







Digital Reference Guide

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2024 Training Binder



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HUDDLE	9-1-978-990-5432 | Meeting ID 105457#

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CASA PALMERO
6650/6666

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LANGUAGE LINE

Pebble Beach Client ID# 695366

1. Press Conference
2. Dial 1.844.577.2174
3. Press:
   - *1 for Spanish*
   - *2 for all other languages*
   - *0 if you don't know the language*
4. Greet the Interpreter
5. Bring all 3 lines together:
   - Conference (office phone)
   - Join (WFH phone)
6. Say "End of Call" to the interpreter when conversation is over

INTERNATIONAL DIALING

Make Outbound International Call:
Dial US Exit Code + Int'l Country Code + 10 Digit Phone Number
Example: 011 - XX - XXX-XXX-XXXX

Pebble Beach Shop Extensions

The Lodge at Pebble Beach

The Heritage Shop	**x8799** 6:30am-6:30pm
Pebble Beach Outfitters	**x6612** 9:00am-6:00pm
Stillwater Clothing Company	**x6545** 9:00am-6:00pm
The Lone Cypress Shop	**x8634** 8:00am-6:30pm
Pebble Beach Women's Shop	**x8544** 8:00am-6:30pm
Golf Links to the Past	**x3334** 9:00am-6:00pm
The Kid's Shop	**x6382** 9:00am-6:00pm
The Beach Club Tennis Shop	**x8549** 9:00am-5:00pm
The Spa Boutique	**x6446** 9:30am-6:00pm
The Beach Club Tennis Shop	**x8549** 9:00am - 5:00pm
Marchesa Jewelry	**x3129** Open daily
Pebble Beach Market	**x8528** 7:30am-6:00pm
The Lodge Gift Shop	**x6383** 10:00am - 6:00pm

The Inn at Spanish Bay

Resortwear Shop at Spanish Bay	**x7931** 8:00am-6:00pm
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<tr><td rowspan="3">OUTSIDE GUEST</td><td>1 day in Advance
Non CXL
12 Player Max</td><td>3 Months (90 days) in Advance
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12 Player Max</td><td>6 Months (180 days) in Advance
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12 Player Max</td><td>6 Months (180 days) in Advance
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<tr><td colspan="2">Aeration – 6 Months (180 days) in Advance
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<tr><td>Free Sell
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NCGA Member
10 Days in Advance | Non-CXL | 4 Player Max | Collect NCGA #</td><td></td><td>Book at Rack Rate:
Teens Age 13-19
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<tr><td>DUKE'S MEMBERS</td><td>Outside Guest Guideline</td><td colspan="2" rowspan="3">Duke's Rate
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Duke's members to present their comp vouchers to pro shop
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Max of 3 active tee times
Resident/Member must play
Max 1 4sm per day
14 Day CXL</td><td rowspan="2">3 Months (90 Days) in Advance
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Resident/Member must play
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3 CXL</td></tr>
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<tr><td>2ND CONDO OWNER</td><td>Blackout: SEP-NOV
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Max of 3 active tee times
Resident/Member must play
Max 1 4sm per day
14 Day CXL</td><td>3 Months (90 Days) in Advance
Max of 3 active tee times
Resident/Member must play
Max 1 4sm per day
14 Day CXL</td><td>3 Months (90 days) in Advance
Max of 3 active tee times
Owner must play
Max 1 4sm per day
14 Day CXL</td><td>3 Months (90 Days) in Advance
Max of 3 active tee times
Resident/Member must play
Max 1 4sm per day
3 Day CXL</td><td rowspan="2">Outside Guest Guideline</td></tr>
<tr><td>ORIGINAL CONDO OWNER</td><td colspan="2">3 Months (90 days) in Advance
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Guaranteed Time on PBC Course</td><td>3 Months (90 days) in Advance
Owner must play
Max 1 4sm twice per week
3 Day CXL
Comp Carts
GTD Time on PBC Course</td><td>3 Months (90 days) in Advance
Max of 3 active tee times
Owner must play
3 Day CXL
12 Players Max
Comp Carts
GTD Time on PBC Course</td></tr>
</table>

Resort Guest Golf Guidelines

	PEBBLE BEACH	SPYGLASS HILL	SPANISH BAY	DEL MONTE	THE HAY
How far in advance can they book?	18 Months in Advance				
Cancellation Policy	14 Days Prior to Date of Arrival			3 Days Prior to Date of Play	
Max. # of Golfers	2 Per Room				
Min. Night Requirement	2 (G) or 3 (H) Nights 1 Less Night for NGTF	1 Night			
Max # Rounds	1 Round +2 Nights for Each Additional Round	No Limit within Dates of Stay			

Same Day Golf Booking
Connect to the Pro Shop of the respective course
Do not quote availability

13+ Golfers
Connect the guest to the "Group Golf Coordinator"
Connect 13+ for Del Monte to the Pro Shop

Re-Round
A Re-round may only be booked on day of play by the pro shop after guest begins their first round

36 Holes
PB + PB can only be booked as a re-round
PB + SG can only be booked within 3 months
SB+ Any other course can be booked 18 months out

Golf Dress Code
Collared shirts and golf shorts/pants, soft spikes.
No denim, cargo shorts, basketball shorts, multi-stud rubber soles, or metal spikes.

Minors in the Room
3 Golfers may be booked per course with 1 room if at least one guest is a minor (under18).
A 4th golfer would require an additional room.

Aeration
Advise of aeration/discount, notate in baby note
Resort Guest Aeration may be booked 18 months out with min 1 night stay (weekend night minimums still apply)
Outside Guest Aeration may be booked 6 months out
J Code Aeration may only be booked by Resort Guests

Free Sell Pebble Beach Golf
Free Sell PBGL dates designated on the Exception Calendar may be booked with or without a room stay
Document in your notes that you booked PB(NR) per the Exception Calendar

Twilight
Twilight = 3 hrs or less of daylight
Twilight will only be available on SG/SB/DM
Ok to book Twilight at rack rate
Discounted Twilight must be booked by Pro Shop 1 Day in Advance

Maintenance Tee Times
Minimum of 3 golfers may book
Day Guests may only book 48 hours in advance
(PB 24 hours in advance)
Resort Guests can book 18 Months in advance

Youth on Course
Do not quote availability—YOC tee times are not visible
Guest uses YOC Mobile App to book SB, SG, DM | 7 days in advance | Mon - Thu
Ok to book The Hay 6 mo. out with playing adult—Must leave baby notes on the tee time "YOC w/adult"

Minimum Age
For safety, on our 18 hole courses, golfers and spectators must be 8 years or older. (Excludes The Hay)
This is ultimately approved by each pro shop, so guests may be connected to discuss this further

Digital Binder Guide

The Digital Binder will be your primary source for information about the Reservations Department.

Other Resources Include:

- ◊ Pebblebeach.com
- ◊ The Back Nine
- • Your supervisor
- • The REVINATE Team Chat

All Standard Operating Procedures (SOPs)

Free Sell Dates

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REVINATE

REVINATE is a **Customer Resource Management (CRM)** program designed to manage relationships between our Reservations Agents and our guests.

As a **Reservations Agent**, you will use REVINATE to:

- Make and receive calls to and from potential and existing guests
- Document interactions with guests to develop strong relationships
- Track potential sales leads
- Follow up with guests in a timely manner
- Send and receive emails utilizing convenient templates
- Review and analyze your personal sales metrics and milestones



Who else uses REVINATE?

Reservations Managers use REVINATE to:

- Monitor/predict call volume to staff appropriately for high and low seasons
- Listen to and score calls
- Plan coaching sessions for agents

Revenue Managers and **Marketing** use REVINATE to:

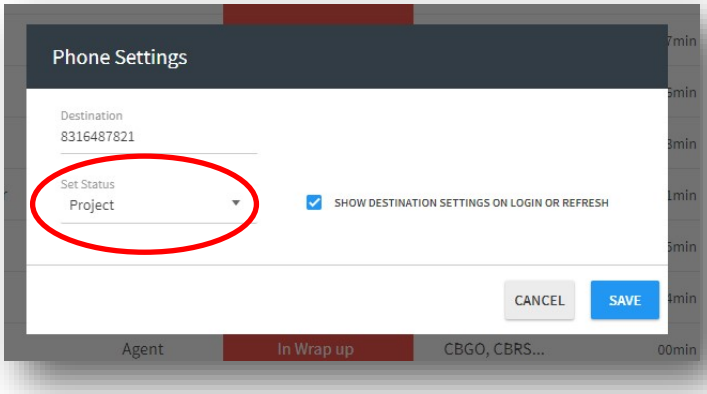
- See the effectiveness of marketing campaigns
- Monitor booking trends to discover new opportunities to maximize revenue
- Analyze common guest issues and objections to adjust pricing and policies

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Agent Status

As soon as you log in, you will be prompted to set your Agent Status.

The following chart below illustrations what status agents should be using in various scenarios.



WAITING FOR NEW CALLS	READY
WORK AFTER A CALL	WRAP UP
APPROVED 10 MINUTE BREAKS	BREAK
STEPPING AWAY FROM WORK STATION	AWAY
HUDDLES	MEETING
MEETINGS	MEETING
ASSIGNED PROJECT TIME HOURS	PROJECT

KRA MEETINGS	
AGENT	TRAINING
SUPERVISOR	COACHING
HELP WITH ARRIVALS, NON-8888 QUESTIONS	
AGENT	TRAINING
SUPERVISOR	COACHING

REVINATE HUB

REVINATE HUB will be your primary view during the day. You will have SMS pulled up on one of your computer screens, then REVINATE will be pulled up on your second screen.

When you take a call, a Lead Form will automatically open in a new REVINATE Tab. Once you are done with your call, you will close that Lead Form and return to REVINATE Hub.

Waiting

Click this dropdown to see details of all callers who are currently in line to speak with Reservations Agents.

Active

Click this dropdown to see details of all calls currently in progress with Reservations Agents.

Phone

Click this button to edit the phone number that your REVINATE calls will ring to.

Status

Click this dropdown to change your current Status during the day.

Chat

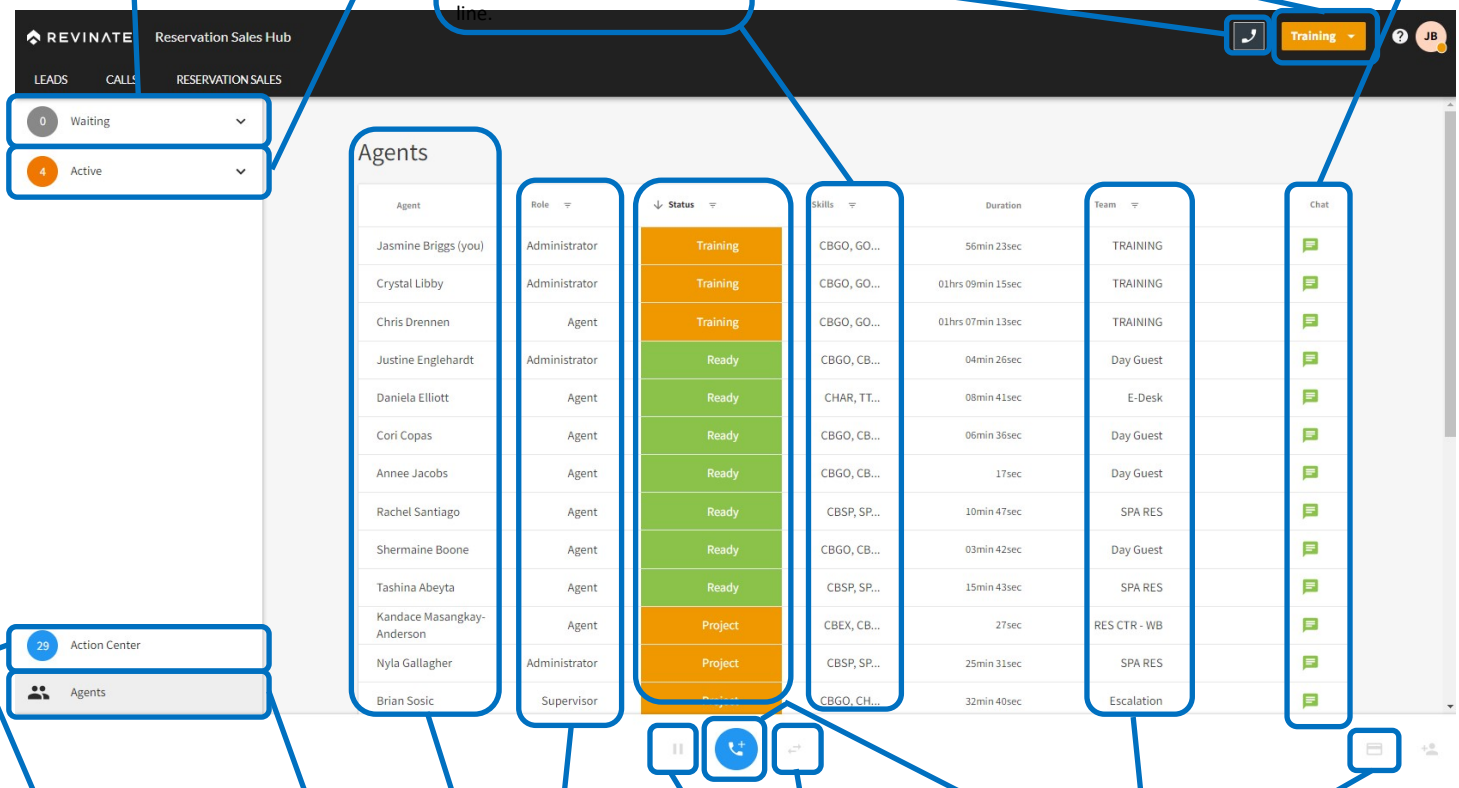
Click any of these chat windows to open the Chat page in a new tab. Keep your Chat open all day.

A green chat bubble means the agent is currently logged into chat.

A gray chat bubble means they have not logged into chat.

Skill

Each agent is assigned specific skills that correspond with the phone prompts guest select when dialing our main phone line.



Action Center

Click this to open your To Do List within REVINATE.

You will see all Lead Forms that are assigned to you as Follow-Up, In-Process, or marked as Attention Leads.

Agents

This is the REVINATE view you're looking at right now!

It shows you all agents currently logged into REVINATE as well as several stats about them.

Name & Role

Agent = Reservations Agent

Supervisor = Coordinator or Auditor

Administrator = Manager, Trainer, Coach/Supervisor

Hold & Transfer

Click Hold to connect a caller to a fellow agent.

Click Transfer to transfer a guest to a Skill that you are not trained to handle.

Outbound

Click this button to dial an outbound call through REVINATE.

Team

All agents are broken up into teams, and each team has one assigned Supervisor.

Each team name is comprised of the office location of that team and the SMS initials the team's supervisor.

Credit Card

Click this button to pause the recording during your call when you collect credit card information.

Day Guest Call Dispositions

CREATE A NEW LEAD FORM

Booked	You created a new golf booking
Booked Call—Add On Spa	A guest has booked golf and wants to be immediately transferred to the Spa

EXISTING BOOKING—FIND THE CORRECT LEAD FORM

(IF THE EXISTING BOOKING IS DINING-ONLY, THERE WILL NOT BE A LEAD FORM)

Reconfirm	You have spoken to a guest about their booking but did not make any changes.
Change/Revise	You have modified an existing booking or Guest Tile
CXL Reservation	You cancelled a full Itinerary
Outbound Call – Left Voicemail	You placed an outbound call to a guest, but they did not answer, so you left a voicemail.
Agent Call Back	A guest wants to speak to a specific agent, but that agent is unavailable, so you have arranged for said agent to call the guest back later.

NO LEAD FORM IS REQUIRED

Rest-Only Booking	You created a new restaurant booking—no golf
Large Party Inquiry	A guest is asking about or has booked a restaurant reservation for 9+ guests
Day Guest Recreation	A Day Guest called to talk about restaurants or other Day Guest recreation, but did not book anything.
Transfer to Another Dept.	You transferred the guest to a more appropriate department.
Misdialed/Disconnected	Your call is inadvertently disconnected or you dialed the incorrect number.
General Inquiry	A caller asked a question that has nothing to do with new or existing reservations *(ex. Pebble Beach Gate Fees)*
Day Guest Golf	A Day Guest Golfer called about a tee time outside of our Day Guest Golf Guidelines and thus could not book.
24 Hour PB Golf	A guest called about PBGL within Day Guest Guidelines, but did not book
90 Day SG Golf	A guest called about Spyglass Hill Golf Course within Day Guest Guidelines, but did not book
6 Month SB/DM Golf	A guest called about The Links at Spanish Bay within Day Guest Guidelines, but did not book
Dukes Hay Golf	A Duke's Member calls to book The Hay and they intend to use their voucher at the Pro Shop
Group Reservation Inquiry	A Group Sales guest called to get information
Group Guest Booking Rec.	A Group Sales guest added golf and/or dining to their existing Group Sales room booking.

Booked Call - Add On Spa

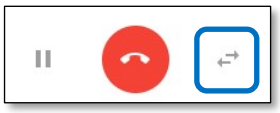
Scenario: You have made a (golf/room) reservation for a guest who wants to book Spa.

Transfer to spa after a booked call:

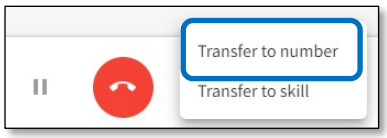
1. **Save** your **Booked lead** form while your guest is on the line.



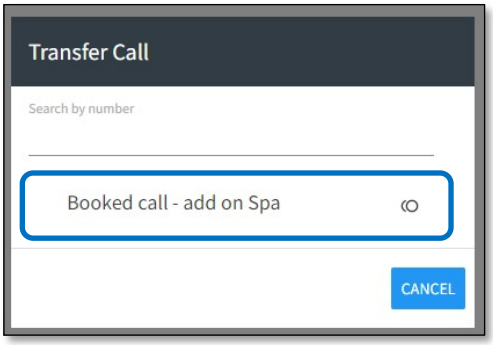
2. In HUB, click the **Transfer** Icon



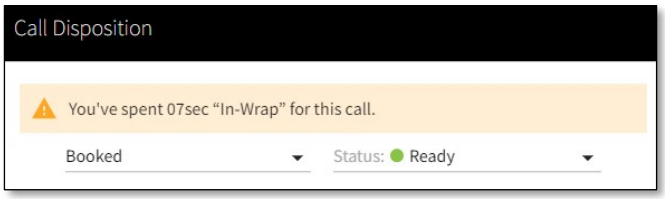
3. Select **Transfer to Number**



4. Select **Booked call - add on Spa**



5. When you are done with your wrap up, set your Call Disposition as **Booked**



NOTE: The call will appear in the queue for the Spa Agent under the skill Reservations Agent transferring to Spa Agent.



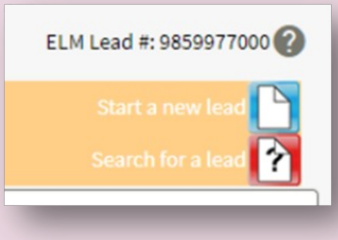
Search for an Existing Lead

If a you answer a call and a blank Lead Form pops, but the guest tells you they:

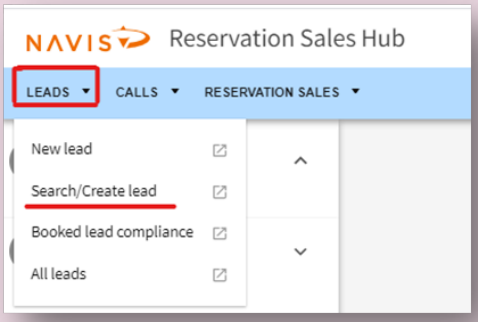
- Already have a booking
- Were previously talking to an agent
- Submitted an online vacation inquiry.

This indicates that a saved Lead Form already exists for your guest.
Instead of using the blank Lead, you should search for their existing Lead Form.

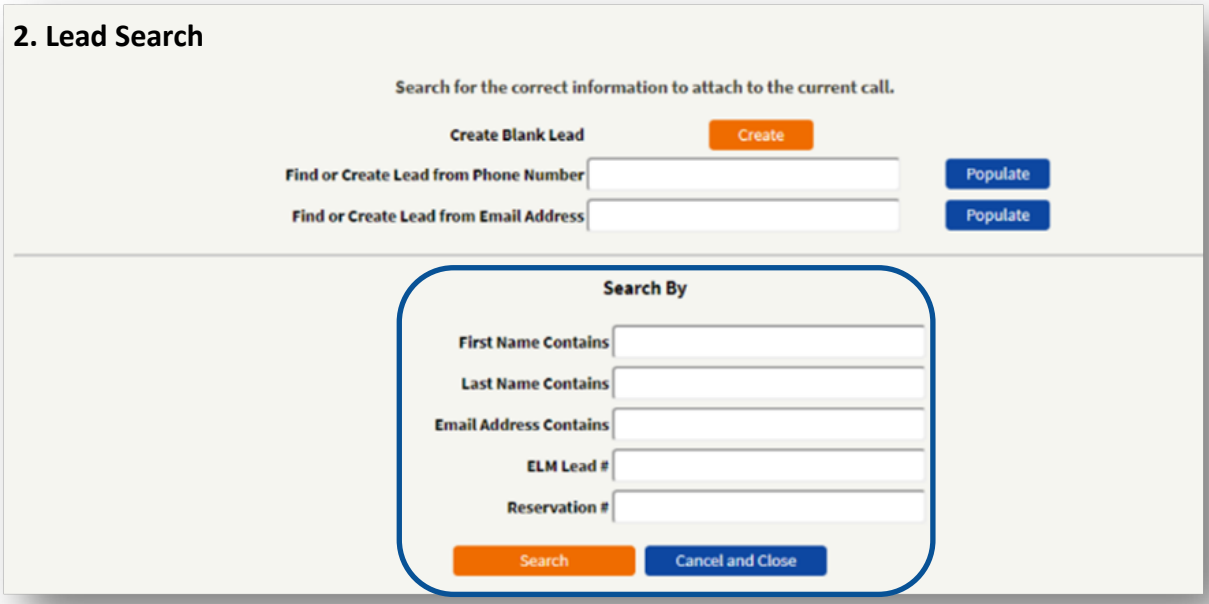
1A. You can access the search window **directly from the lead form** by clicking the Search for Lead question mark button in the top right corner of the lead.



1B. You can also access this search page **directly from HUB**



2. Lead Search

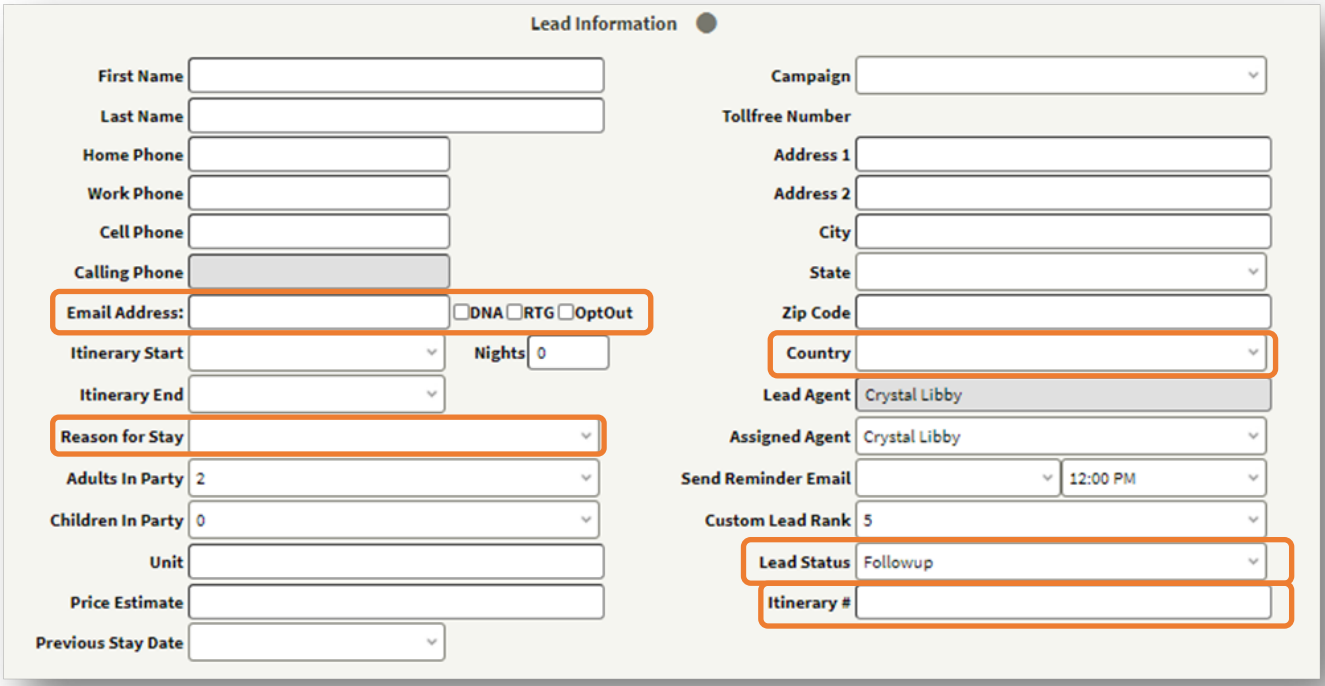


3. Best Methods for Lead Search:

Email Address	This is the best way to locate a Vacation Planner. Ask the caller which email address they used when they submitted their request on our website.
Itinerary Number	This is the best way to locate the lead for an SMS booking
Name	"Name Contains" means you do not need to type out the entire name to see results. This is helpful when searching for a name for which you are unsure of the spelling

Lead Form Hot Spots

When you book a new golf reservation, you must fill out all fields in **orange.**
These are the **Lead Form Hot Spots**.



BOOKED LEAD CHECKLIST

Hot Spots:
- Check DNA box
- Reason for Stay (If golf only select Day Guest)
- Country
- Lead Status (Booked)
- Itinerary Number

Leave A Detailed Note:
- Who you spoke to
- Why they are visiting
- What they booked
- What they declined
- What you advised

Mr. Johnson is staying in Carmel with his wife for the weekend.
He booked:
9.8.23— SB 4sm 8:10am—double cads
9.8.23—The Bench 6pm 4 guests
Declined rental clubs
Adv. 14 CXL
Sent VEMAIL

EXISTING LEAD CHECKLIST

Hot Spots:
- If you cancelled the entire Itinerary, you must change the Lead Status to "Cancelled."
- For all other situations, do not edit the hot spots

Leave A Detailed Note:
- Who you spoke to
- What they added, changed or cancelled
- What you advised

Mr. Johnson called to add dining to his golf booking.
9.8.23—The Bench 6pm 4 guests
Sent VEMAIL

Mr. Johnson called to cancel his SB tee time on 9.8.23 because he got a tee time on Cypress Point.
He will be keeping his booking at The Bench.
Sent VEMAIL

Mr. Johnson will be dining at the bench and asked about the gate fee.
Advised that he will pay at the gate and be reimbursed at the restaurant if he spends $35+.
No changes made

Revinate Changes & Cancellations

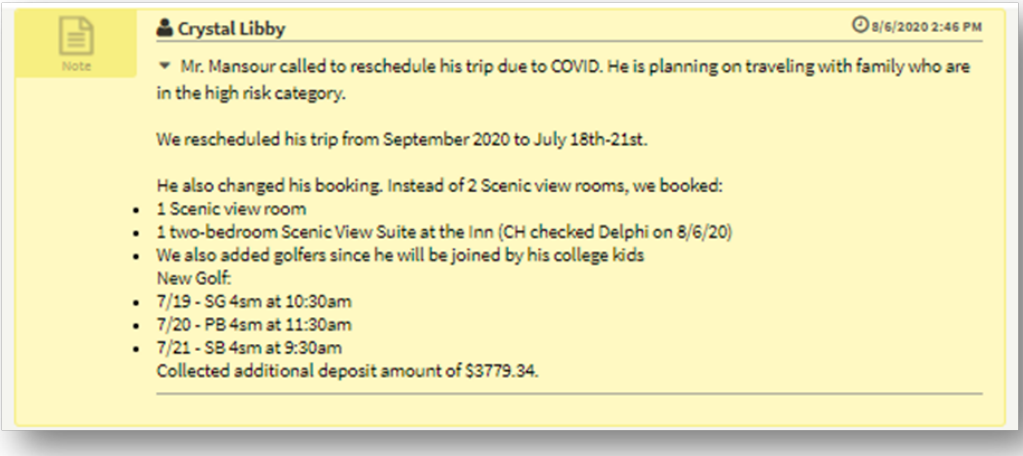


The **Change/Revise** Disposition Code means you have modified something about the existing reservation such as:

- Adding golf, rooms, rec, etc.
- Cancelling part of their Itinerary (not a full cancellation)
- Rescheduling recreation or room stay dates
- Updating information in the Guest Tile, Profiles, Notes, Traces, etc

When creating a **Note** for a booking that you have modified, you must ensure that your notes are thorough enough to answer these questions:

Who did you speak to?
What did they change?
Why did they change it?


Crystal Libby 8/6/2020 2:46 PM

Note

Mr. Mansour called to reschedule his trip due to COVID. He is planning on traveling with family who are in the high risk category.

We rescheduled his trip from September 2020 to July 18th-21st.

He also changed his booking. Instead of 2 Scenic view rooms, we booked:

- 1 Scenic view room
- 1 two-bedroom Scenic View Suite at the Inn (CH checked Delphi on 8/6/20)
- We also added golfers since he will be joined by his college kids

New Golf:

- 7/19 - SG 4sm at 10:30am
- 7/20 - PB 4sm at 11:30am
- 7/21 - SB 4sm at 9:30am

Collected additional deposit amount of $3779.34.



The only time a Lead and Disposition Code should be marked as **Cancelled** is if, after the call, there is nothing remaining on that guest's Itinerary.

Example 1

A guest calls in to cancel their reservation because they have conflicting travel plans. The room, golf, and restaurant reservations are cancelled. Your Disposition Code should be **Cancelled**.

Example 2

A group of four golfers, all of whom have their own rooms, need to cancel their trip. Each guest paid their own deposit, so all 4 guests will need to call in separately to cancel their rooms and be refunded.

Guest #1 calls and cancels. Your Disposition code should be **Change/Revise**. The lead status should still remain as Booked.

Guest #2 calls and cancels. Your disposition code should be **Change/Revise.** The lead status should still remain as Booked.

Guest #3 calls and cancels. Your Disposition Code should be **Change/Revise.** The lead status should still remain as Booked.

Guest #4 calls and cancels. Your Disposition Code should be **Cancelled** because you will now have cancelled the final items on this Itinerary. The **Lead Status** should be changed to **Cancelled**.

Credit Card Protection



The Pebble Beach Company is a PCI Compliant organization. PCI stands for **Payment Card Industry**. This is a data security standard that dates back to 1999 to prevent credit card fraud and identity theft.

It is the responsibility of Pebble Beach Company and every Pebble Beach Reservations Agent to protect the **Personally Identifiable Information** (PII) of each one of our guests.

How to Maintain PCI Compliance:

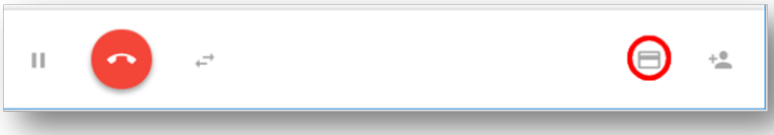
- Do not write down any PII information anywhere other than Revinate or SMS
- Do not record any PII or PCI data into any electronic note-taking media, such as Word or Sticky Notes
- If you suspect a PCI Breach, contact your supervisor who can contact support@revinate.com

PCI Data	**PII Data**
First and Last Name	First and Last Name
Credit Card Number	Phone Number
Credit Card Expiration Date	Address
Credit Card Security Code	Email Address

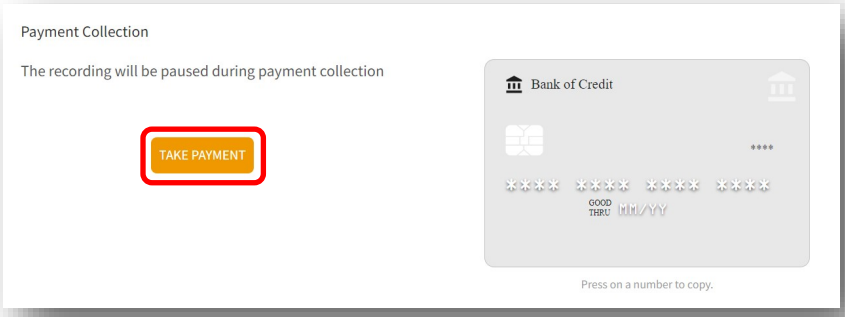
When collecting a credit card from a guest, you must pause your recording in Revinate so that the credit card numbers, expiration date, and CVV code are not captured on the call recording.

1. You are required to inform the caller that you will be pausing the recording.
   "I will be pausing this recording to protect your credit card information."

2. Click the **credit card button** on the right side of the Revinate HUB Call Bar.



3. Click the **Take Payment** button in the middle of the screen.



NOTE: A new window will open with space to enter the guest's credit card.

Do not enter the credit card information into Revinate.

Always enter the credit card directly into the Guest Tile using your IDTech.

4. When you are finished entering the card, Click **Cancel** to exit the pop-up window in Revinate to resume the recording.



Revinate Data Privacy Fail-Safe:
If a Reservations Agent saves a call with a disposition of "Booked" but the recording of that call was not paused, Revinate will automatically delete the entire recording of that call.

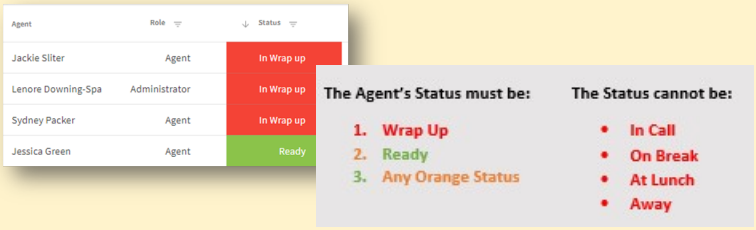
Holds & Transfers

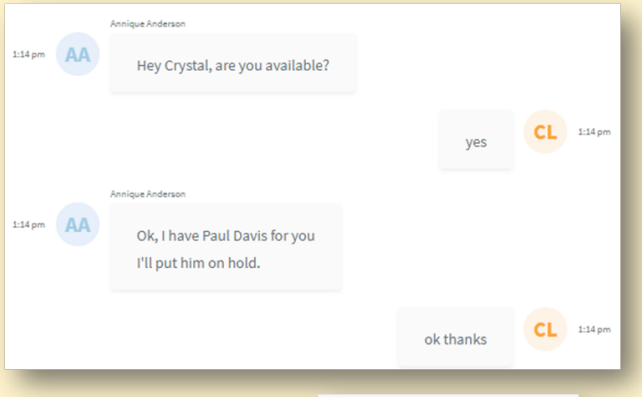
Transfer via your Desk Phone:	Hold for Agent:	Transfer to Skill:
You are connecting to a department outside of Reservations that does not use Revinate, such as the restaurants, pro shops, concierge.	A guest needs to speak with a *specific* Reservations Agent .	Your caller needs to speak with a Reservations Agent about a topic you are not trained to handle. This call will go to the next agent in Ready who is trained for that skill.

How to Hold For Agent

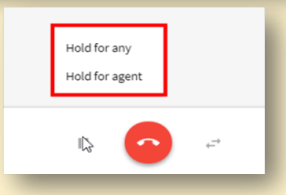
1. Look at the **Agents** page of Revinate HUB to see what **status** the agent is in currently.
2. If they are not busy, send them a **chat message** to ask if they can take the call.
3. If they do not answer in 30 seconds, pick up a second line on your phone and **call that agent's extension**.
4. To connect the caller
    - Click the **Pause** button to the in the center of the Revinate HUB Call Bar
    - Click **Hold for Agent**
    - Select the correct agent from the **menu**

As soon as you click the agent's name, the call will be placed on hold for that agent and your status will be automatically changed to **Project**. There will be no option to select a Call Disposition as that will now be the task of the agent to whom you connected the call.





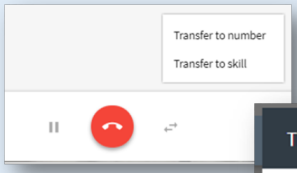


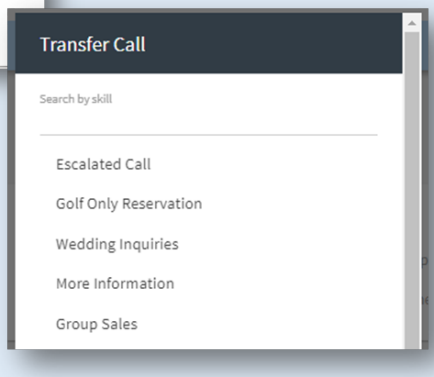


How to Transfer to Skill

1. Click the double arrows button in the center of the Call Control Bar.
2. Click Transfer to Skill
3. Select the appropriate Skill from the menu

As soon as you click the agent's name, the call will be placed on hold for that agent and your status will be automatically changed to **Project**. There will be no option to select a Call Disposition as that will now be the task of the agent to whom you connected the call.





Warm Transfer





RESORT RESERVATIONS



[Standard PBC Greeting]
How can I help you?



I left my chipping wedge on hole 18 at Spyglass. Can you please transfer me to the pro shop?

Certainly! Would you mind if I place you on a brief hold while I get them on the line?
[Guest agrees]





1. PRESS CONFERENCE
2. DIAL PRO SHOP

PRO SHOP





[Standard Greeting]
Hello, Jeanene.
This is Kyle from Resort Reservations.
I am connecting a Mr. Stuart on the line who left his club at the course.





Great! Send him through.

3. PRESS CONFERENCE

Thank you for your patience Mr. Stuart
I have Jeanene from the Spyglass Hill Golf Course Pro Shop on the line to help you with your missing club.
[Wait for the next department to greet the guest]





4. CLICK THE HEADSET BUTTON TO DISCONNECT

Warm Transfer—WFH



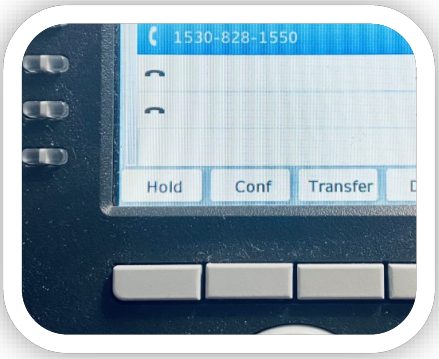
RESORT RESERVATIONS



[Standard PBC Greeting]
How can I help you?



I left my chipping wedge on hole 18 at Spyglass. Can you please transfer me to the pro shop?



Certainly! Would you mind if I place you on a brief hold while I get them on the line?
[Guest agrees]



1. PRESS CONFERENCE
2. DIAL PRO SHOP

PRO SHOP





[Standard Greeting]
Hello, Jeanene.
This is Kyle from Resort Reservations.
I am connecting a Mr. Stuart on the line who left his club at the course.





Great! Send him through.

3. PRESS JOIN



Thank you for your patience Mr. Stuart
I have Jeanene from the Spyglass Hill Golf Course Pro Shop on the line to help you with your missing club.
[Wait for the next department to greet the guest]



4. CLICK THE HEADSET BUTTON TO DISCONNECT

Telephone Etiquette

Full Names

Always use the full names of our Pebble Beach golf courses and properties
Tip: If you're saying less than 4 words, you missed something

Instead of...	**Say...**
The Lodge	The Lodge At Pebble Beach
The Inn	The Inn at Spanish Bay
Pebble Beach	Pebble Beach Golf Links
Spy	Spyglass Hill Golf Course

Formal Language

Replace common slang with formal alternatives. It is ok to match the guest's way of speaking after you have established a professional connection.

Instead of...	**Say...**
Transfer	Connect
Booked up	Fully Committed
No Problem / No Worries	My Pleasure
Okay / Sure	Certainly / Of Course
Got It	Understood

Positive Phrasing

Some common customer services phrases have developed a negative connotation. Practice modifying these phrases to avoid negative responses.

Instead of...	**Say...**
I'm sorry for the wait	Thank you for your patience
We're booked up	We are fully committed
Give me a sec / Just a minute	Please allow me a moment to look into that for you
I'm going to put you on hold	May I please place you on a brief hold while I ___ ?

Next Steps

Do not leave guests at a dead end—If the guest's request will not work, give them a next step

Instead of...	**Say...**
I don't know	That's a great question—let me find out for you
We're booked up	We are fully committed, but I am happy to find you an alternative
I can't do that	I understand you would like ___. What I *can* do for you is...

RETURN TO TABLE OF CONTENTS

Day Guest Golf Scripting Checkpoints

CHECKPOINT	WHAT TO SAY	WHAT TO DO
Introduction	Thank you for calling Pebble Beach Resort Reservations. My name is ___. May I please have your first and last name? How are you doing Mr./Mrs./Ms. ____ How can I help you?	Review the lead form. If you see an Booked Lead, pull up the guest's Itinerary in SMS while you introduce yourself.
Probing Questions	Will this be your first time visiting us? Do you plan to stay with us at our resorts? Are you celebrating a special occasion? Which courses would you like to book? What date would you like to play? How many golfers will be playing? What would be your ideal tee time? Do you plan on staying at one of our Resort Properties or are you just coming in for the day?	Listen and take notes Do not touch SMS during this stage.
Qualify the Call	In order to book ____, we require a room stay at our resorts. Would you be open to staying with us? If so, I can connect you to a Room Reservation Specialist. (If no room) In that case, what we *can* do for you is…	If the guest wants to book outside the Day Guest Guidelines, explain the rules and offer to connect to TNEW. Explain what they can book today and upgrade options.
Availability Search	Thank you. Let me see what I can find for you.	At this point, you can begin searching in SMS for tee times
Offer Additional Services	Would you like to add a request for caddies or rental clubs? Would you like to add a restaurant reservation for lunch/dinner after your round?	Jot down caddie/rental requests in your notes—you will add these in wrap up. You must offer dining on every golf call.
Add-On Dining	Which restaurant are you interested in? What is your ideal time of day to dine? How many will be in your party?	Recommend dining based on proximity to their golf courses. Book dining based on the 5 hour round and transportation time.
Transition to the Guest Tile	For your tee time(s), we have a ___day cancellation policy which means you can change or cancel your tee time without penalty up until 14/7/3 days prior to your date of play. If you cancel within ___days, you will still be responsible for the greens fees. Would you like to proceed with this booking?	Once they agree to proceed, begin searching for or creating their Guest Tile.
Collect Personal Information	In order to secure your reservation, I will need to collect a credit card. Your card will not be charged right now; it will only be charged on the day of play. Before I collect your credit card, allow me to gather some information... Could you please spell your full name? May I please have a billing address? What is the best phone number to reach you? May I have an email address to send you a confirmation email? Would you me to add you to our email list to receive future promotions at Pebble Beach Resorts? To protect your card information, I am going to pause our recording. Would you like to confirm this booking with a MasterCard?	You will stay in Edit Mode throughout this section of questioning. Pause your recording in NAVIS. Remember to un-pause afterward.
Finalize the Booking	Thank you very much. Please allow me a moment to finalize your reservation.	Save their Guest Tile Add the gender to the primary's profile. Return to the Booking Center .
Close the Call	Thank you for your patience. Your reservation is set. I have you booked for _____ You will receive your confirmation email within the hour. Is there anything else I can help you with today? Thank you for calling Pebble Beach Resorts. Have a wonderful day.	Recap everything you have booked. You do not need to complete the reservation with the guest on the line—you can do so in Wrap Up.

Qualifying the Call - Day Guest Team

A guest asks to book golf outside of our day guest golf guidelines. Qualify the call before sending to a Reservations Sales Agent.

*"To book **Pebble Beach Golf Links** more than 1 day in advance, we require a room stay.*
(either 2 or 3 nights)

***Do you plan on staying at our Resort?** If so, I can connect you to one of our room reservations agents."*

"If so, allow me to check Pebble Beach Golf Links availability before I connect you. "

*"To book **Spyglass Hill Golf Course** more than 3 months in advance, we require a room stay.*
(1 night stay)

***Do you plan on staying at our Resort?** If so, I can connect you to one of our room reservations agents.''*

*"To book the **The Links at Spanish Bay** (or DM/ The Hay) more than 6 months in advance, we require a room stay.*
(1 night stay)

***Do you plan on staying at our Resort?** If so, I can connect you to one of our room reservations agents.''*

If guest **<u>is willing to stay</u>** on property and needs to discuss rooms: **Revinate** > **Transfer to Skill > Transfer New Calls**

If guest **<u>cannot stay</u>** on property. Offer a solution within Day Guest Golf Guidelines:

Pebble Beach Golf Links

"In that case, what we can do is book a tee time at our second most popular course, Spyglass Hill Golf Course.

The first 5 holes are very similar to Pebble Beach Golf Links because they follow the same coastline of Stillwater Cove. Then the course takes a turn into the Del Monte Forest, so you get the best of both worlds.

If you book Spyglass Hill Golf Course today, you can still call us within 24 hours and potentially upgrade to PBGL pending availability"

Spyglass Hill Golf Course

"In that case, what we can do is book a tee time at our next most popular course, The Links at Spanish Bay.

This course has 14 out of 18 holes along the ocean. Is a true links course which means it is built along the natural terrain designed to be played like traditional golf courses in Scotland.

If you book the Links at Spanish Bay today, you can still call us within 3 months and potentially upgrade to Spyglass Hill Golf Course pending availability."

The Links at Spanish Bay

"We will need to wait until we are within 6 months in order to book this tee time without a room stay."

Advisory Scripting

OUTSIDE SEATING / VIEWS

Your reservation guarantees you a table inside the restaurant, but you can add your name to the outside seating waitlist upon arrival.

- **I have a dog:**
  Guests who enjoy bringing their dogs are restricted to our patio which is seated on a walk-in basis. We would be unable to make a reservation for you in advance. You would be able to check in with the host stand upon arrival for availability for your party and pet.

- **Why can't I make an outside reservation?**
  We only make reservations for indoor dining due to weather considerations.

- **Can I have a table with a nice view/window?**
  You can check in with the host stand upon arrival and let them know you prefer a window seat or a table with a view. The majority of their tables have amazing views of the ocean.

- **View Obstruction:**
  Your view of the ocean, 18th fairway, and green will be obstructed by grandstands, tents and other structures for (event). There may also be construction noise associated with this activity. It is an exciting time to be here, I assure you, but I want to advise you of this important activity in preparation for the upcoming event.

DINING PARTIES OF FIVE (5) OR MORE

- **Splitting the Check:**
  "In anticipation of your upcoming reservation, we'd like to inform you of our Restaurant's split check policy. Please note that the restaurant can accommodate a ***maximum*** of four (4) separate checks for parties of eight (8) or less. The restaurant will not be able to offer separate checks for parties of nine (9) or more."

WAITLISTS

- **Existing Reservations**
  Due to the popularity of our resorts and golf courses, it is unlikely that availability will open as we get closer to your arrival. You are certainly welcome to reach back out to us to see if anything becomes available as we near your desired date, but I do want to assure you that what you have reserved now will provide you with a once in a lifetime experience.

- **No Reservations**
  Due to the popularity of our resorts and golf courses, it is unlikely that additional availability will open as we get closer to your requested date. I recommend making a reservation from what is available now to guarantee a Pebble Beach experience while you are in town, and you would still be welcome to reach back out to us to see if anything becomes available. Would you like to secure this reservation today?

CADDIES

We recommend caddies for all our golf courses. Would you like me to add a caddie request to your tee time?

- **What does a caddie do?**
  A caddie will act as an assistant who carries your golf clubs for your entire round of golf. They will advise on yardages to the flag, fix ball marks and divots, rake bunkers, and keep your clubs and equipment clean. They also have immense knowledge of the course and will provide invaluable advice about your game. Would you like to add a caddie to your round of golf?

- **Can each of us have our own caddie?**
  Pebble Beach has a double caddie policy which means each caddie will assist two golfers. If you would like a caddie to yourself, I can add that request, but depending on availability, that request may not be filled, and a double caddie would be provided. The price for a single caddie would be $__ per bag. The price for a double caddie would be $__ per bag. Which caddie service would you like to request?

- **What is a forecaddie?**
  A forecaddie is one caddie that will service a group of 3 to 4 golfers. Those players will typically take carts because the forecaddie does not carry golf bags. They will typically stay ahead of the group so they can spot the position of balls and will provide advice and information about the course to include yardages, club selections, and reading greens.

- **Can I have a caddie and take a golf cart?**
  Yes. All our courses are cart-path-only which means there is a good deal of walking even if you choose to take a cart, so it is still very helpful to have a caddie assist you with your equipment and provide advice to help you have a great round. The rate for that service would be (single/double caddie fee).

GREENS AERATION (Day #)

I see that we will be performing aeration on the greens ___ days prior to this date of play including aeration of (Tee Box, Fairway, Top dress) so you may see visible impact during your round.

As a benefit to booking on this date, I can offer you a discounted rate of $___ per player. Would you like to make that reservation today?

- **What is aeration?**
  Aeration is the process of punching holes into the ground to allow nutrients and water to penetrate deep into the soil to keep the turf healthy. It is an important part of course maintenance that allows our Pebble Beach courses to stay in championship condition throughout the year. Would you like to take advantage of this discounted rate and reserve a round today?

- **What date does aeration start?**
  Currently, aeration is scheduled to begin after everyone has completed their round on (date). The schedule is subject to change based on variables such as weather, but if you reserve today, you will be securing the rate of $___ per player. Would you like to reserve that round of golf today?

- **How long does aeration last?**
  The standard aeration healing time is a 10-day period. The special rate is available for all 10 days of aeration. Would you like to take advantage of this discounted rate and reserve a round today?

COURSE AERATION (No Day #)

- **Will there be any aeration going on during this time?**
  Currently, there is a minor (fairway/tee box/top dress) aeration scheduled to begin on (date). This is an important part of course maintenance that allows our Pebble Beach courses to stay in championship condition throughout the year. The schedule is subject to change based on variables such as weather. Would you like to proceed with this reservation?

- **What is a tee box aeration?**
  Aeration is the process of punching holes into the ground to allow nutrients and water to penetrate deep into the soil to keep the turf healthy. Since tees are typically used in the tee box, this maintenance has minimal impact on your play. Would you like to secure this tee time today?

- **What does top dress maintenance mean?**
  Topdressing is the process of spreading nutrient-filled soil and sand across the fairway to promote drainage and produce a smooth playing surface. This method of maintenance has minimal impact to your play. Would you like to proceed with this reservation?

- **What is fairway aeration?**
  Aeration is the process of punching holes into the ground to allow nutrients and water to penetrate deep into the soil to keep the turf healthy. The punched holes are immediately filled with sand to smooth out the playing surface, so this aeration will have minimal impact on your play. Would you like to reserve that tee time today?

WEATHER

- **Weather Policy**
  Our courses are open rain or shine. We do close the courses in cases of lightening, flooding, or unsafe conditions. If the course is open, you would be expected to play.

- **Weather Cancellation Scripting**
  We have a very moderate climate on the peninsula, so even when the forecast calls for rain, it very rarely rains for an extended amount of time. While we cannot make any changes prior to your round based on weather forecasts, if it is raining on the morning of your round, you can contact the pro shop to discuss your options.

CANCELLATION WITHIN 14 DAYS

To help me understand your situation, may I ask the reason for your cancellation?
(PAUSE and LISTEN)
Are you looking to cancel everything for this trip, make a modification, or reschedule?
(PAUSE and LISTEN)
I see that you are within 14 days of your reservation, which means this reservation is currently non-cancellable. If you do choose to cancel, you would be charged your greens fees.
(PAUSE)
Are you able to find a substitute for your reservation so you would not be charged?
(PAUSE)

CANCELLATION WITHIN 14 DAYS CALL FLOW

Step 1: Ask for the reason of the cancellation and sympathize with their situation.

"I am sorry to hear that you will be unable to make this trip. I'm sure you were looking forward to this vacation. For our records, may I please have the reason for your cancellation?"

Step 2: State the cancellation policy outright.

"I see that you are within 14 days of your date of play, so we are unable to cancel your booking at this time. *If you are unable to make it, you will still be responsible for the greens fees."*

Step 3: Let the guest know what we *can* do that is within our guidelines.

"If you know anyone who can take your place, we could certainly transfer your reservation into their name."

Step 4: Ask questions to determine what type of exception you may request from a supervisor.

"Since you can't make this tee time, if we were able to make an exception to reschedule, would you be able to decide on a new date right now?"

Step 5: Place the guest on hold.

"Thank you for this information. Let me see what I can do. May I please place you on a brief hold while I look into this?"

Step 6: Contact a supervisor to request an exception.

Be specific about:

- What the guest's current situation is
- What they are asking you to do
- What you offered within guidelines
- What you think the best solution would be

"Can you please pull up an Itinerary? The number is 1050xxxxxx. This guest wants to cancel their tee time within 14 days because they threw out their back. Since they are coming from Rhode Island, they don't have anyone who can take their place in the tee time. They need to check with their friends before setting new dates, so I want to see if I can get approval to hold their funds on a city ledger for 6 months."

If an exception is approved, ensure that the guest understands that this is a *one-time exception* to our guidelines that we are making due to their *extenuating circumstances*, and that their new tee time will be *non-cancellable and non-changeable*.

Day Guest Recommendations

FAMILY

	GOLF	DINING	RECREATION
WHAT TO ANTICIPATE	Not everyone is at the same skill level	The kids are picky eaters Don't want a place too quiet in case kids are loud	Not everyone is into golf
SOLUTIONS	• The Hay 9 hole course • Free putting course at The Hay • Book end of day tee times • Golf lessons • Spectator Rule • Spyglass Driving Range	• Stick's • Hay's Place • Pebble Beach Market to get picnic supplies for 17 mile drive • Gallery Café to go • Gelato at PB Market	• Visit the kid's shop • Walk to Spanish Bay Beach

COUPLES

	GOLF	DINING	RECREATION
WHAT TO ANITICIPATE	One of the spouses doesn't play golf or isn't very good	Want a quiet, romantic setting Need something more upscale to celebrate a milestone	They want to be together, but don't want to just golf the entire visit.
SOLUTIONS	• Golf Lessons • Spectator Rule • Caddies • The Hay 9-hole or putting course • Spyglass Driving Range	• Stillwater Bar & Grill • Peppoli • Roy's at sunset • Hair/Make-up at the spa to get ready • Stave Wine Cellar	• PB Market for wine and cheese • Couple's massages • Visit PB Outfitters for hiking apparel/accessories • Stave Wine Cellar

FRIENDS

	GOLF	DINING	RECREATION
WHAT TO ANTICIPATE	Don't want to have a bad round Want as much golf as possible	They want to kick back and be loud, not fancy	The *think* that only thing they will have fun doing is golfing
SOLUTIONS	• Golf lessons • Caddies • Extra rounds to fill out sched-ule, such as Del Monte or The Hay • Spyglass as a challenge • Spanish Bay for true links	• Tap Room for PB 19th Hole • Stick's for sports bar fair • The Bench for 18th hole view • Hay's Place Outdoor view of course	• Visit Lone Cypress Shop for • engraved bag tags • Visit Golf Links to the past • Pre-Golf warm up massage / Post golf Therapy massage • Barber • Heritage Shop for golf attire

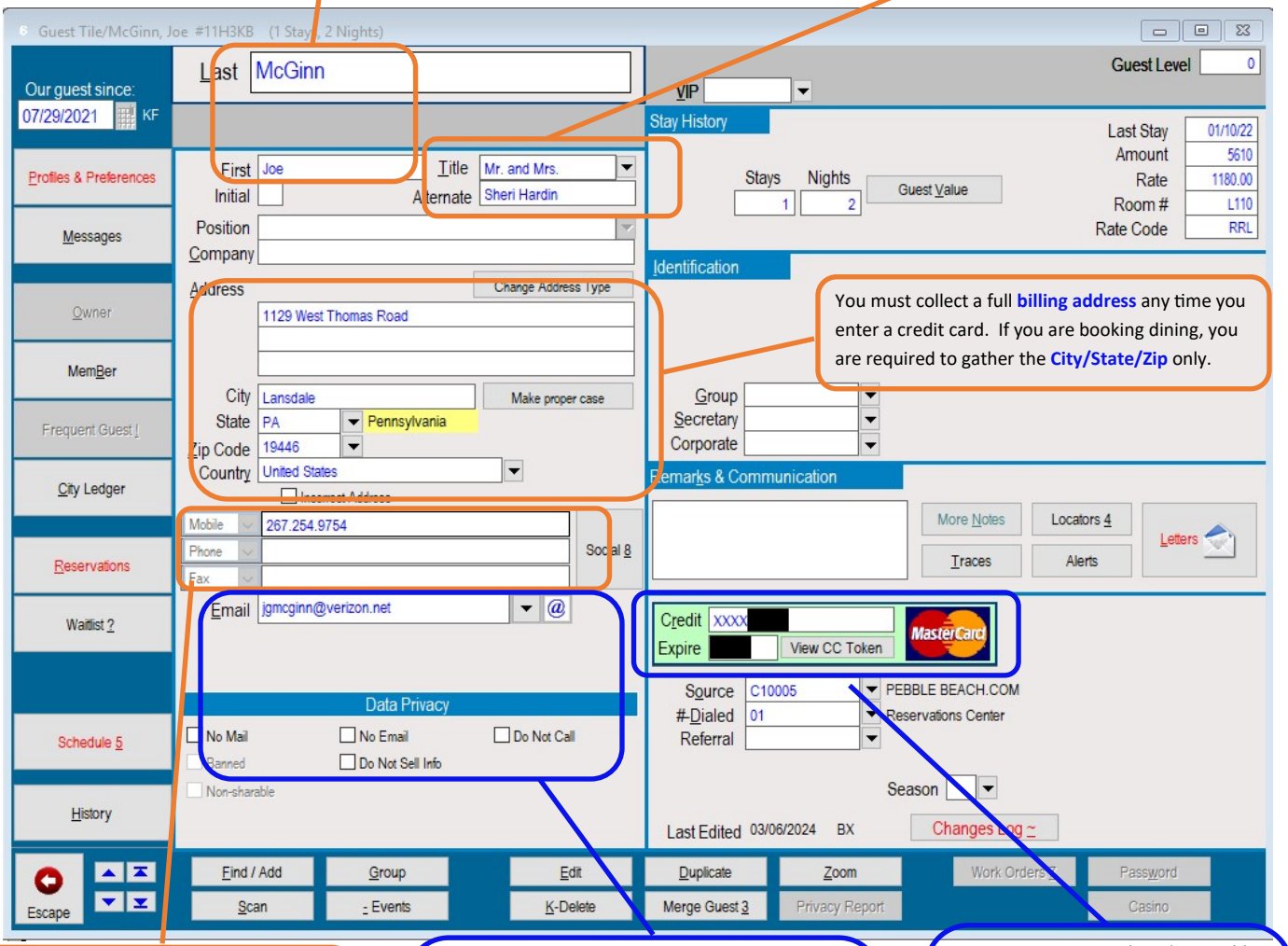
Guest Tiles

A **Guest Tile** is like a file folder in which we store all information about each guest. This can include contact information, booking history, special notes, memberships, credit card information, etc.

Sections in **orange** are required in order to save a new Guest.

The **lead name** on the guest tile is for the Primary Guest only. The Primary Guest will typically be the person who is on the phone with you booking their reservation. Immediate family members will be entered as **Profiles** within the Guest Tile.

If the lead guest has a spouse, the **title** should reflect this, i.e. Mr. & Mrs. / Mr.. & Mr. / Mrs. & Mrs.
The spouse's name should be entered into the **Alternate** field.



You must collect a full **billing address** any time you enter a credit card. If you are booking dining, you are required to gather the **City/State/Zip** only.

Phone numbers must be entered in the following format: xxx.xxx.xxxx.

If the guest is providing a mobile number, change the drop down from Phone to **Mobile**.

Every time you collect an **email address,** you must ask the guest if they would like to be placed on our email list to receive future promotions from Pebble Beach Resorts.

If they opt out, click the **No Email** checkbox in the Data Privacy section of the Guest Tile. You will also click the Opt Out checkbox in your REVINATE Lead Form.

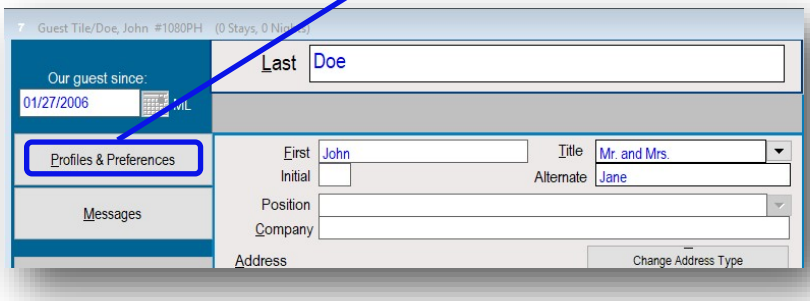
Use your IDTECH card reader to add a **credit card** to a Guest Tile.

Only one card may be stored on the Guest Tile at a a time.

**You must collect a new credit* card for every booking to refresh the card information in SMS.

Profiles

Once you have saved your Guest Tile, you must click the **Profiles & Preferences** button to complete your guest's profile.



Who should be included as a Profile within a Guest Tile?

