put on "Exception Hold Check"
- Provide RDC address:

  PBC Reservations
  Attention: Crystal Libby
  2136 Sunset Drive
  2nd Floor
  Pacific Grove, CA 93950
- We can send them a "cost breakdown" if requested, but do not call this an invoice because that implies services already occurred.
- Have them overnight the check (we can negotiate to certified 1st class)
- Make sure they write the R# on the check (Accounting does not use ITNs)
- Once check arrives, make a copy of the check for yourself, then forward the original to accounting
  - Make sure the R# is on the check
- Set a reminder to check on the reservation in a week.
- Once the payment has been posted to the reservation by accounting, you can throw away your check copy.

ACH / Wire Transfer

- Must put on Exception Hold
- Access the account information sheet stored in the L Drive under "wire transfer" L:\RESORT RESERVATIONS\Forms\OFFICE FORMS
- Email this form to them
- Ask them to email you a receipt when they send the funds
- Send the receipt to Accounting and ask them to move the money into the appropriate reservation number when the funds arrive.

Account Information
Pebble Beach Company 2700 17-Mile Drive
Pebble Beach, CA 93953

Attention: Jeff Moir Pebble Beach Treasurer's
Account #4420-013112

Wire Payment: ABA #121-000-248
Swift Code: WFBIUS6S
ACH Payment: ABA #122-000-247

Bank Information:
Wells Fargo Bank Carmel-by-the-Sea Branch
San Carlos & Ocean
Carmel-by-the-Sea, CA 93921
Attention: William Meidl
P: (831) 624-5302

MasterCard Promotion



Pebble Beach Resorts along with our Brand Partner, **MasterCard**, is offering a special promotion to all **Mastercard Holders**.

Valid Dates: October 27th, 2020 – December 31st, 2021

Special Offer: When a MasterCard hold books a Four (4) night stay at Rack Rate at any of our three Resort Properties, they can receive a complimentary round for one or two players at The Links at Spanish Bay per room, per stay.

Eligibility Requirements:

- Guest must be a current MasterCard holder
- Guest must use their MasterCard for all charges on their Itinerary throughout their stay, including all incidentals charged to their room.
- The guest must mention the promotion code on the call; we do not offer this promotion openly
- The guest must book a room type that is at least one grade above the Garden View Room(s)

How to Book:

- Create the reservation with the room type that the guest wants
- Manually adjust the deposit to equal the required deposit of the room type that is one level below their selected room.
    - If the room will be split into shares, we can add it to each share as long as both shares will be using a MasterCard.
- Enter the Promo Code MCGOLF21 into the Corporation Field
- Click the down arrow next to the Secretary Field and select 7: Promotion Offer Upgrade
- Set the following FDB Trace: *Guest is under a MasterCard promotion; all charges must be posted to a MC."*
- Select the MasterCard Rate Code for the complimentary tee time: GTF 4th Nt MC Comp – 20GZMC
- Once you have completed the reservation, contact a supervisor so they can approve the upgrade and adjust the rate.
- Send IEMAIL after the supervisor has made this adjustment.

Supervisor Process:

- Edit the room code to be the code of the room one category down from what was booked, then page down
- Say no to updating the package
- Mark as Downsell
- Change the room type back to what they are upgrading to
- Select "G" to flag as an upgrade"
- Select the matching upgrade code "Promotion Offer Upgrade"
- Open S.B. and zero out the red "1" by "corporate," then escape
- Hit Value Zoom to make sure the rate we charged matches the lower level's deposit or base package price if a package

Gift Cards



Pebble Beach Resorts sells **Gift Cards** both online at www.shop.pebblebeach.com/gift-cards and in person at any of our shops and the Spa at Pebble Beach.

These cards are **universally valid for use across Pebble Beach Resorts** from shops to restaurants to greens fees and even room reservations.

Gift cards cannot be purchased for specific activities, such as a tee time at Pebble Beach Resorts. They can only be purchased for set dollar amounts.

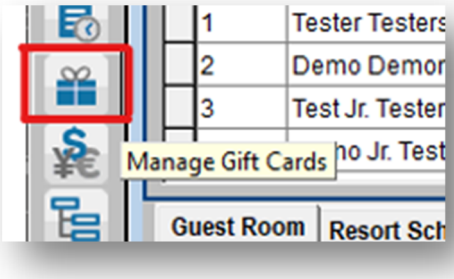
A gift card does not guarantee guests a tee time, room, or any other activity. All guests must book under our Outside Guest or Resort Guest Guidelines and are subject to availability.