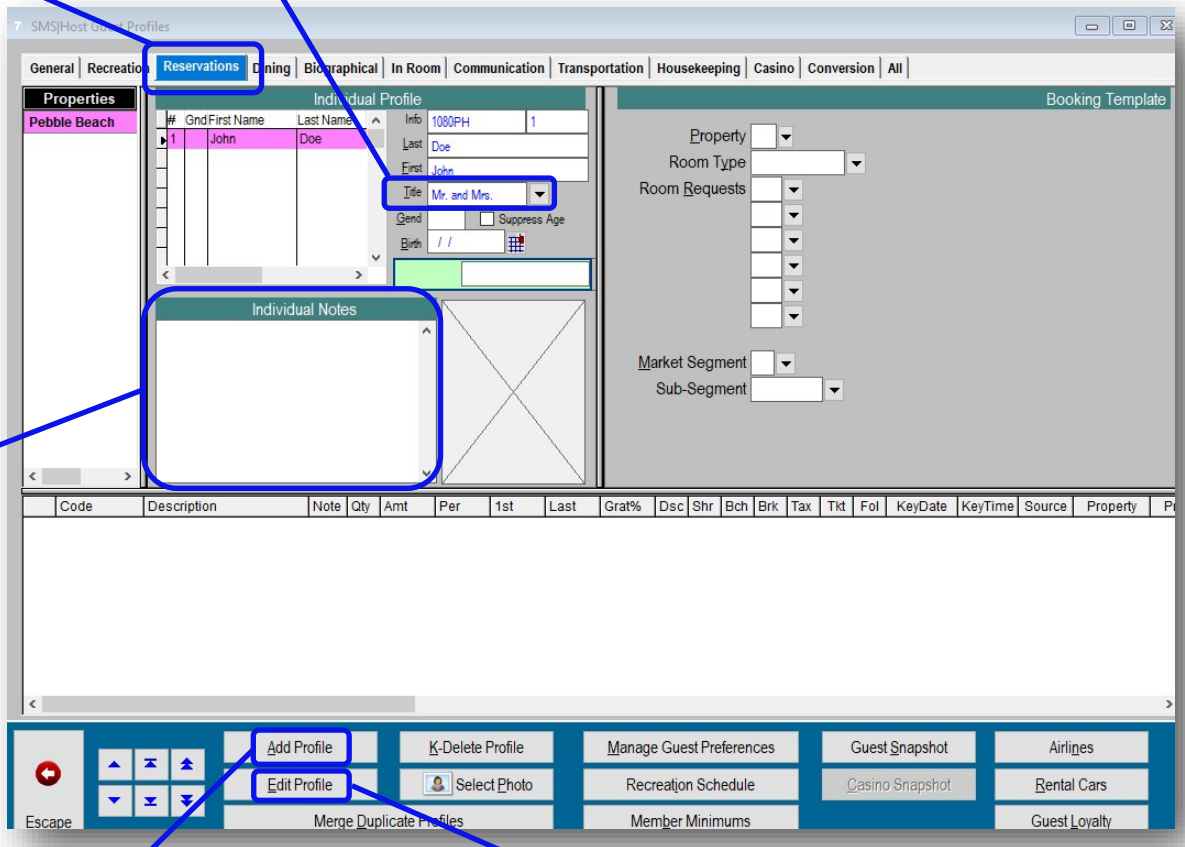
- ✓ The primary guest
- ✓ The primary guest's spouse
- ✓ The primary guest's children under 18 years old
- ✓ The primary guest's Disabled Adult Dependents
- ✓ Permanent Traveling Companions/ Aides of immediate family
- ⊘ The primary guest's adult (18+) children
- ⊘ The primary guest's parents
- ⊘ The primary guest's siblings
- ⊘ The primary guest's friends

The **title** field of the Primary Guest will automatically be set to match the title on the Guest Tile.

If your Guest Tile title was entered as Mr. & Mrs./ Mr. &Mr. / Mrs. & Mrs., you will need to edit the title field within the profile to a singular title.

The Profiles window will default to the **Reservations Tab**. This is the only tab you need to use.

Other departments such as Housekeeping, the Concierge, and Front Desk will use the additional tabs.



If a guest has children, we need to document the children's ages.

We typically do not obtain a birth year, so instead of filling in the Birth field, we document the age of each child in the **Notes** section in the following format: Age 12 in 2021.

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

Use the **Add Profile** button to add additional family members.

Use the **Edit Profile** button to edit any fields within these tabs.

Media Type & Source Codes

Upon saving a new Guest Tile, you will be prompted to select the **Media Type** from a pop-up window.
You click the number next to the option you want to select, which will open a second pop up window for more detailed options based on your selection.

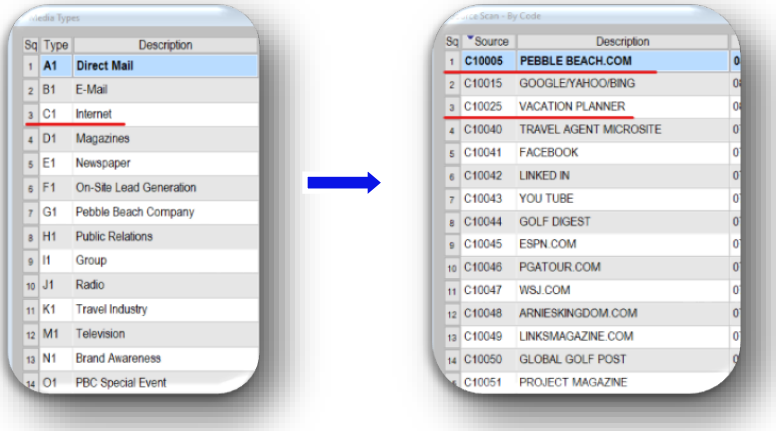
The following examples are the three most common Media Types you will select.

Internet

Guests who have visited our website prior to booking their trip.

Pebblebeach.com – If they simply reviewed the information on the website

Vacation Planner – If they submitted a VP request.



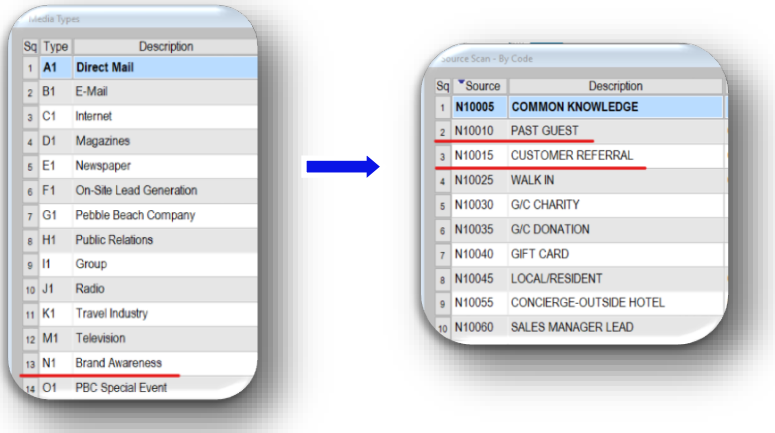
Sq	Type	Description
1	A1	Direct Mail
2	B1	E-Mail
3	C1	Internet
4	D1	Magazines
5	E1	Newspaper
6	F1	On-Site Lead Generation
7	G1	Pebble Beach Company
8	H1	Public Relations
9	I1	Group
10	J1	Radio
11	K1	Travel Industry
12	M1	Television
13	N1	Brand Awareness
14	O1	PBC Special Event

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
10	C10046	PGATOUR.COM
11	C10047	WSJ.COM
12	C10048	ARNIESKINGDOM.COM
13	C10049	LINKSMAGAZINE.COM
14	C10050	GLOBAL GOLF POST
15	C10051	PROJECT MAGAZINE

Brand Awareness

Past Guest – Guests who have stayed long ago, but their Guest Tiles are now archived.
Guests who stayed before, but not under their own Guest Tile.

Customer Referral – C/O Guest Tiles



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

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



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

Once the Media Type is set, you will be prompted to select the **Source Code** which indicates the department the guest contacted.

You will always set this to **Reservations Center.**

Recreation Confirmation Emails

A **Recreation Email** will send a confirmation email to the guest listing **all active recreational activities** (meaning not cancelled or in the past) **associated with their Guest Tile,** regardless of what Itinerary they are connected to.

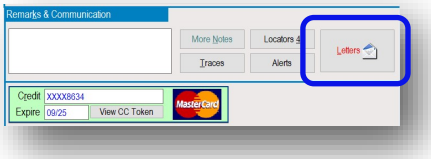
Recreation emails sent from the Guest Tile

VEMAIL: Guest based recreation email

DNDEMAIL: Does not disclose rates for golf

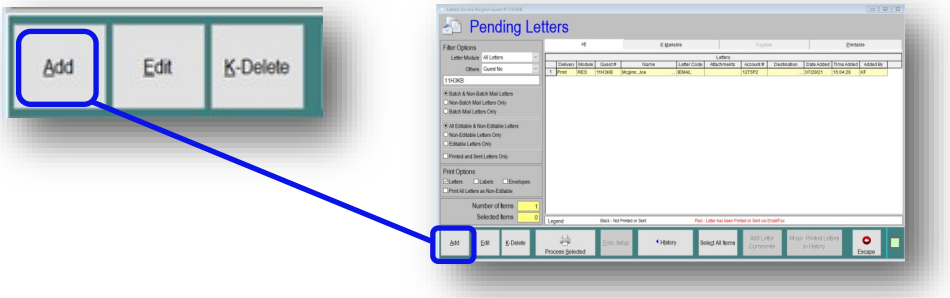
SPEVMAIL: Special events based email (dinning)

1.) Open the Guest Tile and click the Letters button



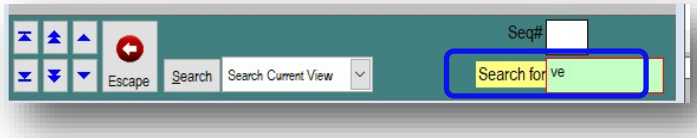
2.) This will open the Pending Letters window

Click Add to open a menu of letters that you may send

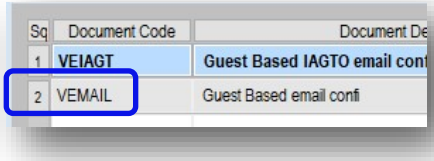


3.) Hit tab to move your curser to the Search field

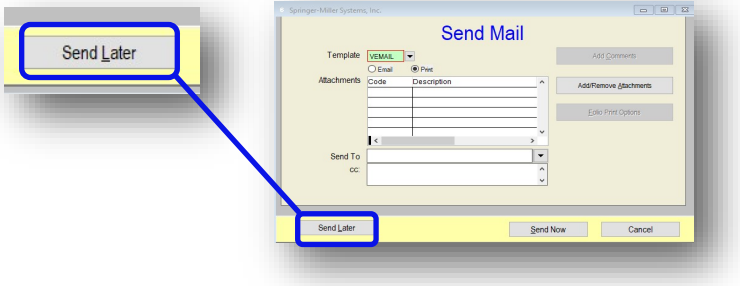
Type "VE" then hit Enter



4.) Type "02" to select the VEMAIL document code



5.) Type "ALT+L" to select "Send Later"



HOTKEYS:

⇒ L

⇒ A

⇒ Tab

⇒ VE

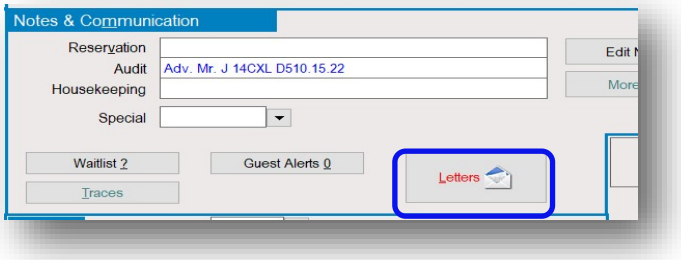
⇒ 02

⇒ ALT+L

Room Confirmation Emails

Resort Guests are sent different confirmation emails than Outside Guests.

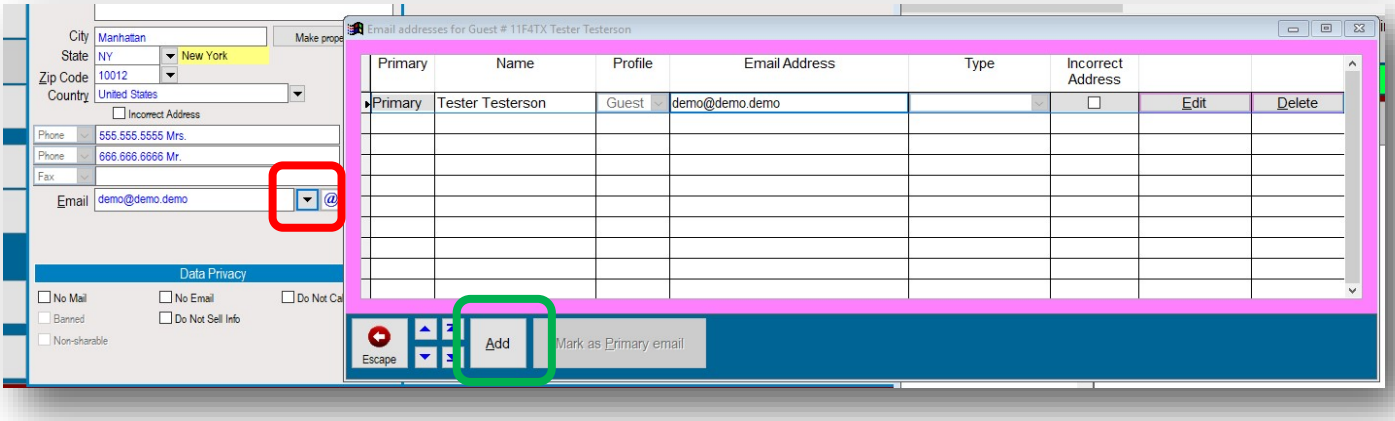
Additionally, these Resort Guest confirmation emails must be sent from the Room Reservation instead of the Guest Tile.



Code	Reservation Type	Reason
IEMAIL	Primary Resort Guest 3rd Party Payers Friends and Family	• These guests are personally financially responsible for their own bookings and are fully aware of the room rates. • This email will display the room type, room rates, and recreation for all bookings connected to the guest's Itinerary.
REMAIL	Secondary Resort Guests	• These guests are sharing an Itinerary with other guests who are coming on the same trip. • This email will only send room and recreation details specifically booked by this guest; not all guests on the Itinerary.
UPGDMAIL	Upgraded Guests	• These guests have been given a complimentary room upgrade by the Front Desk. We do not want guests to know that they have been upgraded until check-in because the Front Desk can still potentially remove the upgrade before they arrive. • This email confirmation will display the room type the guest paid for; not the room type they have been upgraded into.
TAIEMAIL	Travel Agent Bookings Tour Operator Bookings	• These bookings have been made by Travel Agents or Tour Operators on behalf of guests and are the "owners" of the booking. • This email code states that the booking is for their "client," not the agents themselves. • Only send these emails to the agents; never the attending guests. Guests receive their confirmations directly from the Travel Agencies.
IEIAGT	IAGTO Bookings	• These bookings have been created by a special type of Tour Operator who receives negotiated room rates. They make their profit by charging their clients more money than they pay Pebble Beach Resorts. • The discount that the Tour Operator receives is confidential, so you must only send these emails to the IAGTO agents; never the attending guests. Guests receive their confirmations directly from the IAGTO agencies.
DNDEMAIL	Charity Bookings	• These guests won a gift certificate at a Charity Auction. The charity pre-paid for the guest's trip at a negotiated rate. • The negotiated rate that the charity paid is confidential, therefore we send a confirmation email to the attending guest that does not display the room rates.
GEMAIL	Group Reservations	• These guests are attending a stay with a corporation or organization. • The rates that the corporation/organization paid are confidential AND the room type the guest has been booked into is confidential. • This confirmation email will not display the room rate or room type
INSPIRAT	Inspirato Guests	• These guests are working with the luxury travel agency, Inspirato, whose agents book online via GDS. The E-Desk team manages these bookings. • These emails quote a 30 day cancellation policy and hides the nightly rate, instead referring guests to their Inspirato booking form.

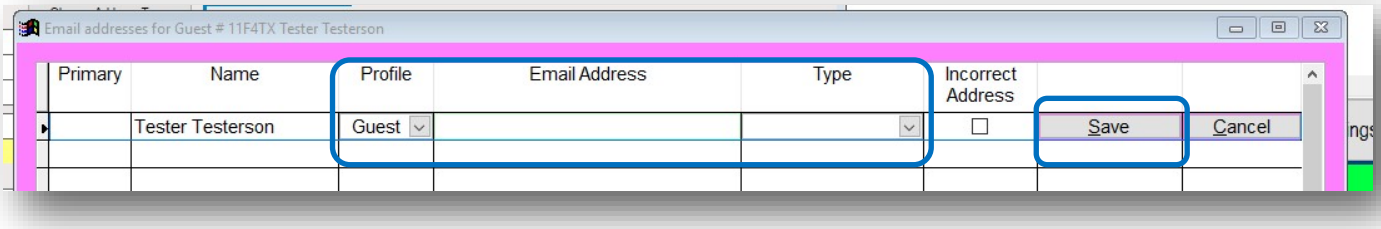
Add Multiple Email Addresses To A Guest Tile

Step 1– Click the drop down arrow next to the existing email address. That will cause this window to open.
Step 2– Select Add

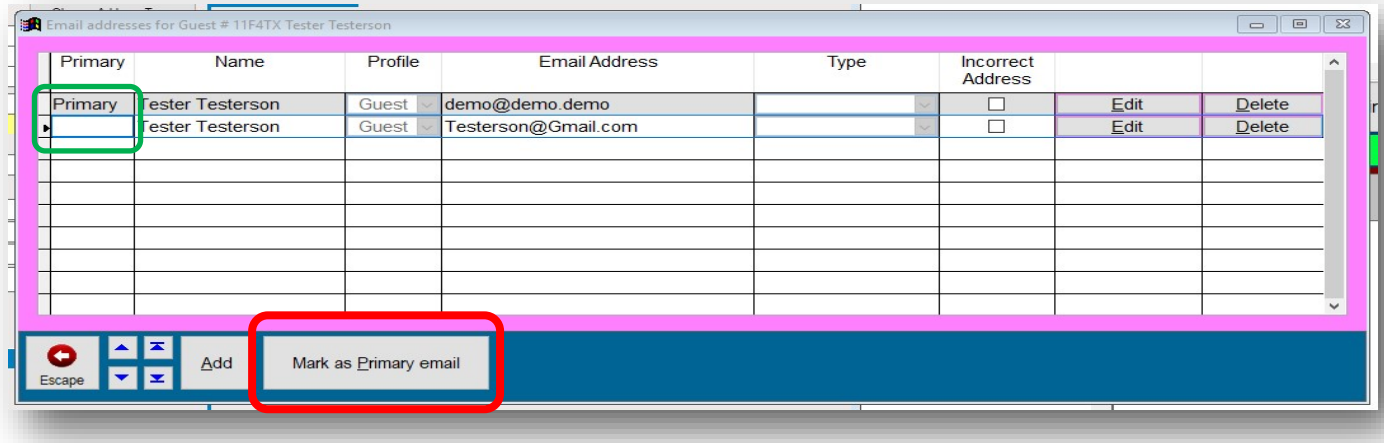


Step 3–

- Add the new email address to the required field and click save.
- If the email address if for a different Profile on the Guest Tile, select the correct profile from the dropdown
- You can specify Personal or Business in the Type Field if that information is provided.



Step 4– Select the Primary Field for the new email you have just added
Step 5– Click on Mark as Primary Email. This will now be the guests default email.



NOTE: All email address added to a Guest Tile must belong to the Guest or the Profiles. If a Travel Agent or Third party wants to receive an email confirmation, you must enter their email address into the **Housekeeping** line of the Reservation Tile.

Confirmation will only be sent to the email in Housekeeping:

Reservation	
Audit	adv 14cxl 3.4.22 bx 10.4.21
Housekeeping	travel@agent.com

Confirmation will be sent to both the email in the Guest Tile AND the email in Housekeeping:

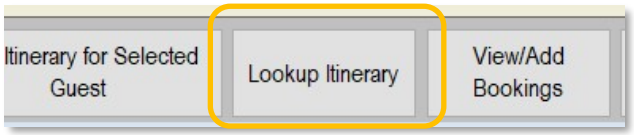
Reservation	
Audit	adv 14cxl 3.4.22 bx 10.4.21
Housekeeping	COPY: travel@agent.com

Lookup Itinerary

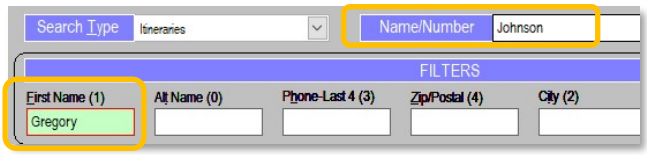
Before we create a new booking, we must find out if the guest already has an existing reservation.

- *This helps us avoid scheduling conflicts*
- *It helps all resort departments stay organized*
- *It allows us to send confirmation emails that include everything about a guest's stay*
- *And—most importantly— golf guidelines can potentially change depending on what they have already booked*

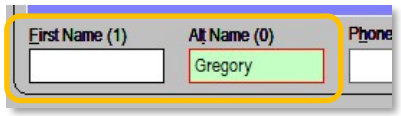
1. To search for an existing Itinerary, click the "Lookup Itinerary" button at the bottom of your booking center.



2. Ask the guest what name the booking was made under—and how to spell it.
   Enter this into the First/Last Name fields

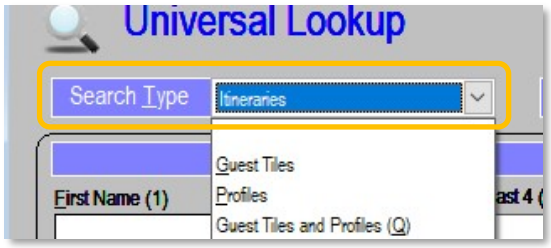


3. If nothing pulls up, move the first name to the "Alternate" field.



4. If nothing pulls up, change the Search Type:

Room	All Reservations
Golf	Golf Tee Time Bookings
Dining	Dining Bookings

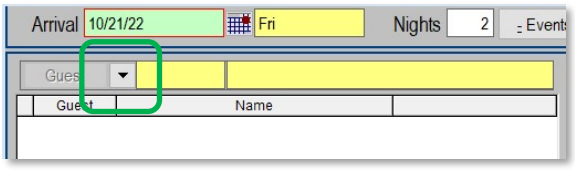


5. If, still, nothing pulls up check the Dining Sheets or Tee Sheets
   Ask the guest:
   - What they booked
   - Dates / Times
   - How Many People
6. If you still cannot find the booking, contact your supervisor for assistance



Guest Tile Search

Guest Tile Searches are done *after* you have fully created a booking for your guest. **Once everything is in your booking center, click the down arrow next to the Guest Button.**



To avoid creating duplicate Guest Tiles, you must ask the following questions:

- **Have you visited Pebble Beach Before?** *(meaning dined, played golf, or stayed at the resort)*
- **How long ago was your last visit?** *(If it was 10+years ago, their existing Guest Tile was likely purged from our system, so you will need to create a new one)*

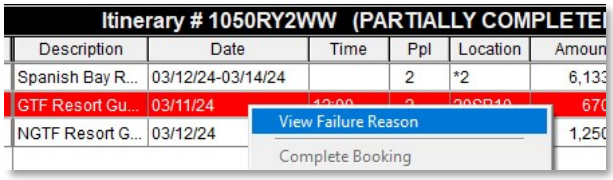
If you do not see results when searching for their Guest Tile, ask:

- **Was that previous visit booked under your name or made by someone else?**
- **Could it have been booked under a spouse's name instead?**

If you still do not pull up any results, you are clear to create a new Guest Tile

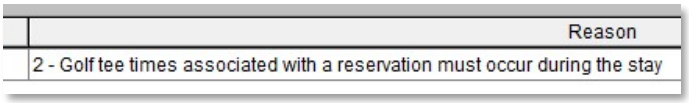
Booking Rules

Booking Rules are rules that are set into place in SMS that will prevent a booking from being complete until the criteria is met.
To view why the booking cannot be completed > Right Click the line item in red > Click View Failure Reason

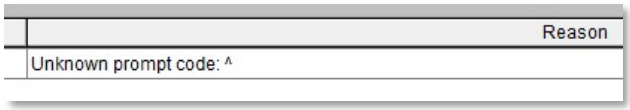


Solutions to Common Booking Rules

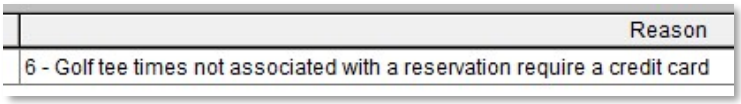
1. Failure Reason: Recreation connected to a room must occur during the stay
   Action: Change the date of the recreation to during the stay or book as outside guest within guidelines



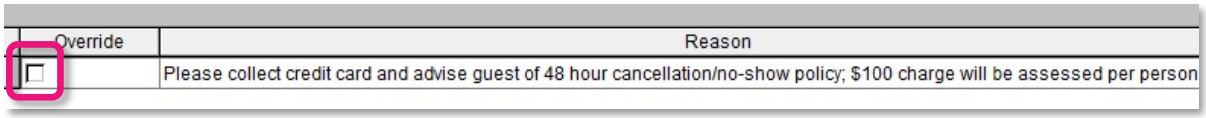
2. Failure Reason: Multiple recreation activities overlap each other
   Action: Move one of the activities to give time between each recreation



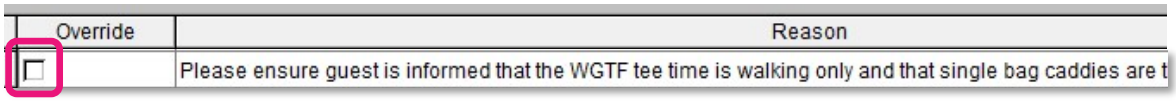
3. Failure Reason: A credit card is required to secure a tee time
   Action: Collect a credit card onto the Guest Tile and whose it to the tee time



4. Failure Reason: A credit card is required to secure holiday/PBC special event dining
   Action: Collect a credit card onto the Guest Tile > quote cancellation and fee > check Override box > Click Escape > Complete booking



5. Failure Reason: The tee time is Walking Only
   Action: Advise the guest tee time is Walking Only > Guest can take a single bag caddie or no caddie > check Override box > Click Escape > Complete booking

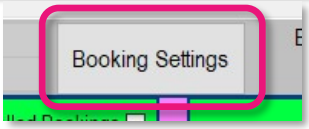


6. Failure Reason: Tee time is on a Wednesday when Spyglass Driving Range closes early for maintenance
   Action: Advise the guest that the Spyglass Driving Range closes early for maintenance at 11:30am > check Override box > Click Escape > Complete booking



7. Failure Reason: Not all fields have been filled out to complete the booking
   Action: Complete the Booking Setting for the **Room** reservation



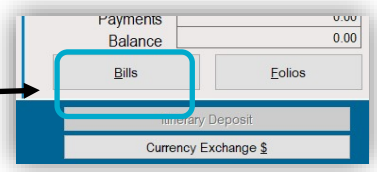


How to Charge a Credit Card

Always keep the guest on the line while you charge a credit card.

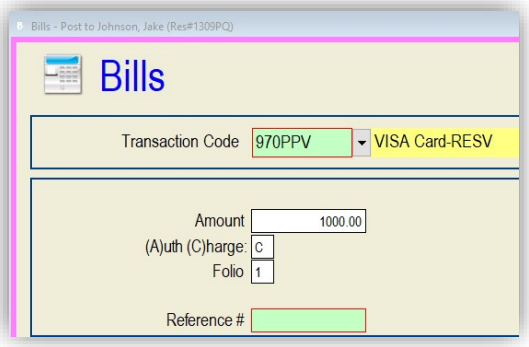
1.) Locate the Reservation Tile

2.) Click the Bills Button



3.) Input the following into the Bills window:

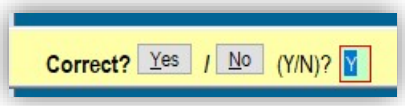
- Transaction Code
- Dollar Amount
- "C" to charge the card
- Keep the Folio as 1
- Keep Reference # blank



WHAT IS MY TRANSACTION CODE?

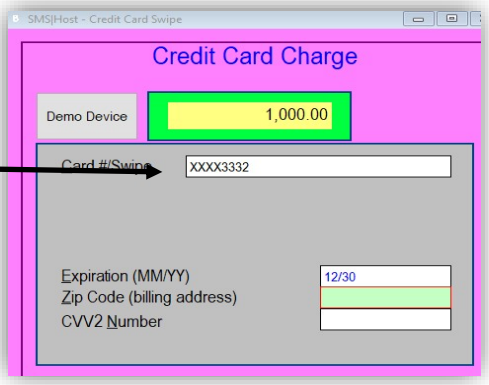
Dept. #	Post Payment	Credit Card Code
970	PP	**M**astercard *(always starts with 2 or 5)* **A**merican express *(always starts with 3)* **V**isa *(always starts with 4)* di**S**cover *(always starts with 6)* JCB and Dinners Club also use **S** **Y**ou got me a Gift Card! *(always starts with 0)*

4.) Press "Enter" to confirm



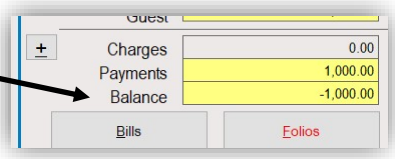
5.) Select "Y" to the following prompt

You will see the credit card number from the Guest Tile populate here



6) Hit Page Down to charge the card

7.) Click Escape twice to return to the Reservation and see the finalized charge



IS THE CARD DECLINING?

- Make sure the name on your Guest Tile exactly matches with the name on your Guest 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)

Gift Card FAQs

The photo on the gift card is purely decorative

- The photo does not indicate where the card may be utilized

Online Store Customer Service:

Phone (USA or Canada): (800) 873-0341
Phone (International): (831) 649-7637
Fax: (831) 648-7881
E-mail: customerservice@pebblebeach.com
Hours: 8:00 a.m. - 4:00 p.m. PST Monday - Friday

www.shop.pebblebeach.com/contact

Gift Cards are valid for all purchases at Pebble Beach Resorts

- Room bookings
- Greens Fees
- The Spa at Pebble Beach
- Pebble Beach Restaurants
- Pebble Beach Retail Outlets including Pro Shops
- Pebble Beach Online Shop

Guests may purchase Pebble Beach Resorts Gift Cards:

- Online at pebblebeach.com
- In person at any recreation / dining / retail location on property
- For international shipping, connect to online customer service to place a phone order

Online Gift Cards can be sent with expedited shipping

- Guests will select the shipping speed during checkout
- Advise guests to factor in order processing time (1-2 days)
- We only send physical gift cards—no E-Gift Cards

A gift card does not guarantee a specific tee time, room, or any other activity

- Guests must still adhere to Outside Guest / Resort Guest Guidelines

Guaranteeing Room or Golf with a Gift Card

- Tee Times—Guests must either pre-pay the entirety of their golf booking with their Gift Card on a City Ledger (or) guarantee the booking with a standard credit card, then bring their Gift Card to the pro shop on the day of play
- Rooms—Guests must either prepay the entirety of their booking, room and golf, with their Gift Card at the time of booking (or) pay their deposit with their Gift Card, then provide a standard credit card to keep on file to guarantee the booking.

Gift Cards Returns/Refunds

- Gift cards may only be returned/refunded by the original purchaser, and funds will be re-turned to the original credit card used to purchase the gift card
- Refer guests to the Online Shop Customer Service to process the return/refund

Refer Lost Gift Cards to Online Store Customer Service

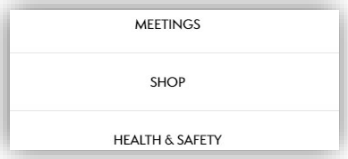
Gift Card Website Directions

1. Access www.pebblebeach.com

2. Click the Menu in the top right corner



3. Click Shop



4. Click "Gift Cards" in the Header Menu



Guests select the photo they want on the card, then follow prompts to complete their order.

Online Store Customer Service:

Phone (USA or Canada): (800) 873-0341
Phone (International): (831) 649-7637
Fax: (831) 648-7881
E-mail: customerservice@pebblebeach.com
Hours: 8:00 a.m. - 4:00 p.m. PST Monday - Friday

www.shop.pebblebeach.com/contact

Check a Gift Card Balance

1. In SMS, click on the Gift Card Icon



2. Place your curser in the green Credit field

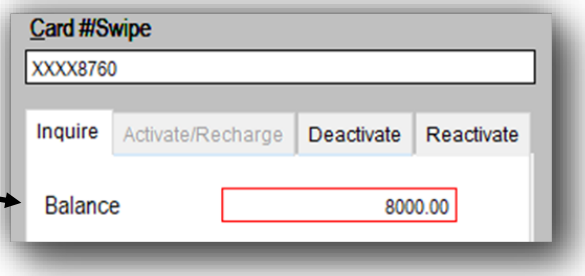


3. Use your ID Tech to input the 16 digit Gift Card #

4. Enter any date in the future

5. Hit Enter to bypass the Security Code

The Balance will populate:



Group Reservation Inquiry

Group Attendee—The guest whose room has been reserved by their corporation/organization

Group Coordinator—The Group Room & Golf Coordinator within PBC who is responsible for all room reservations for an Attendee's corporation/organization

Group Planner—The representative from the outside company/organization who is working with the Pebble Beach Group Coordinator to plan the large group's visit

Group Attendee Wants to Adjust Their Room or Group Golf?

1. Access the Group Listing document in the Digital Binder
2. Search for the name of the group
    - The Coordinator's name will be documented on the same line as the group
3. Access the Group Guest Inquiry email template in the Digital Binder
4. Fill out all fields of the template as applicable, this template has everything the Group Coordinator needs to know
5. Send the email to the applicable Group Coordinator and cc your supervisor



Brand New Group Inquiry:

If you are speaking to someone who wants to set up a large group stay for their organization or corporation, you can refer them to _SalesLeads

Large Group Roles and Responsibilities Overview

Business Development Coordinators (SalesLeads): Vet new large group leads and assign them to either Pebble Beach Preferred or National Sales Managers.

Pebble Beach Preferred: Manages contracts for smaller groups (13-15 rooms), focusing on weddings, smaller events, and the Club Pro Program.

National Sales Managers: Create contracts for larger groups exceeding the booking thresholds set by Leisure Reservations and Pebble Beach Preferred.

Group Rooms & Golf Coordinators: After contracts are signed, they handle all room and golf bookings for the groups.

Group Golf Coordinator: Oversees tee sheets for all courses and manages Non-Resort Golf Groups of 13 or more golfers.

Caddie Services: Manages schedules for all contracted Pebble Beach Caddies.

Catering & Conference Services: Coordinates banquets, catering, A/V requirements, and logistics for all large group meetings and events.

Group Attendee Booking Recreation (1/2)

Link to Video Tutorial

Group Reservations manages all rooms and tee times for large groups, however, Group Attendees sometimes want to book additional golf or dining outside of what their group arranges.
It is the job of Leisure Reservations to reserve additional recreation for Group Attendees.

STEP 1: LOCATE THE ROOM

Open "Lookup Itinerary" and change the Search Type to "All Reservations" and search by name.



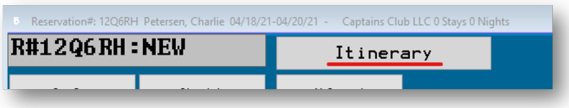
IF YOU DO NOT FIND THE ROOM:

That means that the guest's name has not yet been assigned to a room.

- If the guest wants to book golf under Resort Guest Guidelines, use the Group Guest Inquiry Template in the Digital Binder to ask the Group Coordinator to assign this guest's name to a room.
- If the guest is within Day Guest Guidelines, offer to book their golf as a day guest, but advise them to call back to connect the golf to their room so they will receive complimentary carts.
- If the guest only wants to book dining, use Zomato to book dining.

STEP 2: CREATE AN ITINERARY

Open the guest's Reservation Tile and click on the "Itinerary" button in the top left corner.



◊ Click "C" to create and Itinerary
◊ Click "Y to confirm creation

The Booking Center will automatically open.

STEP 3: BOOK GOLF AND DINING

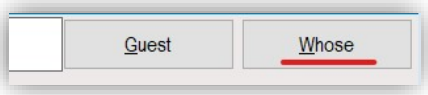
Use the Tee Times Tabs of the booking center to book whatever recreation the guest would like. Use Zomato to book dining.

◊ All golf must meet our Resort Guest or Outside Guest guidelines.
◊ Golf should be booked as Resort Guest unless the dates of play do not overlap with the guest's dates of stay.
◊ Quote the appropriate CXL policy based on the date of play.

Group Attendee Booking Recreation (2/2)

STEP 4: WHOSE THE GUEST TILE

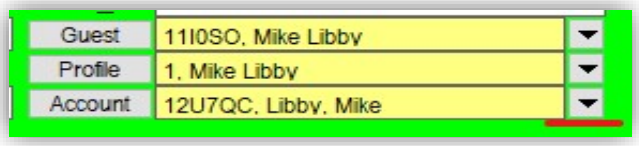
- Double click on the room to re-open the Reservation Tile
- Click the “Whose” button on the Reservation Tile to open the Guest Tile Search



- Locate or create a Guest Tile for your guest.
  - ◊ Collect a credit card
  - ◊ Collect Ful Billing Address
- Close the Call

STEP 5: WRAP UP

- Rename the tee time to the name of the guest
- Attach the credit card to the tee time by refreshing the room (Account)

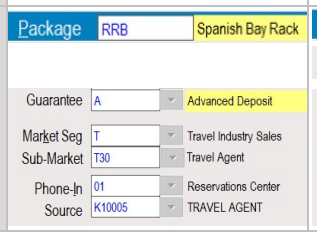
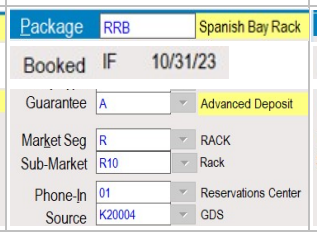
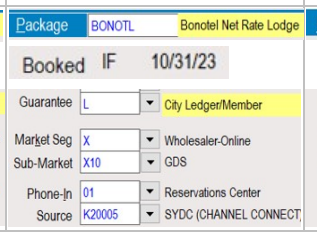
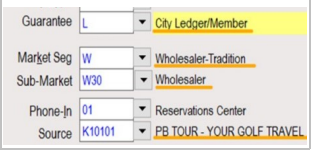


- Leave a babynote with CXL Adv.
- Complete (do not confirm)
- Send a GEMAIL from the room
- There will not be a Lead Form
- Call Disposition = Group Attendee Booking Recreation

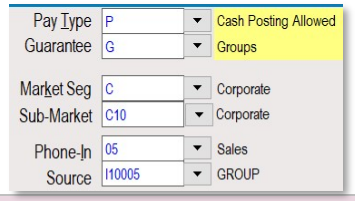
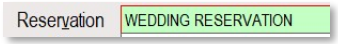
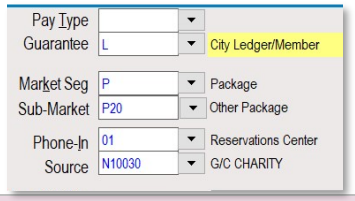
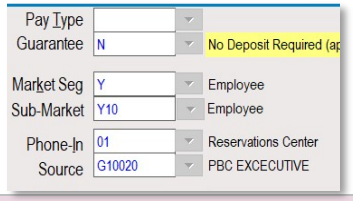
RETURN TO DGA TABLE OF CONTENTS
RETURN TO RSA TABLE OF CONTENTS

C9|BX 8.22.24

Travel Agents & Tour Operators

	TRAVEL AGENT	GDS ONLINE PORTAL	INSPIRATO [GDS]	BONOTEL [GDS]	IAGTO	WHOLESALE TOUR OPERATORS
CONTACT E-DESK	• IF YOU ARE SPEAKING WITH A TRAVEL AGENT/TOUR OPERATOR, IMMEDIATELY CONNECT THEM WITH THE E-DESK VIA TTAG OR EMAIL TRAVELDESK@PEBBLEBEACH.COM • IF YOU ARE SPEAKING TO THE GUEST, FOLLOW THE CHART BELOW, THEN EMAIL TRAVELDESK@PEBBLEBEACH.COM TO ADVISE OF WHAT YOU CHANGED • IF YOU ARE HAVING TROUBLE ASSISTING YOUR GUEST, CALL AN AVAILABLE E-DESK AGENT TO EXPLAIN THE SITUATION, THEN USE HOLD FOR AGENT IN REVINATE TO CONNECT					
CAN I ADD DINING?	YES	YES	YES	YES	YES	YES
CAN I ADD CADDIES/CLUBS?	YES QUOTE FEES	YES QUOTE FEES	YES QUOTE FEES	YES QUOTE FEES	YES QUOTE FEES	YES QUOTE FEES
CAN I CHANGE OR ADD GOLF?	YES IF TAG'S CC IS ON FILE, ADV GUEST TAG MUST CALL	YES RACK RATE RESORT GUEST GUIDELINES GUARANTEE W/GUEST'S CC & UPDATE GUEST TILE	NO	YES RACK RATE RESORT GUEST GUIDELINES GUARANTEE W/GUEST'S CC & UPDATE GUEST TILE	NO	NO
CAN I DISCLOSE RATES ?	NO	YES	NO	NO	NO	NO
CAN I MODIFY THE ROOM?	NO	NO	NO	NO	NO	NO
CAN I CANCEL THE RESERVATION?	NO	NO	NO	NO	NO	NO
CAN I SEND A VEMAIL?	NO	YES	NO	YES	NO	NO
CAN I SEND A ROOM EMAIL?	YES TAIEMAIL ADV GUEST THAT TAG WILL RECEIVE THE EMAIL	YES TAIEMAIL ADV GUEST THAT TAG WILL RECEIVE THE EMAIL	YES INSPIRAT ADV GUEST THAT TAG WILL RECEIVE THE EMAIL	YES IEIAGT ADV GUEST THAT TAG WILL RECEIVE THE EMAIL	YES IEIAGT ADV GUEST THAT TAG WILL RECEIVE THE EMAIL	YES IEIAGT ADV GUEST THAT TAG WILL RECEIVE THE EMAIL
HOW TO IDENTIFY? • PACKAGE CODE • MARKET CODE • SOURCE CODE • BOOKED INITIALS						PACKAGE COULD BE IAGTO OR PB TOUR 

Specialty Reservations

	GROUP	WEDDING	CHARITY/DONATION CERTIFICATES	EMPLOYEE VALUE SEASON (EVS)
CONTACT	SEE GROUP LISTING	_RES WEDDING DESK	_CHARITY DESK	_EMPLOYEE RESERVATIONS
IF **NEW** INQUIRY CONTACT	_SALES LEADS	_WEDDINGS	IF **CHARITY** INQUIRY: EMAIL _CHARITY DESK IF **GUEST** REDEMPTION: BOOK IT & ADV VIA EMAIL _CHARITY DESK	ADV SUBMIT FORM THROUGH BACK 9
CAN I ADD DINING?	YES	YES	YES	YES
CAN I ADD CADDIE(S)?	EDIT LEISURE GOLF ONLY **DO NOT** EDIT GROUP GOLF	YES	YES	YES
CAN I CHANGE OR ADD GOLF?	ADD GOLF @ RACK RATE RESORT GUEST GUIDELINES	ADD GOLF @ RACK RATE RESORT GUEST GUIDELINES	ADD GOLF @ RACK RATE RESORT GUEST GUIDELINES	ADD **PB** AND **SG** AS DAY GUEST GUIDELINES @ RACK ADD **SB** @DISCOUNTED RATE USE: EHR $140 Rate 4SM PER ROOM PER NIGHT
CAN I DISCLOSE RATES TO THE GUEST?	NO	YES	NO	YES
CAN I MODIFY THE ROOM?	NO	NO	NO	NO REFER FRIENDS/FAMILY TO PBC EMPLOYEE REFER PBC EMPLOYEE TO THEIR MANAGER
CAN I CANCEL THE RESERVATION?	NO	NO	NO	YES ADV EERES@ WHEN COMPLETE
CAN I SEND A VEMAIL?	YES	YES	YES	YES
CAN I SEND A ROOM CONFIRMATION EMAIL?	SEND GEMAIL	SEND IEMAIL	SEND DNDEMAIL	SEND IEMAIL
HOW TO IDENTIFY?				
If NO, then collect the guest's information and email the contact for that reservation or transfer to appropriate skill in Revinate				
SKILL IN REVINATE	NONE	WED	NONE	NONE

VIP Reservations

	VIP 1-2	VIP 3	VIP 4	VIP 5	VIP 6	VIP 7	VIP 8
How to identify? Reservation Line:	V1 or V2	V3	V4	V5	V6	V7	V8
Contact	Transfer call to Sara Gray x7823 grays@pebblebeach.com & _VIPReservations	_VIPReservations	**Check D-Note / G-Note** Original Requestor & _VIPReservations	**Check D-Note / G-Note** Sales Assistant & _VIPReservations	**Check D-Note / G-Note** _VIPReservations	Joyce Hiura hiuraj@pebblebeach.com & _VIPReservations	Christianna Hazelip hazelipc@peblebeach.com & _VIPReservations
Can I add Dining?	YES Adv contact of changes	YES Adv contact of changes	YES	YES	YES	YES Adv contact of changes	YES Adv contact of changes
Can I change or add golf?	NO	NO	NO	YES Day Guest Golf Guide-lines	Add golf @ Rack Rate **Do not adjust comp golf**	NO	NO
Can I modify the room?	NO	NO	NO	NO	Add nights @ Rack Rate Ask Supervisor for assistance **Do not adjust comp room nights**	NO	NO
Can I disclose rates to the guest?	NO	NO	NO	NO	YES	NO	NO
Can I cancel the reservation?	NO	NO	NO	NO	YES	NO	NO
Can I send a room confirmation email?	NO	NO	NO	YES VEMAIL	YES VEMAIL / IEMAIL	NO	NO

If NO, then collect the guest's information and email the contact for that VIP reservation. Please always CC _VIPReservations in this communication.

The Lodge at Pebble Beach

	Style	View	Signature Dish
THE BENCH VO L/D **(1) TV**	Eclectic International Wood fired dishes Elegant/Casual	Stillwater Cove PBGL 18th Green	Fire Cracker Shrimp Bread Balloon Flatbread Pizzas
STILLWATER BAR & GRILL RO B/L/D	CA Coastal Seafood Local organic produce Upscale/Formal dining	Full wall of windows Stillwater Cove PBGL 18th Green	Oysters Crab Cakes Abalone Filet & Lobster Tail
TAP ROOM G L/D **TVs**	Steakhouse / Tavern 19th Hole of PBGL Casual/Lively	Our "Trophy Room" Historic Memorabilia	Kobe Brie Burgers Coconut Cake Prime Rib Chili
HAY'S PLACE VOF L/D **TVs**	Mexican Inspired Cuisine Casual/Fun	The Hay Lodge and Stillwater Cove	Tin Can Nachos Tiger Fajitas Horchata
GALLERY CAFÉ *Walk-in only* G B/L	For Early Risers Homestyle Sit down or to-go Casual	PBGL Putting Green PBGL 1st tee box	Sticky Buns Chorizo Biscuits Huevos Rancheros Chicken & Waffles
BEACH CLUB RESTAURANT *Resort Guests/ Members only* O L	Seafood & Traditional Favorites Cathedral ceiling with walls of windows over-looking PBGL hole 17 Poolside Service	Stillwater Cove/ Harbor PBGL 17th Green	Petrale Sole Ahi Poke Bowl Beef Wok Stir Fry
PEBBLE BEACH MARKET F	Great stop for bike riders. 17 Mile Drive Picnic Over 500 wine selec-tions	Stillwater Cove Visitor's Center Adirondack chairs Picnic tables	Picnic Baskets Wine and Cheese Gelato Sandwiches Small Gifts
TERRACE LOUNGE O	Lobby/Gathering Place Limited SWBG menu	Stillwater Cove PBGL 18th Green Live Music Th-Sat	Oysters Artisan cheeses Lobster sandwich
THE SPA JUICE BAR & CAFÉ V *Spa Guests only*	Fresh, healthy food Quiet/relaxing Coffee/Tea Bar	Outdoor seating Spa pool/Courtyard	Smoothies Salads and Wraps Fresh Juices

The Inn at Spanish Bay

	Style	View	Signature Dish
ROY'S VO B/L/D	Hawaiian-Asian Fusion Elegant/Casual	Lobby Firepits Asilomar Beach Sunset SB 1st Fwy/2nd green	Sushi Beef Short Ribs Kona Cake
PEPPOLI RV D	Northern Italian/ Tuscan Terrific wine selection Upscale/Formal	Open Kitchen Asilomar Beach Sunset SB 1st Fwy	Fillet Mignon Lasagna Tiramisu Fresh Ricotta app.
STICK'S GF B/L/D **TVs**	Upscale Sports Bar American Comfort Food Casual/Lively	Asilomar Beach Sunset SB 1st tee box/Fwy	Fish Tacos Nachos Cookie Skillet
STAVE WINE CELLAR	Certified Sommeliers Intimate Wine Lounge Luxurious yet casual Wine and small bites	Leather armchairs 2-sided fireplace	Wine tastings Cheese boards
TRAPS R	Limited Peppoli menu Late night bar	Televised sporting events Live music SB Fairway/Ocean	Pretzel/Sausage board Truffle parmesan fries Toscana Burger
LOBBY LOUNGE O	Lobby/Gathering place Limited Roy's menu	Outdoor firepits Asilomar Beach SB 1st Fwy/2nd green Live music Th-Sat	Roy's Mai Tai Sushi/Poke Calamari

Golf Course Eateries

SPYGLASS HILL GRILL G	Grab and go food Casual	SG 9th green "the turn" Casual, Counter service Outdoor patio	Beers and Cocktails Breakfast Burritos Chicken Sandwich Hot Dogs
DEL MONTE BAR & GRILL G	Traditional American Casual/Counter service	View of the putting green of DM Outdoor patio	Smash Burgers Fried Chicken Sand-wich
NEVILLE'S G	Snack Shack, Golfers only	At the turn of PBGL	All premade grab and go snacks

O = Ocean View
R = Romance/Upscale
TVs = Televisions
G = Before/After Golf
F = Families with Kids
V = Vegetarians/Vegan/Gluten Free
B = Breakfast
L = Lunch
D = Dinner

Dining Booking Call Flow - Zomato

1. Call Opening:

- *"Thank you for calling Pebble Beach Resort Reservations.*
- *My name is _____.*
- *May I please have your first and last name?*
- *Thank you Mr./Ms. ____.*
- *How are you doing today? I'm great, thank you.*
- *How may I assist you?"*

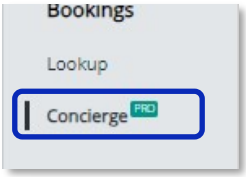
Logistical Questions:

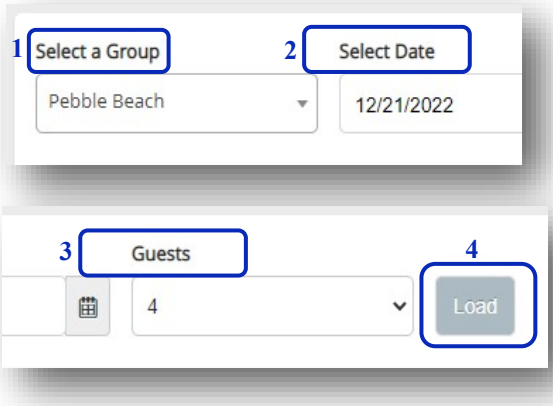
- *"What day would you like to dine?*
- *How many people will be dining?*
- *Which restaurant would you like to dine in?*
- *What is your ideal time?*
- *Will you be staying with us at the resort during your visit?"*

2. Search for Availability:

"Please allow me a moment while I look into availability."

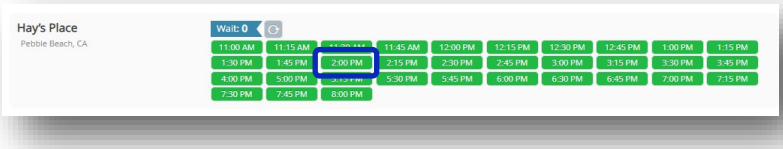
⇒ Click Concierge
⇒ Set your search fields
⇒ Click Load





3. Book Dining:

Select the time slot by clicking a green time within your selected restaurant



4. Transition to Guest Information

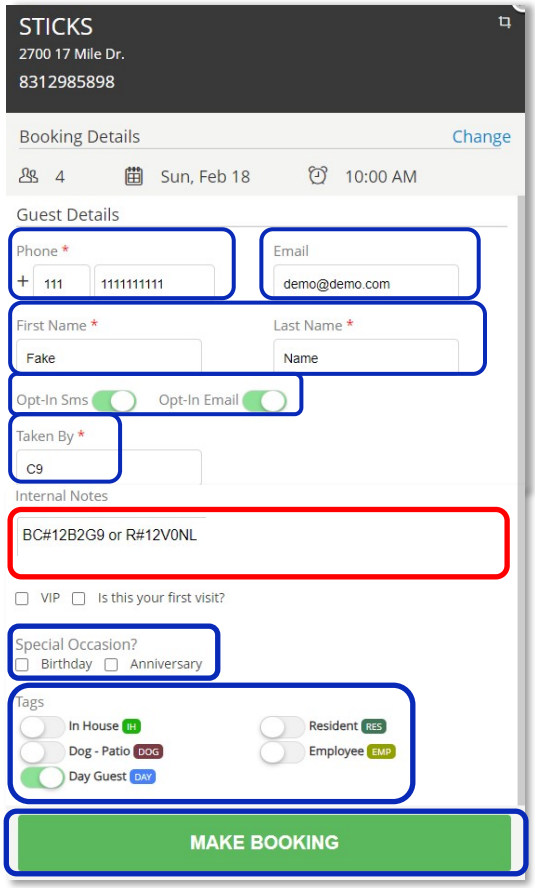
"To confirm this reservation, I need to gather some information. Can you please spell your first and last name?"

5. Booking Details:

⇒ Collect the guest's Phone Number
  ◊ Zomato will recognize phone numbers and auto-populate the guest's information
⇒ Collect guest's email if it didn't populate

"Would you like to opt in to receive an email confirmation after this call and text message from the restaurant on the day of your reservation?"

⇒ Select the appropriate Opt-In options
⇒ Input your SMS Initials into the Taken By field
⇒ Internal Notes— No special seating requests
  ◊ Notate celebration details or chargeback notes
  ◊ Notate BC# or R# if booking Beach Club Restaurant
⇒ Select the appropriate Special Occasion options
⇒ Select the appropriate guest Tags



6. Secure Reservation:

Click Make Booking to finalize the reservation

7. Call Closing:

- *"Thank you for your patience.*
- *You are reserved for **(recap the booking.)***
- *You will receive your confirmation email shortly*
- *Is there anything else I may assist you with?*
- *Thank you for calling Pebble Beach Resorts.*
- *Have a wonderful day."*

8. Wrap Up

Save your Call Disposition as Rest-Only Booking

Dining Booking Call Flow - Holidays and PBC Events

1. Call Opening:

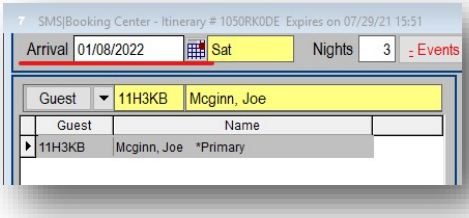
- *"Thank you for calling Pebble Beach Resort Reservations.*
- *My name is _____.*
- *May I please have your first and last name?*
- *Thank you Mr./Ms. ____.*
- *How are you doing today? I'm great, thank you.*
- *How may I assist you?"*

Logistical Questions:

- "Do you have an existing reservation?"
  "Before we begin, let me start by locating your existing reservation." (Use Lookup Itinerary)
- *"Are you looking to book for today or a future date?*
- *Which restaurant would you like to dine in?*
- *How many people will be dining?*
- *What is your ideal time?"*

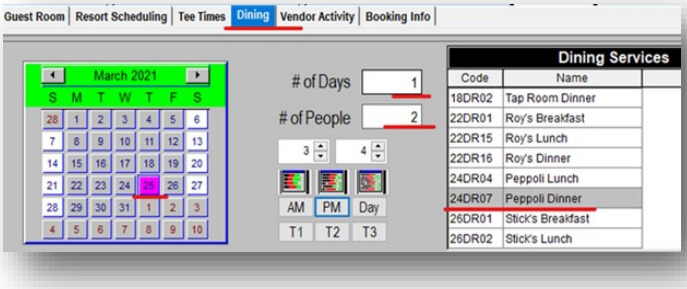
2. Master Calendar:

"Please allow me a moment while I look into availability."
Set the date range using your Master Calendar



3. Search for Availability:

Click on the Dining Tab and set the following fields:



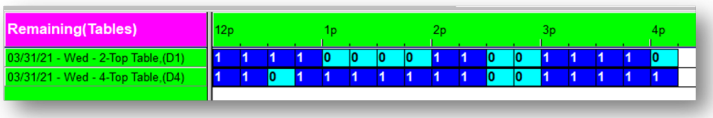
4. Advise:

- *"Since this date falls on (Holiday / PBC Event) we have a 48 hour cancellation policy. This means you can change or cancel your reservation up until 48 prior to the date of your booking.*
- *If you cancel or reduce inside 48 hours, you will be responsible for a $100 per person fee.*
- *Would you like to proceed?"*

5. Book Dining:

Double click on any of the dark blue time slots to pull that reservation into your Booking Center.

Never select the light blue or red fields—Reservations Agents may not overbook



6. Additional Dining:

"Are there any other reservations you'd like to make today?"
(Additional dining booked in Zomato if not a Holiday or Special Event)

7. Guest Tile:

"To confirm this reservation, I need to gather some information. Can you please spell your first and last name?"

Open Universal Lookup to search for a Guest Tile:

- If you find a Guest Tile, confirm the contact information with your guest. Double click to select.
- If no Guest Tile exists, click "Add New Guest" button

Guest Tile Must Include:

- Name
- Title
- Phone number:
  "What is a good mobile number to add to your profile?"
  (Change drop down to Mobile)
- Email:
  "What would be a good email to send your confirmation to?"
  "Would you like to be added to our email list to receive future promotions from Pebble Beach Resorts?"
- Billing Address:
  To secure this reservation, I will be collecting a credit card. May I please have your billing address?

8. Collect Credit Card:

"I am going to place our recording on pause to protect your credit card information."

- **Pause** the recording in REVINATE
- Collect the CC on your card reader
- **Un-Pause** the recording
- Save the Guest Tile
- Escape to the Booking Center

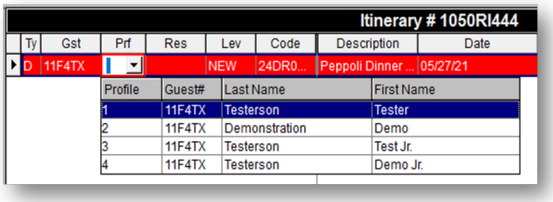


9. Call Closing:

- *"Thank you for your patience.*
- *We have reserved for you...* (recap the booking)
- *Once again, we have a 48 hour cancellation policy—cancelling or reducing within 48 hours will be subject to a $100 per person fee.*
- *You will receive your confirmation email within the hour.*
- *Is there anything else I may assist you with?*
- *Thank you for calling Pebble Beach Resorts.*
- *Have a wonderful day."*

10. Wrap Up

- Edit the Profiles on your Guest Tile:
  - ◊ Title
  - ◊ Gender
- Assign profiles to your dining bookings



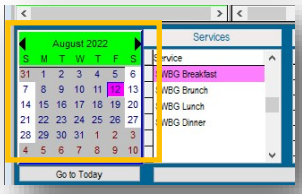
- Override the Failure Reason
  - ◊ Right click the booking - "View failure reason"
  - ◊ Check the Override box
- Complete and Confirm the booking
- Write your babynote on the dining booking
  - ◊ **ADV 48hr CXL & Fee BX 1.25.24**
- Send a **SPEVMAIL** confirmation email from the Guest Tile
- Save your Call Disposition as **Rest-Only Booking**

Locate A Booking on the Dining Sheets

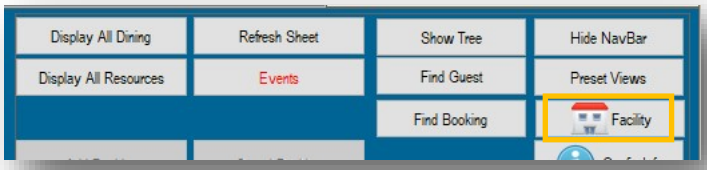
1. Ask the guest for the **date**, **time**, and **restaurant** that they reserved

2. Click the **fork/knife icon** in SMS to access the Dining Sheets 

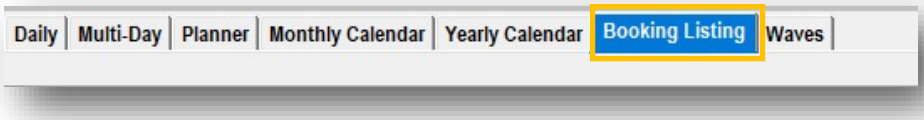
3. Use the **calendar** in the bottom left corner to set the date



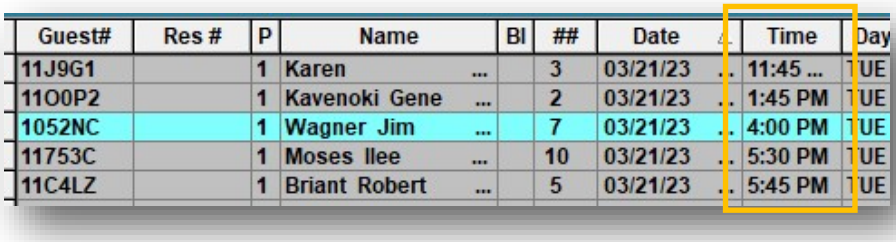
4. Click the **Facility** button to select the appropriate restaurant



5. Select the **Booking Listings Tab** at the top to display all dining reservations on that date

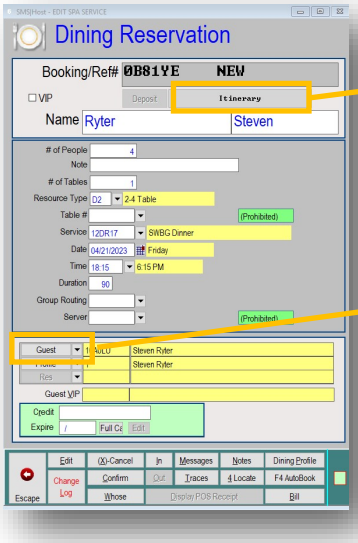


6. Now you can scan the results for the time slot the guest has provided and see who is booked into that spot



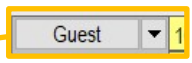
Guest#	Res #	P	Name	Bl	##	Date	Time	Day
11J9G1		1	Karen ...		3	03/21/23 ..	11:45 ...	TUE
11O0P2		1	Kavenoki Gene ...		2	03/21/23 ..	1:45 PM	TUE
1052NC		1	Wagner Jim ...		7	03/21/23 ..	4:00 PM	TUE
11753C		1	Moses Ilee ...		10	03/21/23 ..	5:30 PM	TUE
11C4LZ		1	Briant Robert ...		5	03/21/23 ..	5:45 PM	TUE

7. Once you find the correct booking, you can double click on it to open the **Dining Tile**





If the **Itinerary button** just says the word “Itinerary” instead of “ITN#XXXXXXX, click the Itinerary button to put this dining reservation onto a new or existing Itinerary for your guest.



If the dining reservation is connected to the wrong guest tile, or not connected to a Guest Tile at all, click the **down arrow next to the Guest button** to find/locate the correct tile.

Large Party Dining

1—8 Guests

- Book per standard procedures
- If party of 5-8, advise that restaurants allow a max of 4 separate checks

The Bench:

- Agents may book up to 10 guests at one table
- The Bench only has one 10-top in the dining room
- 11+ guests, must be booked at staggered times/tables per below instructions

The Beach Club:

- Agents may book up to 10 guests at one table
- Agents must verify BC Membership or Resort Guest status
  - ◊ If BC Member, notate membership # in dining notes
  - ◊ If Resort Guest, use "In-House" tag
- 11+ guests, email inquiry directly to the beachclubfb@pebblebeach.com
- For Membership Event Inquires, email beachclubfb@pebblebeach.com

9—24 Guests

- Advise that restaurants do not allow separate checks

Roy's or Peppoli:

- Email the Restaurant and CC _Restaurant Reservations
- Utilize the Large Party Email Template in the Digital Binder
- Include the name, phone, email, date, time, and # of guests

All other Restaurants - Advise guests:

- Their party will be broken out into separate tables booked 30 minutes apart.
- The restaurants cannot provide separate checks for parties of 9 or more .
- If they do not want separate times / separate tables, they can book a Private Dining Room or Communal Area.

How to Book: 

- Reserve up to 8 guests per table with time slots 30 minutes apart.
- Add "1/2", "2/2", etc., after the last name on each dining reservation.

24+ Guests

See Private Dining Rooms & Communal Areas SOP

"To accommodate a party of this size, we would need to reserve either a private dining room or communal area at our property. I am happy to discuss these large party options with you."

Restaurant Buyouts

The Tap Room	No	Roys	No
The Bench	No	Sticks	Yes
Stillwater Bar & Grill	Yes	Peppoli	Yes
Hays Place	Yes		

Private Dining Rooms & Communal Areas

1. Explain pricing and restrictions per the chart below
2. Advise that you will send an email to the restaurant managers—They should receive a response within 48 hrs.
3. Fill out the Dining Request Email Template in the Digital Binder—email to the contact listed on the charts below

PRIVATE DINING ROOMS	GUEST MAX	RENTAL FEE	FOOD & BEV MIN
Stanton Room _*The Bench*	**45**	**$2,500**	**$3,000** Lunch (11am - 4pm) **$5,500** Dinner Sun-Thu **$7,000** Dinner Fri-Sat
McComas Room _*Lodge Stillwater B&G*	**40**	**$2,500**	**$3,500** Lunch (11am-4pm) **$5,750** Dinner Sun-Thu **$7,000** Dinner Fri-Sat
Tuscan Room _*SB Peppoli*	**32**	**$2,500**	**$5,500** Dinner
Club Room _*Beach Club F&B* *BC Member use only	**40***	**N/A***	**$500***

COMMUNAL AREAS	GUEST MAX	RENTAL FEE	FOOD & BEV. MIN
Indoor Communal Table _*The Bench*	**22**	N/A	**$1,250** Lunch **$1,750** Dinner
Corporate Patio Fire Table _*The Bench*	**18**	**$1,500** (2hr max)	**$1,500** Lunch **$2,000** Dinner
Fire Pit _*Lodge HaysPlace*	**20**	**$750** (2hr max) **$500** (after 2hrs)	**$1,750**
Peppoli Patio (Sun-Thurs) _*SB Peppoli*	**48** Full Patio	**$8,500** Full Patio	**$13,000** Full Patio
Roy's Patio _*SB Roys*	**50-70**	**$5,000**	**$13,000**
Lobby Lounge Patio Fire Pit _*SB Beverage* Bartender **required** when booking **3 Firepits (>75ppl)** • $425 per bartender for 3 hours • After 3 hours, $175 per bartender per hour	**1** Firepit **1-25** ppl [Firepit C] **2** Firepits **25-50** ppl [Firepits A&B] **3** Firepits **50-100** ppl [Firepits A,B,&C] Firepit Configurations	**$1,500** per firepit	**$1,250** per firepit

Special Event PDR Rates

- AT&T Pro-Am | Monday January 27th - Sunday, February 2nd, 2025
- Pebble Beach Food & Wine | Thursday, April 10th - Sunday April 13th, 2025
- Concours d'Elegance | Monday, August 11th - Sunday, August 17th, 2025
- Pure Insurance Championship | Tuesday, September 16th - Sunday, September 21st, 2025

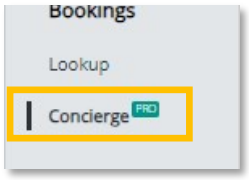
PRIVATE DINING ROOM OPTIONS	GUEST MAX	RENTAL FEE	FOOD & BEV MIN
Stanton Room _*The Bench*	**45**	**$4,500** Pre-fix Menu Only	**$8,500** Dinner
McComas Room _*Lodge Stillwater B&G*	**40**	**$4,500** Pre-fix Menu Only	**$8,500** Dinner
Tuscan Room _*SB Peppoli*	**32**	**$5,000** Pre-fix Menu Only	**$7,500** Dinner

COMMUNAL OPTIONS	GUEST MAX	RENTAL FEE	FOOD & BEV. MIN
Fire Pit _*Lodge HaysPlace*	**25**	**$1,500** Per Firepit	**$2,500** Per Firepit
Lobby Lounge Patio Fire Pit _*SB Beverage*	Max 3 Firepits (Same configurations as listed above)	**$3,500** Per Firepit	**$2,300** Per Firepit

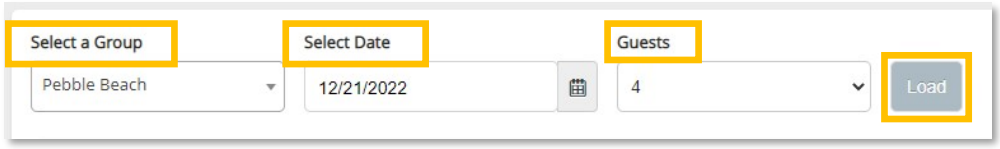
Zomato | Book Dining

Guests will be able to book online up to 90 days.
To book further in advance, they will need to speak with a Day Guest Agent.

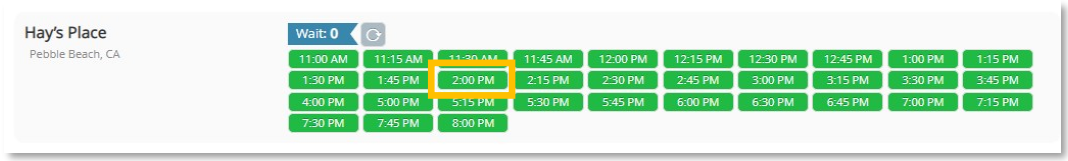
1. Log into Zomato and click the Concierge from the left side menu



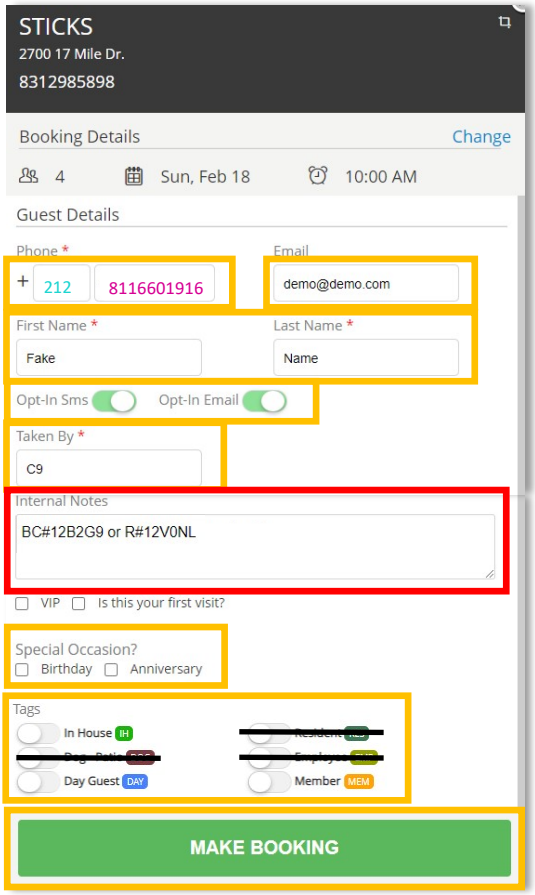
2. Set group to Pebble Beach > set date of requested booking > set the number of guests > then click Load



3. Select your Time Slot by clicking a green time within your selected restaurant



4. Fill out the Booking Details window:
   - ⇒ Collect the guest's Phone Number
     - ◊ Zomato will recognize phone numbers and auto-populate the guest's information
     - ◊ International phone numbers:
       Type the country code in the first box followed by the 10-digit phone number in the second box
   - ⇒ Collect guest's email if it didn't populate
   - ⇒ Select the appropriate Opt-In options
   - ⇒ Input your SMS Initials into the Taken By field
   - ⇒ Internal Notes— No special seating requests
     - ◊ Notate celebration details or chargeback notes
     - ◊ Beach Club Restaurant - Notate BC# or R#
   - ⇒ Select the appropriate Special Occasion options
   - ⇒ Select the In House, Day Guest, or Member Tag

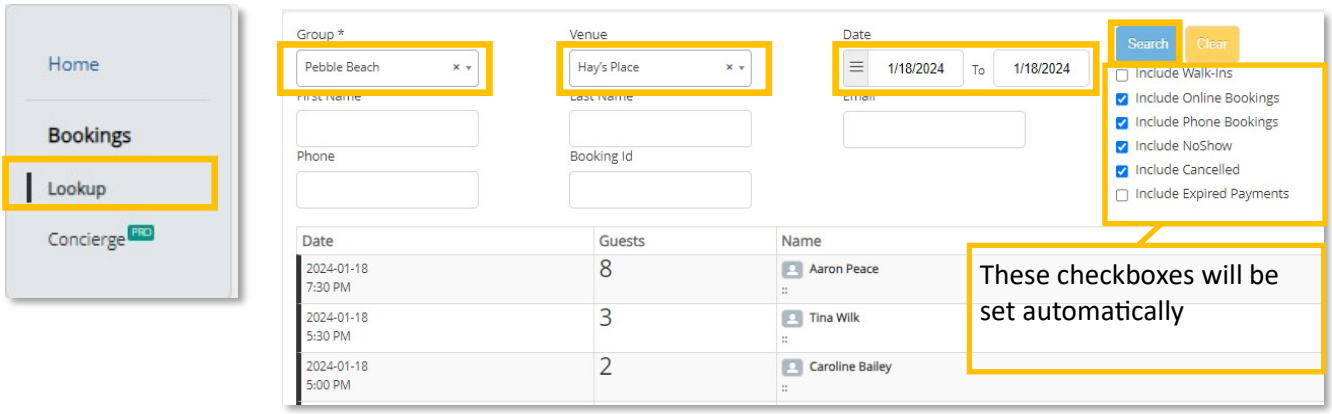


5. Click Make Booking to finalize the reservation

Zomato | Modify a Booking

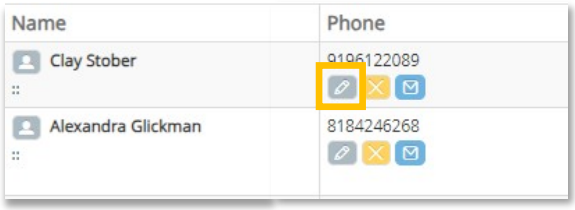
Modify a Zomato Booking:

1. Access Zomato and select Lookup from the left side menu
2. Set the Group as Pebble Beach > Select the Restaurant and Beginning and End Dates > Type in the guest's phone number > Click Search

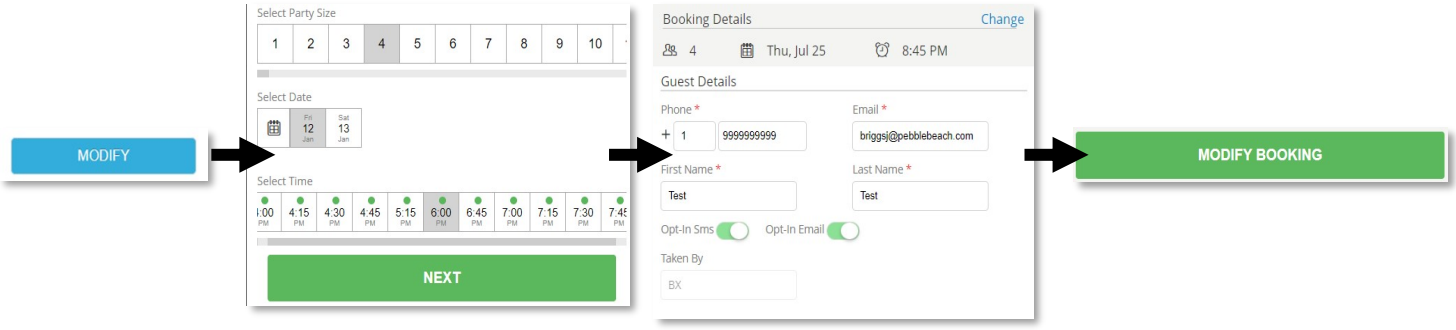


Note: If working with existing same day reservation > Click the date menu > Click Todays Date

3. Once you locate your booking, click the gray pencil icon



4. Click Modify to begin editing
5. Select the applicable modification for party size, date and/or time, then click Next
6. The Booking Details window will open so you can edit the guest's contact info, special occasion and notes
7. Click Modify Booking to confirm changes



An email confirmation will be sent automatically if:

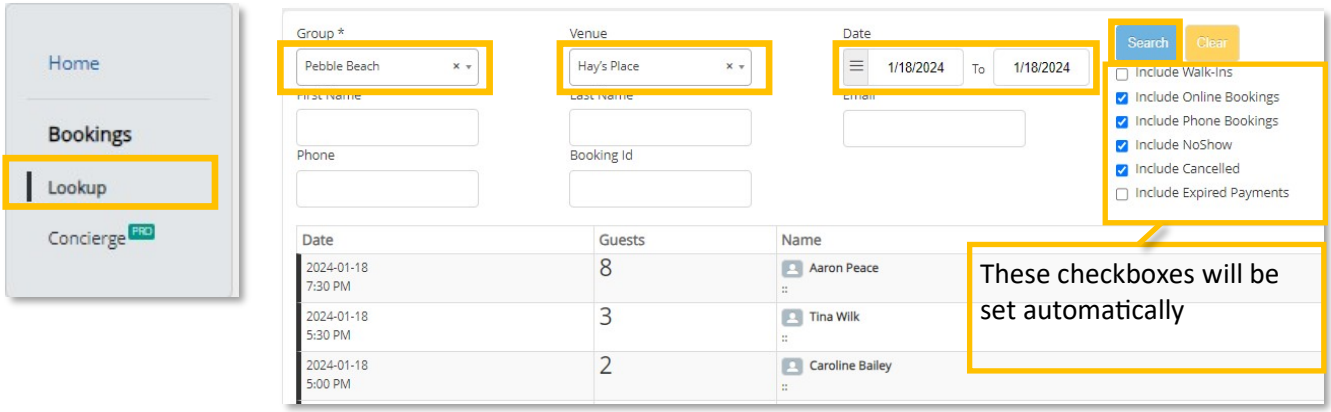
- The guest provided their email
- The guest is opted in to receive email communication
- A change was made to the booking (or the booking was canceled)

Zomato | Cancel a Booking

Cancel a Zomato Booking:

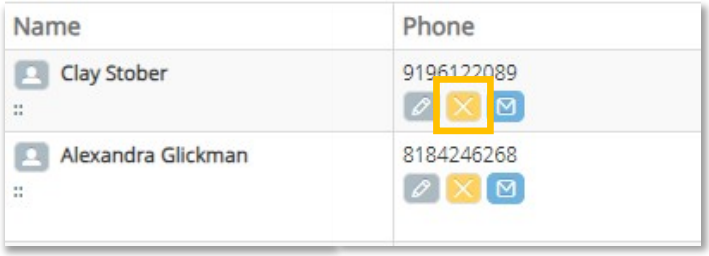
1. Access Zomato and select "Lookup" from the left side menu

2. Set the Group as Pebble Beach > Select the Restaurant and Beginning and End Dates > Type in the guest's phone number > Click Search

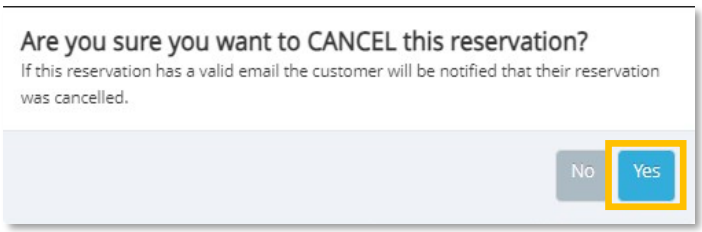


Note: If working with existing same day reservation > Click the date menu > Click Todays Date

3. Once you locate your booking, click the yellow **X**



4. Click Yes to cancel the booking



An email confirmation will be sent automatically if:

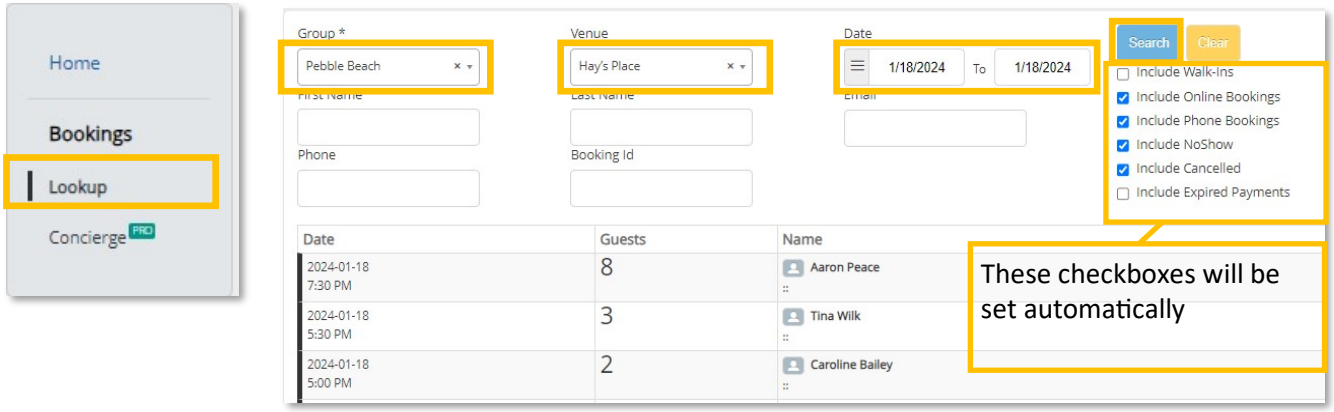
- The guest provided their email
- The guest is opted in to receive email communication
- A change was made to the booking (or the booking was canceled)

Zomato | Resend an Email Confirmation

Manually send a new email confirmation:

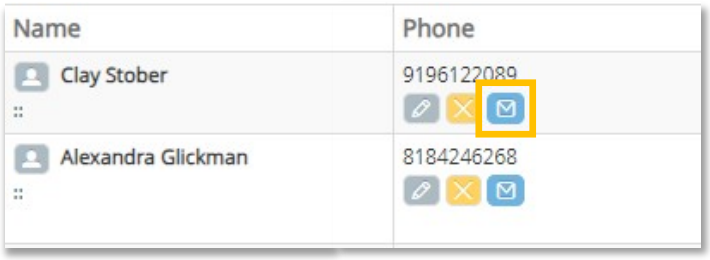
Guest needs to provide their email and be opted in for this function to work

1. Access Zomato and select "Lookup" from the left side menu
2. Set the Group as Pebble Beach > Select the Restaurant and Beginning and End Dates > Type in the guest's phone number > Click Search

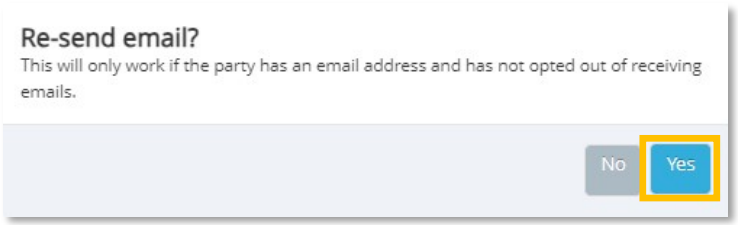


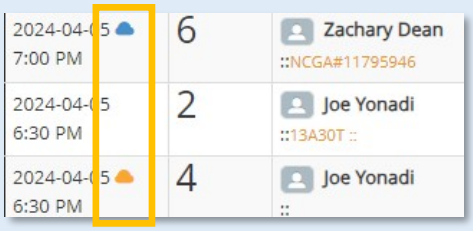
Note: If working with existing same day reservation > Click the date menu > Click Todays Date

3. Click the blue envelope icon



4. Click Yes to send a new email confirmation





Note: The cloud icon indicates how the booking was made

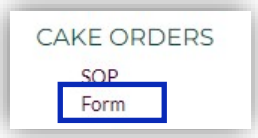
- Blue cloud = Online www.pebblebeach.com Booking
- Orange cloud = Reservations Agent Booking in Zomato
- No cloud = Host Stand, SMS integration, or Online Google Booking

Cake Orders

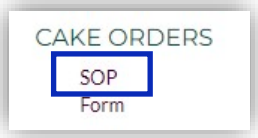
Note—24 Hours Notice is required for all cake orders

1. Go to the Back Nine > Teamwork and open the Cake Order Form



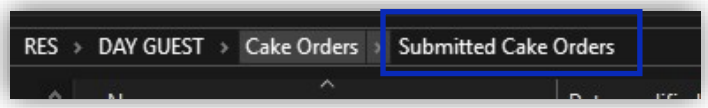


2. Fill out the PDF Form with the guest on the line
    - If the guest has special requirements (e.g. substitutions, additions, special decorations), instead of filling out this form, follow the instructions on the "Custom Cake Order" SOP

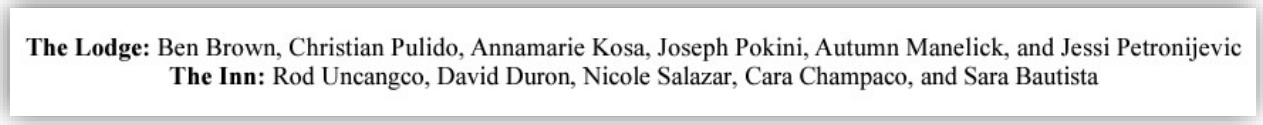


Note—48 Hours Notice is required for custom cake orders

3. Once the form is complete, you can end your call
4. Save your Cake Order Form to the "Submitted Cake Orders" folder



5. Email the form to the contacts listed at the bottom of the form



The Lodge: Ben Brown, Christian Pulido, Annamarie Kosa, Joseph Pokini, Autumn Manelick, and Jessi Petronijevic
The Inn: Rod Uncangco, David Duron, Nicole Salazar, Cara Champaco, and Sara Bautista

- Always CC Restaurant Reservations
- If the guest wants it sent to a restaurant, CC the restaurant email address
- If the guest wants it sent to a room, CC Room Service for that property
- Ensure that the Subject Line includes the Guest's Name and the Date they need the cake



Lexus Champions for Charity (1/3)

Lexus Group Attendees will visit Pebble Beach Resorts for 2 nights: December 12th & 13th, 2024
Each attendee receives a dining credit for their stay.
To ensure dining availability for Lexus Attendees, dining time slots have been pre-reserved in Zomato.

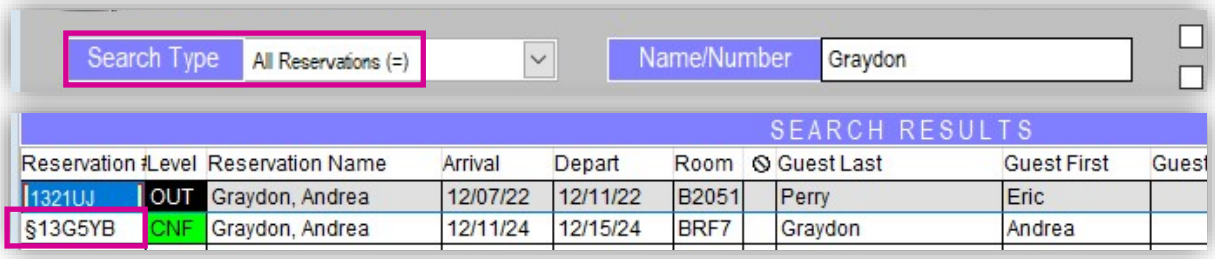
Guidelines:

- Lexus guests must book their room (via online portal) before they can set their dining reservations
- Lexus guests can only reserve 1 reservation each night
- Lexus guests may not book the same restaurant for both dates

1. LOCATE THE EXISTING ROOM RESERVATION:

- Ask the guest: "*Have you already made your room reservation?"*
  - ◊ *No—"To reserve your Lexus dining experience, you must first book your room via the online portal. Once your room is reserved, you are free to give us a call back at this same number."*
  - ◊ *Yes*— "Please allow me to look up your reservation. *Can you please spell the name that the room has been booked under?"*

- Access SMS Host:
  - ◊ Open Universal Lookup (F3)
  - ◊ Change the Search Type to All Reservations
  - ◊ Search for the room by Last and First Name



- Write down the guest's Res # in your notes

2. CHECK DINING AVAILABILITY ON THE LEXUS TRACKER

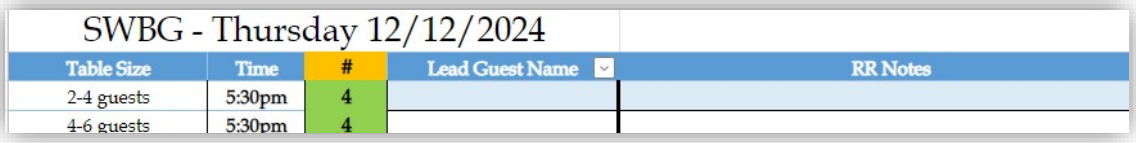
- Open the Lexus Dining Tracker (Excel Sheet)

- Ask the Guest what they want to reserve (Restaurant, # of Guests, Date, Ideal Time)

- On the Excel Sheet, click on the tab of their desired restaurant



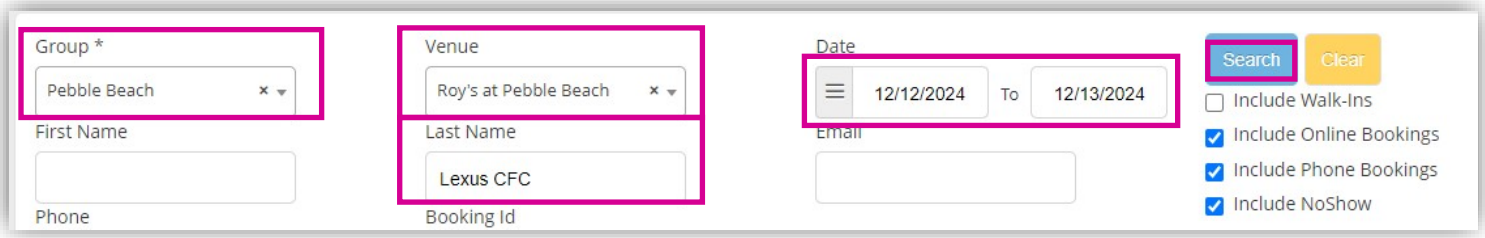
- Verify that there are available times for that restaurant and day that will work for the guest [You will transition to Zomato to secure the booking]



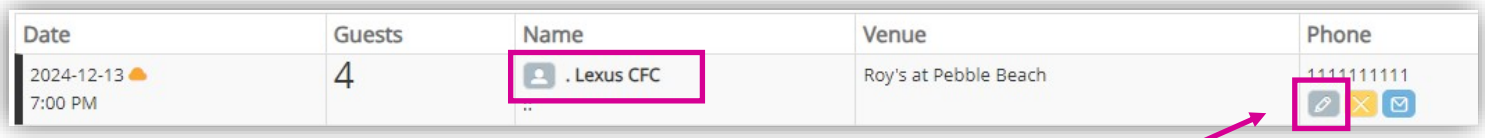
Lexus Champions for Charity (2/3)

3. SECURE THE BOOKING IN ZOMATO

- In Zomato, Lookup the pre-reserved Lexus bookings with the following parameters
  - ◊ Group—Pebble Beach
  - ◊ Venue—The guest's chosen restaurant
  - ◊ Last Name—Lexus CFC
  - ◊ Date—12/12/2024-12/13/2024

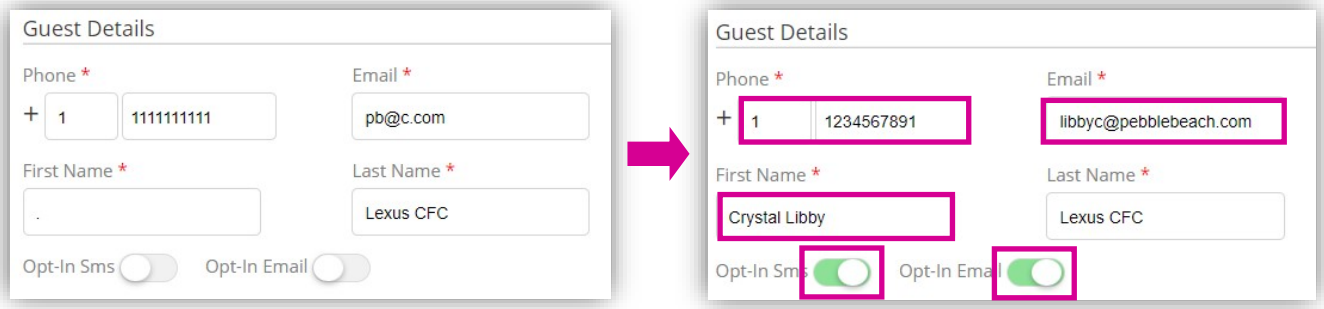


Pre-reserved dining slots will appear with the first name "." and the last name "Lexus CFC"



- Once your guest selects a time slot, click the Edit button on that booking
- Click Modify
- Click Next

- Edit the Booking Details:
  - ◊ Change the First Name to the Full Name of your guest
  - ◊ Leave the Last Name as "Lexus CFC"
  - ◊ Input the guest's phone number into the Phone field
  - ◊ Ask the guest if they want to receive text/email—If yes, toggle the Opt-In buttons and input the guest's email address



- In the notes, type "Lexus Champions for Charity" followed by the Room Reservation #

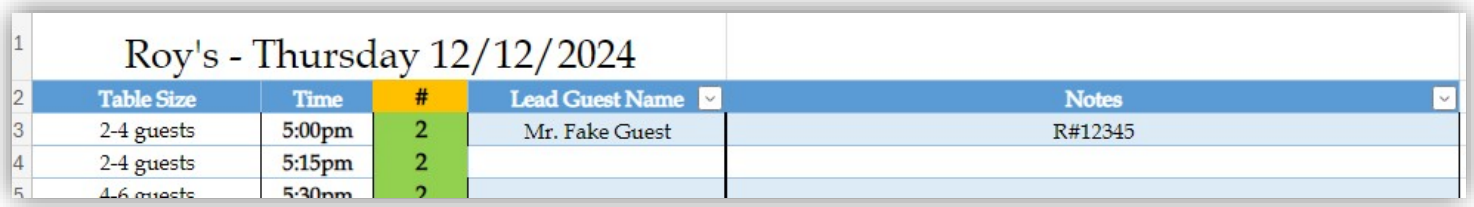


- Make sure the In House Tag is selected
- Click Modify Booking to Save

Lexus Champions for Charity (3/3)

4. WRAP UP

- Return to the Lexus Dining Tracker
- Locate the booking that matches what you reserved in Zomato
- Edit the following:
  - ◊ Input your guest's name into the Lead Guest Name field
  - ◊ Type the guest's Room Reservation # into the Notes field
  - ◊ If you adjusted the number of guests on the booking, notate this in the Notes field



	Roy's - Thursday 12/12/2024				
2	Table Size	Time	#	Lead Guest Name	Notes
3	2-4 guests	5:00pm	2	Mr. Fake Guest	R#12345
4	2-4 guests	5:15pm	2		
5	4-6 guests	5:30pm	2		

Note—this document is live so it does not require you to save

- Set your call disposition appropriately

CHANGES & CANCELLATIONS

1. Do not cancel any reservations
2. Book a new reservation according to what the guest wants
3. **In wrap up:** Let a supervisor/manager know what you changed/cancelled—They will assist you with making that time slot available to new Lexus guests

Holiday & PBC Special Event Dining

During holidays & PBC special events, dining has additional guidelines and requirements.

Holidays & PBC Special Events:

- **Valentine's Day** | Dinner only
- **Easter** | Lunch/Dinner + SWB&G Buffet
- **Mother's Day** | Lunch/Dinner + SWB&G Buffet
- **Concours d'Elegance** | Thu-Sun of event week, Dinner only
- **Thanksgiving Day** | Lunch/Dinner + SWB&G Buffet
- **Christmas Eve** | Dinner only
- **Christmas Day** | Lunch/Dinner + SWB&G Buffet
- **New Year's Eve** | Dinner only
- **2025 AT&T** | Wed-Sun of event week, Dinner only

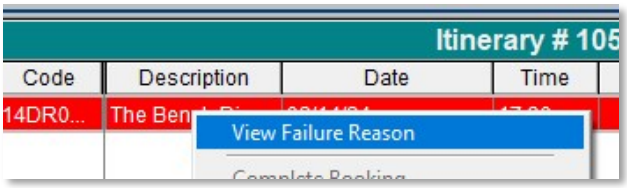
Restaurants:

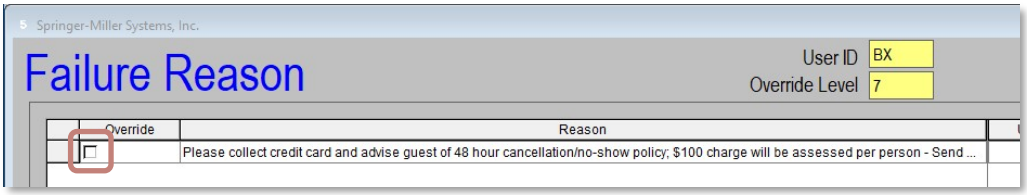
- Roy's
- Peppoli
- Tap Room
  NOTE: FW1 Tap Room & Tap Room Terrace Lounge (Feb 10th 2025 - October 15th 2025) Do not collect credit card
- Stillwater Bar & Grill | SWB&G buffets are booked by host stand x8524
- The Bench

Booking Guidelines:

On the Phone

1. Collect a **credit card** onto the Guest Tile
2. Advise the guest of the **48hr cancellation policy**
3. Advise the guest that a cancellation or a reduction in the number of guests will result in a **$100 charge per person**
4. **Right click** the dining reservation





5. Click view **failure reason**
6. **Read** the booking rule > make sure you have **followed the booking rule instructions**



7. **Override** booking rule by checking the box > Click **Escape**

Wrap Up

1. **Notate** the cancellation **advisement** in the dining tile baby notes | **ADV 48hr CXL & Fee BX [todays date]**
2. Send a **SPEV** email confirmation in SMS

Golf Course Descriptions

PEBBLE BEACH GOLF LINKS	SPYGLASS HILL GOLF COURSE	THE LINKS AT SPANISH BAY	DEL MONTE GOLF COURSE	THE HAY
Setting: PBGL is an iconic championship course rich in history that wraps around the rocky cliffsides of Stillwater Cove.	**Setting:** SG golf course begins along the ocean, then turns into the Del Monte Forest which is teeming with wildlife.	**Setting:** The Links at SB is a breathtaking true links built along the natural terrain of protected marine lands.	**Setting:** DM Golf Couse is a Pebble Beach quality course set inland from the coastline in a park-like terrain.	**Setting:** The Hay is a par-3 short course designed by Tiger Woods that focuses on unique putting challenges.
Style of Play: • Small target greens	**Style of Play:** • Long, narrow fairways • Deep bunkers • Crowned greens	**Style of Play:** • Undulating fairways • Large, tiered greens	**Style of Play:** • Traditional layout • Firm greens	**Style of Play:** • All holes less than 100 yards • Complex greens
Notoriety: • #1 Public Golf Course in America per Golf Digest (of 14k+) • 7th Hole is one of the most photographed in the world • 18th hole is known as “the finest finishing hole in golf” • 17th Hole features a plaque commemorating Tom Watson’s famous 1982 chip shot	**Notoriety:** • In top 15 of Public Golf Course in US (of 14k+) • In the top 10 of Public Golf Course in CA (of 1k+)	**Notoriety:** • Only 1% of golf courses in the world can label themselves as “True Links” • In the top 50 of Public Golf Course in US (of 14k+) • 14 out of 18 holes along the ocean	**Notoriety:** • Old Del Monte is the oldest golf course in continuous operation West of the Mississippi (1897) • It was originally a Dairy Farm owned by Jack of Jack’s Peak which is the origin of Monterey Jack Cheese • Phil Mickelson’s grandfather was one of the original DM caddies	**Notoriety:** • Designed by Tiger Woods and TGR Construction • Hole #2 is a replica of PBGL’s famous Hole #7 • Features a complimentary 18 hole putting course • Dogs are allowed
Food / Drink Options: • Food / Beverage Carts • Neville’s– at the Turn • Tap Room	**Food / Drink Options:** • Food / Beverage Carts • Spyglass Hill Grill—phone at 9th tee box	**Food / Drink Options:** • Food / Beverage Carts • Sticks • Roy’s	**Food / Drink Options:** • Food / Beverage Carts • Del Monte Grill	**Food / Drink Options:** • Hay’s Place
Where to Warm Up: • Golf Academy	**Where to Warm Up:** • Spyglass Hill Driving Range	**Where to Warm Up:** • Spanish Bay Putting Green / Short Game • Golf Academy	**Where to Warm Up:** • Practice Putting Green / Short Game • Monterey Pines Driving Range for a fee (no affiliation)	**Where to Warm Up:** • 18 Hole Putting Course

Golf Course Etiquette

Dress Code

- Wear collared shirts, golf shorts, pants, or skirts
- Avoid denim, running shorts, metal spikes, and multi-stud rubber soles.

Before Play

- Check in 15-30 minutes prior to your tee time

Course Maintenance

- Replace or fill Divots
- Repair Ball Marks
- Rake Bunkers
- Pick up tees

Pace of Play

- Limit practice swings (ideally 2)
- Play Ready Golf—Take shots in order of readiness rather than who is furthest
- Double Par Rule—Concede the hole once your score reaches double par
- Limit ball search to 3 minutes

Safety

- Respect Out of Bounds areas (indicated by red poles)
- Shout “Fore!” for errant shots
- Maintain a safe distance from other golfers’ shot paths
- Follow the instructions of Course Marshals

Courtesy

- Maintain silence during others’ shots
- Silence phones
- Avoid hitting into the group ahead
- Do not walk through others’ lines on the green
- Mind your shadow on the green
- Dispose of trash properly
- Respect wildlife habitats and native flora

Carts

- Park to side of cart paths
- Respect cart path only rules
- If carts are allowed on the fairways, use the 90 degree rule
- Maintain 30-yard distance from greens
- Obey “No Carts” signs

Golf Booking Call Flow

1. Call Opening:

"Thank you for calling Pebble Beach Resort Reservations. My name is____. May I please have your first and last name?"

Probing Questions:

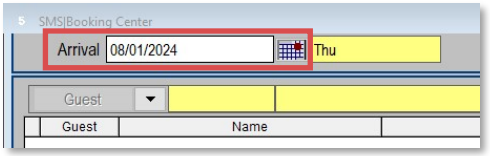
- *"Do you plan to stay with us at our resort?"*
- *"Have you visited before?"*
- *"What brings you to the area?"*

Logistical Questions:

- *"Do you have an existing room or golf reservation?"*
  - *"Before we begin, let me start by locating your existing reservation."* (Use Lookup Itinerary)
- *"Which course(s) would you like to book?"*
- *"Which date(s) would you like to play?"*
- *"How many golfers will be playing?"*
- *"What is your ideal tee time?"*

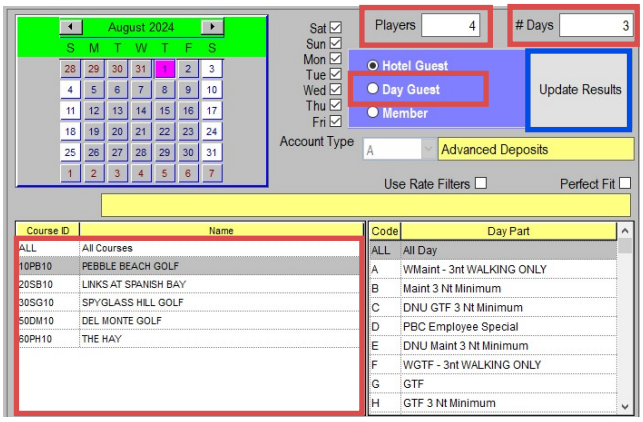
2. Master Calendar:

Set the date range using your Master Calendar



3. Search for Availability:

Set the following fields then click Update Results:

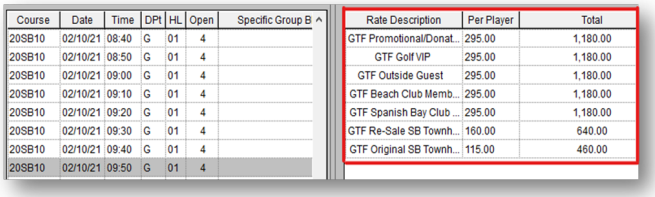


4. Quote Time and Greens Fees:

Single click on the desired tee time

Quote Greens Fees *"The greens fees for this course are __ per player."*

Double click to book the tee time



5. Advise:

- *"We have a __ day cancellation policy, which means you can change or cancel your tee time without penalty up until __ days prior to your date of play."*
- *"If you cancel within __ days, you will be responsible for the greens fees."*
- *"Would you like to proceed?"*

6. Add-Ons:

- *"Would you like to request caddies or rental clubs for your round?"*
  - *We do recommend caddies but they are not required.*
- *"Should we add restaurant reservations for before or after your round?"*
- *"Is there anything else you'd like to reserve today?"*

7. Guest Tile:

"To confirm this reservation, I need to gather some information. Can you please spell your first and last name?"

Open Universal Lookup to search for a Guest Tile

- If you find a Guest Tile:
  - Confirm the contact information with your guest.
  - Double click to select.
- If no Guest Tile exists:
  - Click "Add New Guest" button
  - Fill in Guest Name
  - Fill in Title
  - Fill in City/State/Zip
  - Fill in Phone number: Change drop down to Mobile

  "What is a good mobile number to add to your profile?"
  - Fill in Email:

  "What would be a good email to send your confirmation to?"
  "Would you like to be added to our email list to receive future promotions from Pebble Beach Resorts?"

8. Collect Credit Card:

"I am going to place our recording on pause to protect your credit card information."

- **Pause** the recording in Revinate
- Collect the CC in SMS Host on Guest Tile
- **Un-Pause** the recording in Revinate
- Escape to the Booking Center in SMS Host

9. Call Closing:

- *"Thank you for your patience. Your reservation is set."*
- *"I have you booked for **(recap the booking)**"*
- *"Again, you can still make any changes or cancel up until __ days prior to your date of play."*
- *"You will receive your confirmation email within the hour."*
- *"Are there any other questions I can help you with?"*
- *"Thank you for calling Pebble Beach Resorts."*

10. Wrap Up:

- Create profile in Guest Tile (click Profile, then click ESC to exit)
- Assign a Profile to all recreation
- Connect the credit card to each tee time
- Type your quoted cancellation window into the baby notes
- Notate any caddie requests/rentals/Aeration/NGTF
- Complete & Confirm the booking
- Send the guest a VEMAIL
- Save a Booked Lead in REVINATE
- Mark your call disposition as Booked

Spanish Scripting | Day Guest Golf

Thank you for calling Pebble Beach Resort Reservations. My name is ___. May I please have your first and last name? How are you doing Mr./Mrs./Ms. ____ How can I help you?	Gracias por llamar a reservas del complejo de golf de Pebble Beach. Mi nombre es ___. ¿Puedo tener su nombre y apellido? ¿Cómo está Sr./Sra./Sra. ___ ¿En que le puedo ayudar?
Will this be your first time visiting us? Do you plan to stay with us at our resorts? Are you celebrating a special occasion? Which courses would you like to book? What date would you like to play? How many golfers will be playing? What would be your ideal tee time?	¿Sera esta la primera vez que nos visita? ¿Planea quedarte con nosotros en nuestro complejo? ¿Está celebrando una ocasión especial? ¿Cual/Cuales camp/campos de golf le gustaria reservar? ¿En qué fecha le gustaría jugar? ¿Cuántos golfistas jugarán? ¿Cuál sería su hora ideal paia jugar golf
Thank you. Allow me a moment while I search for availability.	Gracias. Permítanme un momento mientras busco disponibilidad.
Would you like to add a request for caddies or rental clubs? Would you like to add a restaurant reservation for lunch/dinner after your round?	¿Le gustaría agregar una solicitud de palos de alquiler o caddies? ¿Le gustaría agregar una reserva en un restaurante para el almuerzo/cena después de su ronda?
Which restaurant do you want to book? What date do you wan to visit? How many people will be coming? What is your ideal time?	¿Qué restaurante quiere reservar? ¿Qué fecha quiere visitar? ¿Cuántas personas vendrán? ¿Cuál es tu hora ideal para almorzar/cenar?
We have a ___ day cancellation policy which means you can change or cancel your tee time without penalty up until __ days prior to your date of play. If you cancel within ___ days, you will still be responsible for the greens fees. Would you like to proceed with this booking?	Tenemos una política de cancelación de ___ días, lo que significa que puede cambiar o cancelar su hora de salida sin penalización hasta __ días antes de la fecha de juego. Si cancela dentro de los ___ días, seguirá siendo responsable de las tarifas del green. ¿Le gustaría continuar con esta reserva?
Could you please spell your full name? May I please have a billing address? What is the best phone number to reach you? May I have an email address to send you a confirmation email? Would you me to add you to our email list to receive future promotions at Pebble Beach Resorts? In order to confirm your reservation, I need to collect a credit card. To protect your card information, I am going to pause our recording. Would you like to confirm this booking with a MasterCard?	¿Podría deletrear su nombre completo? ¿Cual es la direccion de facturacion de la tarjeta de credito? ¿Cuál es el mejor número de teléfono para comunicarnos con usted? ¿Cual el su direccion de correo electronico para poder enviarle una confirmacion? ¿Quiere que te agregue a nuestra lista de correo electronico, para recibir ofertas y promociones de el complejo de golf de Pebble Beach? Para confirmar su reserve, solicitamos una tarjeta de credito. Para proteger la información de su tarjeta, voy a pausar nuestra grabación. ¿Le gustaría confirmar esta reserva con una MasterCard?
Please allow me a moment to finalize your reservation.	Permítame un momento para finalizar su reserva.
Thank you for your patience. Your reservation is set. I have you booked for _____ You will receive your confirmation email within the hour. Is there anything else I can help you with today? Thank you for calling Pebble Beach Resorts. Have a wonderful day.	Gracias por su paciencia. Su reserva está confirmada. Lo tengo reservado para _____ Recibirá su correo electrónico la confirmación dentro de una hora. ¿Hay algo más en lo que pueda ayudarle hoy? Gracias por llamar a el complejo de golf de Pebble Beach. Quetenga un excelente dia.

Outside Guest Golf Checklist

GUEST TILE

- Name / Title / Alternate
- Billing Address
- Phone number (Mobile)
- Email Address
- Credit Card
- Profiles Include
  - Title
  - Ages of minors
- Club Members/Residents are verified
- VEMAIL has been sent

BOOKING CENTER

- Rate Codes are accurate
- Booking meets guidelines
- Each activity has a Profile assigned
- Dining is appropriately timed with golf
- The booking is Complete and Confirmed

GOLF TILE

- Credit Card is attached to each tee time
- Caddies / Rental Clubs are inputted
- Babynotes include:
  - Correct CXL Policy
  - Rental Clubs
  - Aeration / NGTF advisement
  - Celebration

REVINATE

- DNA box is checked
- Reason for Stay
- Country
- Lead Status is “Booked”
- A detailed note has been saved
- Call Disposition: “Booked”

Resort Guest Golf Checklist

GUEST TILE

- Guest Tile belongs to the person who is financially responsible for the room
- Name / Title / Alternate
- Agent verified:
  - Billing Address
  - Phone number (Mobile)
  - Email Address
- Profiles Include
  - Title
  - Ages of minors
- Club Members/Residents are verified

BOOKING CENTER

- Rate Codes are accurate
- Booking meets guidelines
  - Min # Nights
  - Max # Golfers
  - Max # of PB Rounds
- Each activity is connected to the Room of the financially responsible party
- Dining is appropriately timed with golf
- The booking is Complete and Confirmed

GOLF TILE

- Caddies / Rental Clubs are inputted
- Babynotes include:
  - Rental Clubs
  - Aeration / NGTF advisement
  - Celebration

ROOM RESERVATION TILE

- IEMAIL has been sent
- Add a closed R Note

REVINATE

- You have located the existing lead form
- A detailed note has been saved
- Call Disposition: “Change/Revise”

Golf Availability Search

Most guests will plan their trip around playing our famous **Pebble Beach Golf Links,** which is why it is a good idea to check availability for this course first, before moving on to booking other courses.

Tee Times Tab

Click this tab to access the golf course availability search.

Master Data Range

The Master Data Range calendar will automatically set the calendar within the Tee Times Tab.

of Players & Days

Always keep the # of Days set to 1 so you can search for availability one day a time.

Available Tee Times

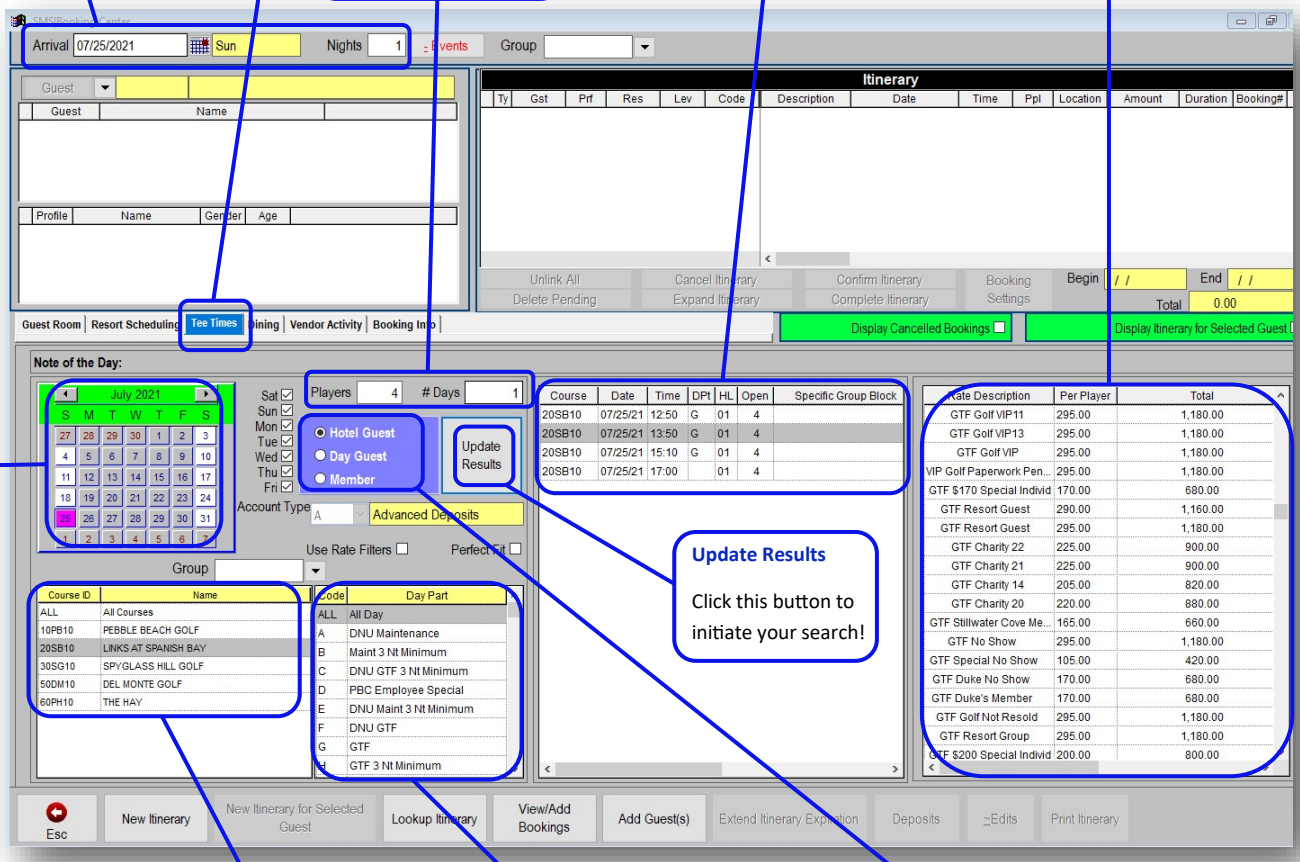
As soon as you click "Update Results," the available tee times will appear in this window.

Click on the preferred tee time to populate all rate options in the next window.

Available Rate Codes

The price options for your selected tee time will appear in this window. Double click on the correct rate to add the tee time to your guest's Itinerary.

The most common rates you will select will be "GTF Resort Guest" or "GTF Outside Guest."



Update Results

Click this button to initiate your search!

Tee Time Calendar

Use this calendar to select individual dates you wish to search.

Course ID

Click once to select the golf course you wish to search.

We always search all courses individually as opposed to clicking "ALL."

Day Part Codes

A golfer will have a different experience on the courses depending on the time of day in which they are booked.

Leave this set to "ALL."
You always want to search for all Day Parts at once.

Guest Type

You will select Day Guest or Hotel Guest depending on which golf guidelines you are following. We do not use the Member radio button.

Golf Tiles

Tee Time Details & Add-Ons

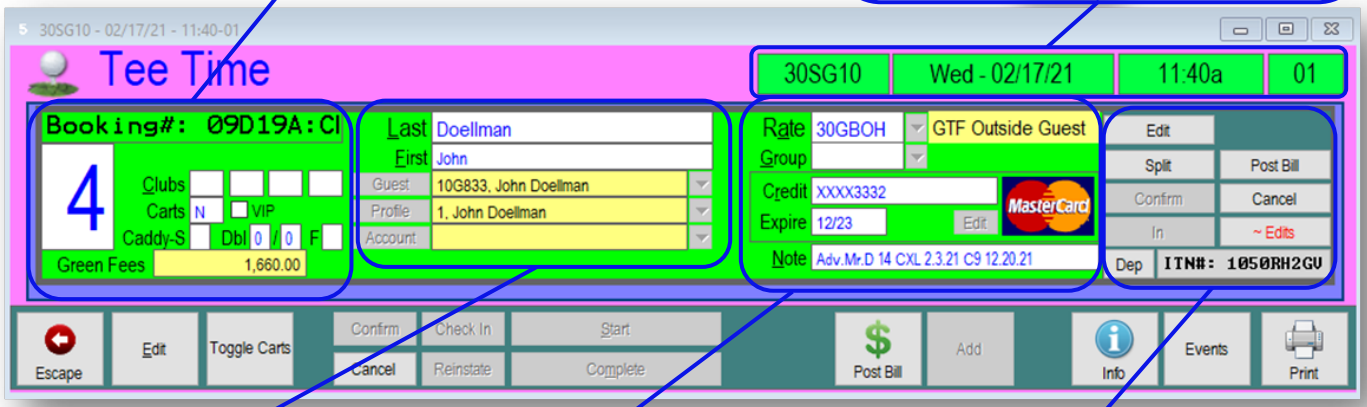
The **big blue 4** indicates that four golfers have been booked for this tee time. This is an editable field.

The **Clubs / Carts / Caddy** sections are where you will see Add-Ons the guest has requested
*Do not edit the Carts field. Only the pro shop should edit this field. Carts are always available without reservation.

What has been booked?

The top right corner of the Golf Tile will tell you (from left to right) which course has been booked, the date of the round, and the time the golfers will tee off.

- Spyglass Hill Golf Course — 30SG10
- Wednesday, February 17th, 2021 — Wed - 02/17/21
- At 11:40am — 11:40a



Guest Info

This section will tell you which **Guest Tile**, **Profile**, and Room Reservation (**Account**) is tied to this golf tee time. The Account field will be blank if the golfer is an Outside Guest.

Money

The **Rate** will tell you the type of price the guest is paying.

You can also see the **credit card** the guest has put down to secure the booking. (*For Non-Hotel Guests, the Credit card will be entered into the Guest Tile at the time of booking. You will then need to manually attach the credit to the tee time .)*

The small notes box is internally referred to as the "**Baby Notes**" field because it has a limit of 40 characters. This is where you will type the cancellation policy for the booking.

Edits

Edit—Click this button to edit fields within the tee time booking.
Split– This button is used to split up a group of golfers into individual bookings so each golfer can pay separately.
Cancel—**ALWAYS** use this cancellation button. (Never use the Cancel button at the bottom of the window)
ITN# - This button will open the full Itinerary for the assigned guest.

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?

Golf-Only Booking Checklist

- ✓ Golf Guidelines Met
- ✓ Smart-Booked
- ✓ Correct Rate Code Selected
- ✓ **Disclosed & Notated Greens Aeration**
- ✓ Guest Tiles & Profiles Complete
- ✓ Credit Card Guaranteed
- ✓ **Membership Dates Verified**
- ✓ **Resident/Property Owners Verified**
- ✓ Credit Card Attached to Booking
- ✓ Cancellation Timeline Quoted & Notated
- ✓ Caddies and Club Rentals Notated
- ✓ Reservation Completed & Confirmed
- ✓ VEMAIL sent

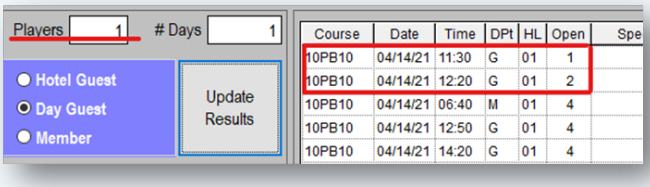
Smart-Booking

Tee times should always be booked in the way that most efficiently fills out our tee sheets to maximum capacity. Like in the game, Tetris, your goal is to completely fill all open spaces.

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. The best option for a single will be alongside any open threesomes.

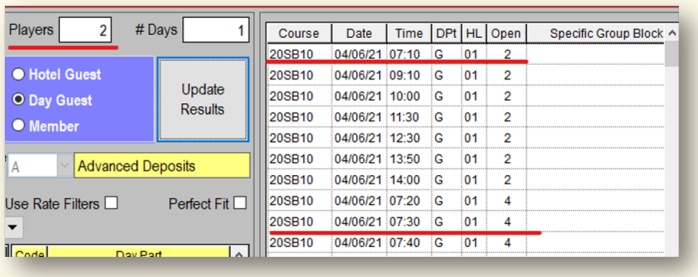
When you search for one player in SMS, you will see that the tee times with the smallest number of available players will filter to the top of the list.



Doubles

If a guest wants a tee time for two golfers, start by only quoting them available time slots with exactly two golfers remaining.