For Technical Online Gift Card issues:

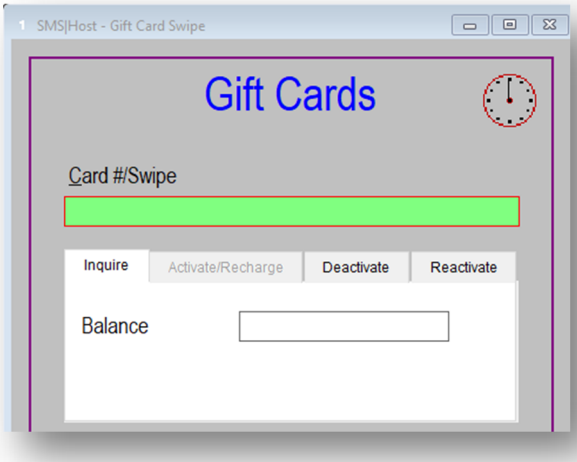
- Do your best to assist the guest by walking them through the website.
- If guests are local, you can let them know that gift cards can also be purchased in person at our Shopping Gallery.
- Guests can be referred to:
  - The Pebble Beach Online Support Desk at 1-800-873-0341
  - Pebble Beach Retail Customer Service Line at 831-649-7637
  - Emails can be sent customerservice@pebblebeach.com or to Barbara Phillips at phillipsb@pebblebeach.com

How to Check A Gift Card Balance

1. Click the **Manage Gift Cards** button in your SMS Toolbar



2. This will open a payment screen.



3. Place your curser in the **Card # / Swipe** field

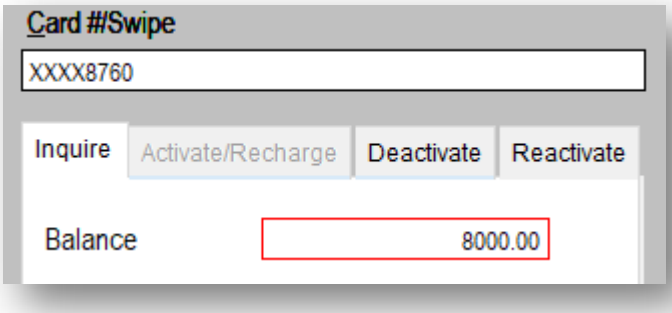
4. Use your Credit Card Reader to enter the 16 Digit card number, then click enter

5. Type any future expiration date, then click enter

6. Hit enter to bypass the security code prompt

   [Allow a moment for the computer to process.]

7. A balance will appear in your payment window:



How to Charge A Gift Card

Gift Cards can be charged to City Ledgers, Reservation Tiles, and Recreation just like a credit card. When charging the gift card, you need to use the **Transaction Code: 970PPY**

Gift Card to Hold Tee Times

If a guest wants to use a gift card for a tee time, they still need to put down a credit card to hold the golf reservation.

Gift Card Day Guest Recreation Pre-Payment

If a guest wants to pre-pay recreation such as golf with a gift card OR a third party wants to use their gift card for a guest, the Gift Card should be charged to a City Ledger on the attending guest's Guest Tile.

A baby note must be left on the recreation tile with instruction to charge the City Ledger.
Example: *PPD. Charge 1 GF to C/L#xxxxxx*

Gift Card to Pay Room Reservation Deposit

If a guest wants to use a gift card to pay their room deposit, the card should be charged directly to the Reservation Tile just like a credit card, but with the **970PPY Transaction Code**

If the guest plans to use the entire gift card for the stay, the best practice is to charge the entire value of the card to the Reservation Tile, then leave an **FDB Trace** that states that the additional funds are available for use during the stay.

Example:
Guest PPD BRG7 @$870+++ x 2 nts = $1986.10
Guest has refundable $1013.90 available for use during stay.