For example, if your guest asks for a 7:30am tee time, you can see in the image below 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 the guest 7:10am.



Groups of Six

Groups of 6 golfers are booked 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. It is much less likely that we fill two singles than one twosome.

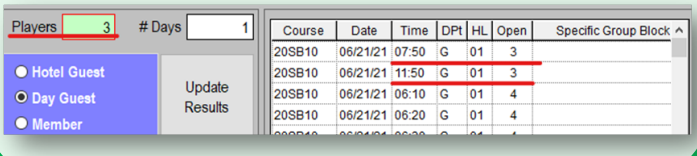
If you receive a call who is adamant about booking their group as two back to back threesomes:

- 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.
- 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.
- 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.
- If none of the above options appease the guests, supervisor approval is required to book the group as two threesomes.

Groups of Five

A group of five golfers should be booked as one threesome and one twosome because we do not want to single out one member of their group by forcing them to play alone or with strangers.

Start by searching for tee times with exactly 3 available spots. Once the threesome is booked, you can book your twosome into a consecutive tee time.



Caddies

WHAT DOES A CADDIE DO?

Single / Double Caddie:

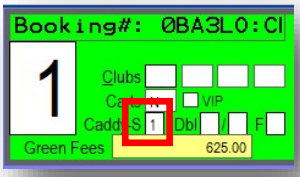
- Carry bags
- Select clubs
- Clean clubs
- Fix ball marks
- Replace divots
- Rake bunkers
- Tend flagsticks
- Drive golf cart

Single / Double / Forecaddie:

- Provide history
- Give advice
- Spotting errant balls
- Take Photos
- Call yardages
- Read greens

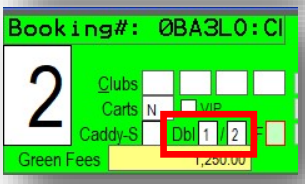


HOW TO INPUT A CADDIE REQUEST



Single Caddie *do not offer*

- 1 to 1 caddie/golfer ratio
- "Depending on caddie availability, these requests may not be filled"
- Input as 1, 2, 3, or 4



Double Caddie *default*

- One caddie carrying two bags
- "Pebble Beach Resorts has a double caddie policy which means each caddie will service two golfers."
- Input as 1/2 or 2/4

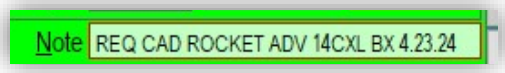


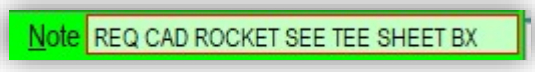
Forecaddie *3 golfer minimum*

- Services the entire group to help golfers play faster
- "Our Forecaddies provide the expert advice of a standard caddie, but does not carry bags or touch your equipment
- Input as 3 or 4

COMMUNICATION

- **Notate specific caddie** requests in the babynotes. If you do not have room for all your notes, make sure the specific caddie request is on the babynotes, then put the remaining info on a Tee Sheet Note





- **To request a caddie inside 24 hours**, call Caddie Masters at 831.622.6162. If caddie services are unavailable, leave a voicemail detailing the guest's name, their caddie request, and the date, time, and course.

- To request a caddie that the guest had during their previous trip and they do not remember the name of the caddie, email pebble@caddiemaster.org with the the guest's name, their caddie request, and the date, time, and course they played on their previous trip, and the same tee time details for their upcoming trip.

- Corporate Group caddie requests: connect guest to Caddie Masters via phone 831.622.6162 or you can email pebble@caddiemaster.org Caddie Masters on the guests behalf.

CADDIE CANCELLATIONS

- **If cancelled within 24 hours** of the tee time, call Caddie Masters directly at 831.622.6162
- **When cancelling a caddie on an active tee time**, document the date and SMS initials in the babynote



Golf Carts & Cart Path Rules

Golf carts will always be available to guests who play our 18 hole courses. Guests do not need to request these in advance as they are always available.

On the Golf Tile, the "Carts" field defaults to "N" for "No." Reservations Agents should never touch this field even if the guest requests a cart. This field should only ever be edited by the Pro Shop.



- Resort Guests receive complimentary carts
- Outside Guests pay a cart fee per rider
- At the Del Monte Golf Course, both Resort and Outside guests are responsible for the cart rider fee
- Guests are welcome to bring their own pull/push carts
- Pro shops have a limited number of pull/push carts to rent for a fee

90 DEGREE RULE

All of our 18 Hole resort courses are "**Cart Path Only**." This means that golfers must stick to the cart path when driving their golf carts, and are not permitted to drive the carts on the fairways.

If course conditions are good, the Pro Shop may decide day-of that guests will be allowed on the fairways using the "**90 Degree Rule**."

<u>This is not something that can be requested or approved in advance.</u>

WHAT IS THE "90 DEGREE RULE"?

This rule means that golfers may drive their carts on the fairways only in a straight line that is perpendicular to the cart path.

Guests line their cart with their golf ball, drive out to the fairway in a straight line, then follow that same line to drive back to the cart path.

This exception to the rule helps us minimizes the impact of the golf carts on the grass, and helps to speed the pace of play.



ADA Golf Accommodations

Guests can make requests for ADA accommodation for many reasons such as injuries, age, or physical limitations. We will always do our best to accommodate our guests so they can better enjoy their Pebble Beach experience. Reservations Agents do not need to ask for details or obtain proof to input these requests.

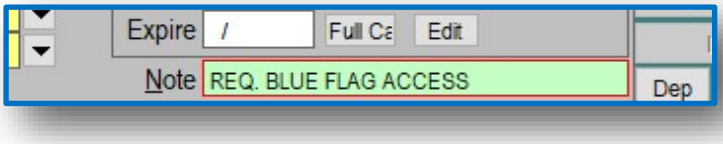
ALL REQUESTS ARE SUBJECT TO APPROVAL BY THE COURSE'S SUPERINTENDENT

BLUE FLAG ACCESS



The golf course staff will attach a **blue flag** to the golfer's cart which indicates to other employees, such as the course marshals, that the guest is allowed to drive on the fairways as opposed to adhering to our "cart path only" rule.

To request Blue Flag Access, type the following note into the Babynotes of your Golf Tile:



SOLO RIDER

A **Solo Rider** is a special golf cart that allows golfers with physical limitations to play with greater ease. Solo Riders have complete access to all areas of our golf courses with the exception of bunkers, due to safety.



To request the Solo Rider, send an email to the Pro Shop with the following:

- Name
- Date of play
- Tee Time
- "The following guest is requesting a solo rider for their round."

Rental Clubs & Spectators

Rental Clubs



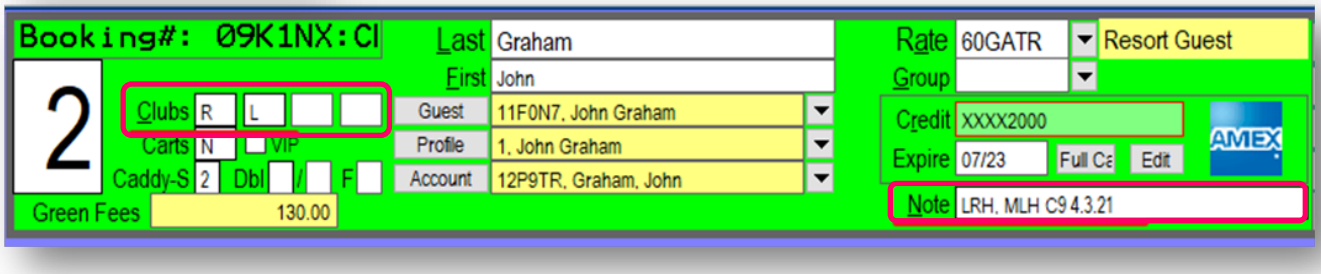
Rental Clubs are all the latest Taylor Made branded sets.

If guests have special club requests (grip, length, flex), they may inquire with the Pro Shop on the day of play.

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?

TO DOCUMENT RENTAL CLUBS:
1.) Enter R or L into the Clubs field
2.) Type the details into the Babynotes

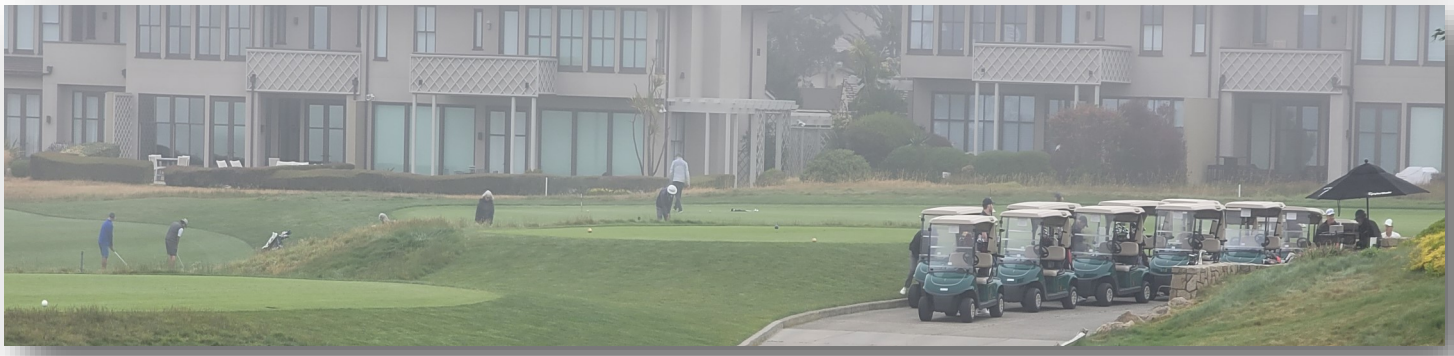
MRH = Men's Right Handed
MLH = Men's Left Handed
LRH = Ladies' Right Handed
LLH = Ladies' Left Handed



Spectators

A Spectator is a non-golfer who will accompany the golfer during their round.

- Spectators must check in at the pro shop to determine if access is safe and available
- Spectators are required to use a golf cart and will be charged the cart rider fee
- Maximum of 1 spectator per golfer
- Maximum of 4 carts per tee time
- A spectator may not "caddie" for the golfer
- Children under the age of 7 are not permitted on the golf course
- Spectators that negatively impact pace of play or the experience of other golfers may be asked to return to the clubhouse



Driving Ranges

Pebble Beach Practice Facility

⇒ Hit off grass
- Hit off mats the last 2hrs of the day

⇒ 350-yard, double-ended
⇒ Accommodates up to 85 golfers
⇒ Closes at 4pm
- Tuesdays they close early at 2pm for maintenance

⇒ Recommended time frames:
- Around 1hr before PB tee time
- Around 1.5hr before SG tee time (Recommend to use SG Driving Range)
- Around 2hrs before SB tee time

Resort Guests (and Members)
- Complimentary Use
- Anytime throughout the day
- Does not have to have a tee time
  - Pro Shop encourages later in the afternoon for Resort Guest who don't have a tee time

Outside Guest w/Tee Time
- Complimentary Use
- Must have PB / SG / SB tee time
- Utilized as warm up only before their round, not for after
- Del Monte and The Hay does not qualify for guest to use driving range / short game / practice putting green

Spyglass Driving Range

⇒ Hit off mats
⇒ 270-yards
⇒ Accommodates up to 15 golfers
⇒ Closes 1-2 hrs before sunset
- Wednesdays they close early (in the fall around 11:30am) for maintenance

⇒ Stevenson students can utilize in the afternoons for $10 as SG is their home course
⇒ Recommended time frames:
- Around 1hr before tee time

Resort Guests
- Complimentary Use
- Anytime throughout the day
- Resort Guests **MUST** have a tee time PB / SG / SB / DM

Outside Guests w/Tee time
- Complimentary Use
- Any of the 18 hole courses PB / SG / SB / DM (For DM recommend using Monterey Pines - No Affiliation)
- The Hay does not qualify for guests to use driving range
- Utilized as warm up only before their round, not for after

Public
- $15
- Pro Shop encourages later in the afternoon (In the fall around noon)

Short Game Practice

Pebble Beach Practice Facility

⇒ Has Putting Green and Chipping Practice
⇒ Pro shop provides golf balls at Chipping Practice that can be used at Putting Green
⇒ Complimentary
⇒ Resort Guests / Members / Lesson
⇒ Outside Guest w/tee time
  - Can only be used on the same day of their tee time
⇒ Not for public use
⇒ Requires Golf Attire

Pebble Beach Golf Links

⇒ Has Putting Green
⇒ Guest use own golf balls
⇒ Complimentary
⇒ Resort Guests
⇒ Outside Guest w/tee time
  - Can only be used on the same day of their tee time
⇒ Not for public use
⇒ Requires Golf Attire

Spyglass Hill Golf Course

⇒ Has Putting Green and Chipping Practice
⇒ Guest use own golf balls
⇒ Complimentary
⇒ Resort Guests / Outside Guests / Public
⇒ Requires Golf Attire

The Links at Spanish Bay

⇒ Has Putting Green and Chipping Practice
⇒ Pro shop provides golf balls at Chipping Practice that can be used at Putting Green
⇒ Complimentary
⇒ Resort Guests / Outside Guests / Public
⇒ Requires Golf Attire

Del Monte

⇒ Has Putting Green and Chipping Practice
⇒ Guest use own golf balls
⇒ Complimentary
⇒ Resort Guests / Outside Guests / Public

The Hay

⇒ Has Putting Green
⇒ Guest use own golf balls
⇒ Complimentary
⇒ Resort Guests / Outside Guests / Public

Forest Residents

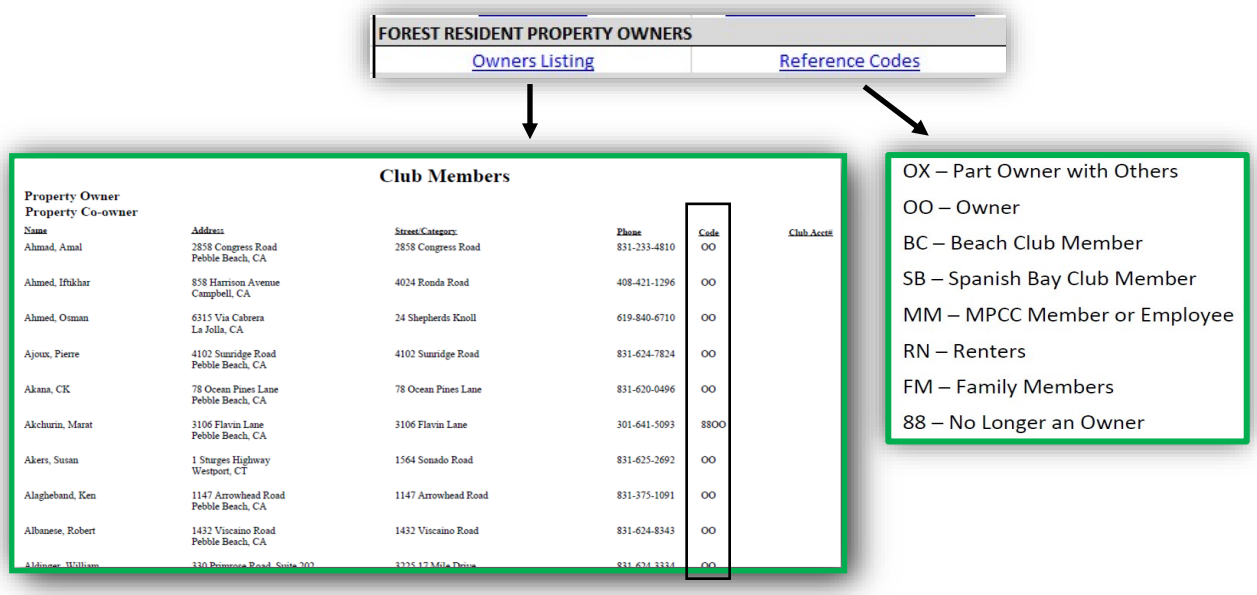
VERIFY A FOREST RESIDENT

1. Confirm that the guest is on the deed of the house:

- Locate the guest's name on the Property Owners Listing in the Digital Binder

  (Use CTRL+F to search the document by name)
- Make sure they have an OO or OX in the Code column

  (This indicates they are a full owner or part owner)

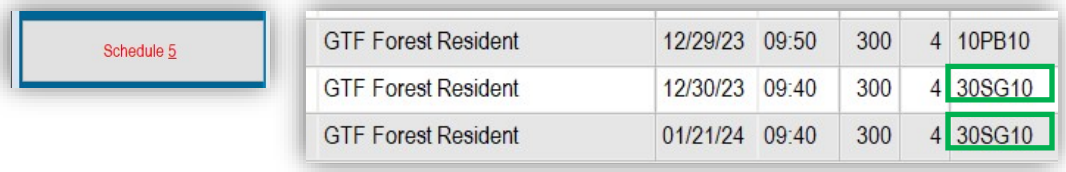


Important Notes:

- The person on the deed must be the one to book the tee times AND must be one of the players
- All Condo Owners will be on this same list with the street name "Spanish Bay Circle"
- If a guest says they are not on the list because they just bought the house, they must register with Pebble Beach Company through Accounting (currently Wendy Minafo)
- Reservations receives an updated Owner's Listing monthly from Security

2. Confirm that the guest does not already have 3 Active Tee Times for their chosen course:

- Access their existing Guest Tile
- Check Schedule 5 to view their active golf bookings



Duke's Club Members 1/2

The Duke's Club is a golf membership through the Del Monte Golf Course. Members pay an annual fee, and in return receive special benefits that include:

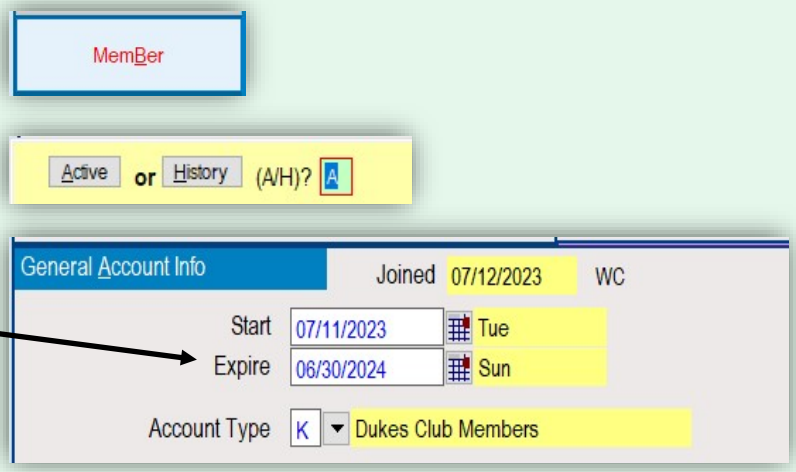
Discounted Greens Fees on:
- Spyglass Hill Golf Course
- The Links at Spanish Bay
- Del Monte Golf Course

A voucher for complimentary rounds at: The Hay

HOW TO VERIFY A DUKE MEMBER:

1. Open the **Guest Tile**
2. Click "**Member**"
3. Select "**A**" for Active
4. **Check the dates** of the membership

The membership must be valid over the dates of the tee time the guest wants to book.



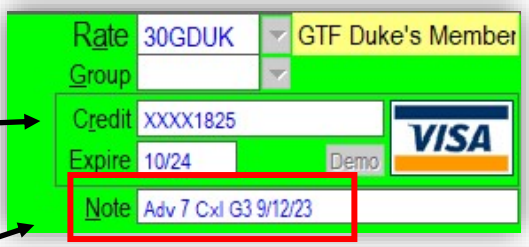
DUKE'S MEMBER BOOKING REQUIREMENTS:

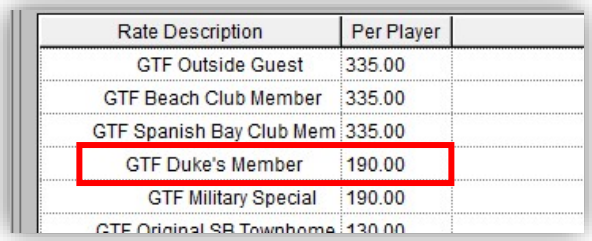
◊ Always collect a new credit card on the Guest Tile, even if the member has one on file

◊ Ensure you go over the Duke's golf rules so you book within guidelines and accurately quote the Duke's cancellation policies

◊ If you do not see the "Duke's Member" rate code in SMS, you are not within guidelines

◊ When booking The Hay for a Duke's Member, always select "Outside Guest," and advise that the Duke bring their Duke's Voucher to the Pro Shop at check-in. Blackout times for this benefit are Friday and Saturday 12pm or later.





Rate Description	Per Player
GTF Outside Guest	335.00
GTF Beach Club Member	335.00
GTF Spanish Bay Club Mem	335.00
GTF Duke's Member	190.00
GTF Military Special	190.00
GTF Original SB Townhome	130.00



Duke's Club Members 2/2

Booking a Duke at the Del Monte Golf Course:

Duke's Members may book 1 foursome per day at the Del Monte Golf Course

- The Duke Member receives the Duke's Member rate
- The 3 guests receive the Duke's Guest rate

To ensure that the rates reflect accurately on the Duke's Member's confirmation email, we must separate the Duke's Member from their guest(s) so we can apply the correct rate codes and price for each golfer.

On the Call:

1. Pull the entire group of golfers into your Booking Center at the Duke's Member rate

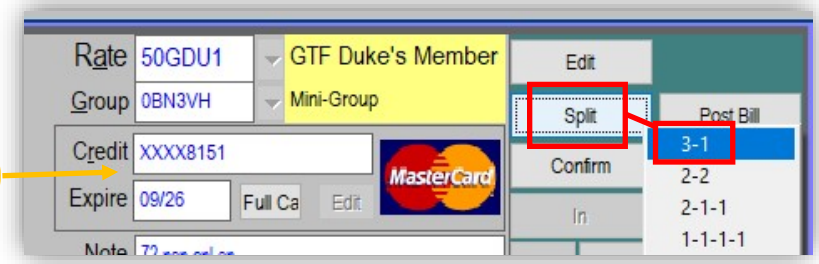


In Wrap Up:

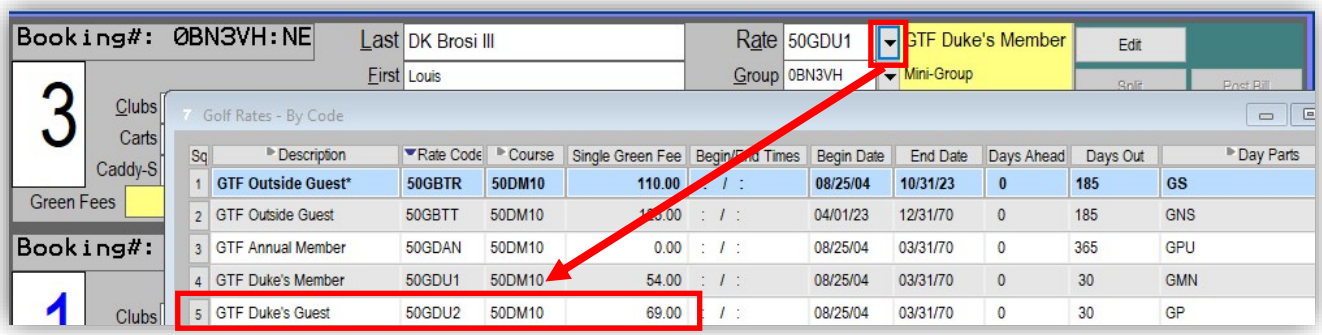
2. Split the foursome into a group of 3 and 1

NOTE:
If the member booked a threesome, you are splitting it into 2 and 1
If a member booked a twosome, you are splitting it into 1 and 1

The credit card should be attached to the tee time before splitting



3. Change the rate code of the threesome to "Duke's Guest"



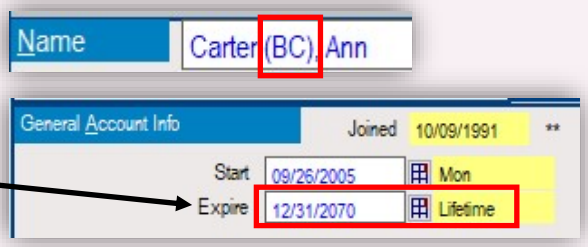
Beach Club Members

The Beach & Tennis Club is a social and recreational club based out of The Lodge at Pebble Beach.

HOW TO VERIFY A BEACH CLUB MEMBER:

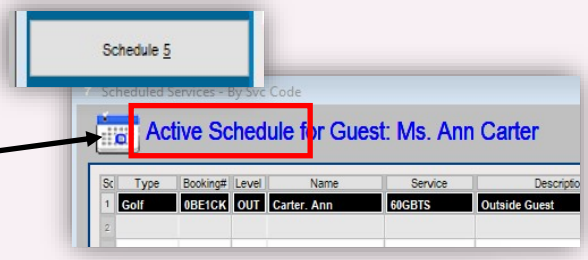
1. Verify that the membership is active

Beach Club members are all set up as lifetime memberships with the end dates set as 12/31/2070. We must make sure the account is not suspended or cancelled.



2. Verify that the guest has not exceeded 3 tee times at the same golf course within 90 days

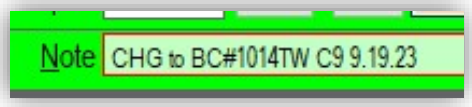
- *Click "Schedule 5" in their guest tile to see a list of the guest's active tee times.*
- *Filter by Golf*
- *Beach Club Members do not get any benefits for The Hay*



HOW TO GUARANTEE GOLF

Upon request, Beach club members are permitted to "guarantee" tee times with their beach club accounts instead of providing a credit card.

1. Verify that the membership is active
2. Pause/Un-Pause the recording in REVINATE
3. Document the membership # in the golf tile Babynotes



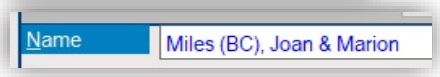
JOINT MEMBERSHIPS

A Joint Membership indicates that spouses are sharing the Beach Club golf benefits. Combined, they can book a max of 3 tee active tee times per course.

SINGLE:



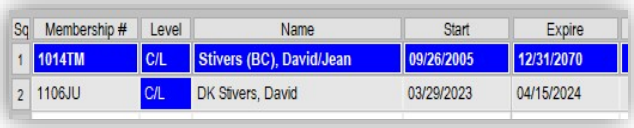
JOINT:



STILLWATER COVE GOLFING SOCIETY

Beach Club Members can choose to opt into an additional golf membership called the Stillwater Cove Golfing Society. These members will have a Duke's Membership in addition to the Beach Club Membership.

1. Verify that their Duke's Membership is Active
2. Book under Duke's Member rate codes and guidelines



Sq	Membership #	Level	Name	Start	Expire
1	1014TM	C/L	Stivers (BC), David/Jean	09/26/2005	12/31/2070
2	1106JU	C/L	DK Stivers, David	03/29/2023	04/15/2024

BILLING ADDRESS CHANGES

If a member needs to change the address on their Guest Tile:

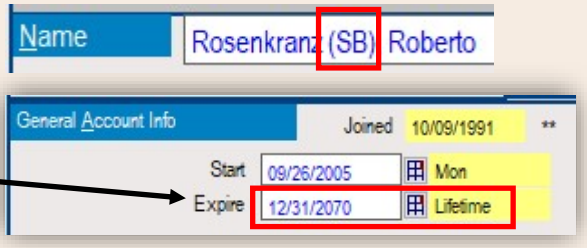
1. Collect the new address
2. Email _Accounts Receivable email distribution with the address change request and the name of the guest
3. **DO NOT EDIT THE BILLING ADDRESS ON THE GUEST TILE**

Spanish Bay Club Members

The Spanish Bay Club is a fitness and tennis club based out of The Inn at Spanish Bay.

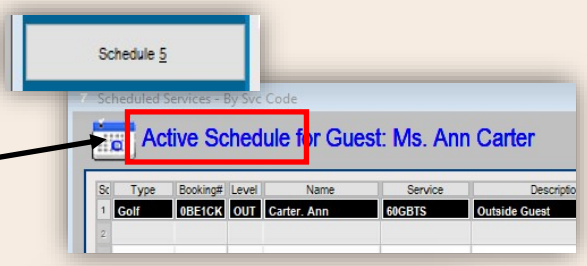
HOW TO VERIFY A SPANISH BAY CLUB MEMBER:

1. Verify that the membership is active *Spanish Bay Club members are all set up as lifetime memberships with the end dates set as 12/31/2070. We must make sure the account is not suspended or cancelled.*



2. Verify that the guest has not exceeded 3 tee times at the same golf course within 90 days

- *Click "Schedule 5" in their guest tile to see a list of the guest's active tee times.*
- *Filter by Golf*
- *Spanish Bay Club Members do not get any benefits for The Hay*

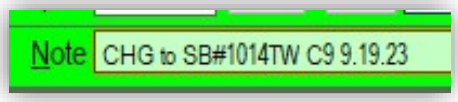




HOW TO GUARANTEE GOLF

Upon request, Spanish Bay Club members are permitted to "guarantee" tee times with their Spanish Bay Club Accounts instead of providing a credit card.

1. Verify that the membership is active
2. Pause/Un-Pause the recording in REVINATE
3. Document the membership # in the golf tile Babynotes



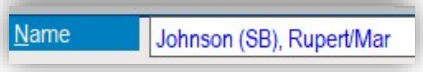
JOINT MEMBERSHIPS

A Joint Membership indicates that spouses are sharing the Spanish Bay Club golf benefits. Combined, they can book a max of 3 tee active tee times per course.

SINGLE:



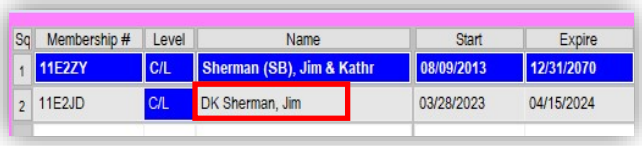
JOINT:



BAG PIPERS

Spanish Bay Club Members can choose to opt into an additional golf membership called the Bag Pipers. These members will have a Duke's Membership in addition to their Spanish Bay Club Membership

1. Verify that the Duke's Membership is active
2. Book under Duke's Member rate codes and guidelines



BILLING ADDRESS CHANGES

If a member needs to change the address on their Guest Tile:

1. Collect the new address
2. Email _Accounts Receivable email distribution
3. **DO NOT EDIT THE BILLING ADDRESS ON THE GUEST TILE**

Monterey Fuel Company Duke's Membership

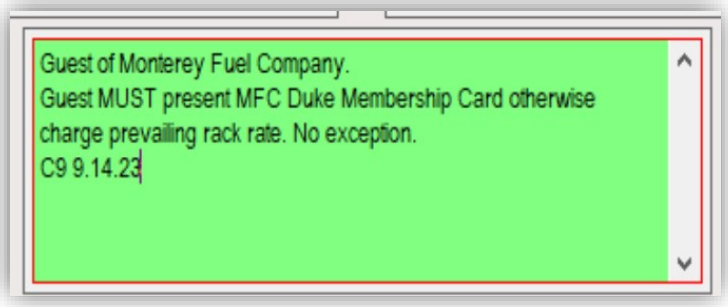
The Monterey Fuel Company (Monterey Jet Center) holds the only **Corporate Duke's Membership**. Both employees and guests of MFC are able to utilize the company's Duke's Membership benefits.

GUEST'S CREDIT CARD

Agents may get calls from the guest directly or from the Monterey Jet Center Concierge.

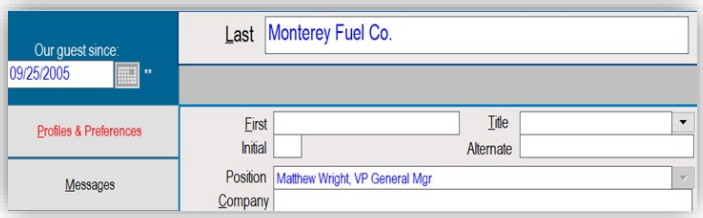
If the concierge books on a guest's behalf, create a c/o Guest Tile for the golfer to collect billing information

1. Book under the Duke's rate codes and guidelines
2. Create/Find a Guest Tile for the primary golfer
3. Collect a credit card
4. Advise that guests must bring the MFC Duke's Membership Card to receive the discount
5. Quote the Duke's CXL Policy
6. Send a VEMAIL
7. Leave a Tee Sheet Note
8. Clean up per your Golf Booking checklist

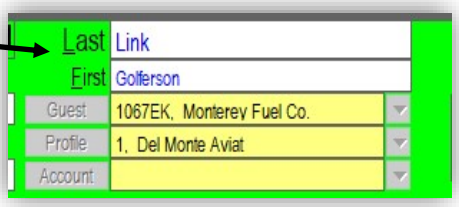


MFC CREDIT CARD

If the concierge cannot provide the guest's billing information, they are permitted to book with the MFC Guest Tile and credit card on file.

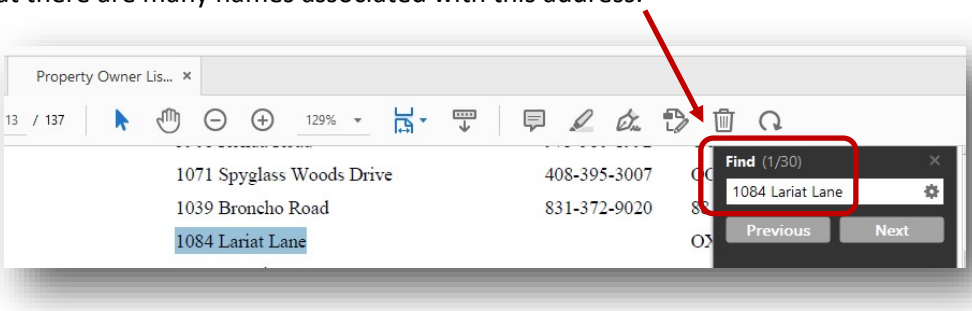


1. Book at the Duke's Rate
2. Locate the MFC Guest Tile
3. Pause/un-pause the recording in REVINATE so the call recording is not deleted (MFC does not need to provide a new credit card on the call)
4. Advise that guests must bring the MFC Duke's Membership Card to receive the discount
5. Quote the Duke's CXL Policy
6. Edit the name on the Golf Tile to the name of the guest
7. Sent a VEMAIL to the email on file for MFC
8. Leave a Tee Sheet Note *(see image above)*
9. Clean up per your Golf Booking checklist



Forest Residents: 1084 Lariat Lane

The property located at **1084 Lariat Lane in Pebble Beach**, CA is a joint venture property which means it has multiple owners. When you search for "1084 Lariat Lane" in the Property Owners Listing, you will see that there are many names associated with this address.



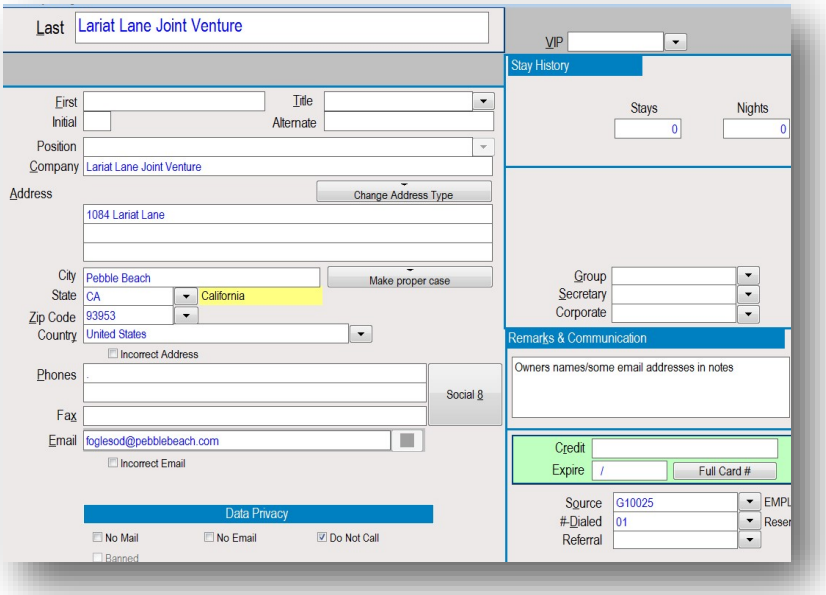
All owners of this property share the Forest Resident Golf Privileges as a group.

Per their contract: *"NO MORE THAN THREE SEPARATE FOURSOMES CAN BE RESERVED WITHIN A 90 DAY PERIOD, PER PROPERTY"*

The Lariat Lane Joint Venture Guest Tile

In order to track how these owners are using their golf privileges, and to ensure they do not exceed three foursomes per course within a 90 day period, a Guest Tile has been created for the Lariat Lane property—as opposed to each owner having an individual Guest Tile.

This **Lariat Lane Joint Venture Guest Tile** should NEVER be edited without authorization from management.



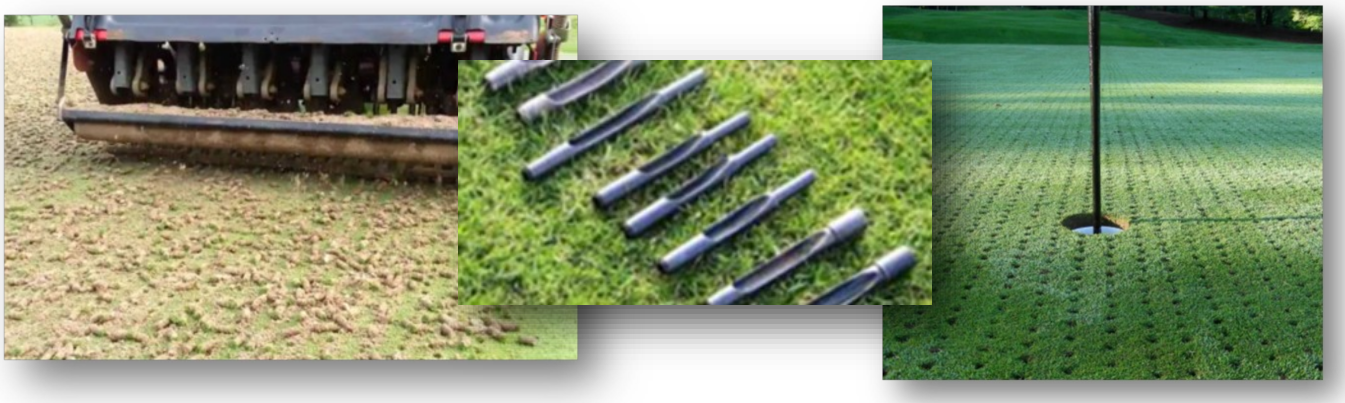
BOOK A TEE TIME FOR A LARIAT LANE OWNER:

1. Locate the Lariat Lane Joint Venture Guest Tile
2. Read the R Note to verify that the caller's name is listed as one of the owners
3. Access Schedule 5 to verify that the course the guest wants to book does not already have 3 tee times scheduled within the upcoming 90 day period
4. Book the tee time using the Lariat Lane Guest Tile, but do not put a credit card on the Guest Tile
5. Add the guest's credit card directly to the Golf Tile
6. Edit the name of the golfer from 'Lariat Lane Joint Venture' to the guests last and first name
7. Type 'See Tee Sheet Note' within the babynotes
8. Create a Tee Sheet Note that states the name of the golfer, the phone number at which they can be reached, and the cancelation policy that you advised
9. Do not send a confirmation email

Aeration

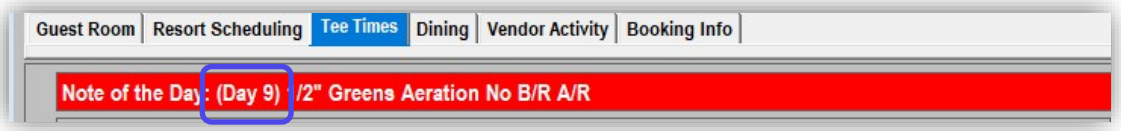
Golf Course Aeration is a process of punching holes into the grass to open growing room for grass roots and allow nutrients and water to penetrate deep into the soil to keep the turf healthy.

	Note of the Day includes (Day #)	**Note of the Day does not include (Day #)**
Which areas of the course are affected?	Tee Box, Fairway, Greens	Tee Box, Fairway, Greens
Are greens fees discounted?	Yes	No
Can PB be booked without the room requirement?	Yes	No
When is it done?	Twice per year	Staggered schedule year round
Are we required to inform guests?	Yes	Only if they ask
Will this affect play?	Yes	No



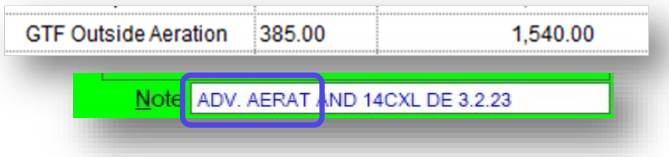
WHEN DO I DISCLOSE AERATION?

If you see (Day #) in the note, this indicates that this is a Major Aeration which must be disclosed to the guest and discounted. If you do not see a Day #, you only need to tell the guest about aeration if they ask and there will be no discount.



HOW DO I BOOK DISCOUNTED AERATION?

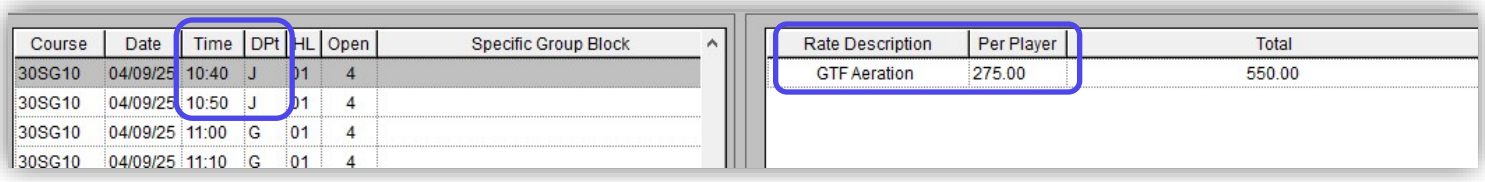
1.) Select the Outside Aeration/Resort Aeration Rate Code
2.) Quote the discounted greens fee from the Booking Center
3.) Document your Aeration Advisement in the Babynotes



WHAT IS J CODE AERATION?

<u>For Pebble Beach Golf Links and Spyglass Hill Golf Course:</u>
Days #6-10 of Aeration *(when the impact to the guest is lesser)* tee times from the beginning of the day until 11am may exclusively be booked by Resort Guests. These tee times are marked with a J Day Part Code.

The "GTF Aeration" rate code will only appear in the second pane when you are searching under "Hotel Guest"



Day Guest Team Third Party Golf Bookings

Assistants / Concierges Booking on the Guest's Behalf

When an assistant or concierge calls to book on a guest's behalf, we treat this as if we are talking directly to the guest.

You will create the booking in the name of the guest.

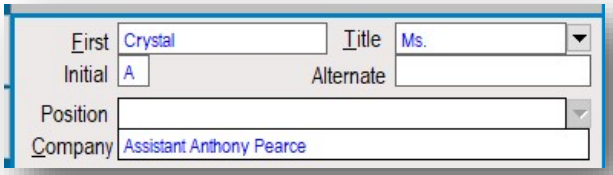
The Assistant/Concierge will need to provide you with:

- The guest's name and contact information
- The guest's credit card information

Make sure that the credit card you are collecting belongs to the guest, meaning that the guest will be legally able to sign for charges upon arrival.

It is common for an Assistants to request that their own email address be added to the Guest Tile instead of the guest. That is fine.

If you are speaking to an assistant, you must take down their full name and document them on the Guest Tile in the Company field:



If you are talking to a concierge, you do not need to add their name to the Guest Tile, but you must collect their first and last name and clearly explain who you spoke with in your REVINATE Note.

Be sure to still advise of appropriate guidelines and cancellation policies. Notate all advisements in your REVINATE Note.

Giving Tee Times As Gifts

If a caller wants to book a tee time on behalf of a friend or family member as a gift—meaning that the person purchasing the tee time will not be playing—the best practice is to first suggest that they purchase a gift card on our website.

By purchasing a gift card, they will not need to decide on behalf of their friend/family member when the tee time will take place. The gift cards also never expire.

If they still want to set up the tee time themselves, let them know that:

⇒ If the tee time is within the next 30 days, we require a Letter of Authorization.

⇒ They will need to pre-pay all fees on this call

⇒ Standard Day Guest Golf Guidelines apply

Use the following 3 S.O.P.s to complete your 3rd Party Booking:

3RD PARTY BOOKING—OUTSIDE GUEST GOLF

HOW TO SEND A LETTER OF AUTHORIZATION

HOW TO CHARGE A CREDIT CARD

Booking with Another Golfer's Credit Card

"I'm booking a tee time for me and my dad. Let's put it under my dad's name. He gave me his credit card to book this."

Even though the dad in the above situation will be present to sign for charges, we are not permitted to take credit card information from anyone other than the person whose name is on the credit card.

In this instance, inform the guest that the father needs to be the one to call in to make this booking.

The only exception to this rule is Assistants and Concierges.

3rd Party Booking | Golf

ON THE CALL

1. Advise the guest that all 3rd Party charges must be **prepaid** at the time of booking.

2. Ask the guest if they just **want to cover** greens fees or also carts/caddies/rental clubs. Obtain the **name of the golfer.**

3. Add the tee time to your **Booking Center**

4. Create a Guest Tile for the **3rd Party Caller**

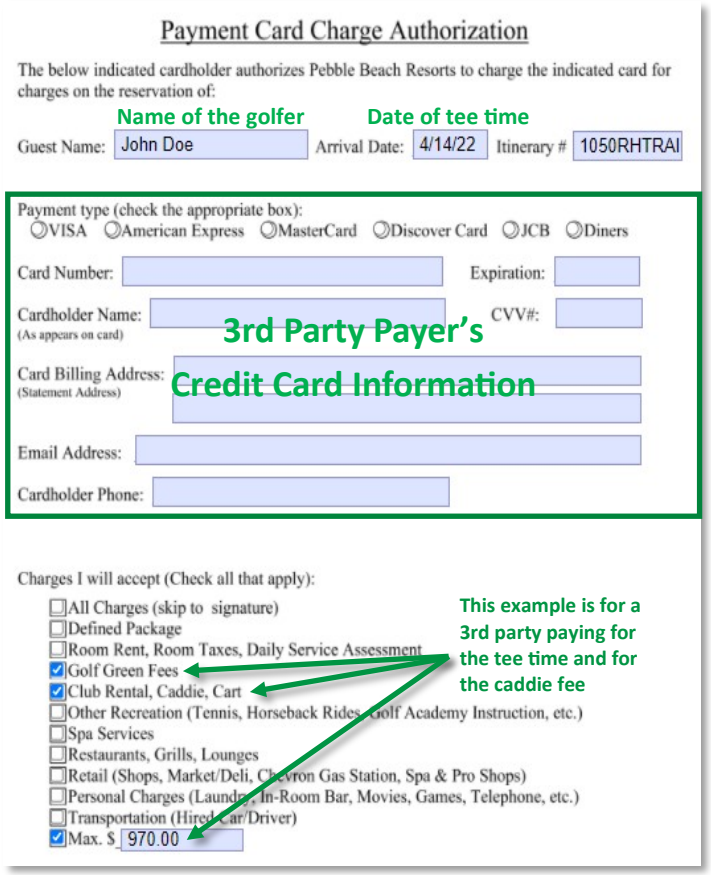
5. If the tee time is within **30 days,** send an **LOA** to the 3rd Party via Sertifi. Have them sign it while you are on the call

6. Create a City Ledger on this Guest Tile

- Click the "**City Ledger**" button within the Guest Tile
- Click "**A**" to search for Active City Ledger accounts
  - ⇒ If none exists, SMS will ask "Do you want to create one—Say **yes**
  - ⇒ If a City Ledger exists, it will open and you will need to click "**Add**" to create a new City Ledger
- Type "**B**" to indicate The Inn at Spanish Bay

7. Charge the City Ledger with the guest on the phone

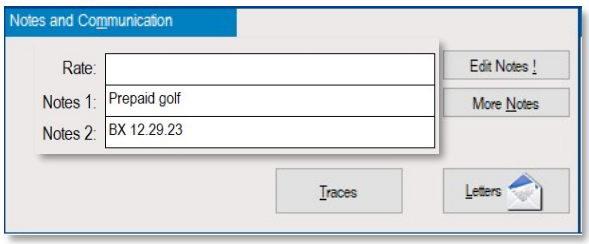
Outside Guest Golf LOA Example



IN WRAP UP

8. Edit the City Ledger

- Set the **start** and **end dates** to the date of play
- Set the **Account Type** to "Day Use Account"
- Add **notes** to the City Ledger

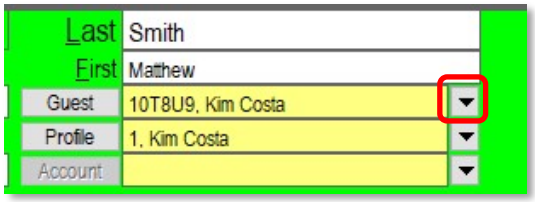


9. Add an **R Note** in More Notes detailing what was prepaid

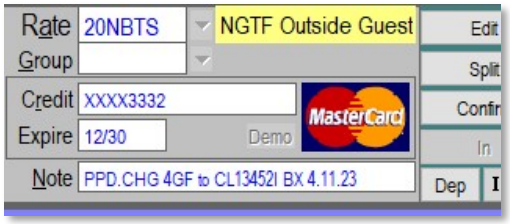
Mr. David Johnson prepaid Spanish Bay tee time on 1.25.24 @10:10 am and Spyglass on 1.26.24 @ 10:30 am. The tee times are under the name Frank Stowe.
SB @ $335 x 4 = $1340
SG @ $465 x 4 = $1860
Double Cads @ $105 x 8 = $840
Total prepaid = $4040
KW 12.29.23

10. Edit the Golf Tile

- **Refresh the CC**; Pull in the CC from the Guest Tile using the drop down arrow
- Edit the name field to the **Attending Guest**



- Enter any **rental clubs or caddies**
- Leave **chargeback** notes



11. Send a **VEMAIL**

12. Create a **Booked lead;** Fill in all hot spots

13. Copy the R Note and paste into a **Revinate Note**

14. Set your Call Disposition as **Booked**

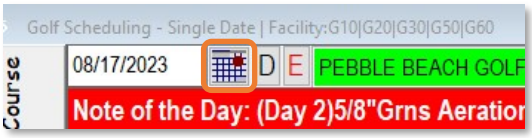
Locate A Booking on the Tee Sheet

1. Ask the guest for the **date**, **time**, and **course** that they reserved.

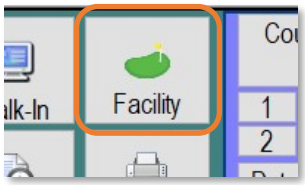


2. Click the **golf ball on a tee** in SMS to access the Tee Sheets.

3. Use the **calendar** in the top left to set the date.

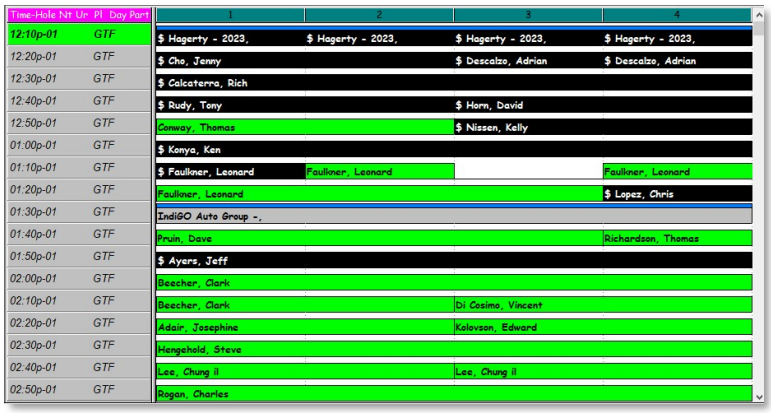


4. Click the **Facility** button and the corresponding number to select the appropriate golf course.

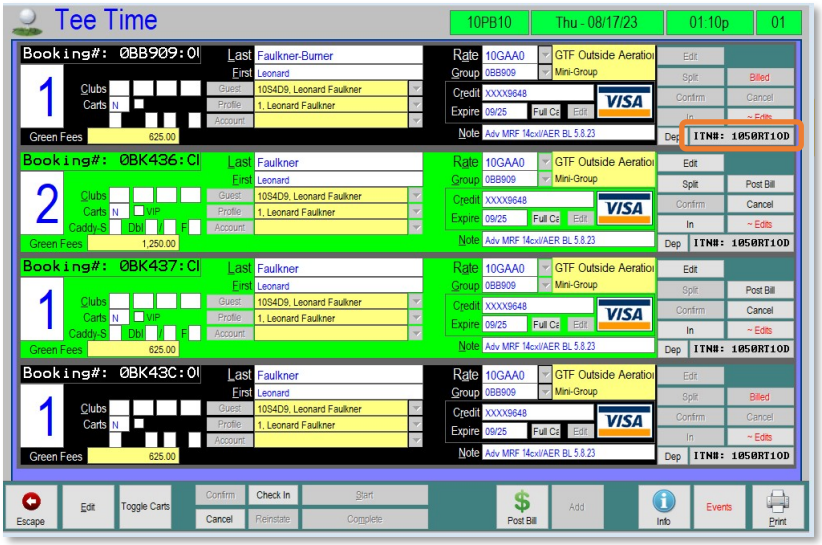




5. Now you can scan the results for the time slot the guest has provided and see who is booked into that spot.



6. Once you find the correct booking, you can double click on it to open the **Golf Tile**



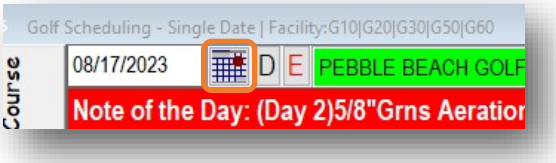
If the **Itinerary button** just says the word "Itinerary" instead of "ITN#XXXXXXX, click the Itinerary button to put this golf reservation onto a new or existing Itinerary for your guest.

Creating a Tee Sheet Note

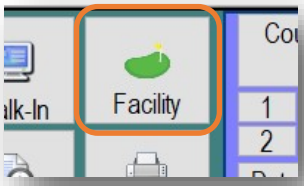
1. Click the **golf ball on a tee** in SMS to access the Tee Sheets.

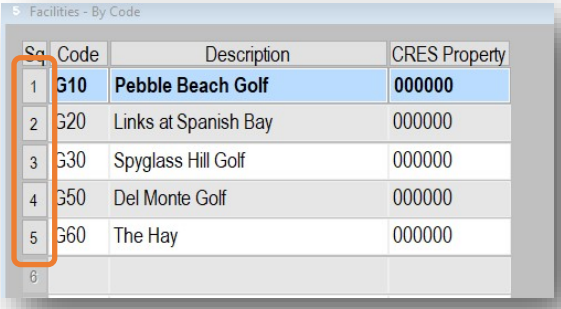


2. Use the **calendar** in the top left to set the date.

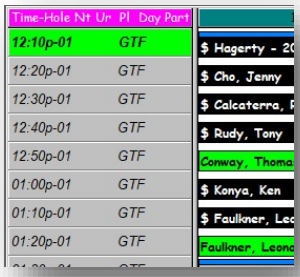


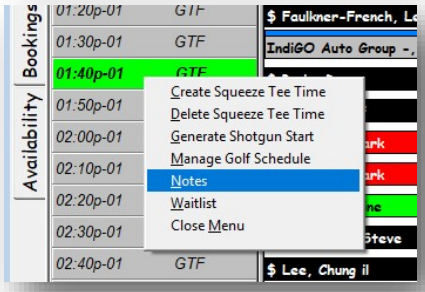
3. Click the **Facility** button and the corresponding number to select the appropriate golf course.





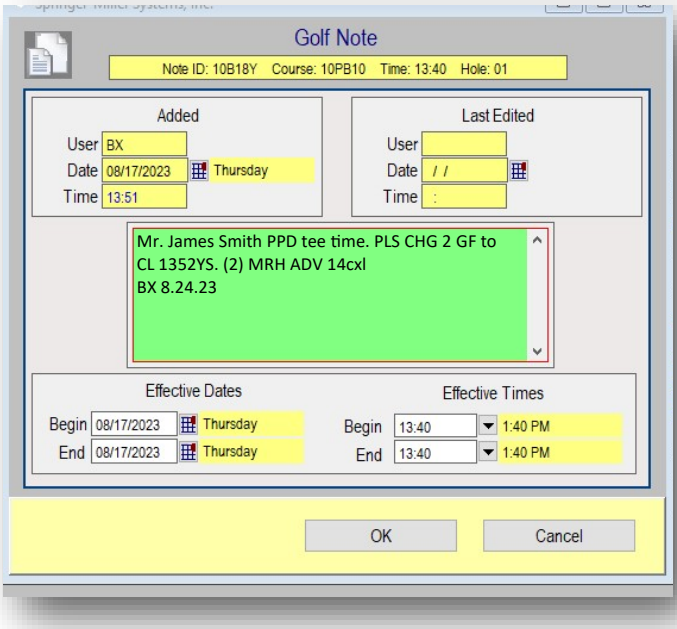
4. Find the time slot where you want to leave a tee sheet note and **double click the time**. Then **Select Notes**.





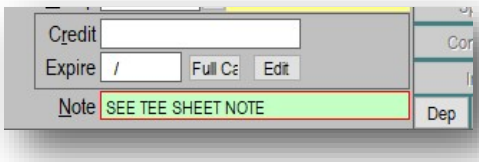
5. **Write** your tee sheet note as appropriate. Make sure to indicate the guests name this note is for in your tee sheet note.

Click **Page Down** to save.



We mostly write tee sheet notes when we run out of room with the baby notes from the golf tile.

6. On the golf tile your baby notes should read **"See tee sheet note"**



Change a Tee Time

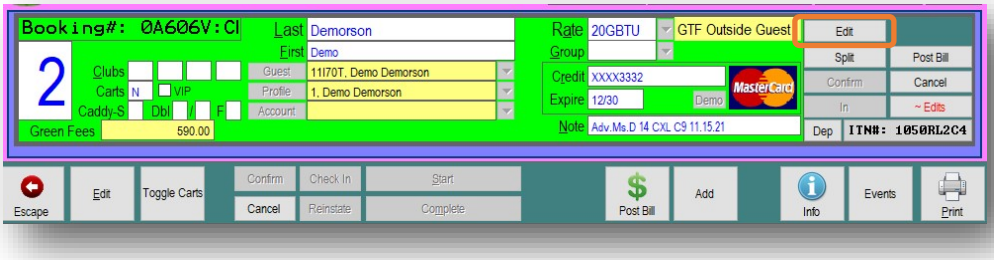
WHAT CAN I EDIT?
without needing to cancel and rebook?

	Dining		Golf
✓	Time	✗	Time
✓	Date	✗	Date
✓	Number of Guests	✓	Number of Golfers
✗	Service	✗	Course

Change the Number of Golfers

Do not cancel the tee time and rebook it with the new number of golfers.

1. Double click on the tee time to open your **Golf Tile.**
2. Click the little **Edit** button on the right side of the tee time. Do not click the edit button along the bottom button bar.



3. Type the correct number of golfers into the large **number field** on the left side of the tee time.



4. **Page Down** to save.
5. Send a **VEMAIL** to your guest and update the **Lead Form** with the notes of what you changed.

Change a Golf Rate Code

Do not cancel the tee time and rebook it with the new rate code.

There are several reasons you may need to change the golf rate code. The most common reasons are:

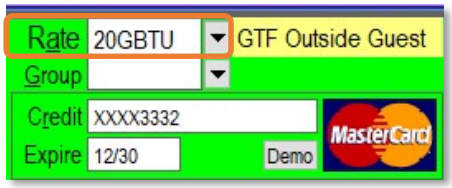
- A guest waited until after you pulled your tee time into the booking center to tell you that they are a Duke's Member, Forest Resident, or Beach Club / Spanish Bay Club Member.
- You selected the wrong rate code by mistake.

<u>To Change Your Rate Code:</u>

1. Click the little **Edit** button on the right side of the tee time. Do not click the edit button along the bottom button bar.



2. Click the Down Arrow next to the **Rate field**.

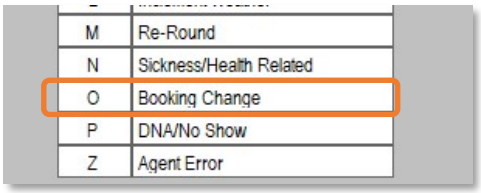


3. Select the correct **rate code** from the window that pops up.



Sq	Description	Rate Code	Course	Sing
1	GTF Promotional/Donatior	20FPRO	20SB10	
2	GTF Golf VIP	20FVIP	20SB10	
3	GTF Outside Guest	20GBTU	20SB10	
4	GTF Spanish Bay Club Mem	20GCSB	20SB10	
5	GTF Re-Sale SB Townhome	20GRRS	20SB10	
6	GTF Original SB Townhome	20GRTH	20SB10	

4. Select the **reason** for the rate code change from the second pop-up window.

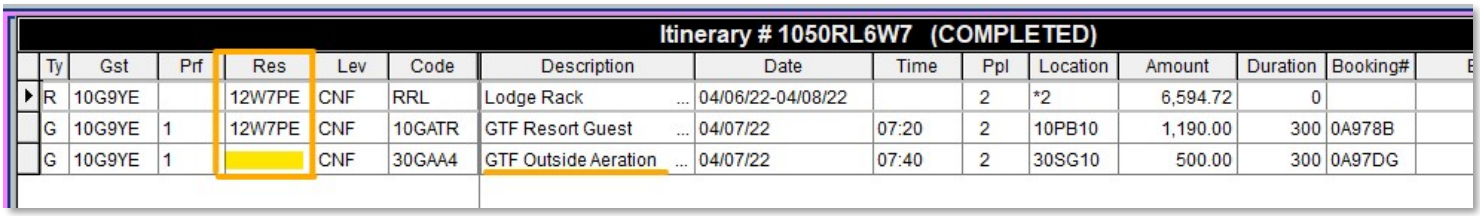


M	Re-Round
N	Sickness/Health Related
O	Booking Change
P	DNA/No Show
Z	Agent Error

5. **Page Down** to save.
6. Send a **VEMAIL** to your guest and update the Lead Form with the notes of what you changed.