How to Refund A Charge to A Gift Card

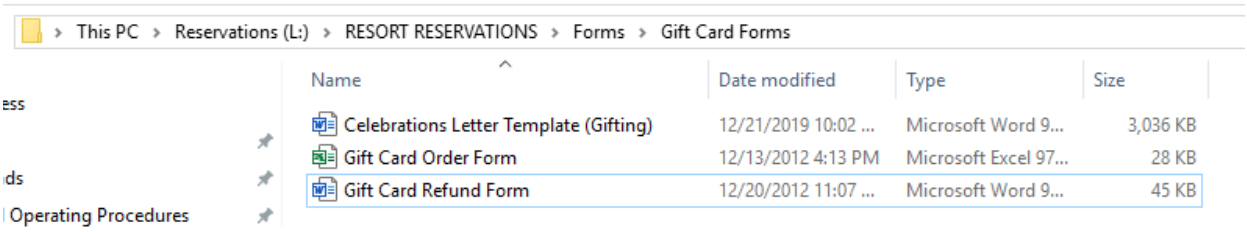
If the guest still has their gift card, it can be refunded by Accounting via an ADM Trace. If the guest no longer has the gift card, funds will need to be refunded onto a City Ledger.

Gift Card Return Policy

There is no official refund policy for gift cards, but guests are welcome to fill out a **Refund Form** that may be approved by Accounting on a case by case basis.

- Only the original purchaser can request a refund for the gift card; not the person to whom the gift card was given.
- If the refund is approved, the charge will always be refunded to the original purchaser's credit card.

The **Gift Card Refund Form** is accessible in the **L Drive** and can be emailed to guests:



If a guest wishes to follow up on a refund request, then can contact customerservice@pebblebeach.com.

Charity Gift Certificates



Gift Certificates to Pebble Beach Resorts are currently only issued for Charity Fundraisers.

Unlike Gift Cards, Gift Certificates are issued for specific purchases such as a two-night stay and golf for two at Spyglass Hill Golf Course.

Charity Organizations will pre-pay for these specific purchases on a **City Ledger** that is attached to a **Guest Tile** containing the contact information of the charity organization and the details of the gift certificate.

Charity Organizations are given special discounted rates – which should never be disclosed to the bearer of the Gift Certificate.

Gift Certificates do not expire, but if the owner redeems the gift certificate more than one year from their purchase date, their trip is subject to rate increases. See the **Charity Gift Certificate Upgrades & Surcharges** section for details.

All charity funds must be used within one stay.

PEBBLE BEACH RESORTS
GIFT CERTIFICATE
HOME FOUNDATION

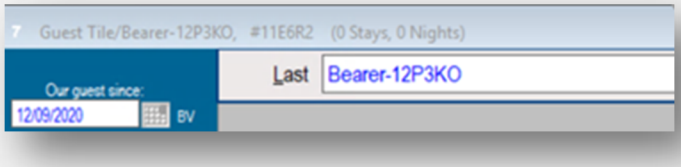
THIS CERTIFICATE CONFIRMS RECEIPT OF PAYMENT IN FULL FOR:
TWO NIGHTS LODGING IN ONE GARDEN VIEW ROOM AT THE INN AT SPANISH BAY™;
GOLF FOR TWO PLAYERS, INCLUDING CART
ON PEBBLE BEACH GOLF LINKS® AND THE LINKS AT SPANISH BAY.

TO MAKE YOUR RESERVATIONS PLEASE CALL (855) 923-7907.
NOTE: THE VALUE OF THIS CERTIFICATE IS BASED ON RATES IN EFFECT AT TIME OF ISSUANCE. USE AFTER 8/30/2017 WILL BE SUBJECT TO PAYMENT OF ANY SUBSEQUENT RATE INCREASES. ANY CHANGE TO CONFIRMED DATES OF STAY ARE SUBJECT TO AVAILABILITY AND ANY APPLICABLE RATE INCREASES. PLEASE VISIT WWW.PEBBLEBEACH.COM FOR BOOKING GUIDELINES. THIS CERTIFICATE MUST BE PRESENTED AT TIME OF CHECK-IN, IS ONLY VALID AS SPECIFIED, AND HAS NO CASH VALUE. ALL CHARGES IN EXCESS OF THE VALUE OF THIS CERTIFICATE ARE THE RESPONSIBILITY OF THE RECIPIENT.