Convert Rate Codes from Outside Guest to Resort Guest

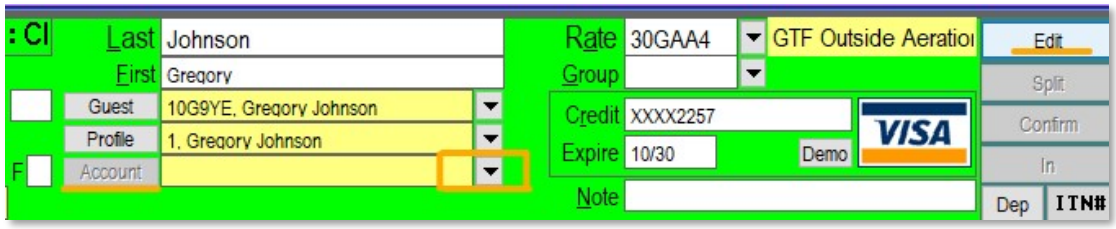
Example Scenario: A Resort Guest calls to add a tee time to their existing Itinerary. You add the tee time, but SMS does not automatically connect it to the guest's room. You need to manually connect the tee time to the room so it is booked as a "Resort Guest" tee time.



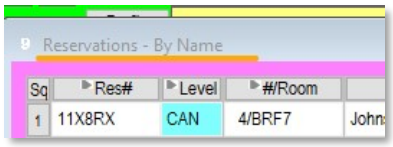
Itinerary # 1050RL6W7 (COMPLETED)

Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location	Amount	Duration	Booking#
R	10G9YE		12W7PE	CNF	RRL	Lodge Rack	04/06/22-04/08/22		2	*2	6,594.72	0	
G	10G9YE	1	12W7PE	CNF	10GATR	GTF Resort Guest	04/07/22	07:20	2	10PB10	1,190.00	300	0A978B
G	10G9YE	1		CNF	30GAA4	GTF Outside Aeration	04/07/22	07:40	2	30SG10	500.00	300	0A97DG

1. Open the **Golf Tile**
2. Click "**Edit**"
3. Click the **down arrow** next to the "Account" field



4. A "Reservations—By Name" window will pop up

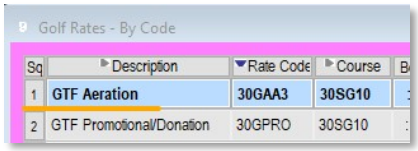


5. Click the **appropriate number** on this list to select your guest's current reservation.
   Note: It should be one of the green options

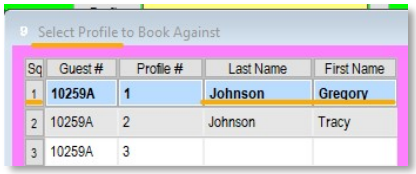


9	12I1BE	OUT	1/B2524	Johnson, Gregory	06/28/2021	07/01/2021
10	12G03X	CNF	1/BRC7	Johnson, Gregory	03/15/2022	03/17/2022
11	12W7PE	CNF	2/LROS	Johnson, Gregory	04/06/2022	04/08/2022

6. **Follow the prompts** to select the correct Rate Code and Profile to finalize the change





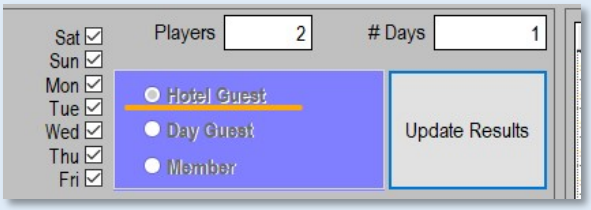


Convert Rate Codes from Resort to Outside Guest

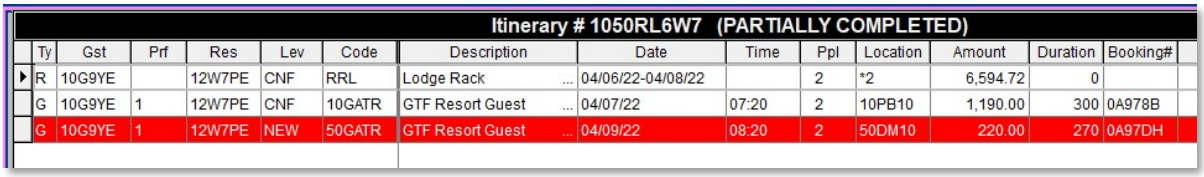
Example Scenario: A guest is staying at our resort, but intentionally wants to book an Outside Guest tee time:

- They only have one room, but want to book 4 golfers, so 2 players need to be outside guest
- They are staying somewhere nearby immediately before or after their trip and want to play on a date that doesn't overlap with their room stay.

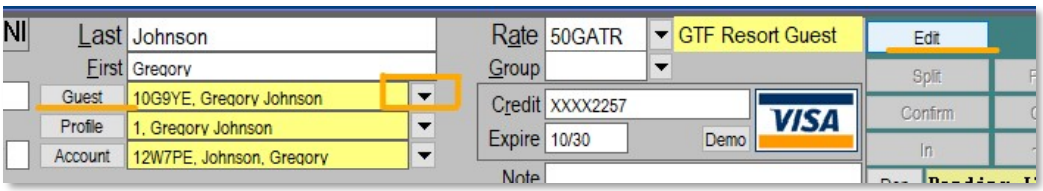
NOTE: Since there is a room on the Itinerary, SMS will automatically lock the tee time search criteria to "Hotel Guest." To get around this, book the tee time using the Resort Guest rate code, then manually change it to Outside Guest.



1. Book the tee time as **Resort Guest**



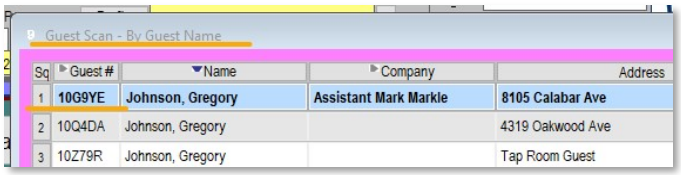
2. Open the **Golf Tile**



3. Click "**Edit**"
4. Click the **down arrow** next to the "Guest" field
5. A prompt will ask if you want to disconnect the room from this golf tee time, Click **Yes**.



6. A window will pop up that lists the Guest Tiles that match the name typed into the tee time and is asking you to select a Guest Tile to connect to the booking. The guest's current Guest Tile will be first on this list. **Click the 1** to select it.

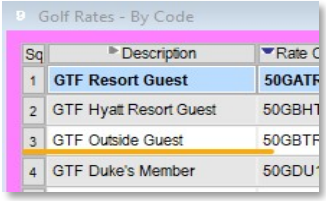


7. Click **Yes** to update the name on the booking
   Since the guests name shouldn't change, Clicking **No** works too



8. Click the **down arrow** next to the Rate Code and select **Outside Guest** Rate Code from the menu.





Add Resort Guest Golf (1/2)

Financial Responsibility

Since golf has a financial liability, only those who are financially responsible for the room are able to add, change, or cancel golf reservations.

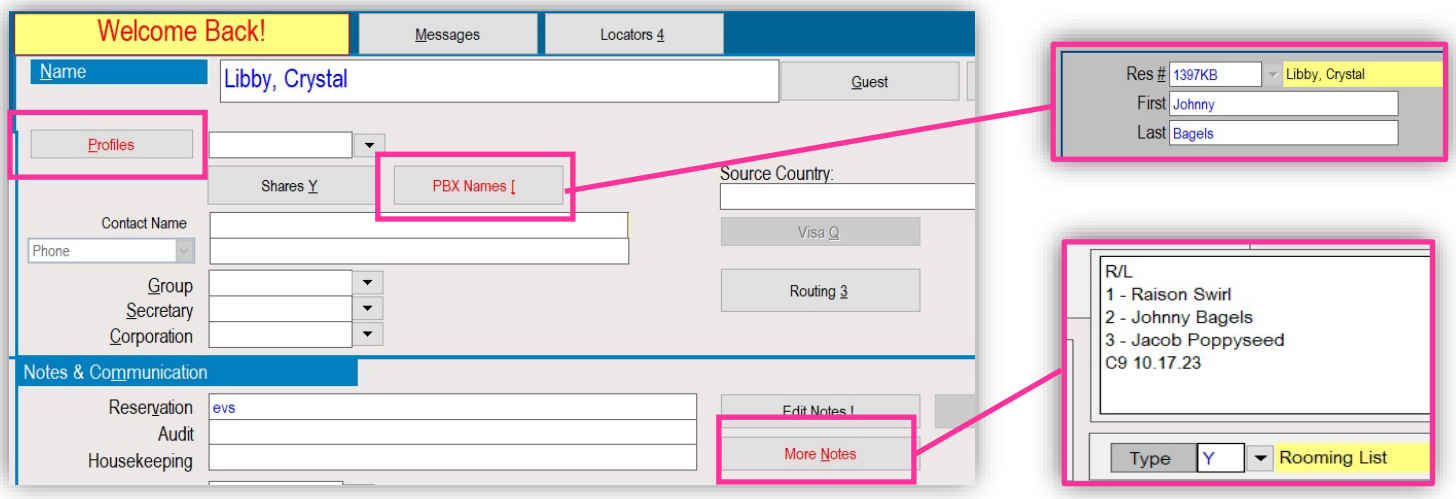
When a guest calls to add golf to a room stay, ask yourself:

Who paid the room deposit?

⇒ If you are talking to the primary guest (i.e. the person who paid the deposit, you are clear to add resort guest golf within Resort Guest Guidelines. (Proceed to page 2)

⇒ If you are talking to someone who is simply joining the primary on this trip, you must check to see if their name is documented on the room booking.

- Check the Profiles (spouse)
- Check PBX (non-paying travel companion)
- Check the Y Note (list of guests coming on the trip)



⇒ If you find the caller's name on the room booking, connect them with a Resort Sales Agent to continue the conversation.

⇒ If you do not find the caller's name on the booking, advise them that the Primary Guest must add their name to the room reservation in order for us to discuss the booking with them.

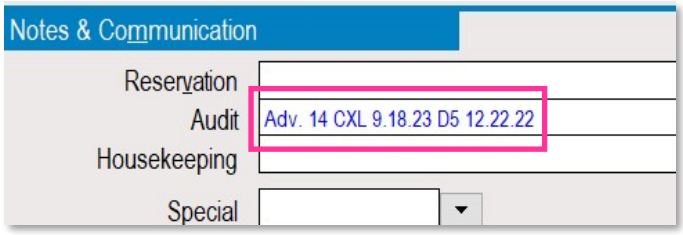
Add Resort Guest Golf (2/2)

On the Call

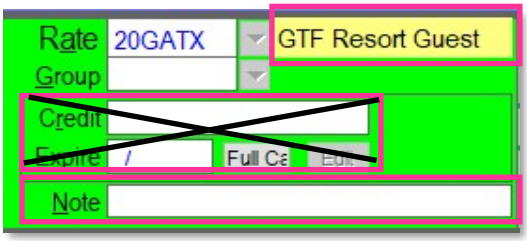
1. Locate the room first – There will be an existing Itinerary, Guest Tile, and Lead Form
2. All resort guest tee times must occur within the guest's dates of stay
3. You do not need to collect a credit card—the guest already paid a deposit for their room
4. Quote the CXL based on the date of arrival, not date of play (DM/TH are still date of play)

Resort Guest Golf Cleanup

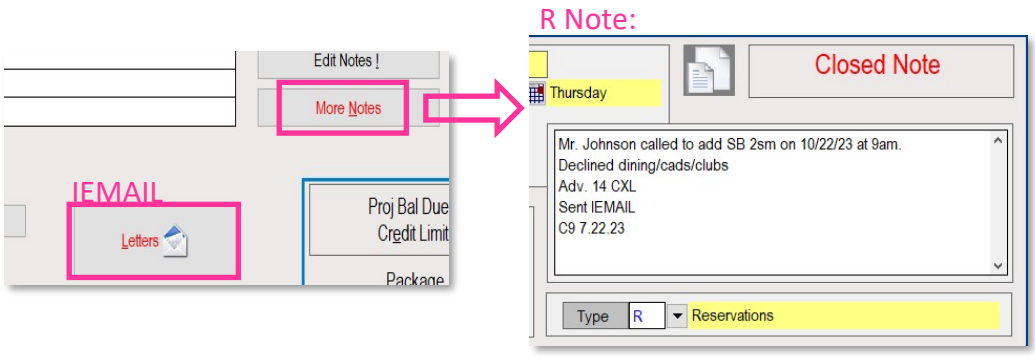
1. You do not need to document the CXL policy in your babynotes because it is already documented on the room.



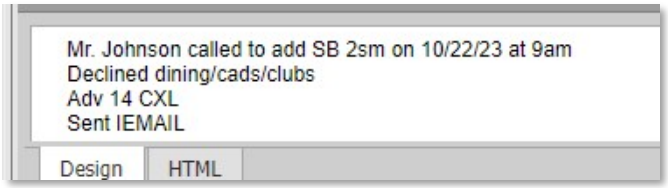
2. You do not need to attach a credit card to the Golf Tile
3. You will still add babynotes for:
   - Rental Clubs
   - Aeration Advisements
   - NGTF Advisements
   - Celebration Notes



4. Send an IEMAIL from the Letters button within the Room Reservation
5. In More Notes, leave a detailed R Note on the Reservation Tile—Close this note!



6. Copy and paste your detailed note to the existing Booked Lead Form

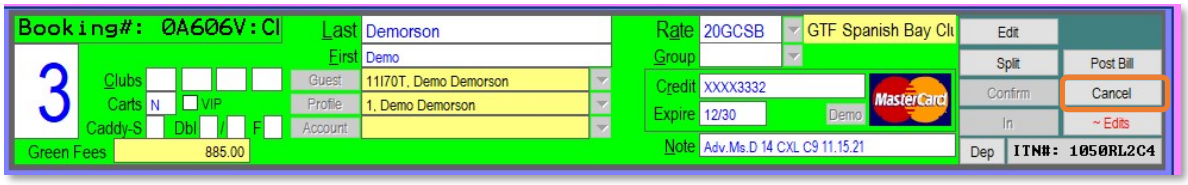


7. Set the call disposition as Change/Revise

Cancel A Golf Reservation

Before cancelling, make sure that the guest's tee time is outside of their non-cancellation window.

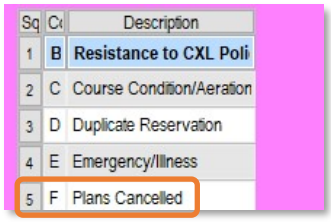
1. Double click on the tee time to open your **Golf Tile**
2. Click the little **Cancel** button on the right side of the tee time. Do not click the cancel button along the bottom button bar.



3. Select **Y** to proceed with the cancellation



4. Select the appropriate **Cancellation Reason** from the pop-up window



5. Enter more details about their reason into the **Cancellation Information** field



6. Once cancelled, the booking will turn blue



7. Leave a detailed **Revinate Note** on their Lead Form.
   - ◊ If you cancelled everything on the Itinerary or the last item on the Itinerary, mark your **Lead Status** as **Cancelled**. Set the **Call Disposition** as **Cancelled**.
   - ◊ If you only cancelled one portion of their Itinerary, keep the **Lead Status** as **Booked**. Set the **Call Disposition** as **Change/Revise.**

Create A City Ledger | Golf Cancellation inside Policy 1/2

Note:

- This exception requires approval from a supervisor.
- Before asking your supervisor for approval, you must inform the guest that their funds are forfeited. Do your due diligence by holding this policy firm with the guest.
- If the guest has an extenuating circumstances and has asked for an exception, ask if they are able to reschedule, place the guest on hold so you can "see what you can do," then ask your supervisor for approval. If approved follow the below steps.

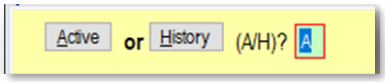
On the Call:

1. **Advise** the Guest:
    - They will be charged for their tee time today.
    - This is a one time exception to our cancellation policy.
    - Their next booking will be **non-cancellable**.
    - They must complete their tee time by the deadline
    - Their funds will be held on file under their name
2. **Cancel** the booking in SMS per usual procedures.
3. Access the **Guest Tile**
4. Click the **City Ledger** button

    Keep the guest on the line while you create the city ledger



5. Type A for **Active**



6. Type **Yes** to create a new City Ledger

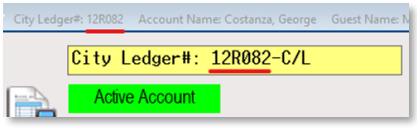


7. Type **B** to select The Inn at Spanish Bay

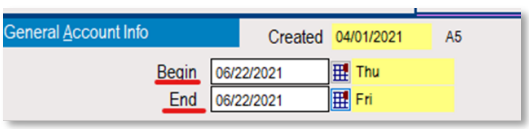
    (You will always select B because our **Accounting** department is at The Inn at Spanish Bay)



8. Write down the City Ledger number

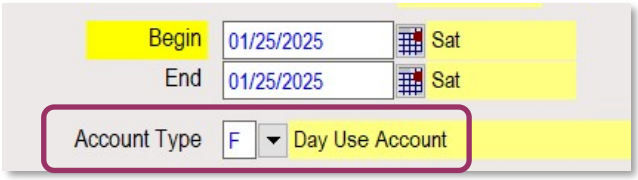


9. Set the **Begin and End Dates** for the final date by which the guest must complete their new reservation



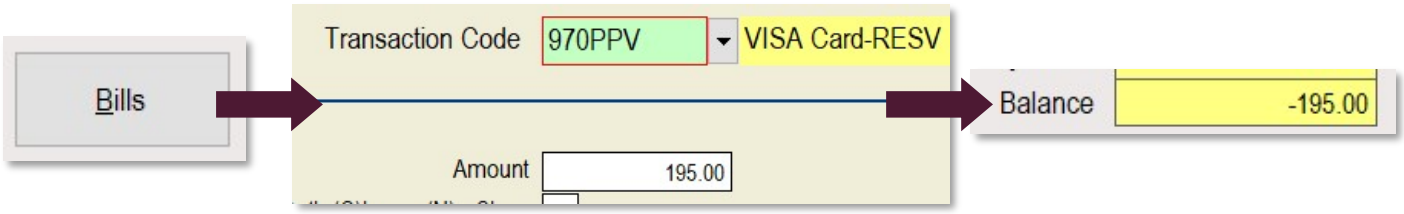
Create A City Ledger | Golf Cancellation inside Policy 2/2

10. Set the **Account Type** to **Day Use Account**



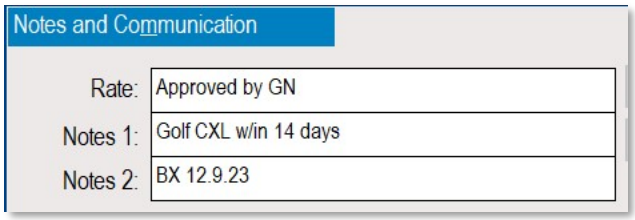
11. Click the **Bills** button to charge the greens fees to the City Ledger

Keep the guest on the line while you charge the credit card to make sure payment goes through



In Wrap Up

1. **Document** in the Notes and Communication fields on the City Ledger:
   - **Rate:** Who approved this
   - **Notes 1:** The reason why the funds are being held
   - **Notes 2:** Agent initials and todays date



2. Save a detailed **Revinate Note** that clearly explains:
   - The reason for the cancellation
   - Why and by whom the exception was approved
   - The City Ledger number
   - What you advised
3. Copy this note to the City Ledger as an **R note** and close the R note

R Note Example:

> Mr. Steve Jones cancelled his Spyglass 4sm due to injured back. Approved by GN. C/L#13A7X2. He has $1860 on file for 6 months, expiring 6.28.24.
> Adv new res non-cxl/non-chng.
> KW 12.28.23

4. Change the Revinate **lead status** to **Cancelled**, Save and close the lead
5. Set the **call disposition** to **Cancelled**

Apply City Ledger Funds | Golf Cancellation inside Policy

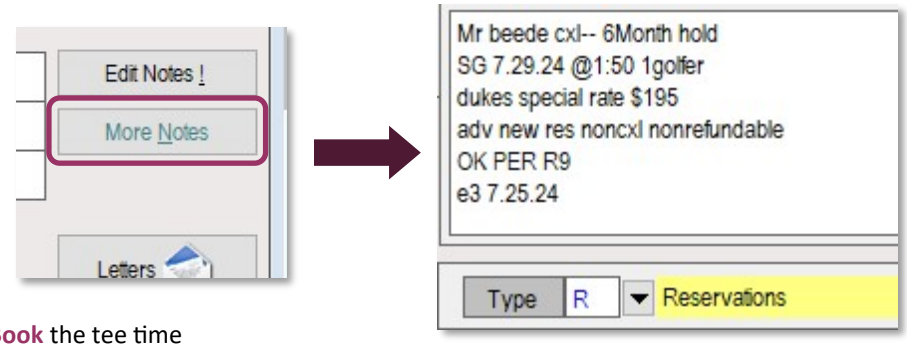
When the guest re-books their tee time:

On the Call:

1. Locate their Guest Tile
2. Check the **City Ledger expiration** date to ensure they are within their deadline
   NOTE: If the City Ledger is expired, call a supervisor for assistance



3. Check the **R note** on the City Ledger to confirm the reason for funds, or any details about the funds
   NOTE: If the funds on the City Ledger do not cover what the guest is reserving, Advise the guest they will be responsible for the remaining green fees, cart, and/or caddie



Common scenarios were City Ledger funds don't cover new tee time:

- Golf rate increase
- Guest was booked at special rate and that rate is no longer available
- Old booking is before the new fiscal year and the new booking is after the new fiscal year (April 1st each year)

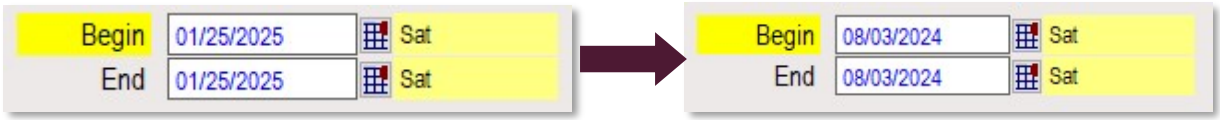
4. **Book** the tee time
5. Collect a **new CC** to guarantee the reservation
6. **Advise** the guest this new reservation is **Non Changeable Non Cancellable**

In Wrap Up:

1. Write a **baby note** on the golf tile that says "CHG GF to C/L#xxxxx No CXL"
   NOTE: If the City Ledger funds do not cover the new golf reservation, indicate the amount to charge to the City Ledger and all additional charges to guest, if you need more room write a tee sheet note instead



2. Change the **beginning and end date** of the City Ledger to the **date of the tee time**
   NOTE: If the guest books multiple tee times that span multiple dates, the Begin date will be the date of the first tee time and the End date will be the date of the last tee time



3. Create a new **booked lead** in Revinate
4. Save a detailed **Revinate Note** that explains:
   - What you booked
   - The City Ledger number for the funds being used
   - What you advised
   - What the guest declined
5. Copy this note to the City Ledger as an **R note** and close the R note

R Note Example:

Mr. Steve Jones called to book golf with CL funds; CL# 12R082
8.3.24 1 golfer SG 12:10pm
Adv noncxl nonchg
Declined clubs, caddies, and dining
BX 7.30.24

R Note Example if C/L funds do not cover tee time:

Mr. Harry Beede called to book golf with CL funds $195; CL# 1366U7
8.3.24 1 golfer SG 12:10pm @ $295
Adv noncxl nonchg Adv guest is responsible for remaining GF
Declined clubs, caddies, and dining
BX 7.30.24

Reservations Sales Team

Resort Reservations

2024 Training Binder









Room Booking Call Flow (1/4)

1.) LISTEN, ASK, AND NOTATE

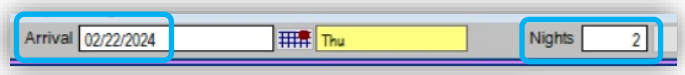
□ Reason for stay / Celebration
□ Who is coming: Family/Friends/Couples
□ Anticipated activities
□ Room Needs: View/Space/Location/Price

□ Dates of stay
□ # of Nights
□ # of Rooms

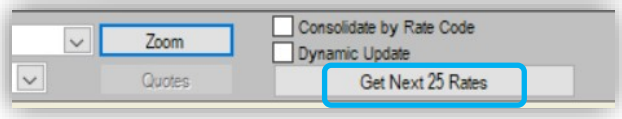
□ Which courses
□ # of Golfers
□ Ideal tee time

2.) SEARCH

- Set the Master Calendar start date and number of nights



- On the Guest Rooms tab, click Get Next 25 Rates

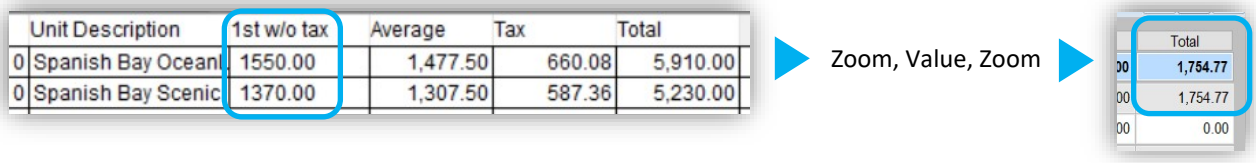


- If your guest is booking room AND golf:
  - Silently check that we have rooms available at any property during their chosen dates.
  - If yes, switch to the tee times tab and plan/notate their ideal golf schedule, starting with PBGL
  - Quote greens fees as you notate the golf "The greens fees for this course are ___ per player."
  - Once you have notated the tee times, quote room category availability. <u>The room should be the first item you pull into your booking center, followed by all golf.</u>

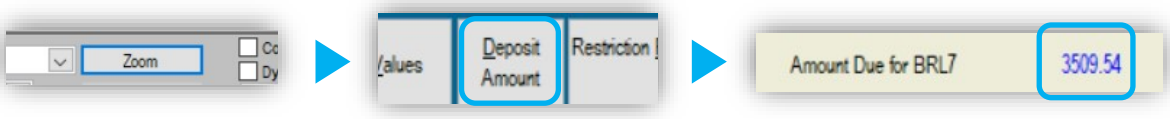
3.) QUOTE

- Quote the nightly base rate + gratuity AND the total nightly rate
  "The Ocean Loft Room is $1550 per night (per room) which includes the nightly service fee"
  "With taxes, this comes out to $1,754.77 per night (per room)."

If dynamic room rates
See Dynamic Rates SOP



- When the guest selects a room category, quote the 2 night deposit with taxes and fees:



"To confirm this reservation, we collect a deposit of the first two nights of your stay. Charges beyond the first two nights will be due at checkout. The total deposit we will collect today is $3509.54."

Cancellation Policy:

- ◊ Outside 14 Days: "We have a 14 day cancellation policy which means you may change or cancel your stay without penalty up until 14 days prior to your date of arrival. If you change or cancel within 14 days of arrival, you will forfeit your deposit."
- ◊ Within 3-14 Days: Since we are within two weeks of your arrival, you have until end of business day tomorrow to cancel this reservation without penalty. If you cancel after that, you will forfeit your deposit.
- ◊ Inside 2 Days: Since we are within 2 days of your arrival, this booking is non-cancellable. A cancellation after this phone call will result in the forfeiture of your deposit."

"Would you like to proceed?"

4.) BOOK

"One moment while I finish putting your Itinerary together."

- Double click on the room to pull it into your Itinerary Details window
- If your guest is booking golf, return to the golf search tab and double click to reserve all tee times

Room Booking Call Flow (2/4)

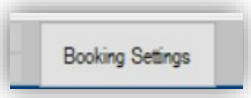
5.) GUEST TILE

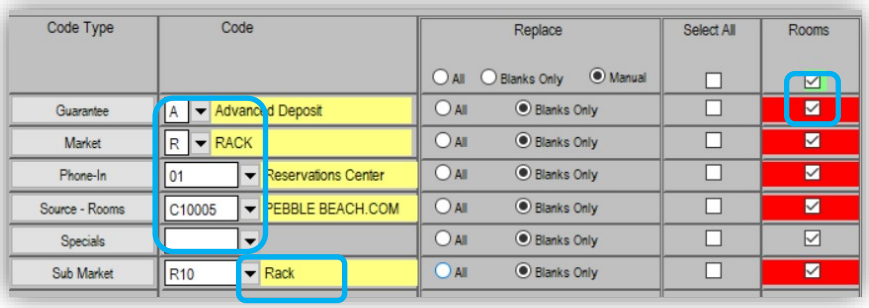
- Search for / Create their Guest Tile
  - "Before I collect your credit card, I will need to gather some information…"
    - "Have you stayed or golfed at the resort before?"
      If yes, search for existing guest tile. If no, create a new guest tile.
    - "Can you please spell your last name?"
    - "May I have the billing address for your credit card?"
    - "What is the best mobile phone number to have on file?"
    - "What email address would you like us to send your confirmation email to?"

- Collect the Credit Card
  - "I am going to place our recording on a brief pause to collect your credit card information."
    In Revinate, Pause/Un-pause recording while collecting CC
  - "Thank you. Please allow me a moment while I finalize your reservation."

6.) BOOKING SETTINGS

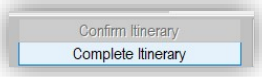
- Save and Escape the Guest Tile to return to the Booking Center
- Click Booking Settings and apply the following:



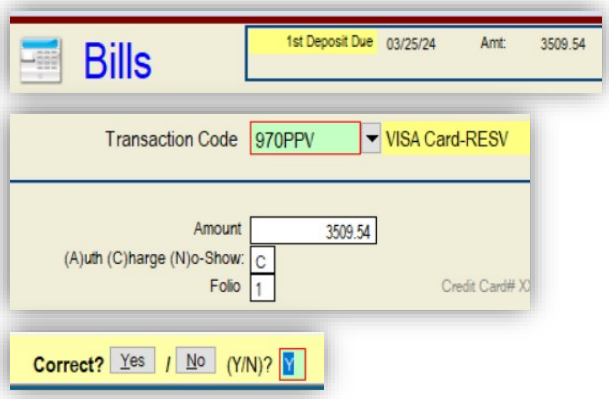


- Page Down to save/escape

7.) CHARGE



- Complete
- Confirm
- Quote the Deposit Due amount
- Charge the credit card
  - Transaction Code: 970 PP ___ (MAVSY)
  - Amount = 2 night deposit
  - (C) Charge
  - Page Down
  - Yes
  - Page Down to confirm



Note—If the deposit is being collected on a Gift Card, after the GC is charged, collect a standard CC to store on the Guest Tile. If room and golf is fully prepaid on the Gift Card at time of booking, a credit card is not required until check-in with the Front Desk.

8.) CLOSE

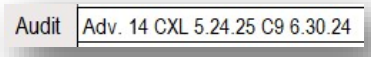
- "Thank you for your patience. Your reservation is now finalized. I just want to review the Itinerary with you to make sure everything is accurate." Recap the full booking to the guest.
- Re-quote the cancellation policy:
  - ◊ Outside 14 Days—"Again, we have a 14 day cancellation policy, so you will be able to change or cancel without penalty up until [exact date]."
  - ◊ Within 3-14 Days— "Again, you will have until the end of business day tomorrow to cancel this reservation without penalty
  - ◊ Inside 2 Days—"Again, this reservation will be non-cancellable once we complete this call"
- "I will be sending you a confirmation email that will arrive within one hour."
- "May I offer you your itinerary number?"
- "Is there anything else I can help you with today?"
- "Thank you Mr./Mrs./Ms. _____ for calling Pebble Beach Resorts! Have a wonderful day."

Room Booking Call Flow (3/4)

5.) WRAP UP [SMS]

- Complete the Guest Tile:
  - Spouse name in the Alternate Field
  - Spouse and all children have Profiles—Children's profiles include their ages
- Write the cancellation policy on your Audit Line

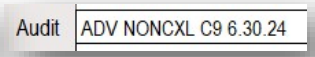
Outside 14 Days



Within 3-14 Days



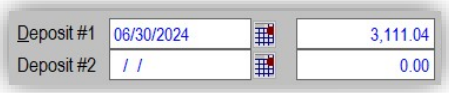
Inside 2 days



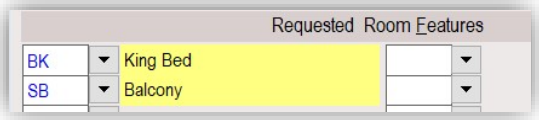
- Leave a Closed R Note

> Mr. Minotti is coming with his wife to Pebble Beach.
> Booked(1)BRC7 arriving 7.5.24 for 2nts
> SG 7.6.24 @12:50 single
> Dining in Zomato
> ADV NONCXL
> KT 6.30.24

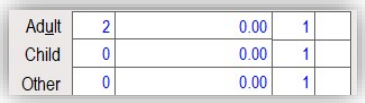
- Deposit #1 In Special Billing equals the guest's deposit



- Room features are inputted as needed



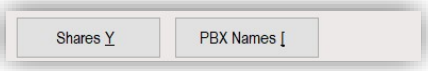
- Review your Pre-Block chart to see if your reservation requires Pre-Blocking / Non-Moveable / K Notes
- The Adults / Child / Other (dog) section is updated as needed
  - If dogs will be in the room, add the Pet Fee to Special Billing



- Special occasions have been documented in the Meal Plan, Special Field, and Room Service Trace [LRS/SRS]



- Leave a K Note to:
  - Advise of pet fees
  - Advise of 3rd Adult fee
  - Advise of Dynamic Pricing
- Add a PBX name for non-paying travel-withs

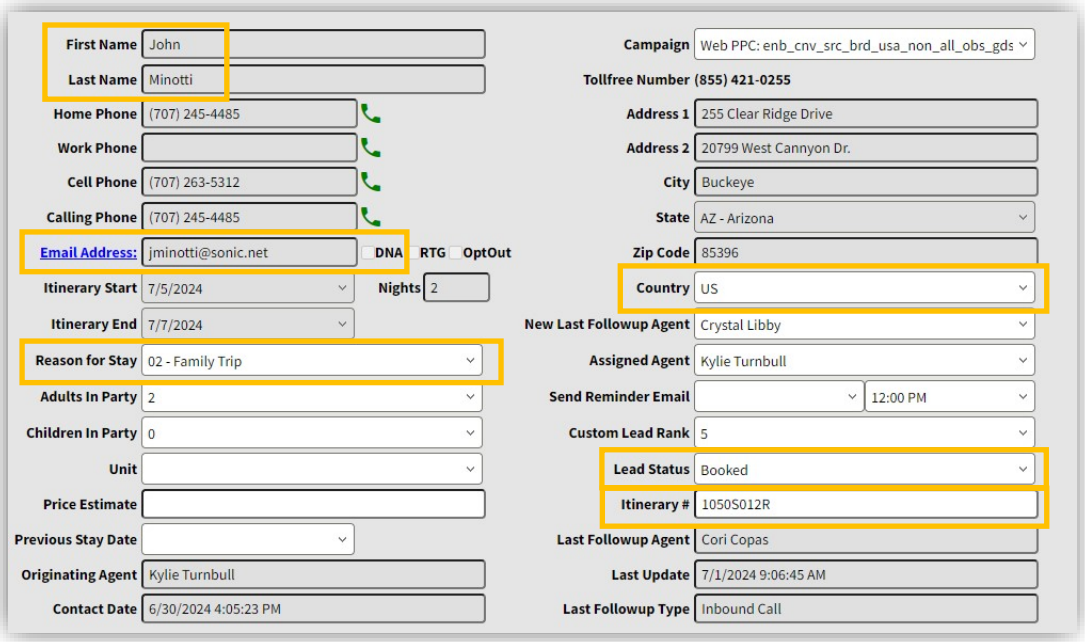


- If there are multiple rooms:
  - Mini-group the rooms together with the R# of the primary
  - Leave an FDB Trace with the billing scenario
  - Leave a Y Note with the rooming list
  - Primary Room
    - Has an A guarantee code
    - Deposit #1 equals the deposit for all rooms combined
  - Secondary room
    - Have a J guarantee code
    - Deposit #1 is cleared out [D > C > B]
- Send a Confirmation Email via Letters—The IEMAIL cancellation policy verbiage is applicable regardless of when the guest booked their room stay.

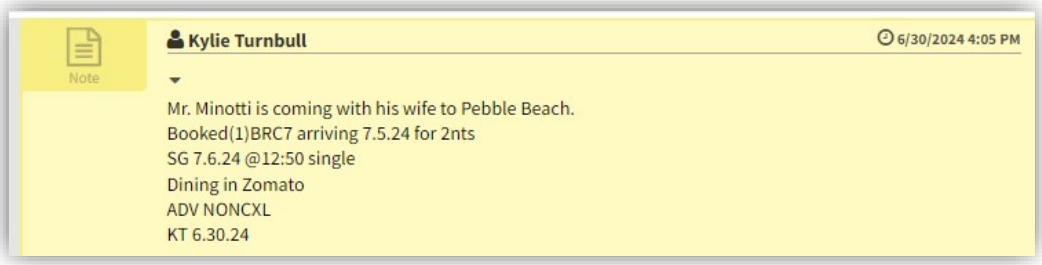
Room Booking Call Flow (4/4)

5.) WRAP UP [REVINATE]

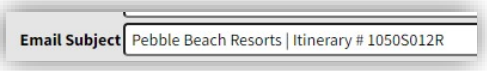
- Fill out the 6 Hot Spots of the Lead Form



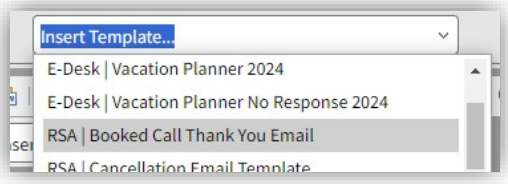
- Copy your R Note into the lead form's New Note field
- Click Save and Edit



- Send a Thank You email
  - Click the hyperlinked email address or the Send Email button
  - Input your Email Subject



  - Use the template dropdown menu to apply the template



  - Edit the template as needed
  - Click Send and Edit

- Once saved, close the Lead Form
- Set your Call Disposition to Booked

Room Booking Call Flow—Scripting Only (1/2)

PROBING QUESTIONS

Why don't you tell me a bit about the type of trip you're looking to plan?
What is bringing you to Pebble Beach?
Who is going to be coming on this trip? Family? Friends? Couples Trip?
Have you visited our Resorts before?

- What did you like most about your previous stay?
- Is there something you would like to do differently?

Are there specific accommodations or room features you are interested in?
Do you plan on playing golf while you're with us?

LOGISTICAL QUESTIONS

What are the ideal dates for your trip?
How many nights would you like to stay?
How many rooms will you be needing?
Which golf courses would you like to play?
How many golfers will be playing each course?
What is your ideal time to tee off?

To confirm, you are looking for __[re-state the guest's desired booking]__
Please allow me a moment while I look into availability

GOLF QUOTE

The greens fees for this __(golf course)__ are $___ per player.
Would you like to request any caddies or rental clubs for your round(s)?

ROOM QUOTE

The __(room type)___ is $_____ per night (per room) which includes the nightly service fee.
To confirm this reservation, we collect a deposit of the first two nights of your stay.
Charges beyond the first two nights will be due at checkout.
The total deposit we will collect today is $_____.

- **Outside 14 Days:** "We have a 14 day cancellation policy which means you may change or cancel your stay without penalty up until 14 days prior to your date of arrival. If you change or cancel within 14 days of arrival, you will forfeit your deposit. Would you like to proceed?"
- **Within 3-14 Days:** Since we are within two weeks of your arrival, you have until end of business day tomorrow to cancel this reservation without penalty. If you cancel after that, you will forfeit your deposit. Would you like to proceed?"
- **Inside 2 Days:** Since we are within ~~2~~ days of your arrival, this booking is non-cancellable. A cancellation after this phone call will result in the forfeiture of your deposit. Would you like to proceed?

Room Booking Call Flow—Scripting Only (2/2)

GUEST TILE

Before I collect your credit card, I will need to gather some information…

- Have you stayed or golfed at the resort before?"
- Can you please spell your last name? And can you spell your first name, please?
- And may I please have the name of your [spouse / kids] ?
- May I have the billing address for your credit card?
- What is the best mobile phone number to have on file?
- What email address would you like us to send your confirmation email to?
- I am going to place our recording on a brief pause to collect your credit card information.

Thank you. Please allow me a moment while I finalize your reservation.

DEPOSIT CHARGE

I am now going to charge the deposit to your card.

As a reminder, the amount we're charging today is _____.

MULTIPLE ROOMS

Can you please provide me with the first and last names of who will be staying in each room?

Will you be covering all charges for this booking or should we split up charges between each guest at checkout?

CLOSING

Thank you for your patience. Your reservation is now finalized.

I just want to review the Itinerary with you to make sure everything is accurate.

I have reserved for you the (room type) at (property) from (arrival) to (departure) .

On (date) we have booked (course) at (time) for # golfers.

I have notated your caddie (and/or) rental club requests.

- **Outside 14 Days:** Again, we have a 14 day cancellation policy, so you will be able to change or cancel without penalty up until [exact date].
- **Within 3-14 Days:** Again, you will have until the end of business day tomorrow to cancel this reservation without penalty
- **Inside 2 Days:** Again, this reservation will be non-cancellable once we complete this call

I will be sending you a confirmation email that will arrive within one hour.

You will also receive an email directly from me which you can respond to with any questions.

Would you like to write down your Itinerary number?

Is there anything else I can help you with today?

Thank you Mr./Mrs./Ms. _____ for calling Pebble Beach Resorts!

Have a wonderful day.

New Room Bookings

C9|BX 12.5.24

Guest Tile

- Name, Title, Alternate Fields
- Address, Phone, Email
- Profiles include correct Titles
- Child Profiles include Ages *(12 in 2024)*

Booking Center:

- Room and Golf meets guidelines
- All recreation is whosed to a room
- Golf Rate Codes accurate
- Caddies/Rental Clubs notated
- Booking is Completed & Confirmed

Reservation Tile

- Audit Line CXL
- Bedding Requests
- Guarantee Code is accurate
- Value Zoom to verify deposit
- Deposit Line #1 = Charged Deposit
- R Note with Who, What, Why
- Y Note or PBX travel/withs
- FDB Trace for Billing Scenario
- Mini-group code
- Dynamic Rates: K note if rate increases on additional nights past deposit
- Occasion: Special Field, Meal Plan, Room Service Trace
- Pets: Housekeeping Trace, Room Service Trace, Add Pet Fee in Special Bill, K Note Advisement
- Kids: Housekeeping Trace for child sized Amenities
- 3rd Adult: Housekeeping Trace for additional amenities, K Note Advisement
- # of Adults/Children/Other Updated
- Pre-blocked / Non-Moveable
- IEMAIL

REVINATE

- Lead Form Data Fields Complete
- R Note is copied to Lead Form
- REVINATE Thank you Email Sent
- Call Disposition marked "Booked"

Room Change/Revise

C9|BX 9.16.24

On the Call

- Check Availability in Booking Center
- Zoom +Value+Zoom to verify deposit
- Advise guest of upsell charge [OR] ask how they want the downsell balance to be handled
  (refund or keep funds on file)
- Advise of new CXL date
- Search for/update recreation

Upsell

- Update Special Billing
- Charge difference in Deposit

Downsell– Refund

- Update Special Billing
- Set ADM Trace for tomorrow

Please refund $xxxx.xxx to MC x####
New balance should be $xxxx.xx
[Guest] changed room category.

Downsell– Keep Funds on File

- Update Special Billing
- Set FDB Trace for Date of Arrival

PPD by [Guest]:
BRO7 @$xxxx+++ x 2nts = $xxxx.xx
Guest has refundable balance of $xxxx.xx to use during stay.
Total funds on file = $xxxx.xx

Cleanup

- Update Traces to new date of arrival
- Change Audit line to new CXL date
- Write R Note—who called, what changed, why they changed it
- IEMAIL

Room Guidelines / Policies

Call Qualification

Resort Reservations may book up to 12 rooms or a maximum of 36 room nights

If the booking exceeds 12 rooms or 36 room nights or the guest requires meeting space, gather booking details and send information to the _SalesLeads

If the guest is arriving same day, you must verify room availability with the front desk prior to bookng

Weekend Night Stay Requirement

Guests must stay a minimum of 2 nights if their dates overlap with Thursday, Friday or Saturday Night

**If we are within 2 months of arrival, you may check the Exception Calendar to see if a weekend 1 night stay exception can be approved*

Hotel Booking Guidelines

	Inn at Spanish Bay	Lodge	Casa Palmero
Room Guideline	Can book up to 18 months in advance		Can book up to 12 months in advance
Suite Guideline	Ok to book within 1 month of arrival Sup. approval required 1-18 mo. in advance	Can book up to 18 months in advance	Can book up to 12 months in advance
Maximum Per Room	4 Adults 5 Souls 2 Golfers		
Minimum Age (unaccompanied)	21 years		
Pre Block	Suites (Req. Supervisor Approval) Both Rooms of 2-Bedroom Suites Families with Underage Children ADA Rooms Scenic View w/QQ	Suites Both Rooms of 2-Bedroom Suites Families with Underage Children All rooms of Fairway One Cottage ADA Rooms OV Studio Garden Spa Ocean Deluxe w/QQ	NONE, but must prepare for arrival at time of booking
Mark "N" Non-Moveable	ADA Rooms *Leave K Note* Both rooms of 2 bedroom Suites *Leave K Note on both rooms* Connecting Rooms for Families with Underage Children *Leave K Note on both rooms* Fairway One Cottage		

**We Guarantee View Purchased and Standard Amenities / We do not Guarantee Room Bedding, Room Numbers, Location or any other Request*

Room Rates and Payment Details	
Rates and Fees	
Base Rate	**The rack rate of the room**
Occupancy Tax	**10.5% per night**
California Tourism Assessment	**0.195% per night**
	The California Tourism assessment is levied on all hotels in the state to assist in tourism marketing campaigns.
Monterey County Assessment	**$7** per night
	The Monterey County assessment, or TID (Tourism Improvement District), is a charge levied on all hotels to fund marketing campaigns and projects that promote the county as a tourism destination and benefit lodging businesses.
Service Charge	**Lodge = $28**
	Inn at Spanish Bay = $32 ($35 beginning Nov. 1, 2024)
	Casa Palmero = $30
	This fee is added automatically per room per night for the convenience of our guests. This does not include F&B outlets or Room Service, Golf or Spa.
	Scripting: "A Service charge of $_____ will be assessed, which covers gratuities for employee at the Front Desk, Porter/Valet, Concierge, House-keeping, and the Resort Shuttle."
Additional Adult	**$100** per night per adult fee applies to 3rd and 4th adults in room; Maximum of 4 adults allowed per room. Children 17 and under stay for free.
Pets	**$150** per night, per room. Dogs allowed at the Lodge only.
Rollaway/Crib	Complimentary; one allowed per room.
Deposit	**Full Rate = Room Rate + Tax + Service Fee + Assessment**
One Night	Full Rate X Total # of Rooms Booked
Two or More Nights	Full Rate for 2 Nights X Total # of Rooms Booked
Packages	Full Package Price X Total # of Rooms Booked
	Offer prepayment for any additional room nights or recreation outside of package
Cancellation	**Outside 14 Days:** "We have a 14-day cancellation policy. You may change or cancel your room and golf reservations without penalty up until 14 days prior to your arrival date. If you change or cancel within 14 days of arrival, you will forfeit your deposit." **Within 3-14 Days:** "Since we are within two weeks of your arrival, you have until the end of business day tomorrow to cancel this reservation without penalty. If you cancel after that, you will forfeit your deposit." **Inside 2 Days:** "Since we are within 2 days of your arrival, this booking is non-cancellable. Any cancellation after this phone call will result in the forfeiture of your deposit."
Payments	Major Credit Cards, PB Gift Card, PB Gift Certificate, Check (with supervisor's approval)
Letter of Authorization	3rd Party paying for another guest and Credit Card holder will not be present to sign for charges
	An L.O.A. is required for any 3rd party reservations arriving inside 30 days from the booking date

Golf Guidelines & Policies 1/2

General Course Policies	
Dress Code	Collared shirts, no denim or running shorts, golfing shorts OK. Soft spikes recommended. No multi-stud rubber soles.
Same Day Booking	Transfer to pro-shop to book.
Smart Booking	Sell into the tee time that best accommodates the # of players.
Maintenance Times	3sm or 4sm only | Resort guests can book 18 mo. in adv. | Outside guests may book within 48 hrs. | Any # of golfers may book w/in 24 hrs.
Twilight	Only apply to SG/SB/DM. Res. Agent ok to book Twilight at rack rate. Discount Twilight must be booked by pro shop 1 day in advance.
Group Golf	Day guests booking 13 or more players must be transferred to the Group Golf Coordinator (Transfer 13+ at DM to DM Pro Shop)
Minor in the Room	3 golfers may be booked per course with 1 room if at least one of the golfers is a minor (under 18). A fourth golfer will require an additional room.
Aeration Policy	
Aeration (Day #)	Advise every guest of aeration and when the note of the day includes (Day #) This will be aeration of the Greens and may include maintenance of Fairway and Tee boxes. Select aeration rate code and notate aeration advisement in notes. J Codes (Days #6-10, Open-11am) are for Resort Guests Only.
Aeration (No Day #)	Only advise aeration if the guest inquires. Book at standard rate code.

Pebble Beach Golf Links - Cart Path Only | Pull Carts Allowed

	Guideline	GTD	Rate	Carts	Max #Players Per Day	CXL	Exception	36 - PB/PB
Hotel Guest (Peak GTF)	18 Months | 3 Nt Min for 1 Round | +2nts for each additional round	Room	Rack	Comp	2 per room	14	RESELL	Re-Round
Hotel Guest (Peak NGTF)	18 Months | 2 Nt Min for 1 Round | Additional rounds negotiable	Room	Rack	Comp	2 per room	14	RESELL	Re-Round
Hotel Guest (Non-Peak GTF)	18 Months | 2 Nt Min for 1 Round | +2nts for each additional round	Room	Rack	Comp	2 per room	14	RESELL	Re-Round
Hotel Guest (Non-Peak NGTF)	18 Months | 1 Nt Min for 1 Round | Additional rounds negotiable	Room	Rack	Comp	2 per room	14	RESELL	Re-Round
Day Guest	1 Day	CC	Rack		12	No-CXL		Re-Round
Hotel Guest Aeration	18 Month | 1 Night Minimum | J Codes (Days #6-10, Open-11am) are for Resort Guests Only	Room	Aer Rate	Comp	2 per room	14		Re-Round
Day Guest Aeration	6 Months | J Codes (Days #6-10, Open-11am) are for Resort Guests Only	CC	Aer Rate		12	14		Re-Round
BC/SB Club Members (Dec.-Aug.)	Max of 3 tee times w/in 90 Days | Member Must Play | Verify Membership	M/CC	Rack	Comp	4	14		Re-Round
Forest Residents (Dec.-Aug.)	Max of 3 tee times w/in 90 Days | Member Must Play | Verify Residency	CC	Rack	Comp	4	14		Re-Round
Original Condo Owners (only 5 exist)	Max of 3 tee times w/in 90 Days | Member Must Play | GTD tee time on PBC course | Verify Residency	CC	Rack	Comp	4	3		Re-Round
2nd Condo Owner (Dec.-Aug.)	Max of 3 tee times w/in 90 Days | Member Must Play | Verify Residency	CC	Rack	Comp	4	14		Re-Round

Spyglass Hill Golf Course - Cart Path Only | Pull Carts Allowed

	Guideline	GTD	Rate	Carts	Max #Players Per Day	CXL	Exception	36 - PB/SG
Hotel Guest	18 Month | 1 Night Minimum Sunday-Thursday	Room	Rack	Comp	2 per room	14	RESELL	3 Months
Hotel Guest Aeration	18 Month | 1 Night Minimum | J Codes (Days #6-10, Open-11am) are for Resort Guests Only	Room	Aer Rate	Comp	2 per room	14		3 Months
Day Guest	3 Months	CC	Rack		12	14		
Day Guest Aeration	6 Months | J Codes (Days #6-10, Open-11am) are for Resort Guests Only	CC	Aer Rate		12	14		
BC/SB Club Members	Max of 3 tee times w/in 90 Days | Member Must Play | Verify Membership	M/CC	Rack	Comp	4	14		
Forest Residents	Max of 3 tee times w/in 90 Days | Member Must Play | Verify Residency	CC	Rack	Comp	4	14		
Original Condo Owners (only 5 exist)	Max of 3 tee times w/in 90 Days | Member Must Play | GTD tee time on PBC course | Verify Residency	CC	Rack	Comp	4	3		
2nd Condo Owner	Max of 3 tee times w/in 90 Days | Member Must Play | Verify Residency	CC	Rack	Comp	4	14		
Duke Members	30 Days | Member Must Play | Verify Membership	CC	Duke Rate		4	7		
NCGA Member	10 Days | Notate NCGA # on Guest Tile	M/CC	NCGA Rate		4	No-CXL		

The Links at Spanish Bay - Cart Path Only | Pull Carts Allowed

	Guideline	GTD	Rate	Carts	Max #Players Per Day	CXL	Exception	36 - PB/SB
Hotel Guest	18 Month | 1 Night Minimum	Room	Rack	Comp	2 per room	14	RESELL	18 Months
Hotel Guest Aeration	18 Month | 1 Night Minimum	Room	Aer Rate	Comp	2 per room	14		18 Months
Day Guest	6 Months	CC	Rack		12	14		
Day Guest Aeration	6 Months	CC	Aer Rate		12	14		
BC/SB Club Members	Max of 3 tee times w/in 90 Days | Member Must Play | Verify Membership	M/CC	Rack	Comp	4	14		
Forest Residents	Max of 3 tee times w/in 90 Days | Member Must Play | Verify Residency	CC	Rack	Comp	4	14		
Original Condo Owners (only 5 exist)	Max of 2 tee times/wk w/in 90 Days| Member Must Play |GTD tee time on PBC course | Verify Residency	CC	Owner Rate	Comp	4	3		
2nd Condo Owner	Max of 3 tee times w/in 90 Days | Member Must Play | Verify Residency	CC	Owner #2 Rate	Comp	4	14		
Duke Members	30 Days | Member Must Play | Verify Membership	CC	Duke Rate		4	7		
NCGA Member	10 Days | Notate NCGA # on Guest Tile	M/CC	NCGA Rate		4	No-CXL		
Youth on Course	1 Day | Mon - Thu | *Transfer to Pro Shop for more information*							

Golf Guidelines & Policies 2/2

General Course Policies	
Dress Code	Collared shirts, no denim or running shorts, golfing shorts OK. Soft spikes recommended. No multi-stud rubber soles.
Same Day Booking	Transfer to pro-shop to book.
Smart Booking	Sell into the tee time that best accommodates the # of players.
Maintenance Times	3sm or 4sm only | Resort guests can book 18 mo. in adv. | Outside guests may book within 48 hrs. | Any # of golfers may book w/in 24 hrs.
Twilight	Only apply to SG/SB/DM. Res. Agent ok to book Twilight at rack rate. Discount Twilight must be booked by pro shop 1 day in advance.
Group Golf	Day guests booking 13 or more players must be transferred to the Group Golf Coordinator (Transfer 13+ at DM to DM Pro Shop)
Minor in the Room	3 golfers may be booked per course with 1 room if at least one of the golfers is a minor (under 18). A fourth golfer will require an additional room.

Del Monte Golf Course - Carts on Course | Pull Carts Accepted - Subject to final decision by Pro Shop on day of play

	Guideline	GTD	Rate	Carts	Max #Players Per Day	CXL	Exception	36 - PB/DM
Hotel Guest	18 Month | 1 Night Minimum	Room	Rack		2 per room	3	RESELL	18 Months
Day Guest	6 Months	CC	Rack		12	3		
BC/SB Club Members	Max of 3 tee times w/in 90 Days | Member Must Play | Verify Membership	M/CC	Rack	Comp	4	3		
Forest Residents	Max of 3 tee times w/in 90 Days | Resident Must Play | Verify Residency	CC	Rack	Comp	4	3		
Original Condo Owners (only 5 exist)	Max of 3 tee times w/in 90 Days | Resident Must Play | GTD tee time on PBC course | Verify Residency	CC	Rack	Comp	12	3		
2nd Condo Owner	Max of 3 tee times w/in 90 Days | Resident Must Play | Verify Residency	CC	Rack	Comp	4	3		
Duke Members	30 Days | Member Must Play | Verify Membership	CC	Duke Rate		4	3		
Duke Guest Passes (6 per year)	30 Days | Member Must Play | Advise to bring passes to pro shop | Verify Membership	CC	Rack		4	3		
Hyatt Guests	Advise to contact Hyatt Concierge							
Youth on Course	1 Day | Mon - Thu | *Transfer to Pro Shop for more information*							

The Hay - No Golf Carts Available | Pull Carts Allowed | Rental Clubs Available $10+++ | No Fee For Putting Course

	Guideline	GTD	Rate	Carts	Max #Players Per Day	CXL	Exception
Hotel Guest	18 Month | 1 Night Minimum	Room	Rack		2 per room	3	RESELL
Day Guest Outside 48 Hours	6 Months	CC	Rack		12	3	
Day Guest Inside 48 Hours	*Transfer to Pro Shop to Book*						
BC/SB Club Members	Day Guest Guidelines | Verify Membership	M/CC	Rack		12	3	
Forest Resident	30 Days | Resident Only | Guests Pay Day Guest Rate | Verify Residency	CC	Forest Rate		12	3	
Duke Member Passes (4 per year)	30 Days | Advise to bring voucher to pro shop | Blackout Times Fri/Sat 12pm or later | Verify Membership	CC	Rack		4	3	
PB Practice Facility Member	1 Day | *Transfer to Pro Shop to Book*						
Teens (Ages 13-19)	30 Days	CC	Rack		4	3	
Juniors (12 & Under)	1 Day | *w/o playing adult Transfer to Pro Shop to Book | w/playing adult book @ rack*	CC	Rack		4	3	
Youth on Course	1 Day | *w/o playing adult Transfer to Pro Shop to Book | w/playing adult book @ rack*	CC	Rack		4	3	
PBC Employees	30 Days	CC	Employee Rate		4	3	

PEBBLE BEACH GOLF LINKS | Multiple Round Guidelines			
	1 Round	2 Rounds	3 Rounds
H Code	3 Night Min.	5 Night Min.	7 Nights Min.
G Code	2 Nights Min.	4 Nights Min.	6 Nights Min.

If any of your guest's rounds are an H Code, follow the H Code Night Requirements above

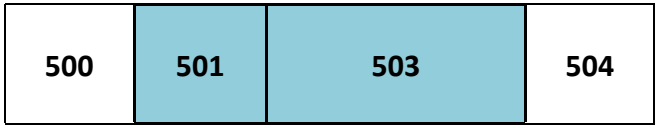
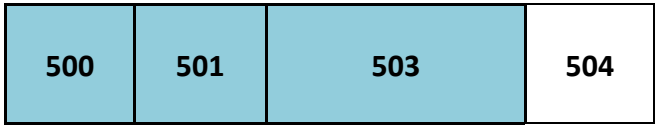
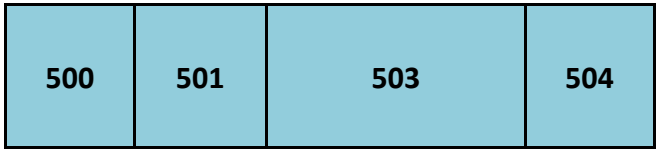
Subtract 1 night for any NGTF rounds

2 Night Minimum on Weekends Still Applies

RETURN TO TABLE OF CONTENTS

BOOKING RULES FOR FAIRWAY ONE COTTAGE SUITES

9/11/17 - TK

		6 to 18 MONTHS OUT	3 to 6 MONTHS OUT	1 to 3 MONTHS OUT	WITHIN 1 MONTH
Cottage Suite*		✗	✗	✗	✓
2-Bedroom Cottage Suite*		✗	✗	✓	✓
3-Bedroom Cottage Suite*		✗	✓	✓	✓
4-Bedroom Cottage Suite		✓	✓	✓	✓

**** Standalone Cottage Rooms cannot be sold outside of 1 month before arrival. Within 1 month, Supervisor approval is necessary.***
No Upgrades or Negotiated rates allowed at Fairway One.