PRESENTED TO: BEARER
ITINERARY #C/L 11X3MY
GUEST TILE # 1112GF #21347

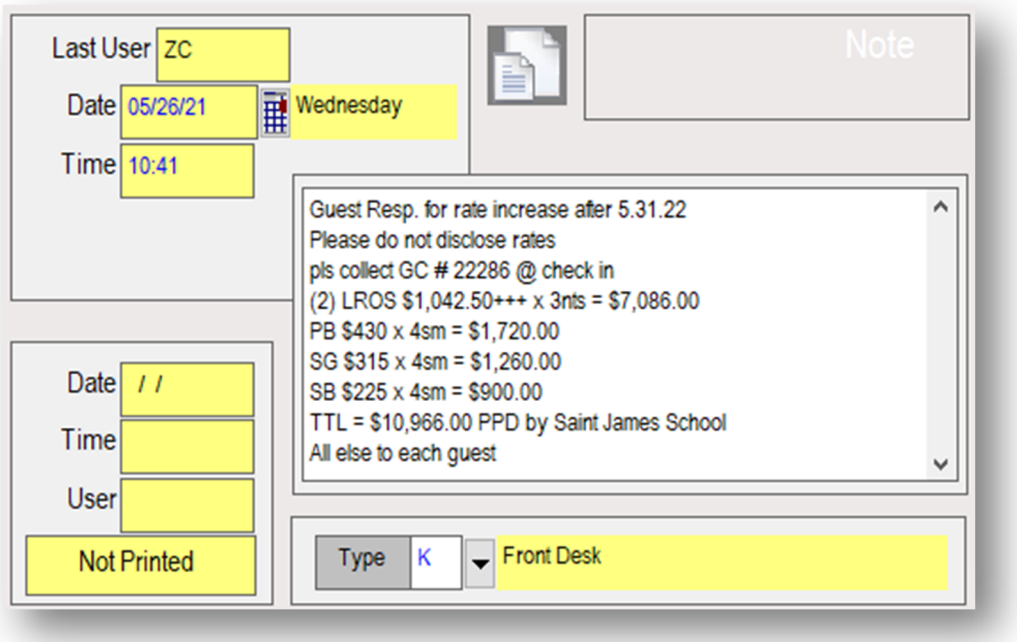
How to Book A Gift Certificate Redemption

Ask the guest to read you all numbers on the Gift Certificate, which should be the following:

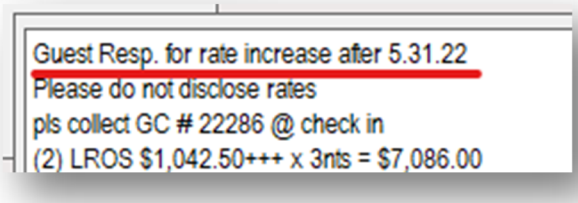
Guest Tile #	This is the number of the Guest Tile with the Charity Organization's information. The name field will state "Bearer": 
City Ledger #	This City Ledger should be attached to the Guest Tile. This is where the pre-paid funds are stored for the Gift Certificate.
Gift Card #	This number should be documented in the Remarks field of the Guest Tile as well as the Rate/Notes fields of the City Ledger.

Access the Guest Tile and open the **K Note.**

This is where you will see exactly what this Gift Card can be redeemed for:



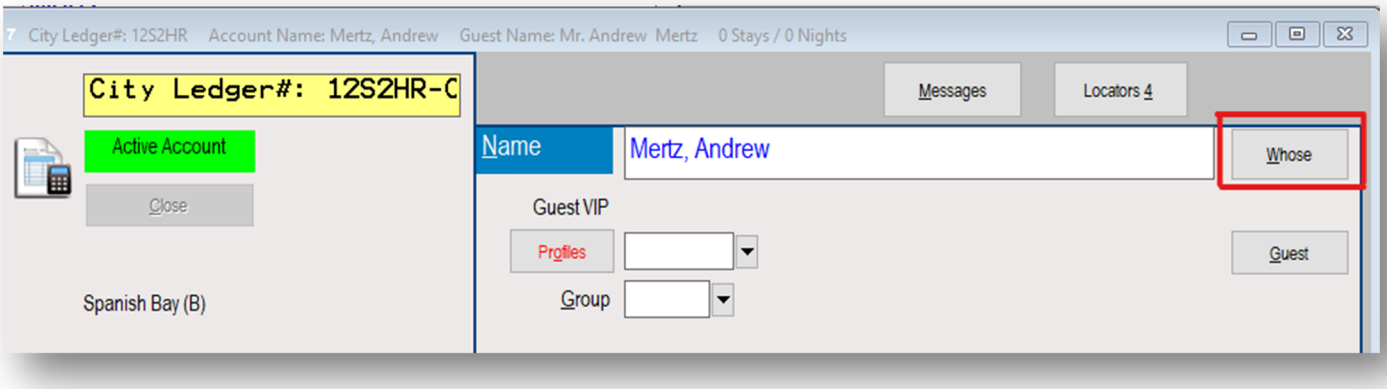
To avoid rate increases, the guest must book their trip within one year of their purchase date. You will see the one-year mark noted in this K Note. If the guest wants to book their trip after the one-year mark, you must consult the price sheet in the **Charity Gift Certificate Upgrades & Surcharges** section of this manual.



Create the reservation with rack rates using your Booking Center

Attach the Charity Organization's Guest Tile to your Itinerary and update the Charity Organization's Guest Tile to the attending guest's information.

> **Note**: If bearer of the certificate is a past guest who has an existing guest tile - Whose the charity city ledger to their existing guest tile. Ask a supervisor to kill the Bearer guest tile.



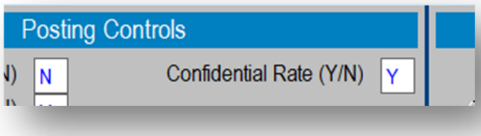
Collect a credit card to hold on the Guest Tile as a guarantee for our 14-day cancellation policy.

Charge any additional required funds to the Reservation Tile

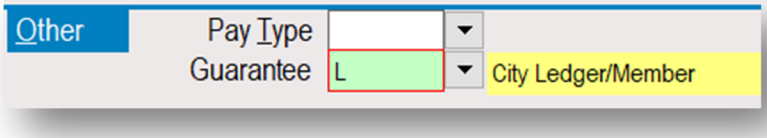
- All annual surcharge or room upgrade fees must be pre-paid at the time of booking.
- Any additional nights or recreation outside of the certificate can be due at checkout

Access Special Billing

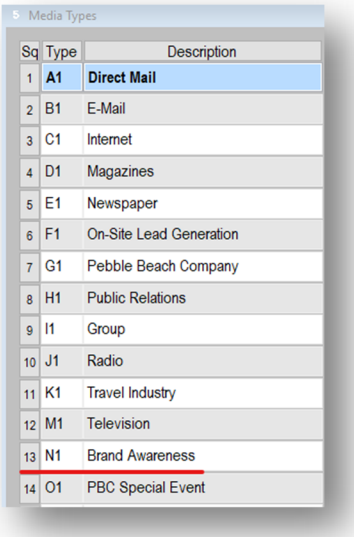
- Set the Deposit #1 line to $0.00
  **If the guest has paid additional surcharges/upgrade fees, the Deposit #1 should that amount.*
- Mark the rates as confidential



Set the Guarantee Code to L for City Ledger / Member

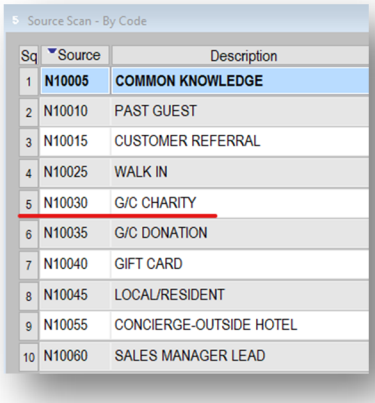


Set the Source Code to N1 Brand Awareness followed by N10035 G/C Charity



Media Types

Sq	Type	Description
1	A1	Direct Mail
2	B1	E-Mail
3	C1	Internet
4	D1	Magazines
5	E1	Newspaper
6	F1	On-Site Lead Generation
7	G1	Pebble Beach Company
8	H1	Public Relations
9	I1	Group
10	J1	Radio
11	K1	Travel Industry
12	M1	Television
13	N1	Brand Awareness
14	O1	PBC Special Event