Room Booking Maximums

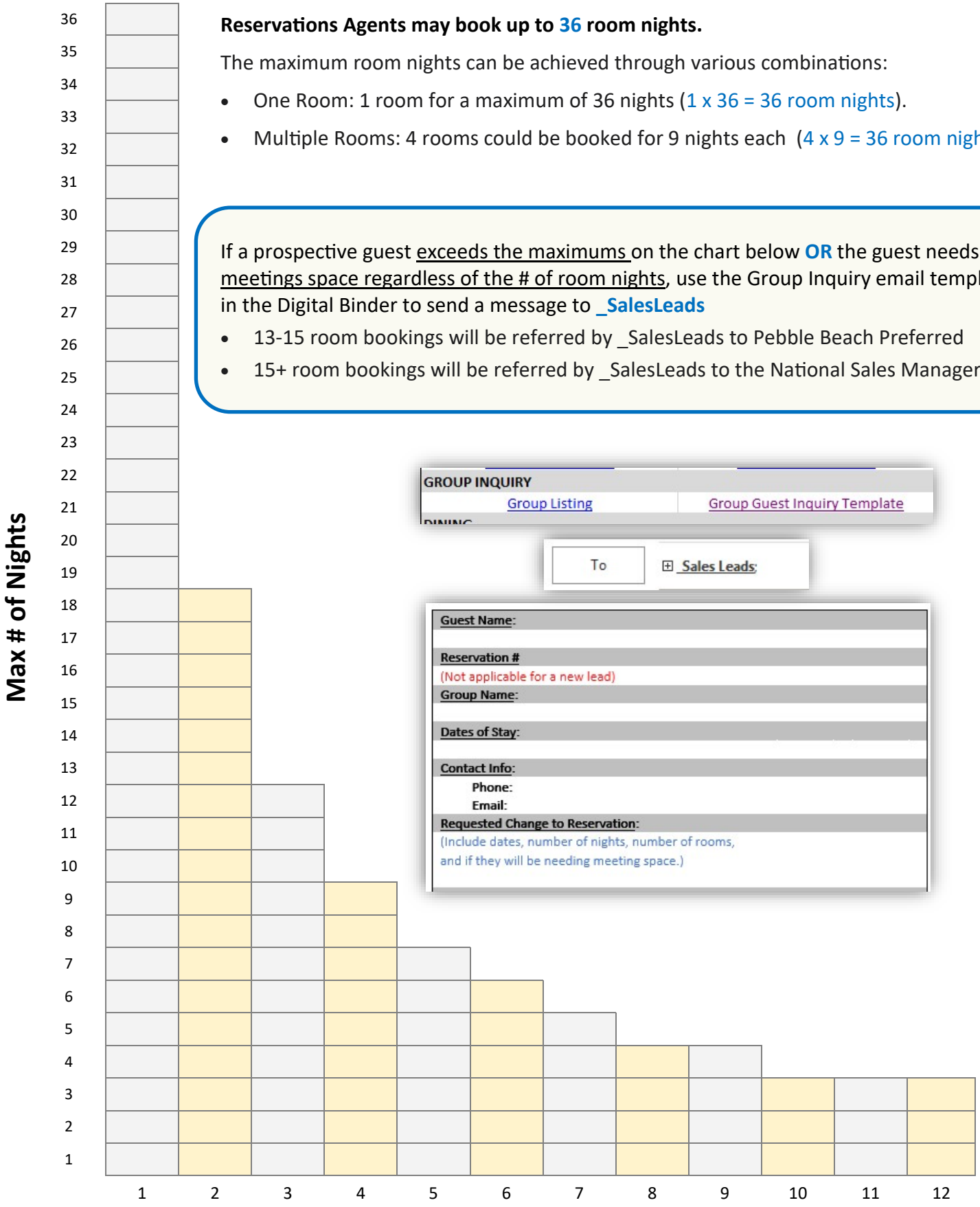
Reservations Agents may book up to 36 room nights.

The maximum room nights can be achieved through various combinations:

- One Room: 1 room for a maximum of 36 nights (1 x 36 = 36 room nights).
- Multiple Rooms: 4 rooms could be booked for 9 nights each (4 x 9 = 36 room nights).

If a prospective guest exceeds the maximums on the chart below **OR** the guest needs meetings space regardless of the # of room nights, use the Group Inquiry email template in the Digital Binder to send a message to **_SalesLeads**

- 13-15 room bookings will be referred by _SalesLeads to Pebble Beach Preferred
- 15+ room bookings will be referred by _SalesLeads to the National Sales Managers



GROUP INQUIRY

Group Listing | Group Guest Inquiry Template

To: Sales Leads;

Guest Name:

Reservation #

(Not applicable for a new lead)

Group Name:

Dates of Stay:

Contact Info:

Phone:

Email:

Requested Change to Reservation:

(Include dates, number of nights, number of rooms, and if they will be needing meeting space.)

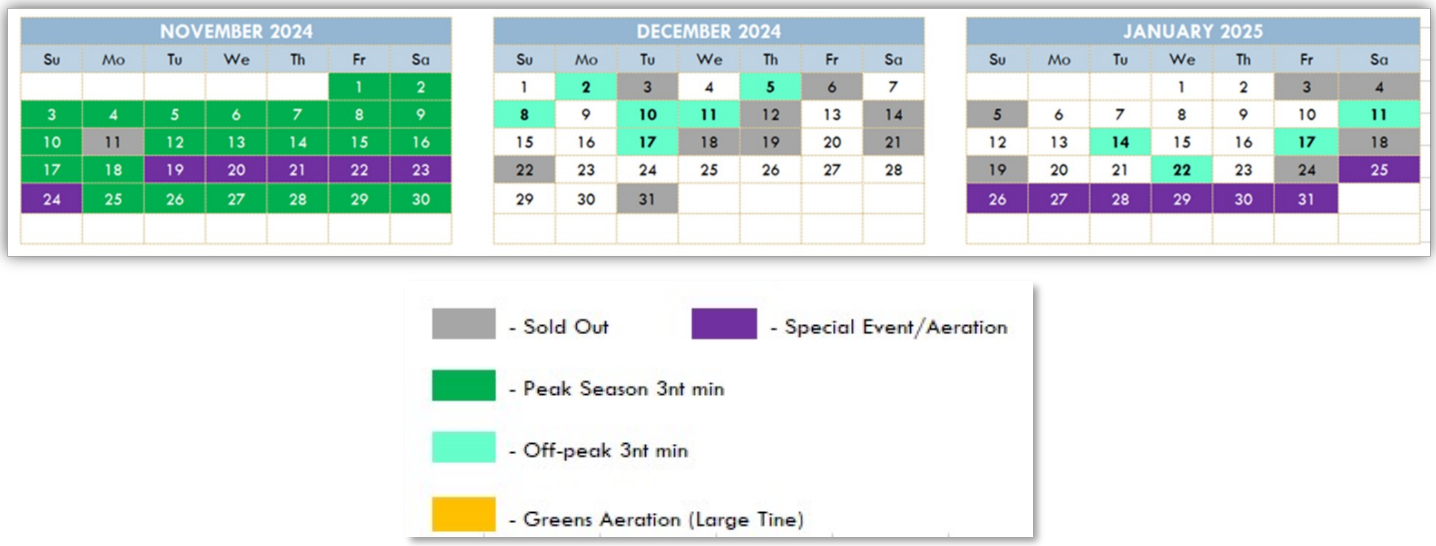
Pre-Block Rules

	Pre-Block	Mark Non-Moveable	Note/Trace
All Casa Palmero Rooms	RSA: Do not block—prepare for arrival at time of booking GRES: Preblock at time of booking		
All Suites	☑		
Both Rooms of 2-Bedroom Suites	☑	☑	K Note
Connecting Rooms for Families with Underage Children	☑	☑	K Note _RS Trace
ADA Rooms	☑	☑	K Note
Fairway One 4 Bedroom Cottage	☑	☑	FWB Trace
Ocean Studio (Lodge)	☑		
Garden Spa (Lodge)	☑		
Ocean Deluxe with BQ Request (Lodge)	☑		
Scenic View with BQ Request (Spanish)	☑		

Pebble Beach Golf Minimum Calendar

Use this chart to search for available 2-night minimum (G Code) Pebble Beach Golf Links tee times for guests who are unable to extend their stays.

The only color you need to look for is **WHITE**



NOVEMBER 2024						
Su	Mo	Tu	We	Th	Fr	Sa
					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

DECEMBER 2024						
Su	Mo	Tu	We	Th	Fr	Sa
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				

JANUARY 2025						
Su	Mo	Tu	We	Th	Fr	Sa
			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	

18 Month Availability Calendar

Use this chart to search for simultaneous room and golf availability.

The only color you need to look for is **GREEN**



PEBBLE BEACH RESORTS 18-MONTH ROOM AND PB GOLF AVAILABILITY CALENDAR

As of 10.27.23

NOVEMBER 2023						
Su	Mo	Tu	We	Th	Fr	Sa
			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		

DECEMBER 2023						
Su	Mo	Tu	We	Th	Fr	Sa
					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						

JANUARY 2024						
Su	Mo	Tu	We	Th	Fr	Sa
	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			

Differences Between Resorts

The Inn at Spanish Bay

SETTING

The Inn at Spanish Bay is set on the West side of the Monterey peninsula between the Del Monte Forest and our coastal beaches.

It is the perfect place to take in the serene ocean waves and listen to our bagpiper serenade the setting sun in Scottish tradition.

CLOSE PROXIMITY TO:

- The Links at Spanish Bay
- Stave Wine Cellar
- Walkable access to Asilomar Beach
- Pacific Grove
- Cannery Row
- Downtown Monterey

The Lodge at Pebble Beach

SETTING

The Lodge at Pebble Beach is rich in golf history.

Set on the breathtaking ocean cliffsides of Stillwater Cove, you can relax with a drink and watch golfers close their once-in-a-lifetime rounds on the 18th green of our famous Pebble Beach Golf Links

CLOSE PROXIMITY TO:

- Pebble Beach Golf Links
- The Hay
- Shopping Arcade
- Forbes 5 Star Spa at Pebble Beach
- Carmel-by-the-Sea
- Big Sur

Casa Palmero

SETTING

Casa Palmero is a boutique hotel set in an elegant Mediterranean-style estate featuring red terra-cotta rooftops, beautiful stone archways, ornate ceramics, all surrounded by an oasis of plant life and water features.

This hidden gem hideaway offers an exceptional level of personalized service.

COMPLIMENTARY EXPERIENCES:

- Breakfast Baskets delivered to your door
- Cocktail Hour in the estate's main lounge
- Nightly Cordials (Dessert Service) in the estate living room
- Enhanced honor bar with Casa Palmero exclusive items such as gourmet candy and glass-bottled water that is carbon filtered in-house

EXCLUSIVE CASA PALMERO:

- The Estate Billiard room
- The Estate Library
- Facilities at the Forbes 5 Star Spa at Pebble Beach
- Fitness classes hosted on the Spa pool patio

GUESTS OF ALL PROPERTIES HAVE ACCESS TO:

- Resort Shuttles
- Spanish Bay Club
- Beach and Tennis Club
- Pebble Beach Practice Facility

Lodge Room Descriptions

Interior of all rooms and suites:

- A comfortable seating area surrounding a gas burning fireplace
- A large flatscreen television
- A luxurious bathroom with double vanities
- An honor bar with complimentary snacks and non-alcoholic drinks

Ocean Studio

LD07: 1 BK / 595 sq ft

- View of the 18th green and fairway of Pebble Beach Golf Links
- One of a kind
- Spacious interior
- Large balcony
- Deep soaking tub
- 2nd Floor
- Guaranteed King Bed

Ocean Deluxe

LROD: 14 BK, 7 BQ / 640 sq ft

- Located in our newest building built from the ground up in 2021
- Panoramic view of the Lodge, 18th green of PBGL, and Stillwater Cove
- Spacious bedroom
- Large balcony or patio

Ocean View

LROS: 19 BK, 14 BQ / 475 sq ft

- View of the 18th green and fairway of Pebble Beach Golf Links
- The most traditional way to experience The Lodge at Pebble Beach

Garden Spa

LRG7J: 5 BK / 600 sq ft

- Spacious bedroom
- Vaulted wood beam ceiling
- Rock wall fireplace
- Garden patio with whirlpool spa
- Deep soaking tub and glass shower
- No rooms above
- Guaranteed King Bed
- L194 is ADA without soaking tub

FWY 1 Partial Ocean

LRCF: 9 BK, 6 BQ / 660-675 sq ft

- Built in 2017 on the first fairway of Pebble Beach Golf Links
- Located behind our FW1 Cottages
- View of the 1st Fairway of Pebble Beach Golf Links and a view of the ocean over the rooftops of The Lodge
- Spacious bedroom
- Modern decor
- Vaulted ceiling
- 2nd Floor with balcony (stairs only)

Partial Ocean View

LRCS: 11 BK, 23 BQ / 550 sq ft

- View of the ocean over the rooftops of The Lodge

Fairway View

LRWS: 4 BK, 12 BQ / 550 sq ft

- View of the first tee box and fairway of Pebble Beach Golf Links

FWY 1 Garden View

LRGF: 5 BK, 10 BQ / 660-675 sq ft

- Built in 2017 on the first fairway of Pebble Beach Golf Links
- Located behind our FW1 Cottages
- View of our manicured gardens
- Modern decor
- Spacious bedroom
- Ground Floor with patio

Garden View

LRGS: 15 BK, 28 BQ / 550 sq ft

- View of our manicured gardens

Lodge Suite Descriptions

Sloat Suite LSO2: 3 BK / 1320 sq ft
- Located in our newest building built from the ground up in 2021
- Panoramic view of the Lodge, 18th green of PBGL, and Stillwater Cove
- Spacious living room
- Double-sided fireplace
- 6 person dining table
- Vast wrap around patio or balcony
- 1 full bathroom, 1 guest bath with shower
- Guaranteed King Bed
- Pullout Sofa Bed
- Ground, 2nd, or 3rd Floor
- Interconnecting and common entry with Ocean Deluxe (1 of 3 is BK)

Vizcaino Suite LSO7: 2 BK / 1305 sq ft
- Located in our newest building built from the ground up in 2021
- Spacious living room
- Large balcony off both the living room and bed-room
- 6 person dining table
- 1 full bathroom, 1 guest bath with shower
- Guaranteed King Bed
- Pullout Sofa Bed
- 2nd or 3rd Floor
- Interconnecting and common entry with Ocean Deluxe (1 BK, 1 BQ)

Alvarado Suite LSO3: 2 BK / 850 sq ft
- Large living room
- Balcony
- Breakfast table
- 2nd or 3rd Floor
- Guaranteed King Bed
- Common entry with QQ Ocean View
- L144 is ADA

Colton Suite LSO1: 1 BK / 1129 sq ft
- 8 person dining table
- Large living room
- Wrap around patio with tables, chairs, and chaise lounges
- Ground Floor
- Guaranteed King Bed
- Adjacent to 1 BK and 1 BQ Ocean View

Steinbeck Suite LSO5: 1 BK / 875 sq ft
- Located in the main Lodge building
- View of the 18th green of Pebble Beach Golf Links and Stillwater Cove
- Living room
- 6 person dining table
- Bay window (No outdoor space)
- 2 full bathrooms
- Top floor (stairs only)
- Guaranteed King Bed
- Adjacent to dormer Ocean View room

Monterey Suite LSO4: 1 BK / 875 sq ft
- Located in the main Lodge building
- View of the 18th green of Pebble Beach Golf Links and Stillwater Cove
- View matches that of our website's 18th hole live cam
- Rooftop balcony
- 2 full bathrooms
- Top floor (stairs only)
- Guaranteed King Bed
- Adjacent to dormer Ocean View room

Fremont Suite LSO6: 1 BK / 850 sq ft
- Studio Suite
- Spacious Seating area
- Breakfast table
- Wrap around patio with table, chairs, and chaise lounges and view of ocean
- Ground Floor
- Guaranteed King Bed
- Deep soaking tub
- Separate private patio with whirlpool spa
- Adjacent to BK Garden Spa

Fairway One 4-Bdrm Cottage (2) LSW1+LRWF
- Built in 2017 on the first fairway of Pebble Beach Golf Links
- Spacious 1000 sq ft living room
- 8 person dining table
- Vaulted ceilings
- Catering kitchen with a microwave, coffee maker, and full size refrigerator
- Communal patio with firepit
- 4 total bedrooms 695-734r sq ft: 2 BK, 2 BQ
- Ground Floor
- 5 full bathrooms
- Complimentary hot breakfast

Spanish Bay Room Descriptions

Interior of all rooms and suites:

- A comfortable seating area surrounding a gas burning fireplace
- A large flatscreen television
- A luxurious bathroom with double vanities
- An honor bar with complimentary snacks and non-alcoholic drinks

Ocean View Room

BRO7: 29 BK, 22 QQ / 470 sq ft

- View of Asilomar Beach and 5 holes of The Links at Spanish Bay
- The bagpiper stops in front of the Ocean View rooms for a solo performance

Ocean Loft Room

BRL7: 10 BK / 470 sq ft

- View of Asilomar Beach and 5 holes of The Links at Spanish Bay
- Bay window (no outdoor space)
- Large day bed
- Guaranteed King Bed
- Dormer ceiling

Scenic View Room

BRC7: 17 BK, 10 BQ / 470 sq ft

- Split view of the ocean and the Del Monte Forest which features old growth Monterey Pines and Cypress Trees

Forest View Room

BRF7: 37 BK, 81 BQ / 470 sq ft

- View of the Del Monte Forest which features old growth Monterey Pines and Cypress Trees

Garden View Room

BRG7: 12 BK, 34 BQ / 470 sq ft

- View of our manicured gardens

Spanish Bay Suite Descriptions

Interior of all rooms and suites:

- A comfortable seating area surrounding a gas burning fireplace
- A large flatscreen television
- A luxurious bathroom with double vanities
- An honor bar with complimentary snacks and non-alcoholic drinks

Spanish Bay Suite BSF2: 1 BK / 1750 sq ft

- View of the Del Monte Forest which features old growth Monterey Pines and Cypress Trees
- Spacious living room
- Grand piano
- Breakfast table
- Hospitality entrance to catering kitchen
- Dining room with 10 person dining table
- Private entrance to bedroom
- Large master bathroom with deep soaking tub, glass shower, and bidet
- Ground floor with wrap around patio
- Guaranteed King Bed
- Interconnects with BQ Forest View

Presidential Suite BSO1: 1 BK / 1650 sq ft

- View of the Del Monte Forest which features old growth Monterey Pines and Cypress Trees
- Spacious living room
- Grand piano
- Breakfast table
- Private entrance to bedroom
- Large master bathroom with deep soaking tub, glass shower, and bidet
- 3rd Floor with multiple balconies
- Guaranteed King Bed
- Interconnects with BK Scenic View (The Scenic View interconnects with BQ Scenic to make a 3 Bedroom Suite)

Governor's Suite BSF3: 1 BK / 1650 sq ft

- View of the Del Monte Forest which features old growth Monterey Pines and Cypress Trees
- ADA Suite
- Spacious living room
- Breakfast table
- Private entrance to bedroom
- Large master bathroom with roll-in shower
- 2nd Floor with multiple balconies
- Guaranteed King Bed
- Interconnects with BQ Scenic View

Honeymoon Suite BSO5: 1 BK / 700 sq ft

- View of Asilomar Beach and 5 holes of The Links at Spanish Bay
- Studio Suite with recessed bedroom
- Unique modern decor
- Two bay window day beds
- Breakfast table
- Glass shower with multiple showerheads
- Unique clawfoot deep soaking tub
- Adjacent to BK Ocean Loft

Ocean Executive Suite BSO4: 2 BK / 750 sq ft

- View of Asilomar Beach and 5 holes of The Links at Spanish Bay
- Separate Living Room
- Deep soaking tub and glass shower
- Guaranteed King Bed
- Interconnecting with BQ Ocean View
- B1546 is ADA

Scenic Executive Suite BSC5: 2 BK / 750 sq ft

- Split view of the ocean and the Del Monte Forest which features old growth Monterey Pines and Cypress Trees
- Separate Living Room
- Deep soaking tub and glass shower
- Guaranteed King Bed
- Interconnects with Scenic (1 BK, 1 BQ)

Forest Executive Suite BSF5: 9 BK / 750 sq ft

- View of the Del Monte Forest which features old growth Monterey Pines and Cypress Trees
- Separate Living Room
- Deep soaking tub and glass shower
- Guaranteed King Bed
- Interconnecting to Forest View (7 BQ, 2 BK)

Casa Palmero Room & Suite Descriptions

Interior of all rooms and suites:

- A comfortable seating area surrounding a gas burning fireplace
- A large flatscreen television
- A luxurious bathroom with double vanities
- An honor bar with complimentary snacks and non-alcoholic drinks

Palmero Suite

PSX1: 1 BK / 1268 sq ft

- Large patio with whirlpool spa
- Private courtyard entrance
- Deep soaking tub
- Ground Floor
- No room above
- Guaranteed King bed
- Pullout Sofa Bed
- Freshbed mattress with airflow technology to control temperature and purify air throughout the mattress up to 99.99%

Courtyard Suite

PSX2: 2 BK / 832 sq ft)

- Private courtyard entrance
- Large Studio Suite
- Large patio with whirlpool spa
- Deep soaking tub
- Ground Floor
- No room above
- Guaranteed King bed
- Pullout Sofa Bed
- Freshbed mattress with airflow technology to control temperature and purify air throughout the mattress up to 99.99%

Deluxe Spa Room

PR1XJ: 2 BK / 585 sq ft

- Patio with whirlpool spa
- Deep soaking tub
- Vaulted ceiling with natural wood beams
- No room above
- Ground floor
- Guaranteed King Bed

Spa Room

PRX3J: 9 BK 585 sq ft

- Patio with whirlpool spa
- Deep soaking tub
- Ground floor

Spa Room ADA

PRX3JA: 1 BQ / 585 sq ft

- Patio with whirlpool spa
- Deep soaking tub
- Ground floor
- P642 BQ is ADA

Estate Studio

PDX4: 2 BK / 703 sq ft

- Spacious studio
- Breakfast table
- Large day bed
- Bay window
- Second floor (stairs only)
- Guaranteed King bed

Estate Room

PRX5: 5 BK, 2 BQ 585 sq ft

- Large day bed
- Deep soaking tub
- Bay window
- Second floor (stairs only)

What Is Included in the Room Rate?

FREE ITEMS

- Complimentary in-room honor bars (excludes alcoholic beverages and retail items). All snacks and nonalcoholic beverages are complimentary, refilled daily
- Complimentary Wireless Internet Access in guest rooms and public space
- Coffee available in lobby daily & in guestrooms
- Commemorative scorecard and digital library at PBGL plus bag tags for golfers at three courses

ACCESS

- Access to The Beach & Tennis Club/Spanish Bay Club with state-of-the-art equipment, relaxation lounge, heated outdoor adult & kids swimming pool, outdoor jacuzzi, locker rooms, elevated sundeck, steam room and sauna. Extensive daily classes may include Pilates /yoga, aqua aerobics, Zumba and stretching/core strength.
- Unlimited use of two driving ranges and multiple chipping and putting facilities at any of our three championship golf courses.
- Access into 17 Mile Drive

SERVICES

- Complimentary Self and Valet Parking
- Complimentary Shoeshine service
- Complimentary Airport transfers to/from Monterey Regional Airport in Lexus vehicles
- Nightly turndown service
- Avis car rental 25% discount and additional value adds at SFO & SJC airports

EXPERIENCES

- Live entertainment with a nightly sunset
- Bagpiper and lobby entertainment Thursday-Saturday at The Inn at Spanish Bay
- Use of Lexus vehicles for domestic and international guests via the 2-hour test drive program
- Personalized escorts to guest rooms

Pebble Beach Resorts FAQs

17 Mile Drive

Gate Fee: $12 per vehicle
Hours: Sunrise-Sunset

Check in / Check out Times

Check In:
4pm —The Inn at Spanish Bay / The Lodge at Pebble Beach
3pm—Casa Palmero
Check Out: 12pm (all properties)

Resort Addresses

The Lodge at Pebble Beach:
1700 Seventeen Mile Drive Pebble Beach, CA 93953
The Inn at Spanish Bay:
2700 17-Mile Drive, Pebble Beach, CA 93953
Casa Palmero at Pebble Beach:
1518 Cypress Drive, Pebble Beach, CA 93953
Pebble Beach Reservations Department:
2136 Sunset Drive; 2nd Floor, Pacific Grove, CA 93950

Restaurant Corkage Fees

$45 for standard 750ml bottle
For other bottle sizes check with the Restaurant or the Resort Knowledge Guide

Electric Vehicle Charging Station Locations

- Casa Palmero
- The Spa at Pebble Beach
- The Pebble Beach Market
- The Inn at Spanish Bay parking lot

ATM Locations

- Pebble Beach Golf Links Pro Shop
- Outside and across the hall from Traps

Babysitting / Dog-sitting

Pebble Beach recommends Art on Wheels
www.artonwheelsmontereykids.com

Hotel Mattresses

Serta Pillowtop—Platinum Suite II Euro Top
Guests may contact 1-877-HOTEL-40 or email guestpro-gram@sertanational.com

Hotel Pillows

Restful Night—Trillium blown fiber Gel Pillow
Pacific Coast Feather Company 1-888-297-1778

Golf Club Shipping

Guests may ship their clubs to the address of the hotel property in which they are staying. (Casa Palmero guests ship to The Lodge)
Advise guests to address the box to their own name and, if possi-ble, notate their date of arrival
Golf club storage is managed by the concierge department

Golf Course Grass

Greens: Poa Annua (Annual Bluegrass)
Tees and Fairways:

- Rye Grass (PB/SB/DM)
- Bent/Fescue Blend (SG)

Pebble Beach Resorts FAQs

Beach & Tennis Club Activities

- Heated lap pool (84 degrees) and Hot Tub
- Lounge seating with food/drink service (Beach Club Restaurant)
- Fitness Facility with Pelotons, weights, fitness classes, etc.
- Tennis Courts and Pickle Ball Courts

Spanish Bay Club Activities

- Heated lap pool (84 degrees) and Hot Tub
- Lounge seating with food/drink service (Stick's)
- Fitness Facility with Pelotons, weights, fitness classes, etc.
- Tennis Courts and Pickle Ball Courts
- Bike and Kayak rentals (via Adventures by the Sea)

Closest Airports

- MRY—Monterey Peninsula Airport (7.8 mi.)
- Monterey Jet Center at MRY (Private Jets / Helicopters) (7.8 mi.)
- SJC—San Jose International Airport (79 mi.)
- SFO—San Francisco Airport (111.5 mi.)

Transportation

- Shuttle Service runs at the top and bottom of every hour
- Hotel guests can arrange complimentary transfer service between MRY and Pebble Beach Resorts via the Transportation department.
- Must give no less than 24 hours notice
- Resort guests may arrange dedicated pick-up/drop-off via the Transportation department.
- Resort Guests receive a 25% discount at AVIS for car rentals. They can book online at pebblebeach.com or call AVIS directly.

Concierge Offers

- Airline & Airport Service
- Area Maps / Sightseeing / Tours / Local Events
- Audio Visual Services
- Automobile Services / Car Rentals / Private Jet Services
- Babysitting/Dog-sitting recommendations
- Courier Services / Shipping / Postal Services
- Secretarial Services / Printing / Fax Services / Notary Public
- Laundry / Seamstress / Shoe Shine
- Newspapers
- Religious Services
- Restaurants in town / Picnics
- Aquarium Tickets (no longer complimentary)

Front Desk Offers

- Gift Cards
- Safe Deposit Boxes
- Cellular Phone Chargers
- Cashier

Housekeeping

- Dry Cleaning
- Shoe Shine
- Umbrellas
- Ice Delivery

Pebble Beach Room Renovations

The Lodge at Pebble Beach

DATE	1909 AUGUST 29TH	1919 FEBRUARY 22ND	1978	2016 NOVEMBER	2017 AUGUST 14TH	2019 APRIL	2021	2025 FEBRUARY - AUGUST
LOCATION	Pebble Beach Lodge	Del Monte Lodge	The Lodge at Pebble Beach	The Lodge at Pebble Beach **Guest Rooms**	The Lodge at Pebble Beach **Fairway One Complex**	The Lodge at Pebble Beach **Guest Rooms**	The Lodge at Pebble Beach **Sloat Building**	The Lodge at Pebble Beach **Main Building**
STATUS	Newly Built	Renamed Rebuilt after fire	Renamed	Renovation Begins **(except Sloat Bld.)**	Newly Built	Renovation Completed **(except Sloat Bld.)**	Renovation Fully Rebuilt	Renovation

The Inn at Spanish Bay & Casa Palmero

DATE	1987 NOVEMBER	1999 JULY	2016 NOVEMBER	2019 MARCH	2024 ARPIL 17TH
LOCATION	The Inn at Spanish Bay	Casa Palmero	The Inn at Spanish Bay **Guest Rooms**	The Inn at Spanish Bay **Guest Rooms**	Casa Palmero
STATUS	Newly Built	Newly Acquired & Renovated	Renovation Begins	Renovation Completed	Renovated

Room Reservation Basics

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

The fields circled in **ORANGE** should only be used on very rare occasions. **Anytime you search for availability, you want to search all rooms at all properties.**

Master Data Range

The Master Data Range calendar will automatically set the calendar within the Guest Rooms Tab. Always use this calendar to set your dates for a room availability search.

Type/Unit/Market

These fields allow you to search for one specific room type, room number, and/or rate type. These fields will very rarely be used because we want to keep our searches open to all room availability.

Dates

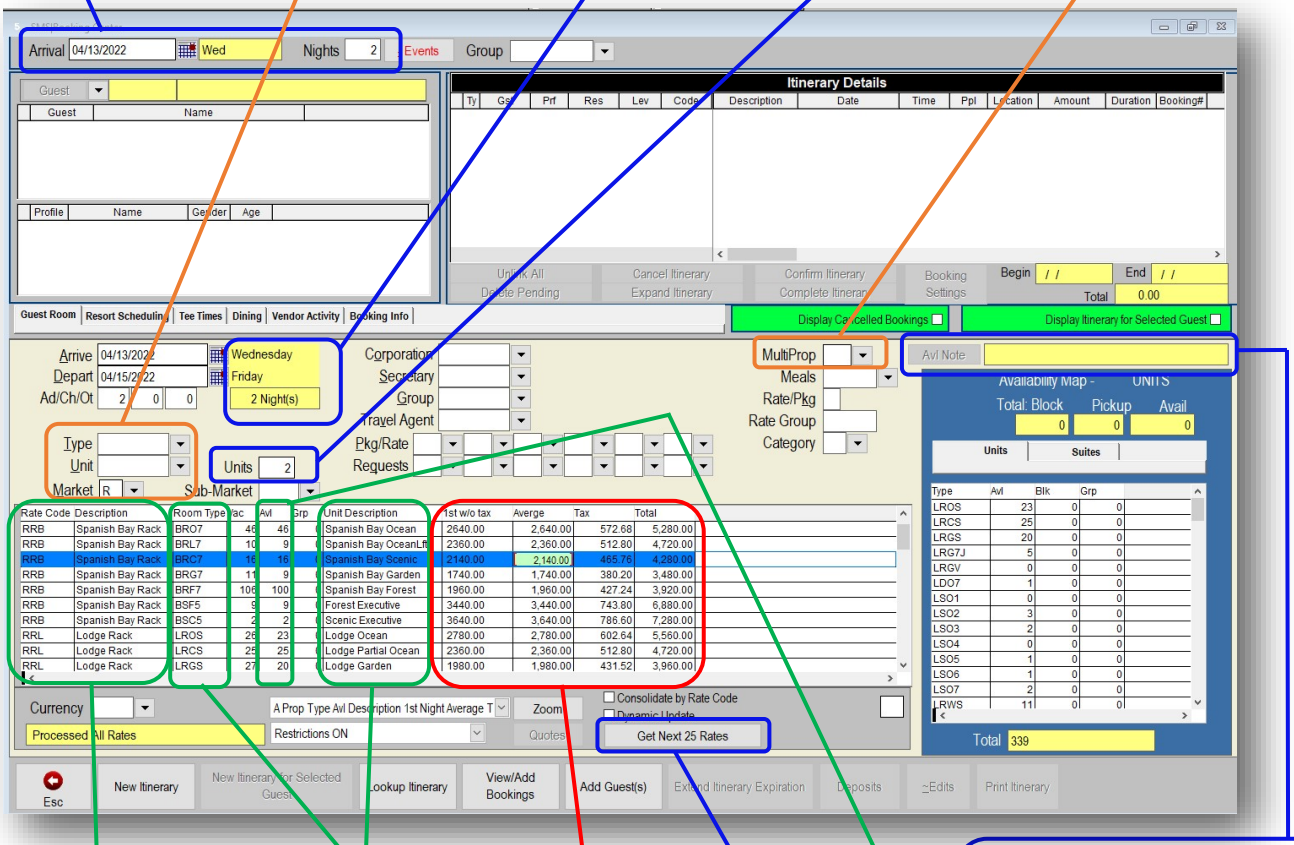
Once your dates are set, review this field to double check that the days of the week and number of nights are accurate.

Units

Edit this field when guests want to book multiple units of the same room type.

Multi-Prop

Click this dropdown to narrow your search to a specific property. We do not use the W Fairway One code



Notes

This field will contain important notifications about the dates you select. You should check this field for notes each time you initiate a search.

Room Type & Unit Description

The codes in the Room Type fields correspond with the Unit Descriptions.

Get Next 25 Rates

Click this button to initiate your search once you have set your parameters.

Rate Code & Description

In Reservations, we book Rack Rate Rooms, meaning the advertised price.
RRB = Rack Rate Bay (Inn at Spanish Bay
RRL = Rack Rate Lodge
RRP = Rack Rate Palmero (Casa Palmero)

Rates

Click **Zoom** > **Value** > **Zoom** to check for Dynamic Pricing and quote all nights +++.

Available Units

This column will tell you how many of each room type are currently available. These numbers will sometimes be negative because we are authorized to overbook rooms to a certain extent.

The Face of the Reservation

Room

This field will display the type of room that the guest has booked and the number of rooms of this same room type. You can hover over the code to see the name of the room type.

ID Numbers

The Reservation Number (R#) is the identifying number for this specific room reservation.

The Itinerary Number (ITN#) identifies the entire Itinerary which includes all rooms and recreation. You can click the ITN# button to open the guest's full Itinerary.

Groups

If your Itinerary has multiple rooms, you can enter a Mini-Group code into this field to link all of your rooms together.

Name & Guest Tile

You can click the Guest button next to the Name field to open the attached Guest Tile.
If you want to attach a different Guest Tile to the reservation, you click Whose to search for the Guest Tile you want.

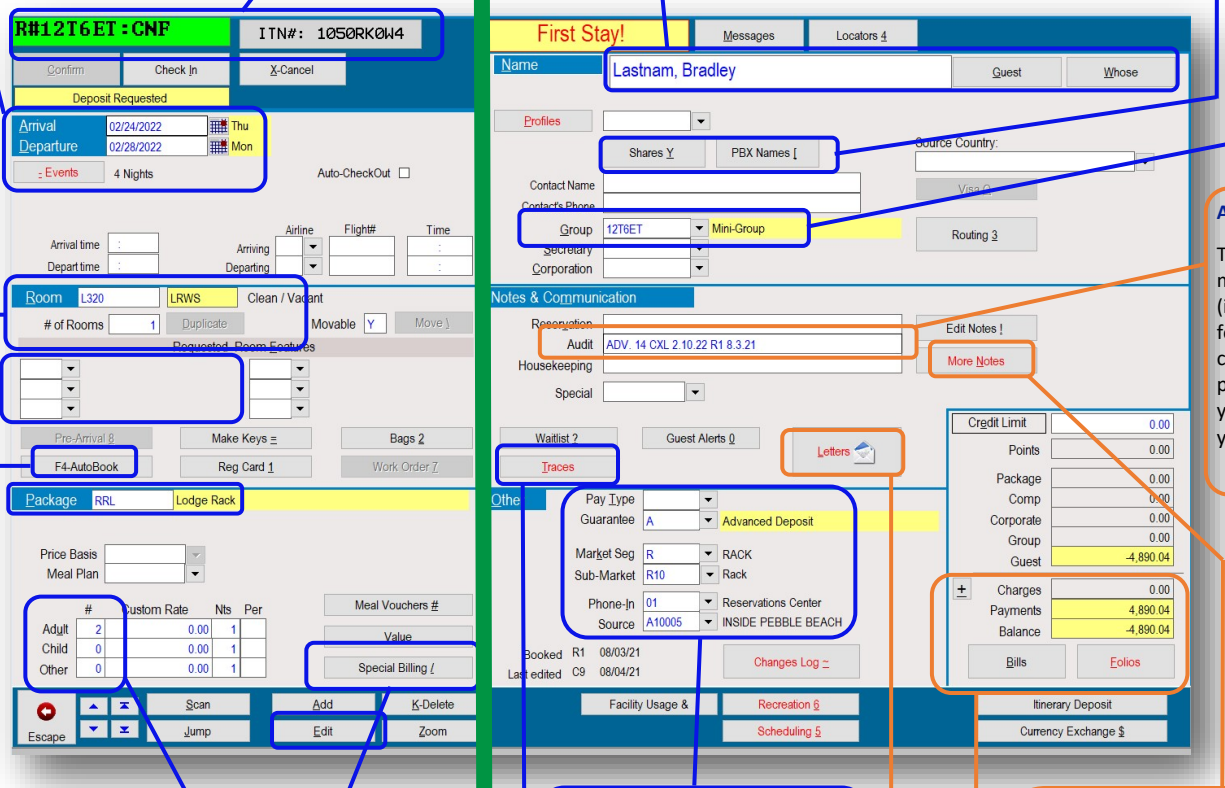
Shares & PBX

You will click the Shares button to split a room into multiple pieces so guests can share payment of the room.

If the Guest is bringing someone who is not an immediate family member and who will not paying for anything, you will click PBX Names to add that person's name to the reservation.

Dates

This field clearly displays the dates of stay, the days of the week, and the number of nights the guest will be staying. This is an editable field if the guest wants to move dates or increase/reduce their nights.



Audit

This field must state (in this exact format) the cancellation policy that you quoted your guest.

Room Features

You can enter specific room feature requests into these fields for the front desk to see.

We do not guarantee any specific features. The only guarantee is the view.

Special Billing

Click this button to see information about the deposit as well as Travel Agent information if applicable.

Other

These fields are pre-populated based on the Booking Settings you select in the Booking Center.

Notes

Every booking must have a **closed R Note** that states:

- Who you spoke to
- Why they are visiting
- What they booked
- Anything you offered that they declined (such as caddies/dining)

Traces

This is where you will send messages to other departments that contain a request for an action to be taken (as opposed to an informational note.

Pre-block

This is how you will Pre-block rooms. Select "Perfect Fit" if you want the rooms to match all criteria in your Room Features section.

Adults / Children / Pets

This is where you can edit the number of Adults, Children, and Pets who will be staying in the room.

We charge a fee for pets (dogs) and for any adults beyond the first 2 (and up to 5) in any room or suite.

Letters

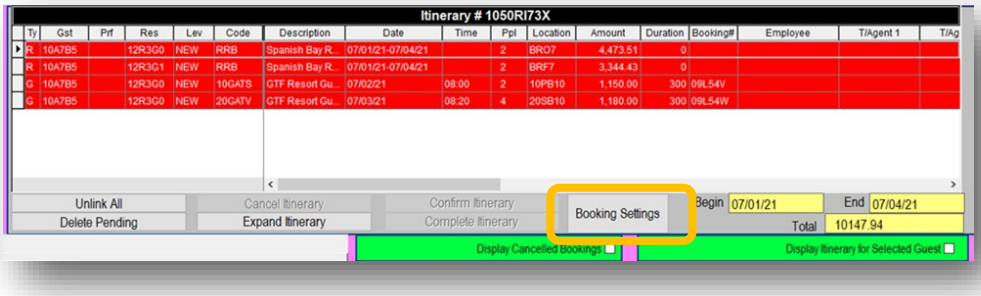
Click here to send confirmation emails.

Bills & Folios

This is where you will see how much money the guest has on file with us. You will use the Bills button to charge a guest's credit card for the 2-night deposit.

Booking Settings

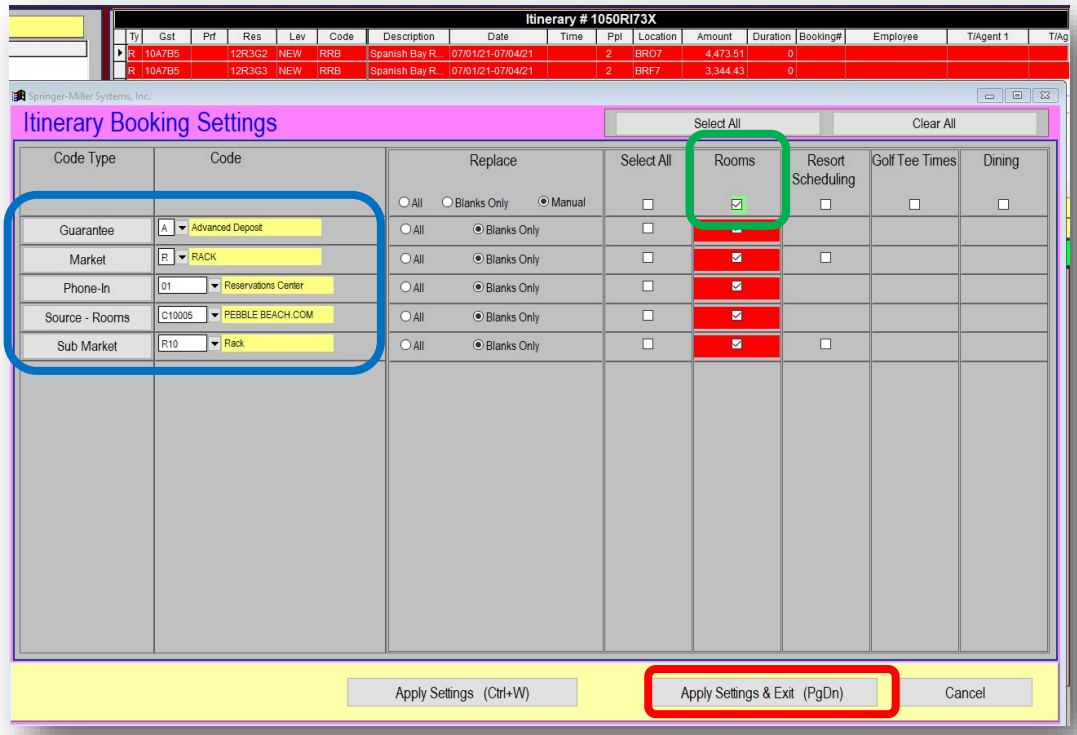
Starting at the point in the reservation that you have the rooms, recreation, and guest tile attached, press the "**Booking Settings**" button.



Step 1
Fill in the appropriate codes from the drop down menus

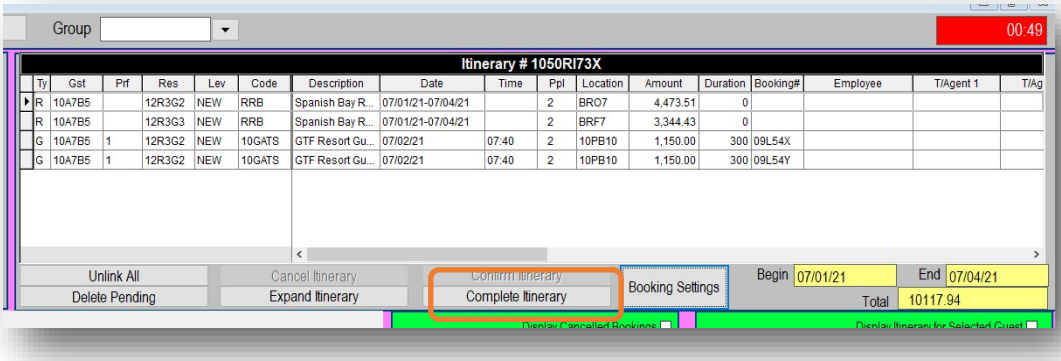
Step 2
Check the box directly below the Rooms Header

Step 3
Select Apply Settings and Exit



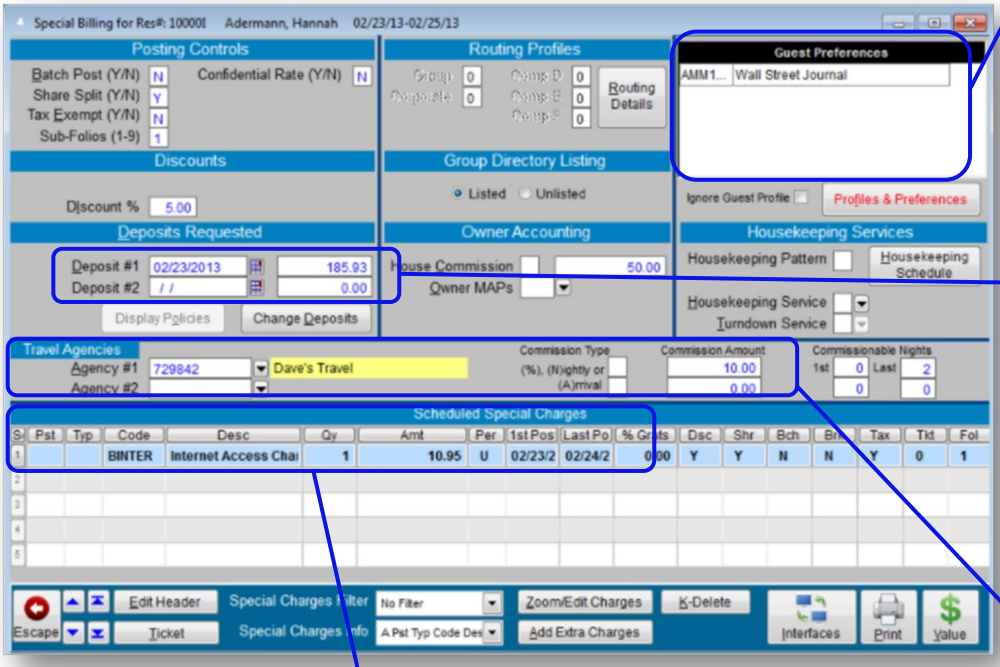
The rooms will turn white and you will be able to select "**Complete Itinerary**"

You may now open the room reservation and update any additional fields, as necessary.



Special Billing

The **Special Billing** screen is used for advanced reservation and billing instructions.



Guest Preferences

This section is pulled from the guest's Profile Preferences. This is purely informational.

A common reason to view this section is to see if a guest has any allergies before sending a complimentary amenity for a special occasion.

Deposit Line

The **Deposit #1** field should always be set to the amount of money that the guest will forfeit should they fail to show up or cancel their stay within 14 days. This will most commonly be the amount of their 2-night room deposit.

The **Deposit #2** line will most often be blank. This field is designated for any amounts of money that the guest or booking agent is required to pay by a specific later date.

Travel Agencies

When booking with a Travel Agent, you will need to enter the agent's IATA number into the Agency #1 field.

The Commission Amount field should automatically set to 10% unless the Travel Agent is IAGTO.

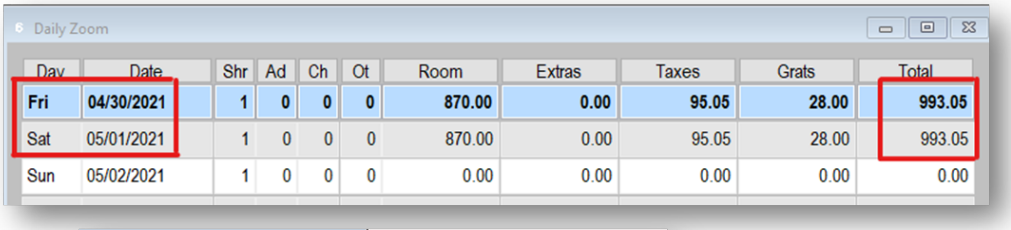
Scheduled Special Charges

This section will most often be blank. Special Charges are fees that we apply to a guest's reservation that our outside of our standard bookings. The only time you will enter this yourself is when a guest is being charged a Pet Fee. Otherwise, only supervisors use this section.

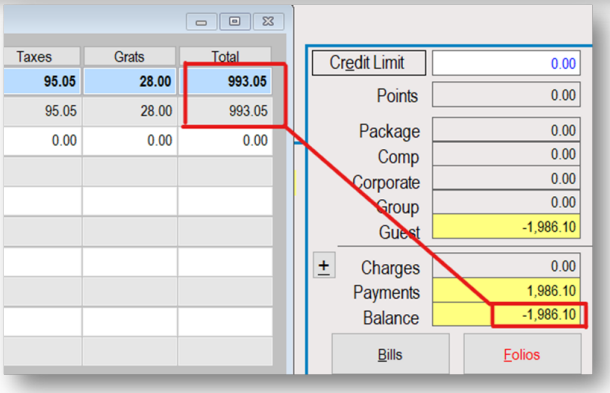
Value + Zoom

Click **V** on your keyboard to open the **Value** screen.
Click **Z** on your keyboard while in the Value screen to open the **Daily Zoom.**

The Daily Zoom window is what other agents / supervisors / auditors are referring to when they say "check Value + Zoom."
This screen has a detailed breakdown of the rates that are being billed for each night of the reservation.



Auditors will use the Value + Zoom screen to verify that you have collected the correct deposit.



The Auditors will add up these first two nightly totals to verify that it equals the amount you charged to your guest's credit card at the time of booking.

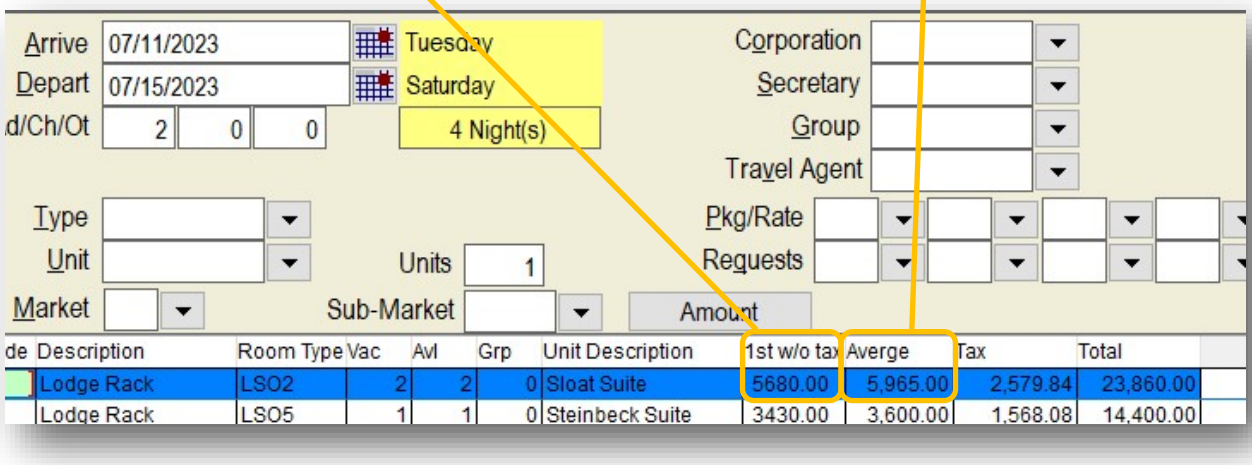
Nightly Total #1 + Nightly Total #2 = 2 Night Deposit

Dynamic Pricing

Dynamic Pricing at Pebble Beach Resorts is the practice of varying the price of rooms to reflect market conditions, i.e. increasing rates during times of higher demand.

When quoting pricing, it is best to search one unit at a time. The "**1st w/o tax**" column will show you the base rate for the 1st night of your current set of dates.

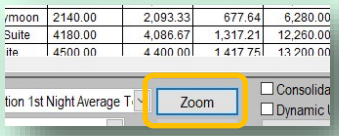
The "**Average**" column displays the average nightly rate of all nights during the stay. You can immediately see if the stay involves Dynamic Pricing by comparing the average rate to the rate of the 1st night.



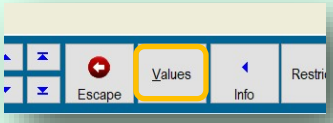
In the above example, the **Average Nightly Base Rate** is **$5965** while the **base rate for the first night** is **$5680**. This **differential in rate** means that Dynamic Pricing is being applied. If Dynamic Pricing were not involved, the "Average" column and the "1st w/o tax" column would be identical.

When a set of dates involves "Dynamic Pricing," you will need to click **Zoom + Value + Zoom** to see the rates for each individual day:

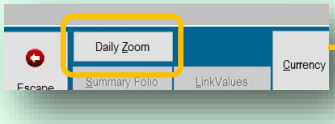
1.) **Zoom**



2.) **Value**

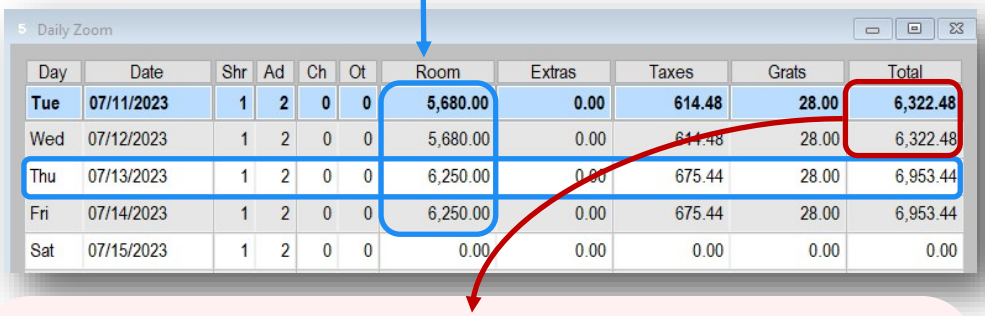


3.) **Zoom**



Zoom + Value + Zoom leads you to the **Daily Zoom** which breaks down the rate for each day within your search parameters.

You can see in this example below that the **base rate pricing is different on Thursday 7/13/23**, which was why the "Average Nightly Rate" is different than the rate of the 1st night in the Booking Center.



Reservations Agent Requirements

- You must quote the exact amount of our required deposit and obtain verbal agreement of the charge from your guest. The deposit equals the total of the first two nights of the guest's stay including taxes, service fee, and assessment.
- You must advise the guest of any Dynamic Pricing and quote the rates of each night individually.
- A K Note is required on the Reservation Tile only when a guest is staying more than two nights and the rate increases for those additional nights.

NOTES

RESERVATIONS — R (CLOSED)

NEW ROOM BOOKING

Elsa Menzel called to book family vacation.
Booked:
(2) LROD for 3 nts 7.5.23 - 7.8.23
PB 4sm 7.6.23 7:10am - dbl cad
SG 4sm 7.7.23 8:30am - adv aer
Tap 4ppl 7.7.23 2:00pm
Declined rental clubs
May call back for spa
Adv 14cxl
BX 4.27.23

CHANGE / CANCEL

Any change in date / # of nights / room category / # of players / # of people in room / rate conversions

Elsa Menzel called to upgrade (1) LROD to Sloat Suite.
Adv and collected difference in depo.
Sent IEMAIL
BX 4.27.23

ROOMING LIST — Y

List of each guest coming on the trip
Required when booking multiple rooms
Can have bedding requests/special occasions

R/L
1. M/M Robert & Roberta Spelman - BRO7 - BK
2. Dale Rayman / Charlie Bogart - BRO7 - BQ
3. Michael Meryash - BRO7 - BK
4. Tony Grasso - BRC7 - BK
BX 4.27.23

ACCOUNTING — A

When a credit card used for a booking does not belong to the attending guest, notate all billing details in an A Note.

MC x8888 on file belongs to 3rd Party Anna Arendelle
8624 West Bridge Dr.
New York, NY 10018
852.599.2564
wintersisters@frozen.com
BX 4.27.23

FRONT DESK — K

DYNAMIC PRICING

Advisement of Dynamic Pricing when a guest's rates will increase after the first two nights.

Guest is aware of price increase for 3rd and 4th night.
BX 4.27.23

FEE ADVISEMENTS

Notate when that a guest is aware of additional fees due at checkout.

Guest declined to prepay _____. Will pay at checkout.
BX 4.27.23

DIFFICULT GUEST

Notate when that a guest is may need specific assistance or attention.

Please be advised Ms. Roberta Spelman _(Reason for handle with care)_. HWC
BX 4.27.23

ADA ROOM

When a guests request an ADA Room

Please do not move.
Guest pre-blocked into requested ADA room.
BX 4.27.23

RATE APPROVAL — D

Add note to all mini-grouped rooms.
Include what was approved and by whom.

ROOM UPGRADE

OK per MG to provide one level comp upgrade to save sale for past guest.
BX 4.27.23

HONOR PAST RATES|NEG. RATES

OK per MG to honor 2022 rates for guest who changed dates due to beach club construction.
BX 4.27.23

TRACES

FRONT DESK - LFD / SFD / CFD

LATE CHECKOUT
Advise of fee (50% nightly rate) after 2PM.
[Arrival Date]

Ms. Elsa Menzel request late checkout.
Adv not guaranteed.
Guest is aware of fee after 2PM
BX 4.27.23

ROOM NUMBER REQUEST
[Arrival Date]

Ms. Elsa Menzel request room B1008
Adv not guaranteed.
BX 4.27.23

ROOM MOVE
See Room Move SOP

PRE-BLOCK / NON-MOVEABLE
See Families w/Small Children SOP
See Two-Bedroom Suites SOP

HOUSEKEEPING - LHK / SHK

FURNITURE
Request additional items in hotel room.

Please provide rollaway.
BX 4.27.23

Please add second mini fridge to room.
BX 4.27.23

PET
See Pets in the Room SOP

ROOM SERVICE - LRS / SRS

See Special Occasion SOP
See Families w/Small Children SOP
See Pets in the Room SOP

ACCOUNTING – ADM

MODIFY DEPOSIT (Outside CXL)
Refund a Guest for a downgrade/reduction or overcharge. You must update Special Billing to match the new balance. [Next Day]

Please refund $154.26 to AMEX x8888
New Balance = $3,684.78
Ms. Elsa Menzel R#123Z5K reduced room type
BX 4.27.23

FORFEIT DEPOSIT (Inside CXL)
Guest calls inside of cancelation policy (14cxl) and will be forfeiting their deposit [Next Day]

Please forfeit $5423.89 from R#123Z5K
Ms. Elsa Menzel canceled res w/in 14cxl.
BX 4.27.23

FRONT DESK BILLING - FDB

BILLING SCENARIOS
See FDB Traces SOP

PREPAYMENTS / 3RD PARTY
See FDB Prepayments SOP

BACK TO BACK PACKAGES
Transfer 2nd PB / SG / SB to P folio
[Departure Date]

RESERVATIONS BILLING - RBT

HOLDS W/OUT DEPOSIT
Supervisor approval is required.
[Hold Expiration Date]

OK per MG to hold until EOD 7.15.23 for guest to pay deposit in the amount of $5628.59.
BX 7.10.23

BILLING SCENARIOS (1 of 2)

IDEAL BILLING SCENARIOS:

"Will you be covering all charges for this trip...

PRIMARY COVERS ALL CHARGES
The Primary Pays the Deposit And All Charges At Checkout

Primary:
All charges for other rooms will be handled by (Primary's Name and R#).
BX 12.5.23

Secondary:
DO NOT ASK FOR CC
Transfer all charges to (Primary's Name and R#).
BX 12.5.23

...or should we split up all charges between guests/rooms at checkout?"

DEPOSIT AS GUARANTEE ONLY
Primary Covers Deposit, but Each Guest Will Pay Individually At Checkout

Deposit paid as Guarantee Only.
Each Guest to cover own charges.
Please refund any balance onto CC on file at checkout.
BX 12.5.23

No Secondary Trace is Needed

COMMON LARGE GROUP BILLING :

"Do you want to cover the deposit and have your friends pay you back directly? This way you will get your funds a little sooner.

Then going forward, we can keep all charges separate."

PRIMARY COVERS DEPOSIT—ALL ELSE TO EACH GUEST
The primary's travelling companions will pay them back directly for the deposit so the primary doesn't need to wait until checkout to get their money back.

Primary:
(Primary's Name and R#) to cover RTSA for the first 2 nights for all rooms.
All else to each guest.
BX 12.5.23

Secondary:
Transfer RTSA for the first 2 nights to (Primary's Name and R#).
All else to each guest.
BX 12.5.23

BILLING SCENARIOS (2 of 2)

Prepayments

Guests are only obligated to pay their 2 night deposit at the time of booking, but they can choose to prepay beyond the deposit. This is most common with 3rd Party bookings

- When this happens, we must write an **Itemized FDB Trace**
- If the guest pre-pays golf, which can include carts/caddies/rental clubs, we must add **Chargeback Notes** to the Babynotes of the Golf Tiles

Itemized FDB Example:

Prepaid by Jerry Joslyn on R#46554:
LRWS @$1125+++ x 3 Nights = $3846.96
PB @$625 x 2 golfers = $1250
Total PPD = $5096.96
C9 5.19.23

Chargeback Notes Example(s):

If prepaying **Spa services**; email **_Spaschedulers**
Spa Schedulers will input chargeback notes into SpaSoft

Note PPD. CHG 4GF + Cads to R#xxxxxx

Note PPD. CHG 2GF to C/L#1360YM

Itemized FDB Formula:

Prepaid by (Primary's Name and R#)
(Room Type) @ (Base Rate) +++ x (number of rooms) x (number of nights) = (Total)
(Additional Room Type) @ (Base Rate) +++ x (number of rooms) x (number of nights) = (Total)
(Golf Course) @ (Golf Rate) x (number of golfers) = (Total)
(Additional Golf Course) @ (Golf Rate) x (number of golfers) = (Total)
(Spa Services with gratuity included*) = Total
Total PPD = (Grand Total Prepaid)
BX 12.5.23

*Use The Spa website on pebblebeach.com to calculate the total price of Spa Services the 3rd party intends to book.