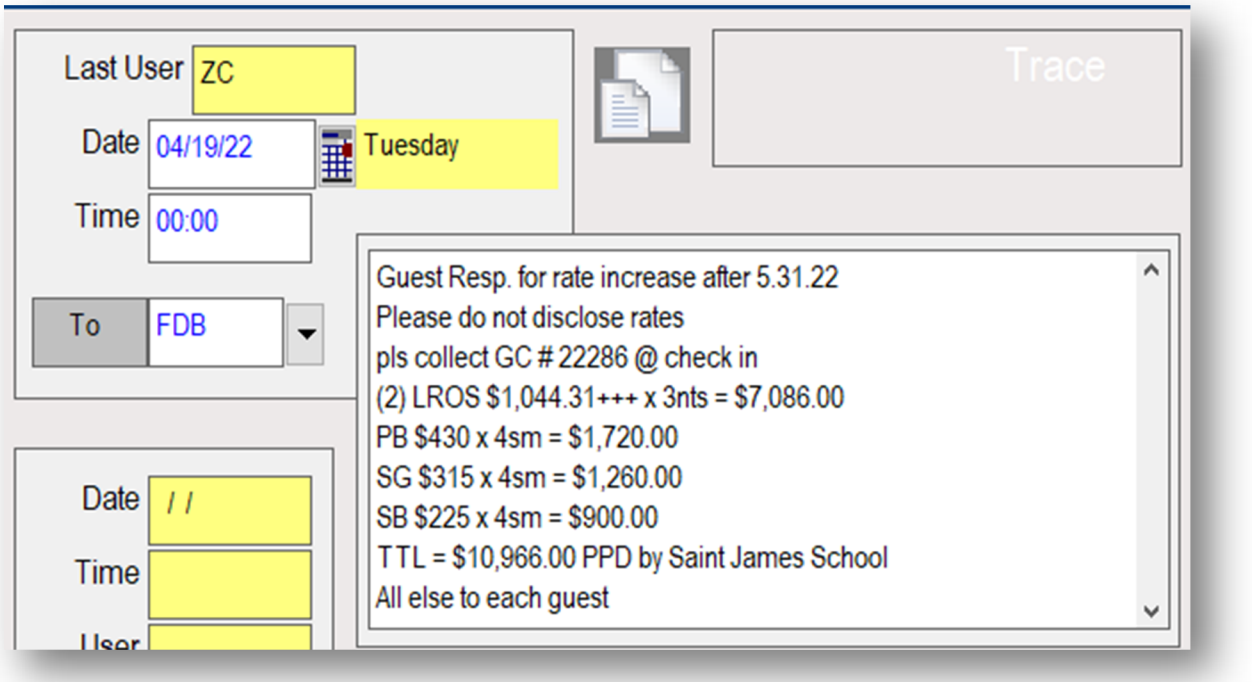


Source Scan - By Code

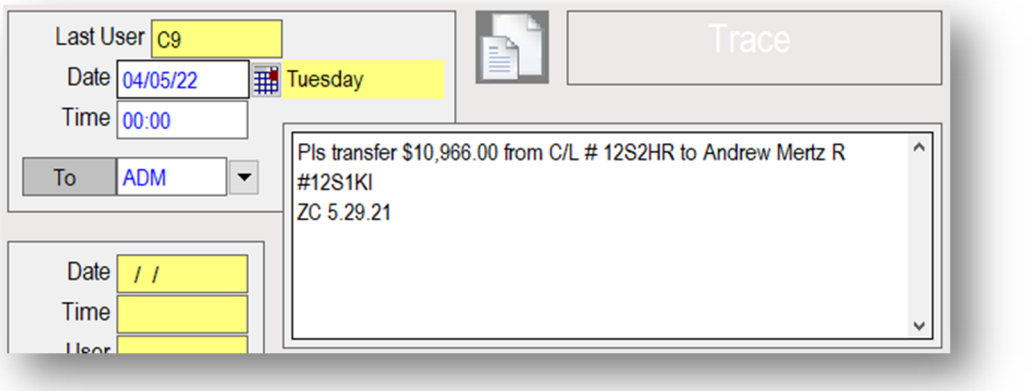
Sq	Source	Description
1	N10005	COMMON KNOWLEDGE
2	N10010	PAST GUEST
3	N10015	CUSTOMER REFERRAL
4	N10025	WALK IN
5	N10030	G/C CHARITY
6	N10035	G/C DONATION
7	N10040	GIFT CARD
8	N10045	LOCAL/RESIDENT
9	N10055	CONCIERGE-OUTSIDE HOTEL
10	N10060	SALES MANAGER LEAD

Create an **FDB Trace** set for one day prior to arrival that explains what has been pre-paid on the reservation.