3rd Party Prepayment:

DO NOT DISCLOSE RATES - 3rd Party Prepayment
Prepaid by 3rd Party John Doe R#xxxxx on MCxxxx:
LRWS @1125+++ x 3 nights = $3816.96
PB @$595 x 2sm = $1190
Guest has refundable balance of $500 on file to use during stay.
Total PPD = $5506.96
No further charges to MCxxxx. All else to guest.
C9 5.4.22

The Payer and their CC # is identified

Everything is itemized

Any "Unassigned Balance" is clearly designated as "refundable" or "non-refundable"

Billing instructions are given for the specific credit card number

3rd Party Prepayment with LOA:

If the arrival is within 30 days or the 3rd party wants to pay remaining charges and/or incidentals at checkout and the 3rd party will not be there to sign for charges, an LOA is required.

DO NOT DISCLOSE RATES - 3rd Party Prepayment
Prepaid by 3rd Party John Doe R#xxxxx on MCxxxx:
LRWS@1125+++ x 3 nights = $3816.98
PB @$595 x 2sm = $1190
Total PPD = $5006.98
All incidentals to MCxxxx.
LOA on file.
C9 4.17.23

This booking requires an LOA because the 3rd Party Payer's CC will be charged at checkout.

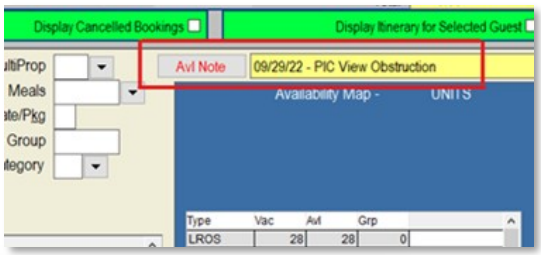
If you are waiting for your guest to sign the LOA, temporarily write "Sent LOA."

Once the Payer signs the LOA, change the FDB Trace to "LOA on file."

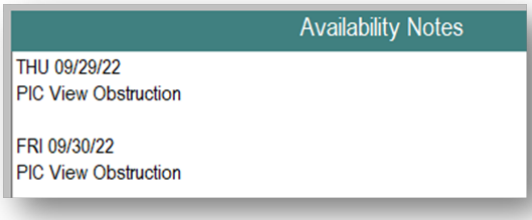
Billing instructions are given for the specific credit card number

View & Noise Obstruction

The **Availability Notes** in the top right hand corner of your room availability search tool, let you know when the guest needs to be advised of a view or noise obstruction (Example: due to an event like AT&T). It will also let you know why room types are unavailable. (Example: if there is a stop sale on Ocean View rooms)



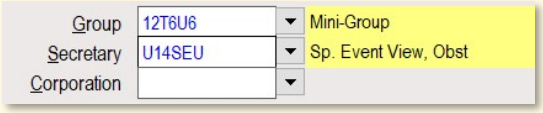
1. Click on the **Avl Notes** button to open an 'Availability Notes' window that lists every note for each day within your search parameters.
2. You are looking for the name of the event and "View Obstruction" or "Noise Impact"
    - PIC = Pure Insurance Championship
    - AT&T = AT&T Signature Event
    - Concours = Concourse d'Elegance
    - USWO = US Women's Open



View Obstruction | Noise Obstruction

If you see a View Obstruction Note in this field over the dates of a guest's stay at **The Lodge at Pebble Beach**, you must:

1. Inform the guest of the **view** or **noise** obstruction
2. Place the View Obstruction Code into the Secretary Field of your Reservation Tile



3. Include the **view** or **noise** obstruction advisement in the R note and in the Revinate note

The rooms affected by **view obstruction** and **noise obstruction** are:

- LROS | Ocean View Rooms
- LROD | Ocean Deluxe Rooms
- LDO7 | Ocean Studio
- LSO2 | Sloat Suite
- LSO7 | Vizcaino Suite

The rooms affected by **noise obstruction only** are:

- LRG7J | Garden Spa
- LSO6 | Fremont Suite

During **AT&T Signature Event,** the Fairway One Meeting Space is used as a locker room. The **Fairway One Rooms** will thus be affected by **noise** during this specific event.

- LRGF | Fairway One Garden
- LRCF | Fairway One Partial Ocean
- LSW1 & LRWF | The Cottages

Scripting for guests staying (1.21.24 - 2.9.24) & (1.18.25 - 2.6.25)
"You may experience some soft noise obstruction while AT&T structures are constructed in the Fairway One Complex Parking Lot. It is an exciting time to be here I assure you, but I wanted to advise you of this important activity in preparation for the upcoming event"

Special Occasions

Complimentary Amenity Guidelines:

- Resort Sales Agents may request one complimentary amenity for guests celebrating a special occasion, even if guests are celebrating multiple occasion(s)
- If there are multiple rooms, the amenity can only be requested in the room of the guests celebrating the occasion(s)

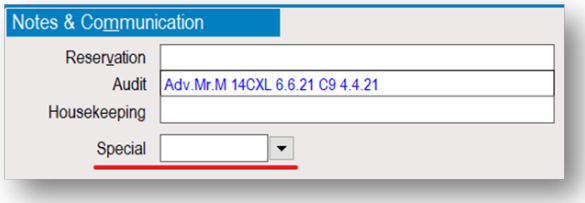
Approved Special Occasions:

- Birthday
- Anniversary
- Graduation
- Retirement
- Wedding
- Honeymoon
- Babymoon

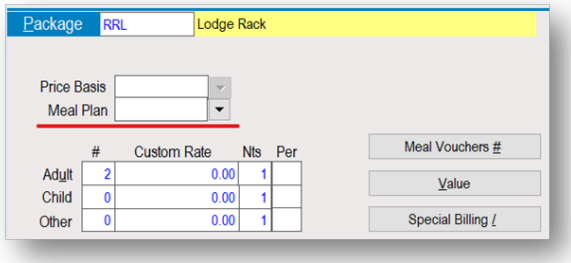
Approved Amenity Options:

- House champagne
- Wine: Chardonnay, Cabernet, Sauvignon Blanc, Pinot Noir
- Sparkling cider
- Beers (brands vary)
- Assortment of Cookies and Milk
  (State "chocolate chip only" if the guest has nut allergies)
- Chocolate Covered Strawberries
- Fruit and Cheese Plate
- Snack Attack Basket

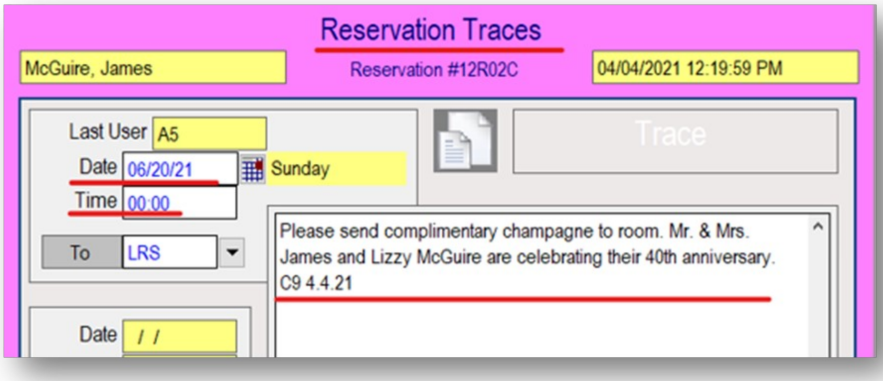
1. The **Special** field



2. The **Meal Plan** code



3. A **Room Service Trace (LRS or SRS)**
   - ◊ Set trace for the date of arrival (even if the celebration date is on another day of their stay)
   - ◊ Request **1** complimentary amenity
   - ◊ If you know the celebration date, include that in your message



3rd Adult in Room

If three or more adults will be sharing one room, each adult beyond the first two will incur a fee of **$100+ per night.**

Base fee x (Occupancy Tax + CA Tourism Assessment)= **Nightly Fee**
$100 x (0.105 + 0.00195) = **$110.70**

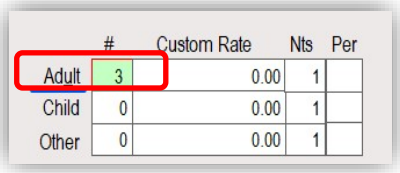
Note—Per the fire code, a room may have no more than 4 adults or 5 souls (adults/kids/dogs)

ON THE PHONE:

1. Inform the guest of the $100+ fee per additional adult, per night, per room
2. Calculate the total for this fee and quote this to the guest
   Example: A guest is booking one room for 3 nights with a total of 4 adults
   $110.70 x 3 Nights x 2 additional adults = Total fee of $664.20
3. Ask the guest if they want to pre-pay it with their deposit or wait to pay this at checkout
4. If the guest opted to pre-pay, charge the fee along with the deposit while on the phone

WRAP UP:

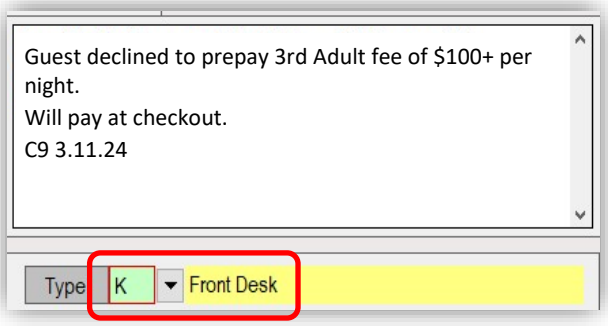
1. The Adult Field on the Reservation Tile should indicate the number of adults in the room



2. Set either a K Note or an FDB Trace depending on whether or not

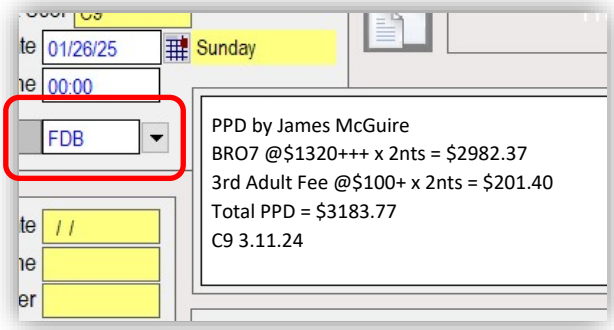
If the guest declines to pre-pay:

- Leave a K Note informing the front desk that the guest is aware of the charge and decided to pay at checkout

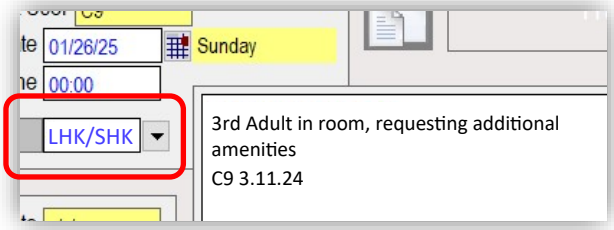


If the guest agrees to pre-pay:

- Leave an FDB Trace that explains why the guest paid more than the 2 night deposit



3. Set a Housekeeping trace to request additional amenities



These amenities will include:

- Robe & Slippers
- Glassware/Mug/Drinkware
- Bottles of Water

Pets & Service Animals Guidelines

Pets

Access:

- All room categories at The Lodge at Pebble Beach
- Outdoor public areas
- Outdoor restaurant areas (walk-in only)
- Del Monte Golf Course and The Hay
- Pets may be walked through the Lobby Lounge and Terrace Lounge for the purpose of accessing outdoor areas

Rules:

- The only pets permitted are dogs
- Dogs may not be left unattended at any time
- Nightly pet fee (cleaning fee) applies for resort guests
- Guests will be responsible if their pet causes damage to the room

Why not cats?

Allergies to cats are about twice as common, the furniture damage from their claws, and the difficulty to clean/ deodorize their urine in order to maintain cleanliness and room quality lead to the decision to not allow cats.

Service Animals

Emotional Support Dogs

If the guest discloses that they have an emotional support dog, they need to stay at The Lodge. The nightly pet fee will be waived.

Access:

- All room categories property-wide
  - ⇒ We can advise that The Lodge can best accommodate Service Animals, encouraging our guest to book their room at The Lodge
  - ⇒ If the guest does not want to stay at The Lodge, then we can offer The Inn or Casa Palmero
- All public areas
- Indoor and outdoor restaurant areas
- All golf courses

Rules:

- Animals may not be left unattended at any time
- Nightly pet fee will be waived for resort guests
- Guests will be responsible if the animal causes damage to the room
- When inside dining rooms or lounges, animals must stay on the floor; not on furniture
- If the animal is disruptive or not housebroken, the handler may be asked to remove the service animal from the premises
- Guests with service animals have priority and must not be moved to accommodate a guest who complains or is allergic to the service animal

How to Identify:

- Service Animals may be dogs or miniature horses; Emotional Support Dogs only
- We take our guests at their word—guests are not required to provide documentation or proof, and the animals are not required to wear service vests
- Service Animals are not limited to specific breeds—they come in all shapes and sizes and can provide many different services

Pets & Service Animals in the Room

ON THE CALL:

1. Obtain the name and breed of the animal
2. Advise of nightly pet fee (waived for service animals and emotional support animals)
3. Advise that animals may not be left unattended (You may recommend Art on Wheels pet sitting)
4. Recommend the dog treat amenity via Enhance Your Stay on www.pebblebeach.com

WRAP UP:

1. Input the number of pets into the "Other" field on the Reservation Tile

	#	Custom Rate	Nts	Per
Adult	2	0.00	1	
Child	0	0.00	1	
Other	1	0.00	1	

2. Leave a Housekeeping Trace (LHK / SHK / CFD) for date of arrival

> Guest is brining Terrier dog, Bonzo, to The Lodge
> BX 12.11.22

3. Leave a Room Service Trace (LRS or SRS) for date of arrival

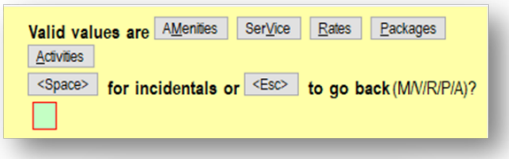
> Guest is brining Terrier dog, Bonzo, to The Lodge + requesting amenities.
> BX 12.11.22

4. Leave a K Note

> Guest is aware of $150 nightly pet fee.
> Will pay at checkout.
> BX 12.11.22

> Nightly pet fee waived for service animal/Emotional Support animal
> BX 12.11.22

5. Apply the Nightly Cleaning Fee (Do not apply if Service Animal or Emotional Support Dog)
   - Access Special Billing
   - A for Add
   - Enter to escape menu
   - Enter code 000PET
   - Page Down to save charge
   - Escape to return to Special Billing





Scheduled Special Charges

Code	Desc	Qy	Amt	Per	1st Post	Last Post
000PET	Pet-in-room Fee	1	150.00	U	12/11/202	12/14/202

ADA Rooms

Fire Safety	• Visual light and siren as fire alarm
Living Area	• Roll-in desk • Longer Curtain rods with easy pull rings • Furniture spaced further apart
Bathroom	• Roll-in shower with hand rails • Roll-in vanity • Adjustable shower heads • Rubber mat. Bathtub and toilet with hand rails
Optional	• Visual light when the phone and doorbell are rung *(Must be activated by Front Desk—set FD Trace)*

Inn at Spanish Bay

Room #	Room type	Bedding
B1502	Ocean View	BK
B1532	Ocean View	BK
B1546	Ocean Executive Suite	BK
B2009	Garden View	QQ
B2036	Governors Suite	BK
B2043	Garden View	QQ
B2502	Ocean View	BK
B3005	Garden View	QQ
B3039	Garden View	QQ
B4001	Garden View	BK

Lodge at Pebble Beach

Room #	Room type	Bed
L103	Ocean Deluxe	BK
L142	Ocean View	BK
L144	Alvarado Suite	BK
L163	Ocean View	BK
L194	Garden Spa	BK
L300	Garden View	BK
L302	Garden View	QQ
L336	Garden View	BK
L404	Garden View	QQ

Casa Palmero

Room #	Room type	Bed
P642	Spa Room	QQ

Reminder:

Pre-Block	Mark Non-Moveable	Note/Trace
☑	☑	K Note

K Note Example:

Please do not move.

Guest pre-blocked into requested ADA room.

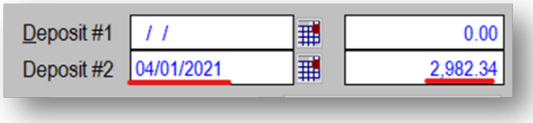
BX 4.27.23

Set Up An Exception Hold

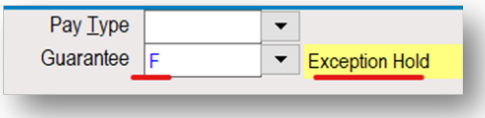
Supervisor Approval is required to place rooms on hold without money

Common Scenario:
Guest has intent to pay, but is having credit card issues or are communicating/paying via email due to being in another time zone or have a language barrier.

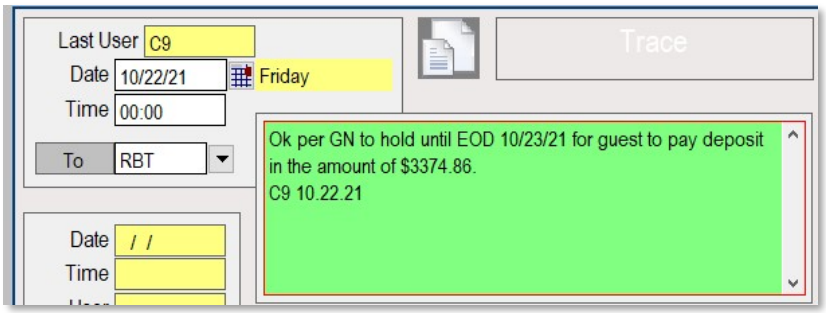
1. In Special Billing
   - Input the required deposit into Deposit #2
   - Set the date of Deposit #2 to the Hold's Due Date



2. Set the Guarantee Code to F - Exception Hold
   If you have multiple reservation tiles, the primary will be F, secondaries will be J



3. Create an RBT Trace
   - Set the Trace Date to the Due Date of the Hold
   - State who approved the hold, what amount is due, and when it is due



4. REVINATE
   - Create an In Process Lead Form
   - Set an email reminder for 2-3 hours before the due date/time
   - Leave a detailed note so agents will understand the next steps
   - Your call disposition will be Hot Lead

5. When money is received
   - Move the deposit information from Deposit #2 to Deposit #1
   - Change the guarantee code to A
   - Close the RBT Trace
   - Change your Lead Status to Booked
   - Your call disposition will be Booked

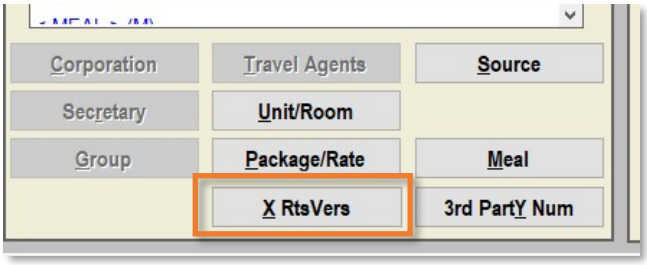
Honor Old Rates

Older Rates: Shortly after we have a rate increase, we give a timeframe of 1 week to close any in-process reservations that have quotes with the old rates. When we honor these old rates we need to "date stamp" the reservation in SMS.

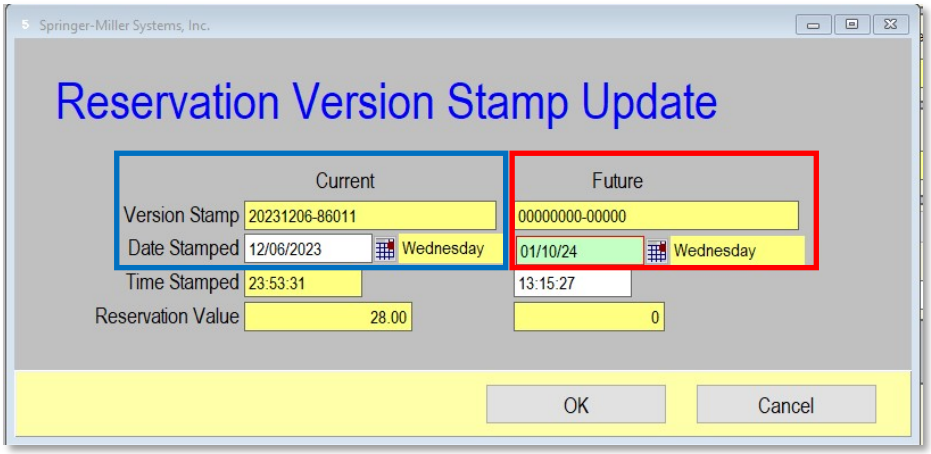
1. On the Reservation Tile, Press **Z** on the keyboard or Click **Zoom**



2. When the next screen pops up, Press **X** on the keyboard or Click **X RtsVers (**Rate version)



3. You can see the **current date** of the reservation. From here **set the future date** by **clicking the Calendar** icon and select the day before the recent rate increase.



4. Press **Page Down** on your keyboard or Click **OK** to save it

ALWAYS: Check Value Zoom to ensure rates are accurate.

3rd Party Booking—Resort Stay (1/2)

ON THE PHONE

1. Use the Booking Center to create your booking with all recreation

2. Clarify with the 3rd Party Payer exactly which charges they will cover:
   "Do you plan to cover all charges for this trip or just a portion such as room and golf?"
   Guests can choose to cover:
   - Room charges
   - Golf Greens Fees
   - Caddies / Rental Clubs
   - Incidentals

3. Determine if the 3rd Party Payer will need to sign an Letter of Authorization
   You must advise of the LOA requirement on the call, but can wait until wrap up to send the form via Sertifi.
   "What we recommend for a gift such as this is that you prepay all charges you plan to cover right now at the time of booking. If you wish to cover incidentals, most guests will prepay a finite amount such as $500 that your guest can use as they wish."
   "If you decide to only pay the deposit today (or) *cover incidentals at checkout, I will need to send you a letter of authorization. This is a form that I would send to you electronically that will allow you to pre-sign for these charges since you will not be on site when your card is charged."*
   - Is the booking within 30 days? *LOA required*
   - Will their credit card be charged at checkout? *LOA required*
   - Will the 3rd party guest be present at check-in? *LOA not required*
     Advise the guest that payment will be collected from the guest at check in if the 3rd party payer is not present to sign for charges—We can offer an LOA if that is more convenient.

4. Create a C/O Guest Tile for the Attending Guest:
   - The Company Field should state C/O (Payer's Name)
   - Put a dot in the address and phone fields
   - Collect the credit card of the 3rd Party Payer

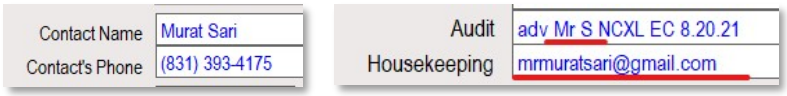
5. Collect the following information from your 3rd Party Payer:
   (Document this in your notes—this will later be your A Note)
   - Payer's full name
   - Payer's Billing Address
   - Payer's Email Address
   - Payer's Phone Number

6. Charge the credit card for all finite charges
   - Advise the payer of exactly what they are prepaying/being charged today
   - Advise the payer of the CXL Policy
   - If sending an LOA, advise the payer that they will receive the LOA form shortly and should sign right away
   - Perform your standard call closing

3rd Party Booking—Resort Stay (2/2)

WRAP UP

1. Document the Payer's contact information on the face of the Reservation:



2. Mark the booking as Confidential in Special Billing

3. Delete the credit card from the C/O Guest Tile—only do so after the card has been charged

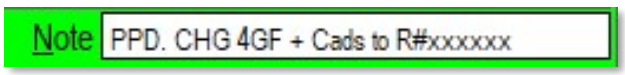
4. Create an A Note containing all billing details for the 3rd Party Payer

MC x8998 on file belongs to Murat Sari
645 West 85th street
New York, NY 10012
212.646.5656
bubbles@gmail.com
C9 12.13.23

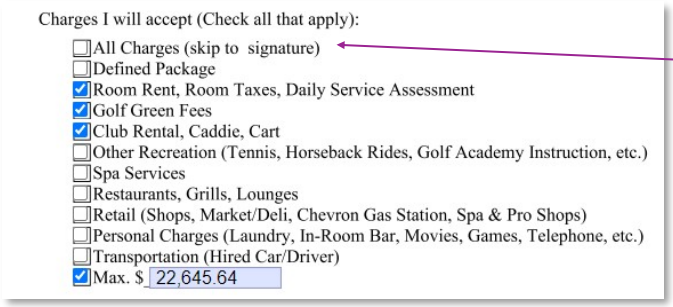
5. Create an FDB Trace set for the date of arrival

PAYER REPAYS ALL AT TIME OF BOOKING	PAYER ONLY COVERS ROOM AND GOLF
DO NOT DISCLOSE RATES—Move to C Folio 3rd Party Prepayment by ____ on Visa x3332 BRO7 @$1500+++ x 3 Nts x 2 rms = $10,166.58 PB @$625 x 4 plyrs = $2500 Guest has $500 balance to use during stay Total PPD = $13,166.58 No further charges to Visa x3332 All else to guest C9 12.13.23	DO NOT DISCLOSE RATES—Move to C Folio 3rd Party Prepayment by ____ on Visa x3332 BRO7 @$1500+++ x 3 Nts x 2 rms = $10,166.58 PB @$625 x 4 plyrs = $2500 Total PPD = $12,666.58 No further charges to Visa x3332 All else to guest C9 12.13.23
PAYER ONLY PAYS DEPOSIT AT TIME OF BOOKING	**INCIDENTALS AT CHECKOUT**
DO NOT DISCLOSE RATES—Move to C Folio 3rd Party Prepayment by ____ on Visa x3332 BRO7 @$1500+++ x 2 Nts x 2 rms = $6,777.72 All further charges to Visa x3332 LOA on file (Write LOA Sent until it is signed, then update FDB) C9 12.13.23	DO NOT DISCLOSE RATES—Move to C Folio 3rd Party Prepayment by ____ on Visa x3332 BRO7 @$1500+++ x 3 Nts x 2 rms = $10,166.58 PB @$625 x 4 plyrs = $2500 Total PPD = $12,666.58 All further charges to Visa x3332 LOA on file (Write LOA Sent until it is signed, then update FDB) C9 12.13.23

6. Add charge back notes on any prepaid golf



7. When applicable, access Sertifi and send a letter of authorization


Charges I will accept (Check all that apply):
- ☐ All Charges (skip to signature)
- ☐ Defined Package
- ☑ Room Rent, Room Taxes, Daily Service Assessment
- ☑ Golf Green Fees
- ☑ Club Rental, Caddie, Cart
- ☐ Other Recreation (Tennis, Horseback Rides, Golf Academy Instruction, etc.)
- ☐ Spa Services
- ☐ Restaurants, Grills, Lounges
- ☐ Retail (Shops, Market/Deli, Chevron Gas Station, Spa & Pro Shops)
- ☐ Personal Charges (Laundry, In-Room Bar, Movies, Games, Telephone, etc.)
- ☐ Transportation (Hired Car/Driver)
- ☑ Max. $ 22,645.64

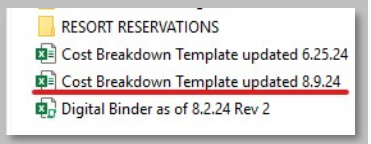
If the 3rd party is covering all charges including incidentals at checkout, you can just check the "All Charges" box.

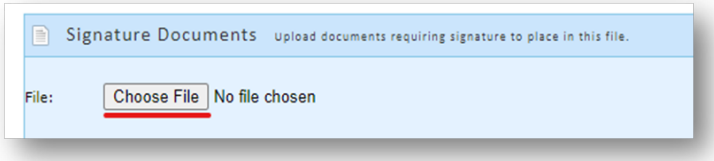
Cost Breakdowns

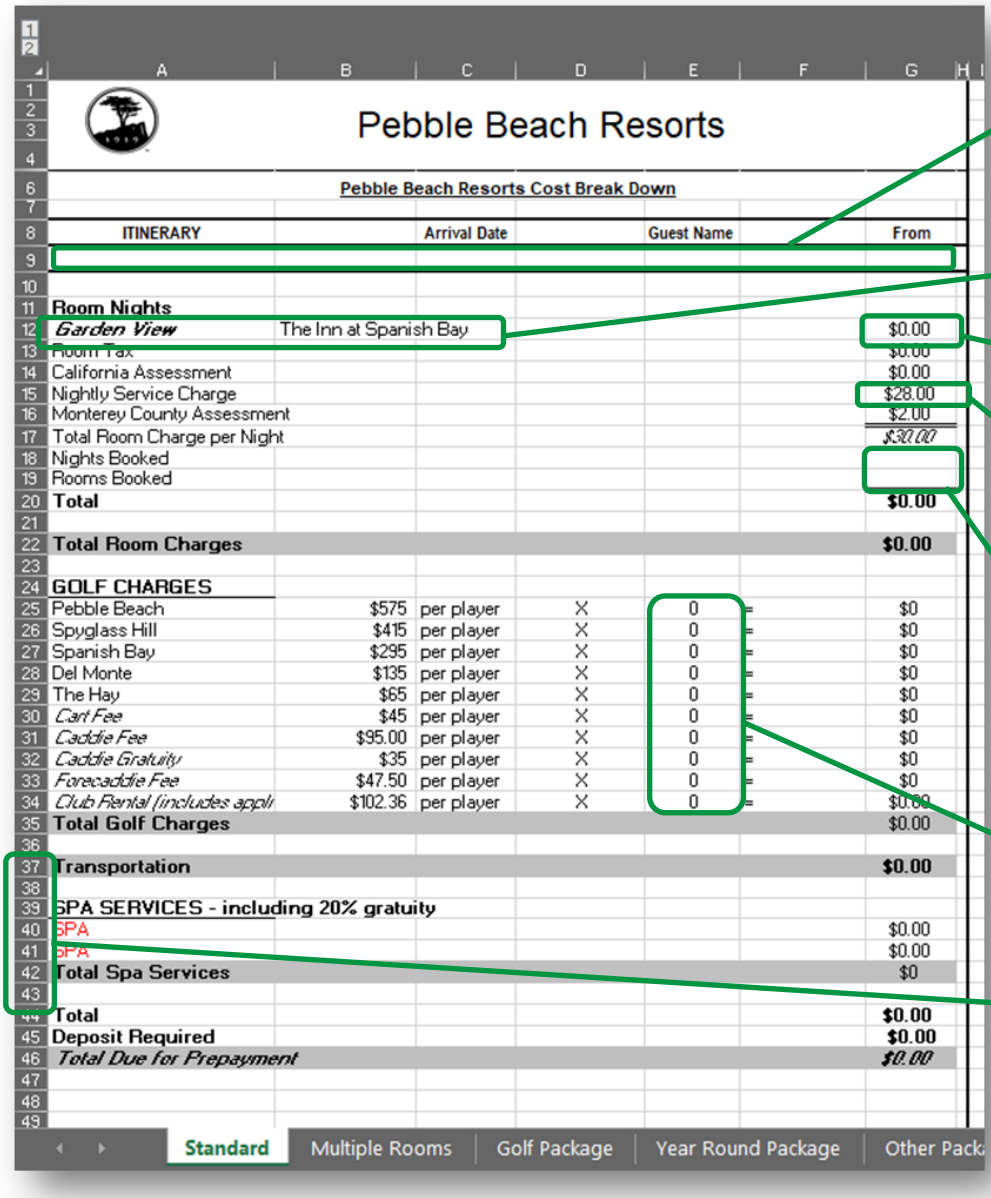
Cost Breakdowns are most often sent in conjunction with Letter of Authorizations when a guest will be pre-paying several items on their booking. In **Sertifi**, you will attach a PDF Cost Breakdown as a "**Signature Document**" which means the person signing the LOA will be also be required to sign the Cost Breakdown, agreeing to those specific charges.

Create A Cost Breakdown

- Open File Explorer
- Access the Z Drive
- Open the most recent Excel Sheet titled "Cost Breakdown"







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

Manually enter all information into this top line of your Cost Breakdown. The "From" field should be your name.

Select the correct room and property from the dropdown menus.

Type in the nightly Base Rate of the room your guest has booked.

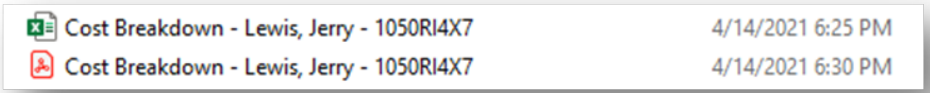
The Nightly Service Charge is $25 at The Lodge and $28 at The Inn at Spanish Bay. You must manually adjust this dropdown.

Type in the number of nights and rooms. Once entered, the total will auto-populate.

Type the number of golfers into the applicable golf categories.

You will typically be left with rows that do not apply to your booking. Highlight these rows by clicking/dragging on the row number, then right-click and select "Hide."

Click **SAVE AS** on your completed Cost Breakdown. Always save **two copies**: first as an **Excel Sheet,** second as a **PDF**.
You will attach the PDF to an email or attach it in Sertifi. The Excel sheet is in case you need to make edits.



Save to your personal folder in the Z Drive. Do not save into the Forms folder.

Send A Letter of Authorization 1/3

The Reservations Credit Card Auth Form is an electronic **Letter of Authorization (LOA)** that gives Pebble Beach Resorts approval to charge a credit card without the card owner being present.

If all 3 of the following are true, you do not need an LOA:
1. The Dates of Stay (or tee time) are **more than 30 Days** out
2. The 3rd Party is **Pre-Paying a fixed dollar amount** at the time of booking (i.e. Room & Golf or Golf, Caddie fee, & Rental Clubs)
3. All **incidentals** during the trip will be paid for by the attending guest at checkout

File Name Guidelines:

LOA with itinerary – **PBCAUTH_1050RZ123**

LOA without itinerary – **PBCAUTH_Flannagan**

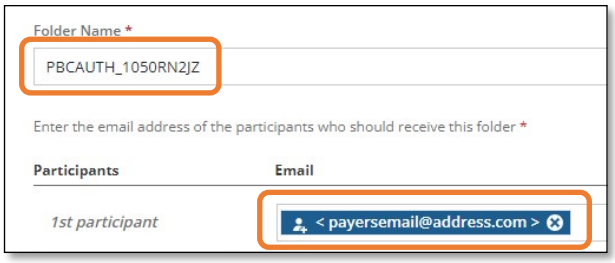
LOA Revision – **PBCAUTH_1050RZ123_REV1**

Send an LOA

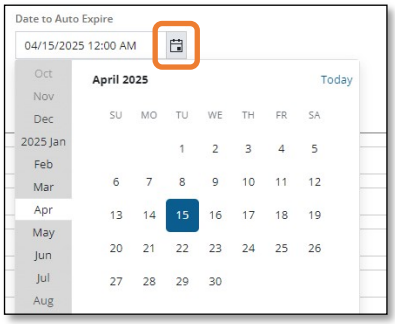
1. **Log into** Sertifi
2. Click **Create New**



3. Enter the appropriate **File Name** *(see File Name Guidelines box above)*
4. Enter the **payer's email address** into the 1st Level Signer field



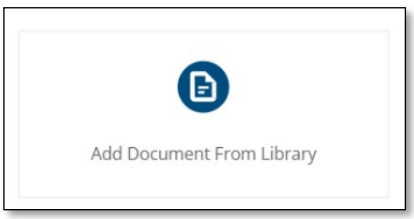
5. Set the **expiration date** to the date of arrival (or date of tee time if golf only)



6. Click **Next** - A new page will open

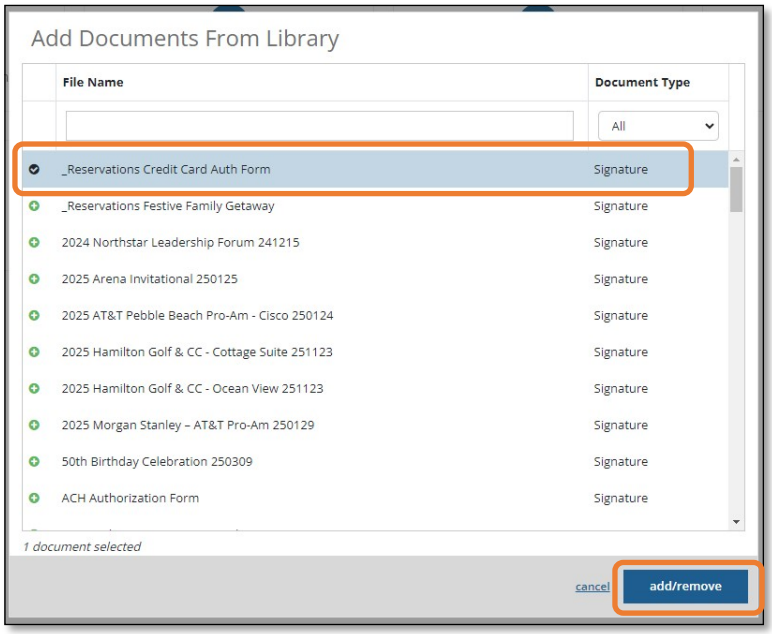


7. Click **Add Document From Library**



Send A Letter of Authorization 2/3

8. Select the **Reservation Credit Card Auth Form**
9. Click **add/remove**



10. Click **Pre-fill Form**

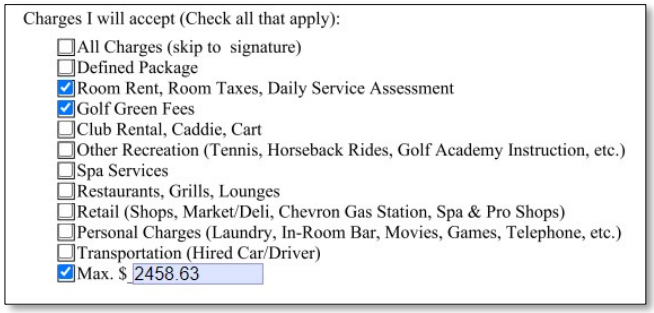


11. Enter the **attending guest's name**, their **arrival date** (or date of tee time if golf only), and the **itinerary number**

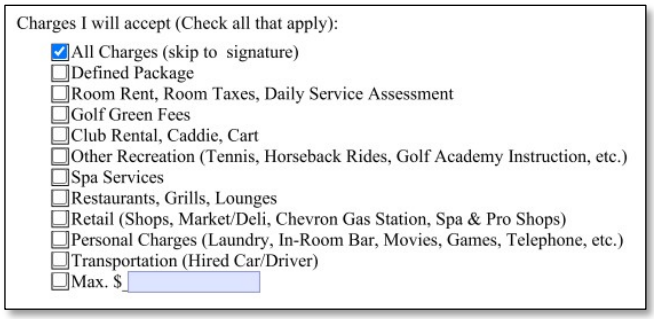


12. Credit card information should be filled out by the payer
13. **Check the boxes** for the charges that the payer is covering

⇒ If the payer is paying a fixed amount, close the billing loop by checking the Max $ box and filling in the dollar amount

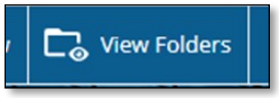


⇒ If the payer is covering all charges, simply check the All Charges box

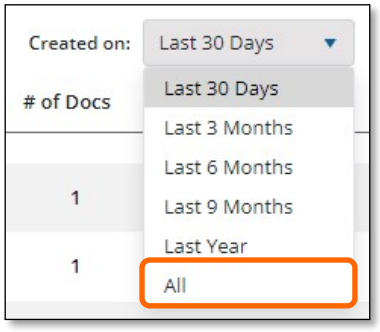


View a Letter of Authorization 1/2

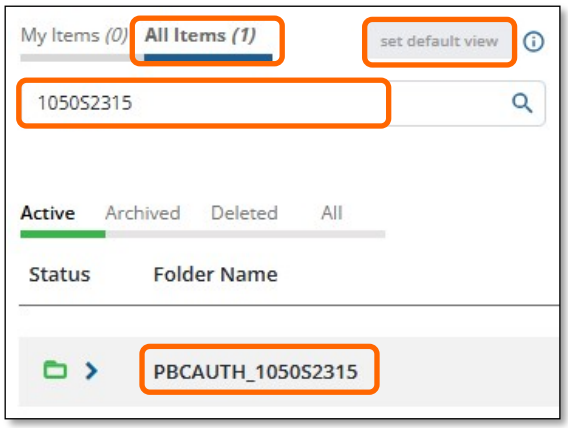
1. **Login** to Sertifi
2. Click **View Folders**



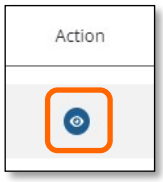
3. Click the drop down next to **Created On** to adjust the **date**
   It is recommended to select **All**



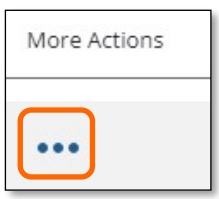
4. Click **All Items**; Click **set default view** to always view All Items (Only need to do once)
5. Type in the **itinerary number**; Sertifi will start searching automatically

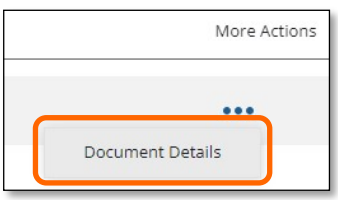


6. Click the **name of the document**
7. To view the **Signed Document**:
   ⇒ Click the **eye icon**



7. To view the **Credit Card** numbers:
   ⇒ Click the **three dots** under More Actions
   ⇒ Click **Document Details**
   ⇒ Click **View Unmasked Document**
   NOTE: The **Signed Document** can also be viewed this way





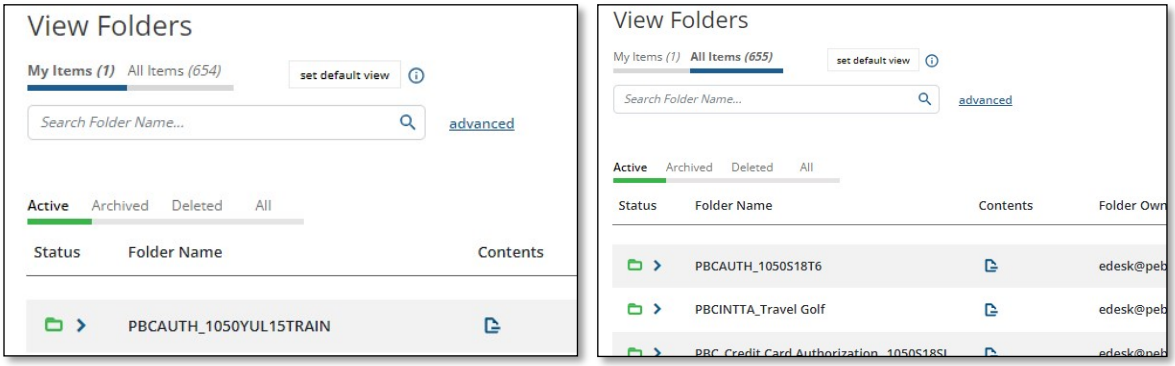


View a Letter of Authorization 2/2

Ways to further filter the search view:

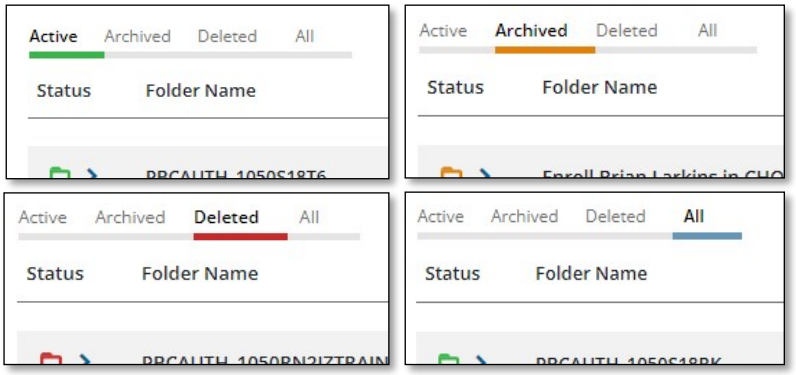
1. Click on **My Items** or **All Items**

   ⇒ This will filter to show just the documents you have sent or show all documents that have been sent by the company

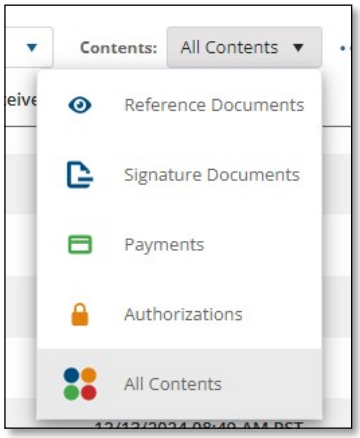


2. Click on **Active**, **Archived**, **Deleted**, or **All**

   ⇒ This will filter by each document status



3. Click the drop down next to **Contents** to adjust the type of document. We recommend keeping it at **All Contents**.



General Availability (F7)

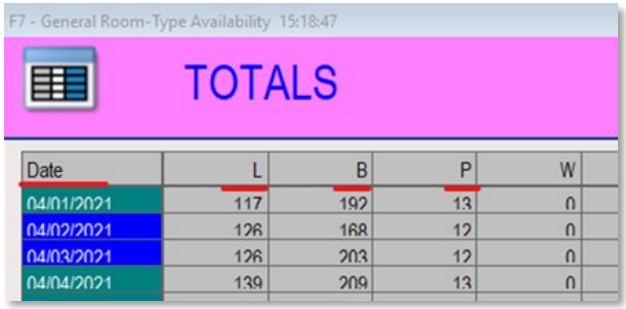
The **General Availability** function of SMS will show you the availability at the Resort over specific dates as well as several other important notations and statistics about all three properties.

1. **F7** to open the menu
2. **G** for **General Availability**

See How Many Rooms Are Available At Each Property:

1. F7
2. G
3. C (Consolidate)
4. P (by Property)

Results will show you how many rooms are available at each property. The most common reason to look this up is to see if we have enough availability to make an exception to allow a 1 night stay on a weekend, per the Exception Calendar.


F7 - General Room-Type Availability 15:18:47

TOTALS

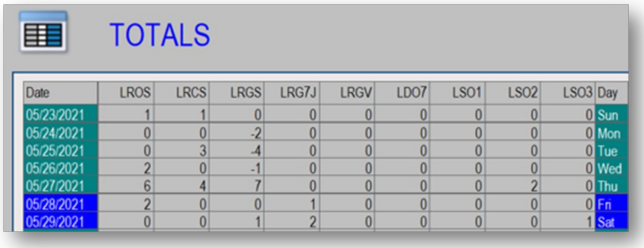
Date	L	B	P	W
04/01/2021	117	192	13	0
04/02/2021	126	168	12	0
04/03/2021	126	203	12	0
04/04/2021	139	209	13	0

One Night Stay on Weekends (Thurs night - Sat night)				
		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

See How Many of Each Room Category Are Available:

1. F7
2. G
3. C (Consolidate)
4. D (by Detail)

The most common reason to look this up when you need to find availability for a specific room category—likely a suite. A guest might say, *"When is the soonest I can book the Monterey Suite for 5 nights in a row?"*

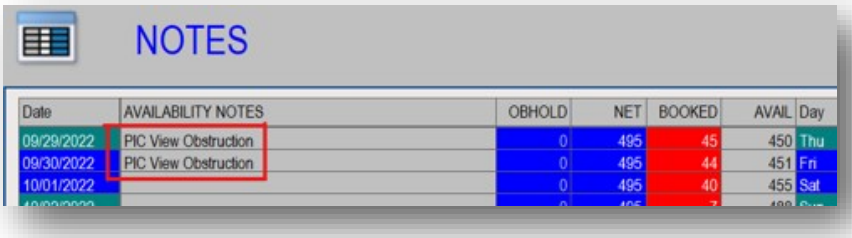

TOTALS

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

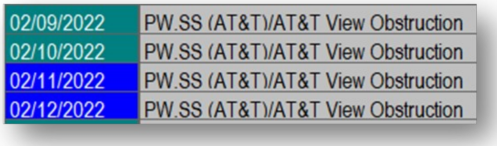
Investigate Why the Booking Center Shows No Availability:

1. F7
2. G
3. ! (Notes)

The most common reason to look Notes is when the Booking Center shows no availability, but Consolidate-by-Property says we have a positive number of rooms at that property.

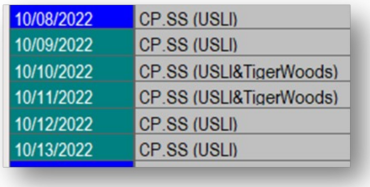

NOTES

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



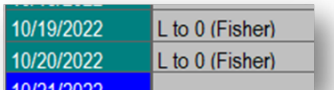
02/09/2022	PW.SS (AT&T)/AT&T View Obstruction
02/10/2022	PW.SS (AT&T)/AT&T View Obstruction
02/11/2022	PW.SS (AT&T)/AT&T View Obstruction
02/12/2022	PW.SS (AT&T)/AT&T View Obstruction

Property-Wide Stop Sell and View Obstruction due to AT&T Tournament.



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)

Casa Palmero Stop Sell due to a block of rooms being reserved for the USLI Group.

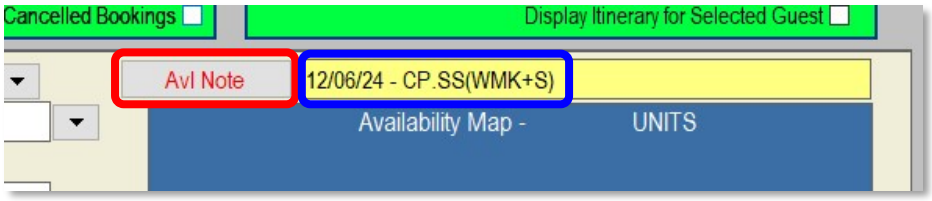


10/19/2022	L to 0 (Fisher)
10/20/2022	L to 0 (Fisher)

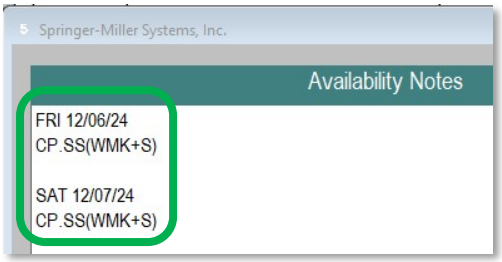
The Lodge at Pebble Beach may only be booked to zero available rooms—i.e., do not oversell.

Availability Notes

- A **snapshot** of **Availability Notes** can be seen in the Booking Center when searching for room availability.
  - This can provide an idea why no rooms are available or why availability is very limited.



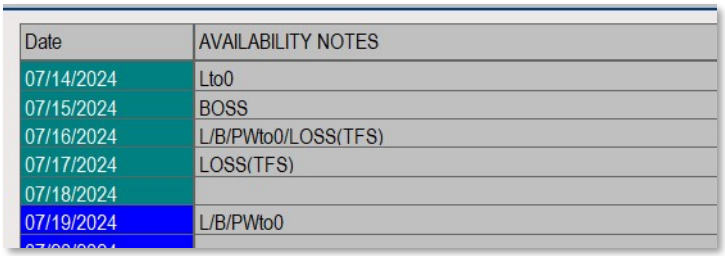
- Click **Avl Note** to see any **notes for the dates of stay** entered into the Master Calendar.
  - This can provide a way to see if the dates of stay just need to be shifted slightly by a day or two, or if we need to significantly move the dates of stay.



- There is an **expanded view** of **Availability Notes** that includes a wider range of dates.
  - This will help find alternate dates of stay if a significant move is needed

From the Booking Center:

⇒ **Press F7**
⇒ **Press G**
⇒ **Press !**

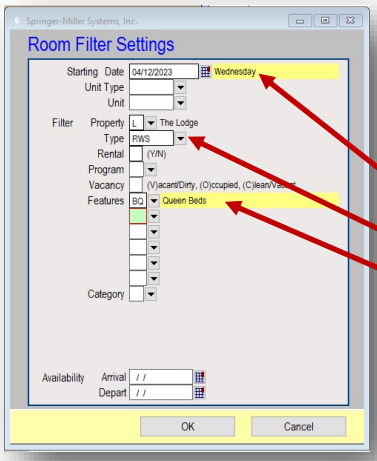


Date	AVAILABILITY NOTES
07/14/2024	Lto0
07/15/2024	BOSS
07/16/2024	L/B/PWto0/LOSS(TFS)
07/17/2024	LOSS(TFS)
07/18/2024	
07/19/2024	L/B/PWto0

Availability Notes Definitions	
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.
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.
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.
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.
BOSS	Inn—Do not sell Ocean View rooms and up (Studio, Deluxe, Suites)
LOSS	Lodge—Do not sell Ocean View rooms and up (Studio, Deluxe, Suites)
View Obstruction	Ocean View rooms/suites may see construction related to PBC Events
(parentheses)	Words in parentheses should not be disclosed to guests. Words in parentheses will indicate the group are event that a note pertains to

Tape Chart (F8)

The **Tape Chart** displays reservations **by room number in a grid format**, providing a visual of the pre-blocked rooms.



Click F8 to open the Tape Chart
To access the chart, you need to enter your filters.

The most common Filters will be:
- Starting Date
- Unit Type
- Features

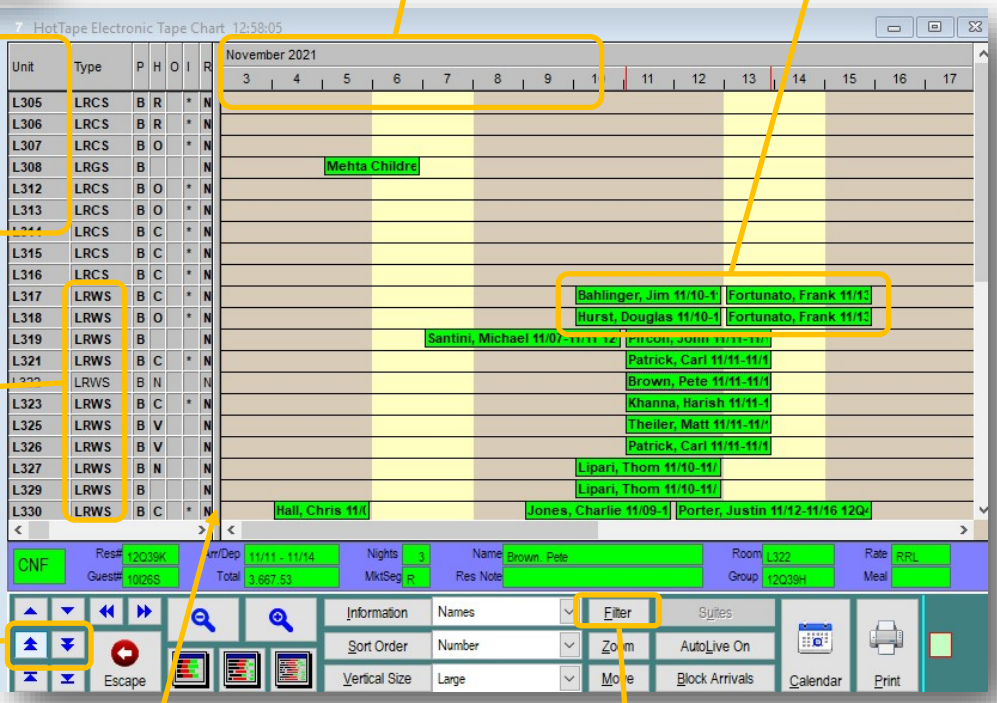
The Dates of stay are indicated at the top of the chart.

The green boxes with names inside indicate that a guest has been pre-blocked into that particular room on those dates.

The Unit column will tell you the exact room number of each Room Type.

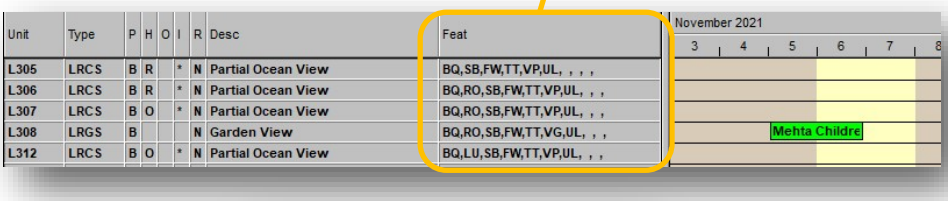
Look in the Type column to find the room that corresponds to the Unit Type you entered in your search filter.

Use the double arrows to navigate up or down one page at a time.



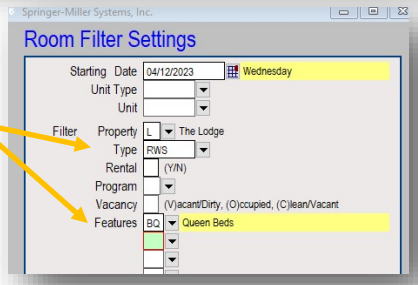
Drag the middle bar to the right to see additional information about each unit.

Click Filter to edit your search parameters.

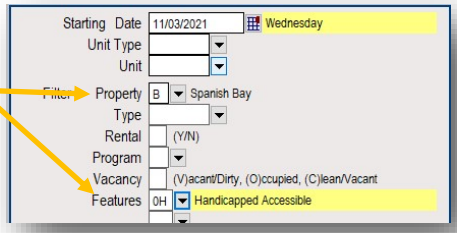


Look at the Room Features in the Tape Chart when your guest wants a room that must be pre-blocked and must have a specific Feature.

"I want a Fairway View Room with two queen beds."



"I need an ADA room at The Inn at Spanish Bay."



Send A Folio

A **Folio** is an account showing charges or payments made during a guest's stay.
Guests may call into Reservations to ask for a copy of their Folio.
This is typically used as an invoice for reimbursement or tax purposes.

- Each room/Reservation Tile has its own Folio
- You may only send a Folio to the email address of the person listed on the Reservation
- If the guest is still in-house, connect them to the Front Desk
- If the guest has questions about charges or is disputing charges, connect them to the Accounting Office

HOW TO REACH ACCOUNTING

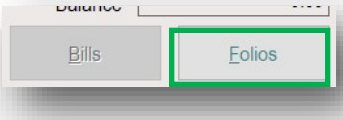
Transfer to x2764
Navigate the phone prompts for the guest to reach a representative

Email billingoffice@pebblebeach.com
CC your supervisor

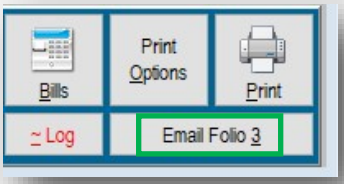
HOW TO SEND A FOLIO RECEIPT TO A GUEST

1.) Access the correct Reservation Tile

2.) Click the Folios button **[F]**



3.) Click Email Folio 3 **[3]**



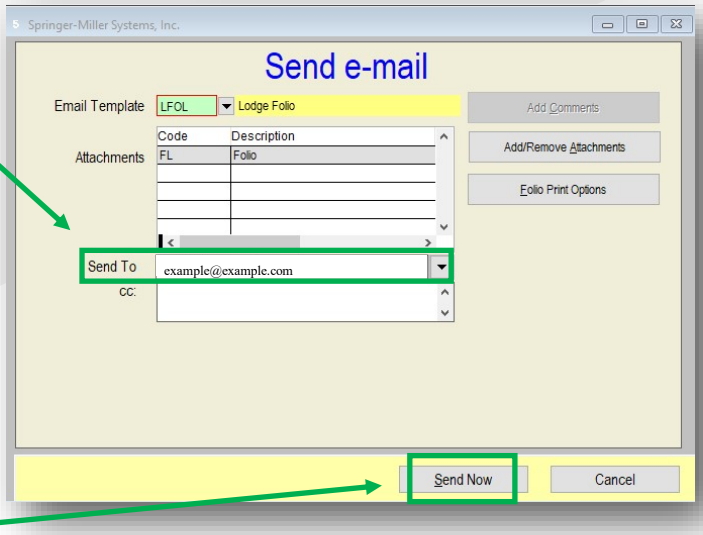
4.) Select the property at which the guest stayed **[01/02/03]**



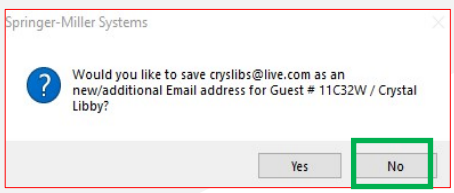
5.) Verify that the email address is correct

⇒ Post-Stay: Send the email directly to the guest from SMS

⇒ Pre-Stay: Send the Folio to your outlook email, then attach the PDF to a new email and send to your guest



Note: If you entered an alternate email into the email field (your Outlook email/3rd party/Assistant/TAG), you will see an additional window pop up. Select "No."