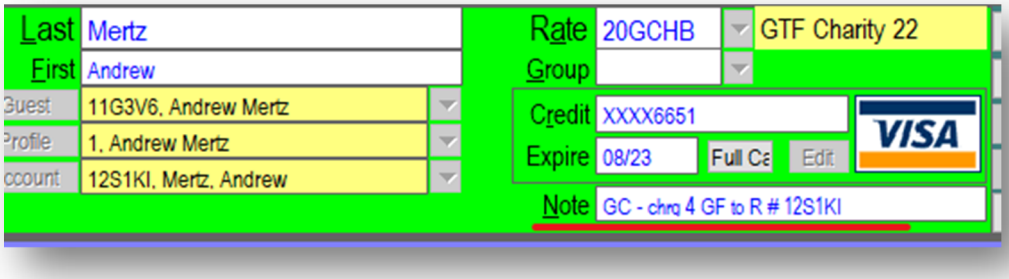
- If the guest has booked exactly what has been pre-paid by the charity, the FDB Trace will be identical to the Guest Tile's K Note.
- If the guest was charged upgrade or surcharge fees, these must be added to the trace.



Create an **ADM Trace** with instruction to move the charity funds from the City Ledger to the Reservation Tile. Set the date for 2 weeks prior to the guest's arrival.



If the guest's reservation includes pre-paid golf, a baby note should be left on each tee time with instruction to charge the greens fees to the Reservation Tile.



If any surcharges or upgrade fees were charged, explain these charges in a detailed R Note.

Email **_Charity Desk** so they can update the rates appropriately.

Charity Gift Certificate Upgrades and Surcharges

Annual Surcharge	If a guest is booking a trip using a Charity Gift Certificate more than one year beyond their purchase date, they are subject to a surcharge that is due at the time of booking. **Surcharge** = $50+++ per room / per night / per year beyond the expiration date
Room Upgrade	Guests can opt to upgrade their room type from the type indicated on the Gift Certificate for an additional fee that is due at the time of booking. **Upgrade Fee** = $100+++ per room / per night for each level upgraded from the original room type.
Golf Upgrade	If a guest's Gift Certificate states that they are entitled to a tee time at one golf course, but the guest wants to upgrade to an alternate course instead, they can do so at an additional fee that is due at the time of booking. **Golf Upgrade Fee** = The difference between the rate paid by the Charity and the Rack Rate of the course they wish to book in its stead. (See the K Note on the Guest Tile for the golf rate paid by the Charity)

Base Rate	w/Tax	2 Nights	3 Nights	4 Nights
$50.00	$55.35	$110.70	$166.04	$221.39
$100.00	$110.70	$221.39	$332.09	$442.78
$150.00	$166.04	$332.09	$498.13	$664.17
$200.00	$221.39	$442.78	$664.17	$885.56
$250.00	$276.74	$553.48	$830.21	$1,106.95
$300.00	$332.09	$664.17	$996.26	$1,328.34
$350.00	$387.43	$774.87	$1,162.30	$1,549.73
$400.00	$442.78	$885.56	$1,328.34	$1,771.12
$450.00	$498.13	$996.26	$1,494.38	$1,992.51
$500.00	$553.48	$1,106.95	$1,660.43	$2,213.90
$550.00	$608.82	$1,217.65	$1,826.47	$2,435.29
$600.00	$664.17	$1,328.34	$1,992.51	$2,656.68
$650.00	$719.52	$1,439.04	$2,158.55	$2,878.07
$700.00	$774.87	$1,549.73	$2,324.60	$3,099.46
$750.00	$830.21	$1,660.43	$2,490.64	$3,320.85
$800.00	$885.56	$1,771.12	$2,656.68	$3,542.24
$850.00	$940.91	$1,881.82	$2,822.72	$3,763.63
$900.00	$996.26	$1,992.51	$2,988.77	$3,985.02
$950.00	$1,051.60	$2,103.21	$3,154.81	$4,206.41
$1,000.00	$1,106.95	$2,213.90	$3,320.85	$4,427.80