6.) Click Send Now **[ALT+S]**

Finding Solutions

Family Vacation

	ROOMS	GOLF	RESTAURANTS	RECREATION	PURCHASES
WHAT TO ANTICIPATE	Need more space for the family	Not everyone is at the same skill level	The kids are picky eaters Don't want a place too quiet in case kids are loud	Not everyone is into golf	Need something the entire family can enjoy
SOLUTIONS	2-Bedroom Suites Cottage Suites Ocean Deluxe Executive Suite + rollaway	Golf Lessons Del Monte The Hay End-of-day tee times	Stick's Hay's Place Picnic Basket from Pebble Beach Market	Trail Rides Pony Rides Beach & Tennis Club kids pool Bike rentals	Snack attack bas-ket Cookies and Milk Kid's shop

Couples Trip

	ROOMS	GOLF	RESTAURANTS	RECREATION	PURCHASES
WHAT TO ANTICIPATE	Need more privacy Want more room comforts so they can spend time alone together	One of the spouses doesn't play golf or isn't very good	Want a quiet, ro-mantic setting Need something more upscale to celebrate a mile-stone	They want to be to-gether, but don't want to just golf the entire visit.	They want to enhance the romance
SOLUTIONS	Fremont Suite Honeymoon Suite Casa Palmero Garden Spa	Lessons Caddies Spectator rule The Hay	Stillwater B&G Peppoli Roy's at sunset Hair/Make-up at the Spa to get ready	Couple's massage Beach Horseback ride Tennis Bike Rides Stave wine tasting Lexus 17 Mile Dr.	Champagne Chocolate covered strawberries Flowers Wine and cheese from the PB market

Golf Buddies Trip

	ROOMS	GOLF	RESTAURANTS	RECREATION	PURCHASES
WHAT TO ANTICIPATE	Adult guys will be cramped No space to hang out in the room Don't care about an ocean view	Don't want to have a bad round Want as much golf as possible	They want to kick back and be loud, not fancy	The only thing they will have fun doing is golfing	Don't care about shopping other than buying a hat
SOLUTIONS	4-Bedroom Cottage 1 Suite + rooms LRODs FW1 rooms Fairway View	Golf lessons Arrival/Departure round at DM/Hay Caddies	Tap Room Stick's The Bench Hay's Place Private dining room	Pre-golf warm up / post-golf therapy Barber Bike Rides Kayaking Golf Academy	Engraved bag tags Heritage shop Golf Links ->Past Snack Attack Bas-ket, B&B, beers Tee Time

Top-Down Selling

1. Get to know your guest through probing questions.
   Listen for queues that indicate aspects of the resort your guest will connect to emotionally.

2. Pitch the most extravagant option that meets your guest's needs.
   To do so successfully, you must tailor your suggestion to your guest's situation.
   For example, a 4-bedroom cottage is certainly a high tier to start with, but you would not pitch this to a couple on their honeymoon.

3. Listen to any objections, and move gently from tier to tier, eliminating unnecessary features until you land on an option your guest is both excited about and comfortable with.

THINK ABOUT THE DIFFERENT WAYS GUESTS CAN EXPERIENCE PEBBLE BEACH HOW WOULD YOU SEPARATE THEM INTO TIERS?

Trip Duration	Accommodations	Golf Schedule	Recreation
1 week to experience the entire resort 5 days to play rounds on days without travel	4-Bedroom Cottage 2-Bedroom Suites Individual Suites	Multiple PB Rounds All 5 Courses Play every day of their trip	Massages Equestrian Rides Restaurants each night Advisory of tennis, pools, shops, Lexus
3 night stay 2 night stay	Multiple individual rooms Ocean Deluxe Ocean View Shared rooms in Ocean Deluxe or FW1 Partial Ocean	Play primary courses plus The Hay Play golf on all full days of their trip	Restaurant only on night of arrival Restaurant only on night of special occasion Advisory of spa and equestrian
1 night on weekday 1 night on weekend per exception calendar 1 night with aeration or free-sell PB	Shared Rooms Scenic View Fairway View	1 round with advisory of other 2 primary courses Advisory of The Hay	Advisory to book restaurants soon Advise of room service

Close That Sale!

Does your conversation with the guest seem to go on and on with the guest asking question after question even though you feel like you've thoroughly explained the options?

Do you feel like you need to urge the guest to make a selection, but can't seem to bridge the gap between the conversation and the transaction?

The "This or That" Close:

Offer the guest a choice between two options.

This circumvents the guest's indecision and removes the option to decline.

Is your guest celebrating a special or monumental occasion?

Will this be one of the only times the guest will visit Pebble Beach in their entire lives?

Do you hear them saying, "We've always wanted to visit," or "We've been saving up for years."

The "Emotional" Close:

Offer your personal opinions about what your guest is considering. Encourage the guest to imagine themselves on their trip to change their state of mind to that of emotions.

Is your guest reciprocating your enthusiasm and demonstrating that they understand the value of what you have recommended?

Are they hinting that they need to speak to other people before committing? *"I have to speak to my spouse/group first."*

The "Assumptive" Close:

Assume that the guest is going to reserve in this phone call. Turn your questions into statements.

- "You're going to love these Ocean Deluxe rooms."
- "Since it's your birthday, let's get you in a suite."
- "Let's lock these tee times down now so you don't lose them."

The Rejection Progression

Step 1: Ask for the Sale

- If we reserve this today, that will allow us to lock in your tee times - which is the most important thing - and you will still have the flexibility to change or cancel any aspect of your reservation up until 14 days prior to your arrival date. Would you like to go ahead and do that?
- I suggest we reserve these rooms and golf right now, while they're still available. Do you want to proceed with that?
- This Itinerary looks good. I am happy to finalize this reservation for you. To confirm this booking, we require a deposit of the first two nights of your stay. Would you like to lock this in now?

Step 2: Explain Why They Should Book Now

- I understand you need some time to check and see if these dates will work.
- Of course, I understand that you need to make sure this works for your spouse.
- Certainly. I understand it takes a good deal of coordination to put together a trip like this for a group.

Urgency

- Just so you are aware, availability changes very quickly and there's a good chance these rooms and/or golf times won't be available when you call back.
- If you decide to book now, that will lock in all of your tee times (which is the most important thing, right?), and you will still have the flexibility to change or cancel any aspect of your booking without penalty.

Step 3: Ask for a Follow Up Call

Okay, I understand. Can I give you call on (specific day 1-3 day from now) to follow up with you?

Yes: Great! I will give you a call on (day/time). In the meantime, **I can send you a quick email**, so you have my contact information in case you'd like to get in touch sooner.

No: Ok, I understand. In that case, **I can send you a quick email** with a recap of what we discussed. Then, once you're ready to proceed, you can reply to that email and I'll give you a call.

Room Upsell Techniques (1/2)

The Size Upsell

Queue: A guest wants to book two golfers per room in BQ beds, or they are coming with a family all sharing one room.

Agent: "I have an Ocean View room available, but since you plan to share rooms, you may want to go with a room that is a larger size. The Ocean Deluxe rooms are significantly larger which I believe would make you much more comfortable without a significant price difference."

Standard	Spacious
Garden	FW1 Garden
Ocean View	Ocean Deluxe
Partial Ocean	FWY1 Partial Ocean

The Golfer's View

Queue: The guest says they don't care about the view, or that they won't be spending much time in the room anyway. They mean they are not worried about the *ocean* view but may be open to a *golf course* view.

Agent: "In your case, what I would recommend is the ocean view rooms at The Inn at Spanish Bay. A lot of our guests have said they loved watching golfers tee off on the Links at Spanish Bay in the morning as they enjoyed their coffee on the balcony or patio. You would also have a private view of our bagpiper who walks along the first fairway in front of the Ocean View rooms each evening to close out the day as the sun sets.

Room	Golfer's View
Lodge Ocean Deluxe / Ocean View	The iconic 18th hole of Pebble Beach Golf Links
Fairway View / FWY 1	The first tee box and fairway of Pebble Beach Golf Links
Spanish Bay Ocean View	5 holes of the Links at Spanish Bay

Suites

Recommending a suite from the very beginning of the conversation—even if the guest says no—will very often help you close on higher category rooms.

Queue	Suite
Guaranteed King Bed	Any Suite
Family with Small Children	2-Bedroom Executive Suites
Parents bringing adult children	Suites with large living rooms to gather
Past Guests	Any suite with a view/space/quality upgrade from past stay
Parties of 8	Fairway One Cottage

Room Upsell Techniques (2/2)

The Garden, But

Queue: The guest asks for the least expensive room. Provide the answer to their question, but also state the benefit of a higher level.

Agent: "The most economical room we have at The Inn at Spanish Bay is the Garden View room at $___.__ per night. If you are interested in just a little bit of an upgrade, I also have Scenic View rooms which will give you a split view of both the ocean and the Del Monte Forest, so you can experience the ocean view without paying the ocean view price. It would be a significant view upgrade without a significant difference in price."

Most Economical	Upgrade
Garden View at Inn	Scenic View
Garden View at Lodge	Fairway View / Partial Ocean View

The Small-Medium-Large

Queue: The guest asks for the "Standard" room.

Agent: "Our standard room is the Ocean View. Our most economical room is the Garden View. If you want an alternate option, I have a Scenic View that will give you a split view of the Del Monte Forest and the Ocean without that Ocean View rate."

Small	Medium	Large
Garden	Scenic	Ocean
Garden	Fairway	Ocean
FWY1 Garden	FW1 Partial	Ocean Deluxe
Ocean	Ocean Deluxe	Suite

The Divide and Conquer

Queue: Your guest is coming with a group and asks for multiple standard rooms. If the guest is not open to booking everyone in a higher category room or suite, you can still suggest that one person get a suite so everyone has a place to gather.

Agent: "What a lot of our guests like to do when coming as a group is have just one person stay in a suite so everyone can have a living room to gather together, play cards, and relax. Then we can book regular rooms for the rest of the group."

Primary	The Rest
Any Spanish Bay Suite	Multiple Ocean View
Any Lodge Suite	Multiple Ocean Views
Sloat/Vizcaino	Multiple Ocean Deluxe

Scripting Checkpoints

CHECKPOINTS	PHRASES
TRANSITION FROM D.R.A.G TO PROBING QUESTIONS	**While I check availability for you, I would like to get some additional information about your stay.** **Our guidelines depend on a few different factors, so before we begin, I would like to get some additional information about your stay.**
PROBING QUESTIONS	**Who will be joining you on this trip? Friends? Family? Spouse? Clients?** **Can you tell me a little bit about this trip you're planning?** **Have you visited Pebble Beach before?** **Are you celebrating a special occasion?** **Have you played other PGA courses before?** **What did you enjoy most about your previous trip?** **What are you looking forward to the most for this trip?** **Are you familiar with our Resort Properties?**
CONVEY URGENCY	**I understand that it takes a good deal of coordination to put together a trip like this. Just so you are aware, because our availability changes so rapidly, there is a good chance that these rooms and tee times will not be available if you call back.** **If you decide to book now, that will lock in all of your tee times (which is the most important thing, right?), and you will still have the flexibility to change or cancel any aspect of your stay without penalty up until 2 weeks prior to arrival.**
TRANSITION FROM CONVERSATION TO TRANSACTION	**I suggest we reserve these rooms and golf right now, while they're still available. Do you want to go ahead and do that?** **This trip looks fantastic. In order to confirm your reservation, we will need to collect a deposit equal to the first two nights of your room stay. The total deposit, including taxes, fees, and assessment, is $____.__.** **We have a 14 day cancellation policy for this booking which means you have up until 2 weeks prior to arrival to make any changes or cancel your trip if necessary.** **Would you like to reserve this right now?**
CLOSING	**Your Itinerary is finalized. I want to review everything with you to make sure it is accurate. (Review Itinerary)** **I will send you a confirmation email with your full Itinerary. That should arrive within an hour. You will also see an email directly from me so we can get back in contact if you have any questions later on. Is there anything else I can help you with? Thank you (Guest's name) for calling Pebble Beach Resorts. We look forward to welcoming you soon!**

Negotiated Rates / Guidelines

Resort Sales Agents should stick to our guidelines and, when presented with objections, strive to find solutions within guidelines for our guests.

Once we are within 45 days of arrival, we can begin to loosen our rules in order to capture last minute business that, otherwise, might result in excessive availability.

Always quote our standard rates and guidelines before offering a negotiation.

Possible Exceptions within 45 Days of Arrival

- 1 OR 2 NIGHT STAY TO BOOK PEBBLE BEACH GOLF LINKS
  - ◊ Offer to take 1 night off of minimum night stay requirement

    [2 nights for H code instead of 3 nights | 1 night for G code instead of 2 nights]

  - ◊ Best to offer on dates in which we have a good amount of either room or golf availability—this can help balance our inventory and sell less popular dates

- 1 OR 2 LEVEL ROOM UPGRADE

  Ensure that we have the upgraded room category available in SMS—do not oversell

Document A Rate or Guideline Exception in SMS:

D Note:

"Okay per GN. PB golf with 2 night stay during 3 night minimum to close sale. "

"Okay per GN. One level complimentary upgrade for guest arriving within 45 days."

Secretary Field:

- U09RES—Res Negotiation, Upgrade

Input a Room Upgrade:

1. Check availability for the upgraded category you are offering
2. Pull in the room category at the level that the guest will be paying
3. Edit the room code in the Reservation Tile to the upgraded room category and, when prompted, select "Upgrade."

De-Escalation Technique

Listen Actively, Empathize, and Validate
Allow the guest to express their concerns without interruption.
Let the guest know you understand their frustration and that their feelings are valid.
Use empathetic phrases so they understand that you both want to resolve their situation
"I can understand how that would be frustrating."
"I know nobody wants to have to cancel their vacation to Pebble Beach."

Ask Open-Ended Questions:
Encourage the guest to share more details about their concerns.
"To make sure I fully understand your situation, can you please tell me more about…"
"Can you please rephrase what you mean by…"

Remain Calm and Professional:
Maintain a calm and composed demeanor throughout the conversation.
Use a polite and respectful tone.
Avoid emotional reactions such as raising your voice or getting defensive.

Calmly and Definitively Explain Our Guidelines - DO NOT START HERE
Use short, clear phrasing that makes it clear to the guest that you fully understand the rule.
"Because your dates of stay are within 14 days, I can cancel your reservation, but you will forfeit your two night deposit."
Stop talking immediately after stating the rule—let the guest react.

Offer Solutions within Guidelines
Guests will assume an exception is the only solution, but we can work with guests to try to logistically sort out their issues within guidelines.
"What some guests have done in your situation is they have gotten a friend to come in their place. We can always transfer your reservation to the name of a friend or family member."

Set Expectations Appropriately:
After stating the guidelines, make sure you let the guest be the one to ask for an exception.
Never state that you will be talking to or getting approval from a supervisor/manager.
Instead, say, "Now that I understand your situation, would you mind if I place you on a brief hold while I research what we can do for you."
If a supervisor approves an exception—take credit for it.
"As I explained earlier, it is our policy for guests in your situation to forfeit their deposits. I was able to get an exception for you. Instead of forfeiting your deposit, we can keep your funds on file and allow you to reschedule your trip within the next 12 months."

Escalated/Offensive Language:
Politely set boundaries with your guest by stating that you will not continue to work with them if they use offensive language.
"I am happy to work with you to help you resolve your situation, but respectful conversation is necessary for an effective resolution. If you continue to use offensive language, I will need to transfer you to my Supervisor who can assist further."
Remember that, while it's essential to handle difficult guests professionally, reservations agents should never tolerate disrespectful behavior. If a guest's language becomes too offensive or the situation becomes unmanageable, report the incident to higher management for further action. The safety and well-being of reservations agents is a top priority.

Identify A Room Share

Shares

- A room is split into shares when two or more adults will be sharing one room and will be splitting charges.
- Each Share will have its own Reservation Tile.
- Each Share will have it's own Guest Tile.

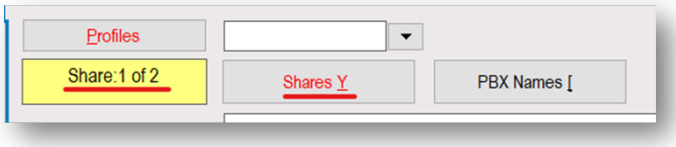
PBX

- PBX Names are secondary adult guests who are not on the Primary's Guest Tile.
- They will not be responsible for any charges during the trip.
- They are authorized to charge things to the room to be paid for by the Primary at checkout.

There are several indicators that let you know if a Room Reservation is part of a Share:

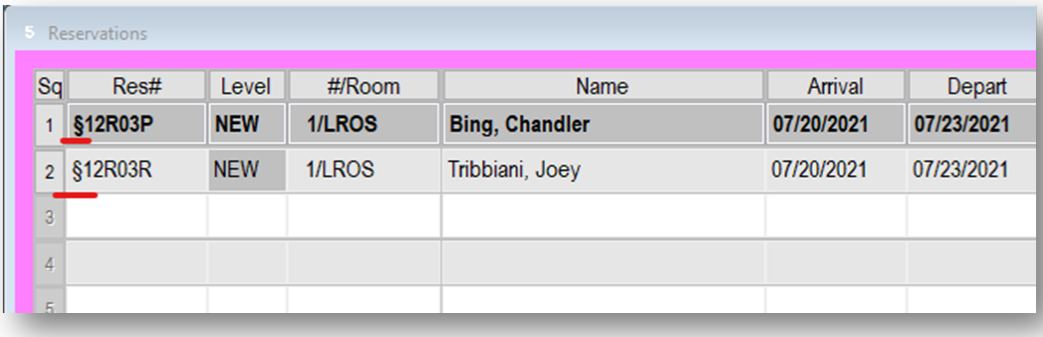
The Name section of the Reservation Tile

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.



Scan + Link within the Reservation Tile

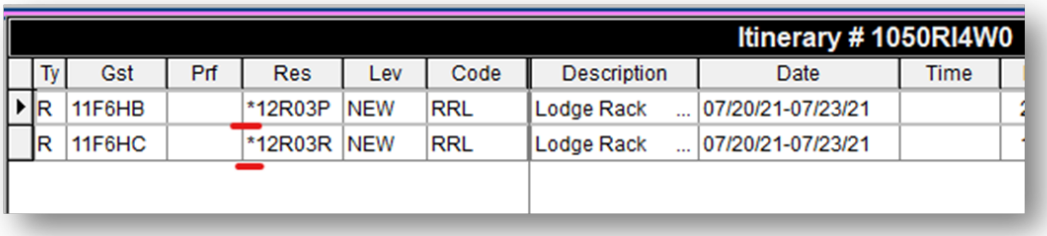
A symbol of overlapping S's symbol indicate that a Reservation Tile is a share.



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						

The Booking Center

An asterisk before each Reservation Number in the Itinerary Detail section indicates that Reservation Tiles are shares.

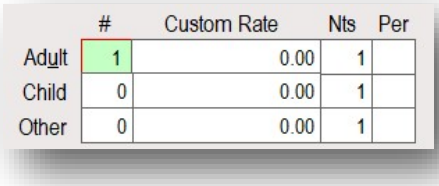


Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time
R	11F6HB		*12R03P	NEW	RRL	Lodge Rack ...	07/20/21-07/23/21	
R	11F6HC		*12R03R	NEW	RRL	Lodge Rack ...	07/20/21-07/23/21	

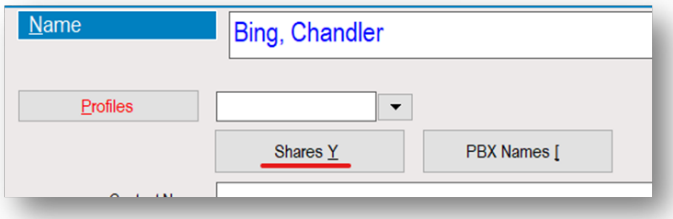
Split A Room Into Shares



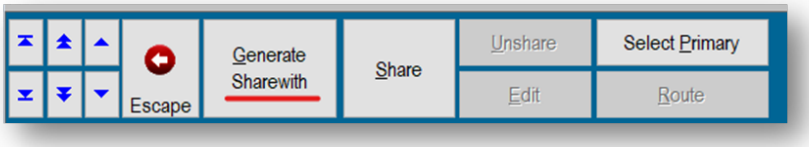
If your booking consists of multiple rooms, duplicate the rooms before sharing.



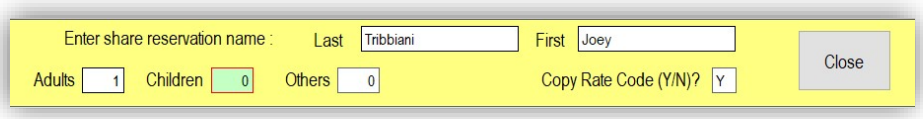
Open the **Reservation Tile** of the room you want to split and change the number of **Adults** in the bottom left corner to 1.



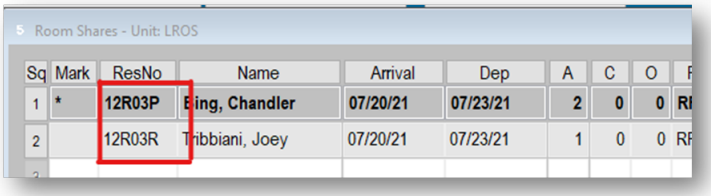
Click the **Shares Y** button on the Reservation Tile.



A new window will open. Click **Generate Sharewith**.



Enter the Last and First **name** of the guest
Tab to the next field
Change the **number of Adults** to **1**
Page Down to save



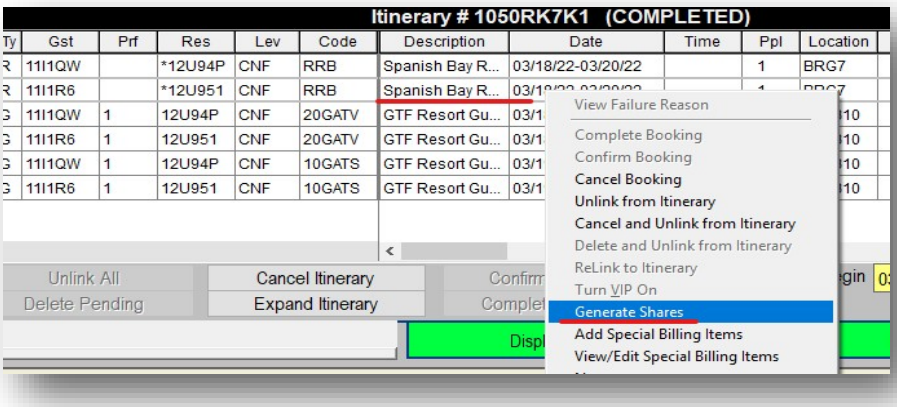
The **Room Shares** window will open again and you will see that there are now two different Reservation Numbers. Each of these shares represents half of the shared room.

You can now click **Whose** within each share to find/create Guest Tiles for both shares and attach them to each room.

Alternatively, this Room-Share process can be started directly from the **Booking Center.**

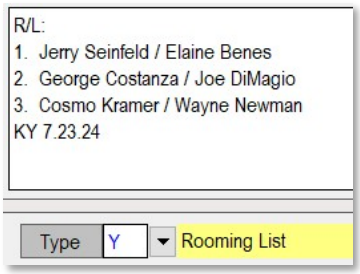
Right-click on the line of the you want to split into shares, then click **Generate Share.**

You follow the same steps as above to complete the sharing process.



Un-Share / Re-Share

The instructions below explain how to re-arrange room shares when a guest has decided to change the Rooming List after the rooms have already been split/shared.

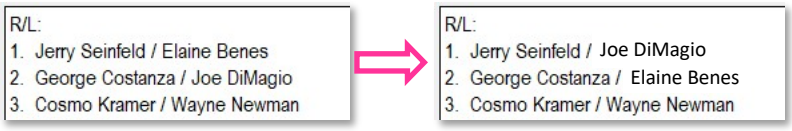




Sq	Res#	Level	#/Room	Name	Arrival	Depart
1	§13C4P4	CNF	1/BRO7	Benes, Elaine	08/01/2024	08/04/2024
2	§13C4P1	CNF	1/BRO7	Costanza, George	08/01/2024	08/04/2024
3	§13C4P6	CNF	1/BRO7	DiMagio, Joe	08/01/2024	08/04/2024
4	§13C4P2	CNF	1/BRO7	Kramer, Cosmo	08/01/2024	08/04/2024
5	§13C4P8	CNF	1/BRO7	Newman, Wayne	08/01/2024	08/04/2024
6	§13C4P0	CNF	1/BRO7	Seinfeld, Jerry	08/01/2024	08/04/2024

Guest (Jerry): *"My friends George and Joe had a big fight, so they don't want to share a room anymore. Can you put Joe with me, then put Elaine in George's room?"*

1. Update the Y note with the new rooming configuration



2. Take a screenshot of the updated Y note and the Scan + Link window
3. Un-block any pre-blocked rooms that will be involved in the re-arrangement
4. Unshare all rooms involved in the new room configuration
   a. Open the Reservation Tile of the first room you want to unshare
   b. Click "Y" to open the Shares window
   c. Click "U" for "Unshare"

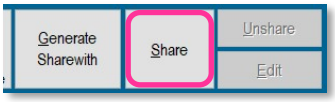


Note—The "Share" button will share the reservation tile with an existing room, while "Generate Shares" will split the current Reservation Tile into two parts.

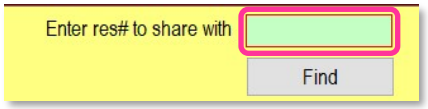
   d. The window will update to reflect "No Shares"



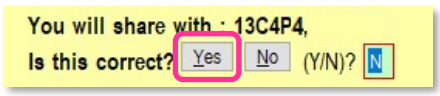
5. Reshare all the rooms involved in the new room configuration
   a. Open the Reservation Tile of the first room you want to reshare
   b. Click "Share"



   c. Type the R# of the guest you they will be sharing with



   d. Type "Y" to confirm the Share



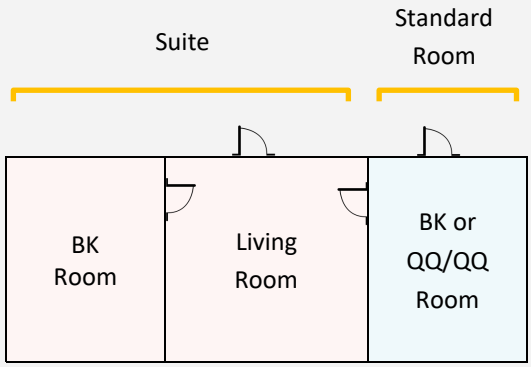
6. Re-block any rooms that require pre-blocking
7. Leave a REVINATE Note and a closed R Note

Two-Bedroom Suites

A **Two Bedroom Suite** is a suite with a standard room that connects either by an internal door or a common entry foyer.

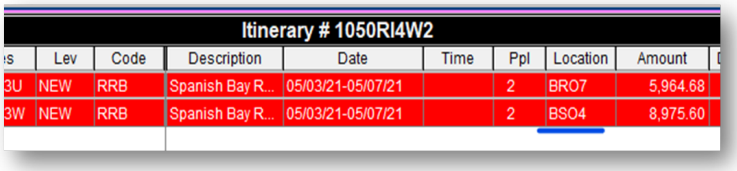
Bedding Arrangements:
Suites always have BK bedrooms
The connecting rooms *often* have QQ/QQ. This is not always true—verify bedding on the Room Features Spreadsheet in the Digital Binder

2-Bedroom Suite Rate:
Suite Nightly Rate + Standard Room Nightly Rate



ON THE PHONE

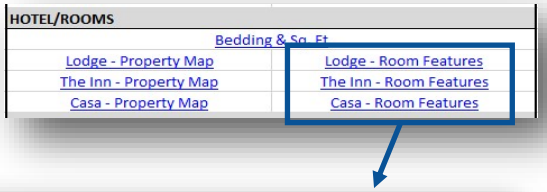
1. Pull the Suite and the Standard Room into your Booking Center separately.
2. Collect the deposit on the Primary's room
3. Ask the guest for their Billing Scenario and Rooming List

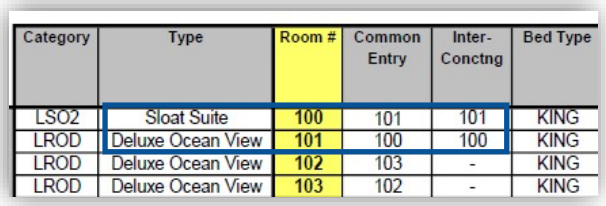

Itinerary # 1050RI4W2

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

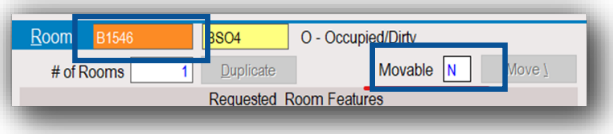
IN WRAP-UP

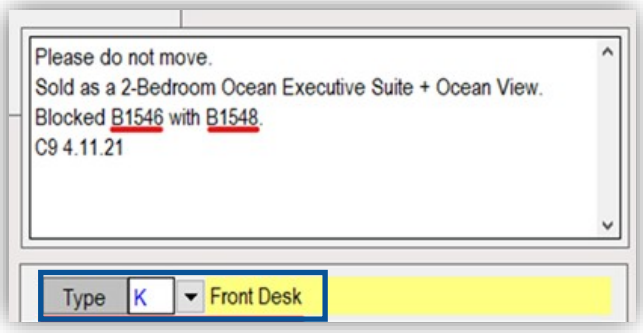
1. Mini-group your Suite and Room together using the R# of the suite
2. Access your Room Features spreadsheet from the Digital Binder to find the room numbers of your suite and room
3. Pre-block the Suite and the Room and mark both as non-moveable
4. Adjust the guarantee codes on both Reservation Tiles (A on Suite, J on Room)
5. Adjust Special Billing Deposit #1 on both Reservation Tiles (Full deposit amount on suite, $0 on room)
6. Input your FDB Trace with the Billing Scenario
7. Input your Y Note with the Rooming List
8. Add a K Note to both rooms





Category	Type	Room #	Common Entry	Inter-Conctng	Bed Type
LSO2	Sloat Suite	100	101	101	KING
LROD	Deluxe Ocean View	101	100	100	KING
LROD	Deluxe Ocean View	102	103	-	KING
LROD	Deluxe Ocean View	103	102	-	KING





Families with Small Children



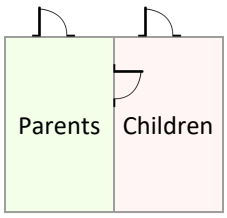
When families with multiple children visit, it is common for them to book two rooms: one room for the parents/guardians and one room for the kids.

We need to pre-block that room next to their parents/guardians. The two rooms need to be connected together either by an internal door (interconnecting) or a common foyer (common entry).

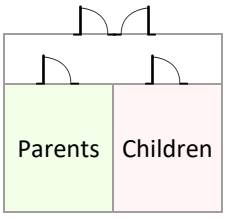
Use your Room Features charts *(in Digital Binder)* to see which rooms interconnect vs. common entry:

-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	

Interconnecting



Common Entry

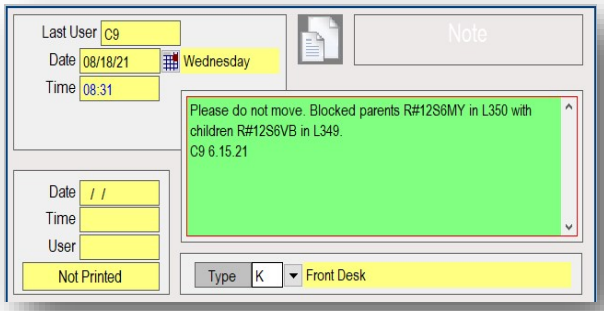


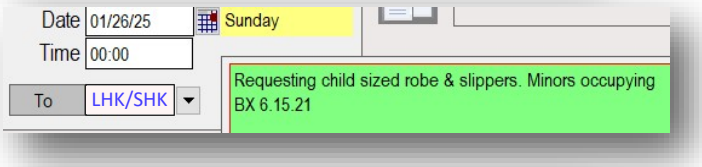
On the Call:

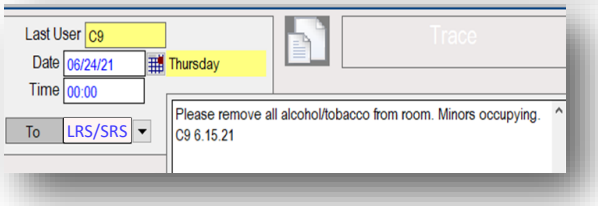
1. Ask for the names and ages of the children.
2. Ask if the children have any allergies we should be aware of *(If yes—you will ask Room Service via your Room Service Trace to remove any applicable honor bar items from the children's room)*
3. Charge the deposit on the Parents' reservation tile

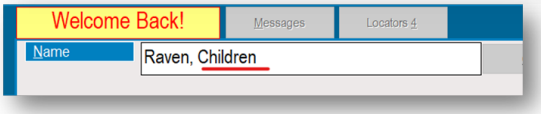
In Wrap Up:

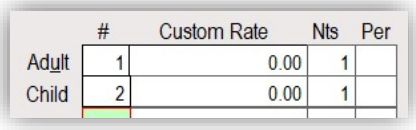
1. Update the Guest Tile/Profiles with all family members—including ages of children
2. Duplicate both rooms
3. Use the Room Features spreadsheet to find the room numbers of the rooms you want to connect
4. Preblock both rooms and mark both as non-moveable
5. Set the guarantee codes (Parents Room = A, Children = J)
6. Edit Deposit #1 in Special Billing (Parents = Full Deposit, Children = $0)
7. Leave a K Note on both rooms
8. Leave a Housekeeping Trace on the children's room
9. Leave a Room Service Trace on the children's room
10. Edit the name of the children's room to "[Last Name], Children"
11. Edit the number of adults in the children's room to 1
12. Edit the number of children on the children's room to the number of kids who will be occupying
13. If a minor will be golfing, document age in golf babynotes











Fairway One Cottages

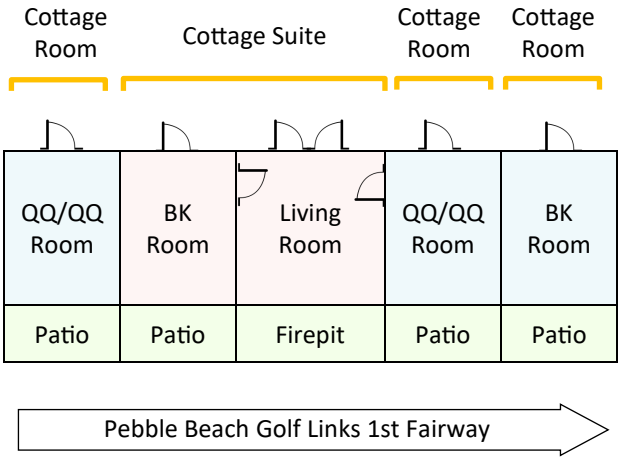
The Fairway One Cottages of The Lodge at Pebble Beach are the ultimate clubhouses for a group of golf enthusiasts.

Cottage Breakfast:
If the cottage suite is booked, guests will enjoy complimentary breakfast for the suite and any additional cottage rooms reserved. Breakfast will either be delivered to each room or set up in the main living room for all guests to enjoy as a group.

Eastwood Cottage Room Numbers:
504 | 503 (suite) | 501 | 500

Palmer Cottage Room Numbers:
514 | 513 (suite)| 511 | 510

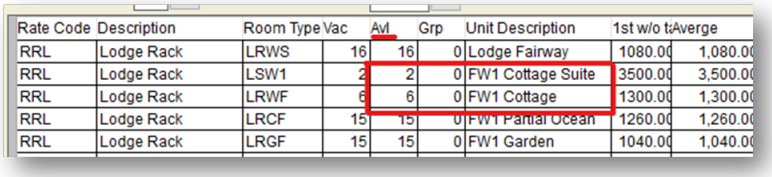
Link to Cottage on Pebblebeach.com



On the Phone

Pull into your Booking Center:

- One FW1 Cottage Suite
- Three FW1 Cottage rooms



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

- Collect the deposit for the 1st 2 nights
- Quote the 14 day cancellation policy
- Obtain the Rooming List
- Obtain the Billing Scenario

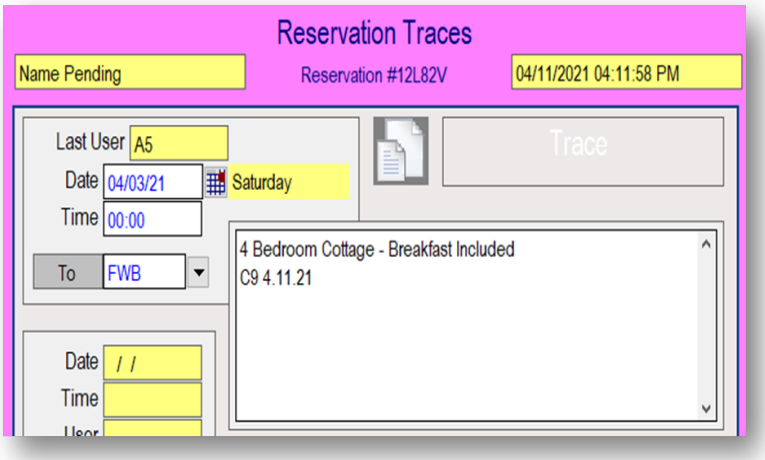
ON THE SUITE:

- Guarantee Code = A
- Deposit #1 = Entire 4 Bedroom Cottage Deposit
- Add the FDB Trace
- Add the Y Note
- Add the Mini-Group Code
- Pre--Block the suite
- Mark the suite as Non-Moveable
- Create a Breakfast Trace for each morning the guests will be in the cottage
  - ◊ Use the Copy To button to copy each of the morning traces to the additional Cottage Rooms

In Wrap Up

ON THE 3 COTTAGE ROOMS

- Guarantee Code = J
- Zero Out Special Billing
- Add the same Mini-Group Code as the Suite
- Duplicate out the 3 rooms
- Pre-block all rooms
- Mark all rooms as Non-Moveable

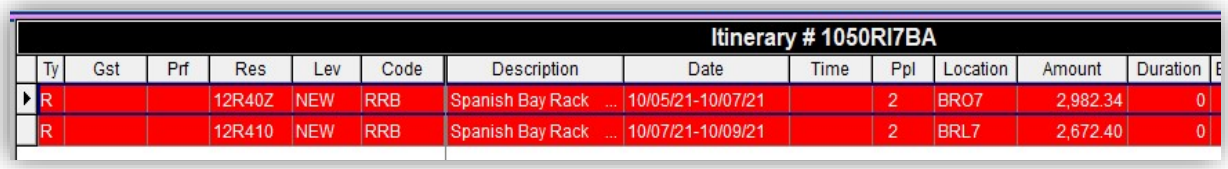


Room Moves

A **Room Move** is when a guest is staying for multiple nights, but will be changing from one room to another during their stay.

Example: A guest wants to stay in an Ocean View room from for 3 nights, but we only have that room category available for 2 nights. This guest may choose to stay in the Ocean View room for two nights, then move to a different room category for night #3.

1. ADD BOTH ROOMS TO YOUR BOOKING CENTER



Itinerary # 1050RI7BA

Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location	Amount	Duration
R			12R40Z	NEW	RRB	Spanish Bay Rack ...	10/05/21-10/07/21		2	BRO7	2,982.34	0
R			12R410	NEW	RRB	Spanish Bay Rack ...	10/07/21-10/09/21		2	BRL7	2,672.40	0

2. COLLECT THE DEPOSIT

- Calculate the deposit based of the room type(s) the guest will occupy for Night #1 and Night #2
- If both rooms are at the same property, collect the deposit on the room the guest will occupy first
- If the rooms are at different properties, collect the deposit on the room the guest will occupy last

3. CLEANUP THE RESERVATION TILE WITH THE DEPOSIT:

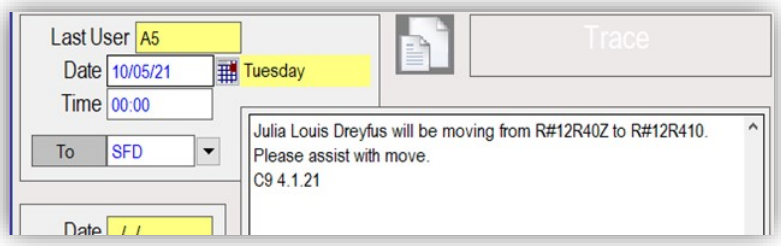
- Guarantee Code = A
- Special Billing = Deposit
- Add the mini-group code (Use the R# from room they will occupy first)

4. CLEANUP THE RESERVATION TILE WITHOUT THE DEPOSIT:

- Guarantee Code = J
- Special Billing = $0
- Add the mini-group code (Use the R# from room they will occupy first)

5. LEAVE A FRONT DESK TRACE ON BOTH RESERVATION TILES SET FOR THE DATE OF THEIR MOVE

- If the guest is moving properties, you will need to adjust the trace code so each trace is directed to the correct property for that room type



Multiple Deposits Scripting

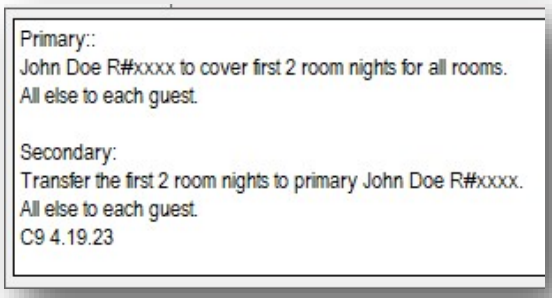
1.) Explain Standard Procedure:

Agent: "The way we typically handle billing for a large group is that the person who books the trip temporarily covers the deposit for everyone. Then, at checkout, we separate all charges between guests."

2.) Explain that the guest can collect privately:

Guest: "What if I don't want to wait until checkout to get refunded?"

Agent: "If you would like to get reimbursed sooner, many guests choose to pay the full deposit at time of booking, then collect individual deposits privately from their group.
We can notate this on your booking so charges are still split appropriately at checkout."



3.) Explain that the guest can pay the full deposit, then we collect individual deposits to process the refund immediately:

Guest: "Can my friends call in and pay you instead?"

Agent: "If you can cover the deposit for everyone today, your friends can call in to pay their individual deposits. We can then refund your credit card as each of your guests pays."

4.) As a last resort, and with supervisor approval, explain the Hold process:

Guest: "Can I just pay *my* room deposit and have everyone else pay separately?"

Agent: "If you can guarantee that your friends can all call in to place their deposits by the end of today, I can hold all of the rooms and golf with just your room deposit.
If they do not call in on time, would you like me to charge your card for the remaining deposits or cancel their rooms and golf?"

Holds longer than end of day require Supervisor Approval

Multiple Deposits | Primary Will Be Refunded

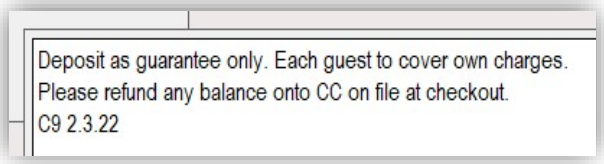
On the Call

1. Charge the deposit for all rooms/shares to the Primary's Reservation Tile
2. Obtain the names of all guests who will pay individual deposits
3. Provide the Itinerary number to the Primary and instruct them to give this to all Secondaries

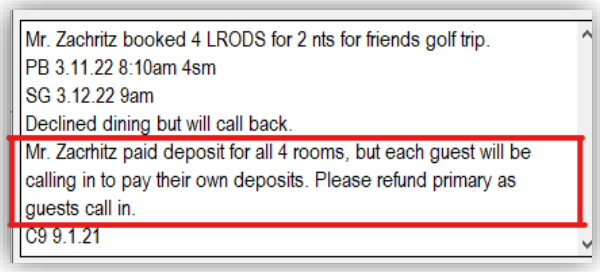
Wrap Up

1. Split out all Rooms/Shares
2. Rename each Room/Share
3. Secondary Reservation Tile(s)
    - Guarantee Code = J—Other
    - Deposit Line #1 = $0.00
4. Primary Reservation Tile
    - Guarantee Code = A
    - Deposit Line #1 = Deposit for all rooms/shares
    - Set an FDB Trace
    - Leave an R Note with clear next steps
5. Confirm the booking and send an IEMAIL
6. Create a Booked lead form
7. Paste your R Note into the lead and save
8. Set your Call Disposition to Booked

Example FDB:



Example R Note:



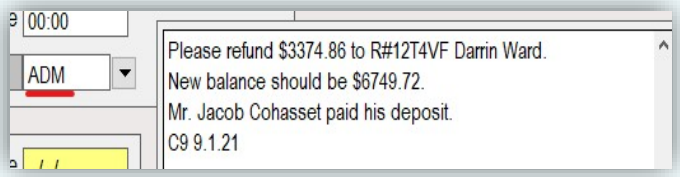
As Each Guest Calls In to Pay

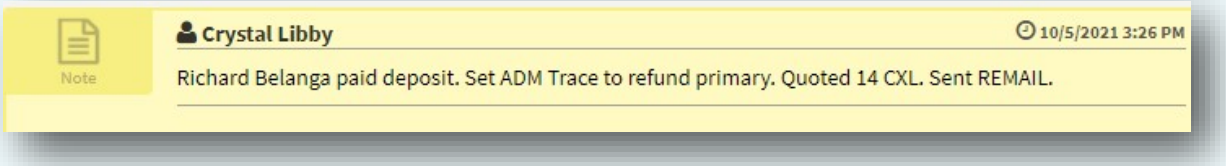
1. Read the R Note and FDB Trace
2. Quote the required deposit amount and cancellation policy
3. Whose a Guest Tile (new or existing) to the Secondary's Reservation Tile
4. Collect a credit card
5. Charge the deposit

Wrap Up

1. Secondary Reservation Tile
    - Guarantee Code = A
    - Deposit #1 = Deposit paid by Secondary
    - Send the Secondary Guest an REMAIL
2. Primary Reservation Tile
    - Set an ADM Trace for the Primary's Refund
        - If you see an existing open ADM Trace, edit the existing trace
        - If you see an closed ADM Trace that is closed, create a new one set for tomorrow's date
    - Deposit #1 = The deposit for all remaining rooms the primary is covering
3. Leave a detailed note on the REVINATE Lead:

Example ADM Trace:





Multiple Deposits | Secondary Rooms On Hold

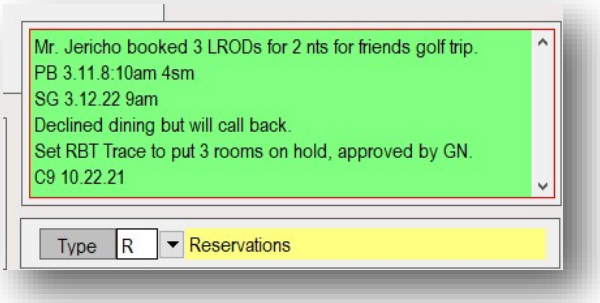
Supervisor Approval is required to place rooms on hold

On the Call

1. Obtain permission for the hold from a supervisor
2. Charge the primary's deposit on their reservation tile
3. Give the primary a definitive due date/time for the funds
    a. Ask if they want us to charge their CC for any guests who do not call in time, or if they want us to cancel the reservations and reduce golf appropriately
4. Document the names of each secondary guest
5. Provide the primary with the Itinerary and tell them to give this number to the secondaries

Wrap Up

1. Split out all rooms and shares
2. Rename each Room/Share
3. Primary Reservation Tile:
    - Guarantee Code = A
    - Deposit Line #1 = Primary's 2 night deposit
    - Leave an R Note
    - Confirm the booking
4. Secondary Reservation Tile(s):
    - Guarantee Code = F
    - Deposit #2 Date = Due Date of Hold
    - Deposit #2 Amount = Dollar amount due
    - Create RBT Trace
    - Do not confirm these bookings
5. REVINATE
    - Create a Booked Lead Form
    - Leave a detailed note with next steps
    - Set a REVINATE reminder for 2-3 hours before the due date to follow up with the Primary if funds are not received
    - Set your call disposition to Booked



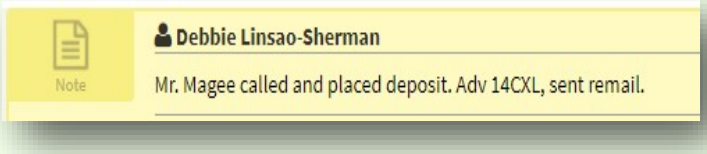
For further detail, see "Set Up An Exception Hold" SOP

As Each Guest Pays:

- Review the RBT Trace for hold details—quote the required deposit and cancellation policy
- Whose a Guest Tile (new or existing) to the secondary's room
- Collect the deposit

Wrap Up

- Close the RBT Trace
- Move the deposit amount from Deposit Line #2 to Deposit Line #1 and set to today's date
- Change the Guarantee Code to A
- Confirm the Secondary's room
- Update the Audit LIne
- Send the Secondary Guest an REMAIL
- Leave a note on the REVINATE Lead

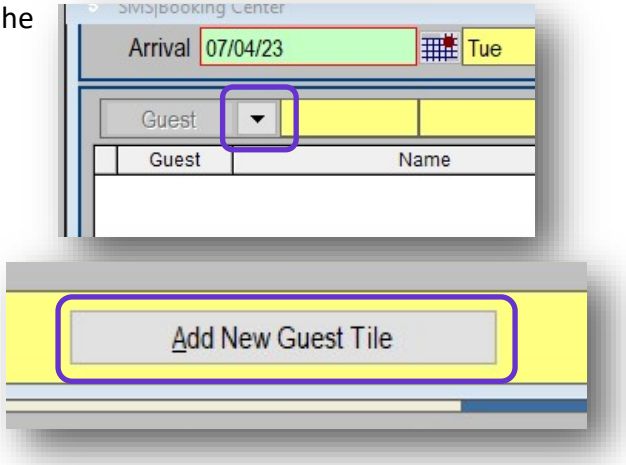


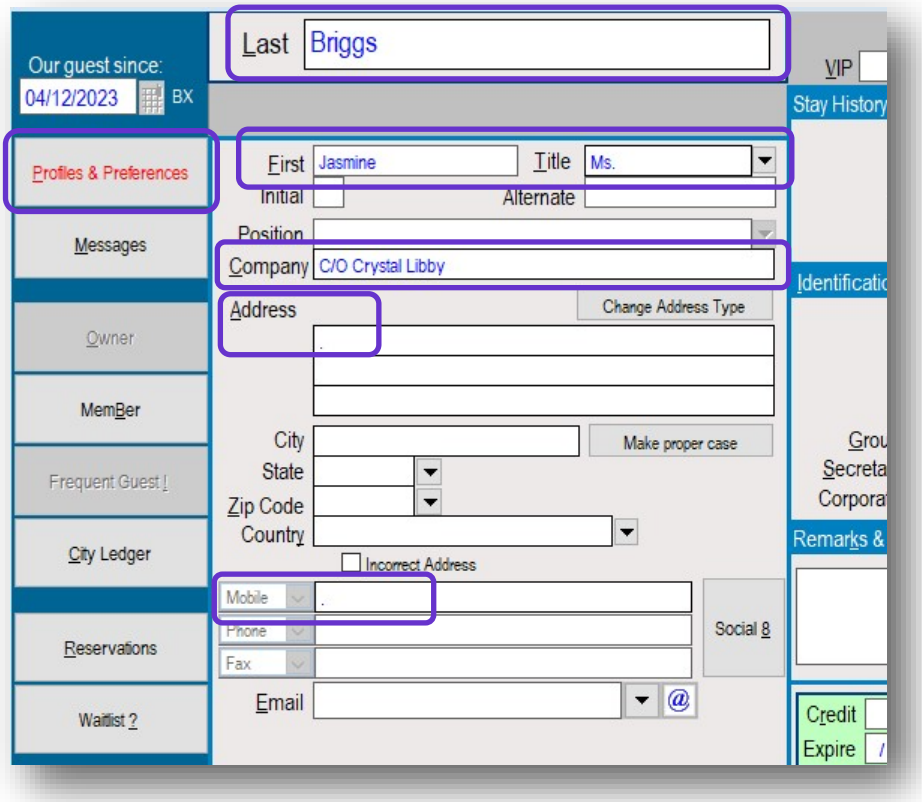
C/O Guest Tiles (1/2)

A **C/O Guest Tile** is a shell of a Guest Tile. We create these for guests who have financial responsibility, but will not directly speak to the Reservation Department during the booking process. We utilize C/O Guest Tiles for **3rd Party Reservations** and when **Preparing Arrivals**.

C/O GUEST TILE—3RD PARTY:

1. Book Room and Golf
2. Click **drop down arrow** in the Guest Tile section of the Booking Center to initiate Guest Tile search
3. Click **Add New Guest Tile**
4. Fill out the Guest Tile with:
    - Last Name: **Attending Guest's Last name**
    - First Name: **Attending Guest's First name**
    - Company Field: **"C/O" the Payer's name**
    - Address Field: **A dot**
    - Phone Number Field: **A dot**

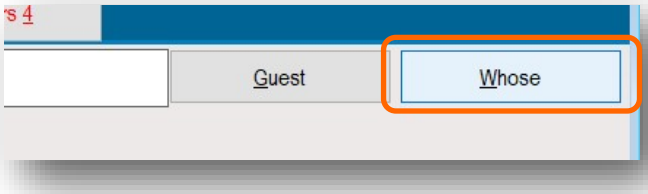


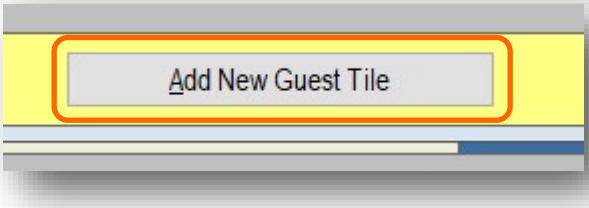


5. Continue with the rest of the booking per **3rd party SOP**

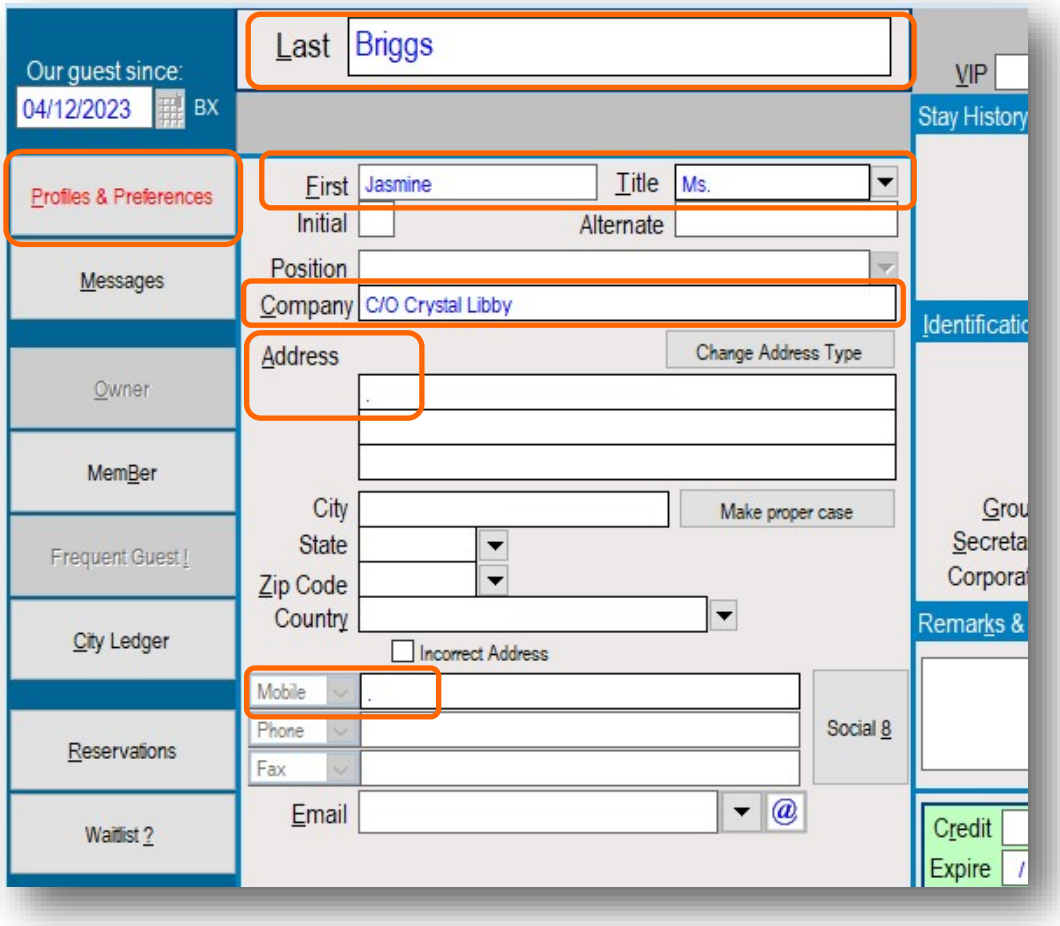
C/O Guest Tiles (2/2)

C/O GUEST TILE—PREPARING ARRIVALS





1. Enter the Reservation Tile and click **Whose**
2. Click **Add New Guest Tile**
3. Fill out the Guest Tile with:
    - Last Name: **Attending Guest's Last name**
    - First Name: **Attending Guest's First name**
    - Company Field: **"C/O" the Payer's name**
    - Address Field: **A dot**
    - Phone Number Field: **A dot**



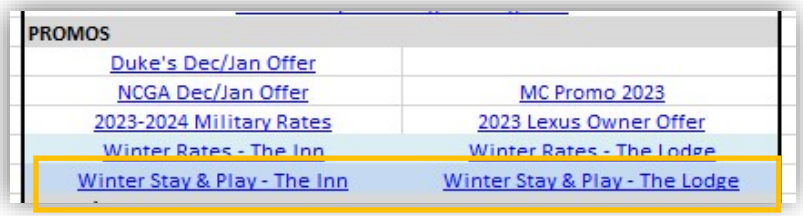
4. Continue with preparing the arrival per the **arrival checklist**

Stay & Play Packages (1/2)

PACKAGE BASICS

- A Stay & Play Package is a reservation that bundles room and golf together
- Instead of quoting room and golf *a la cart*, we quote the total "package price"
- We book 1 Package per room:
  - ◊ Single Golfer Package (1 golfer per room)
  - ◊ Double Golfer Package (2 golfers sharing a room)
- Instead of a 2 Night Deposit, guests pay the full base package price at time of booking

WHERE DO I SEE PACKAGE GUIDELINES?



WHAT INFORMATION DO I NEED FROM THE GUEST?

- Do they want to stay at The Inn At Spanish Bay or The Lodge At Pebble Beach?
- Are they a First Time Guest or a Past Guest?

  For various reasons, not all past guests will have an existing Guest Tile. In these cases, leave an R Note stating that you verified in conversation that the guest has stayed with us before.
- How many nights do they want to stay?
- What room category do they want to book?
- Do they want a Single Golfer Package or a Double Golfer Package?

HOW DO I EXPLAIN THE STAY & PLAY PACKAGE?

First Time Guest

Our Winter Stay & Play Package bundles room and golf together into one special rate. With this package, you would receive a 3 Night Stay at either The Lodge at Pebble Beach or The Inn at Spanish Bay.

- You can choose to have either 1 golfer in each room or 2 golfers sharing 1 room.
- You can add a 4th Night at 25% off our standard rate.
- You can add 5th Night at 50% off our standard rate.

Past Guest

Our Winter Stay & Play Package bundles room and golf together into one special rate. With this package, you would receive a 3 Night Stay at either The Lodge at Pebble Beach or The Inn at Spanish Bay. As a returning guest, we will also give you a $200 Resort Credit per package.

- You can choose to have either 1 golfer in each room or 2 golfers sharing 1 room.
- You can add a 4th Night at 25% off our standard rate which would make your 5th night complimentary.

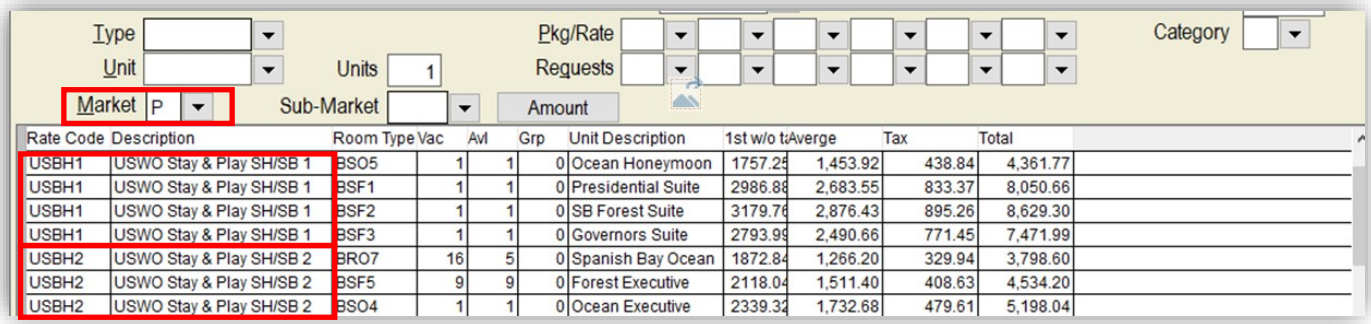
Stay & Play Packages (2/2)

KEY DIFFERENCES WHEN BOOKING A PACKAGE

- Only quote pricing off of the Package Sheet in the Digital Binder
- Collect the entire Package Price at the time of booking

HOW TO SEARCH FOR PACKAGE ROOM AVAILABILITY

- Set your dates in the Master Calendar
- Add "**P**" to the **Market** field—This will narrow down your rate options to Packages
- Click "Get next 25 Rates"



Rate Code	Description	Room Type	Vac	Avl	Grp	Unit Description	1st w/o t	Averge	Tax	Total
USBH1	USWO Stay & Play SH/SB 1	BSO5	1	1	0	Ocean Honeymoon	1757.25	1,453.92	438.84	4,361.77
USBH1	USWO Stay & Play SH/SB 1	BSF1	1	1	0	Presidential Suite	2986.88	2,683.55	833.37	8,050.66
USBH1	USWO Stay & Play SH/SB 1	BSF2	1	1	0	SB Forest Suite	3179.76	2,876.43	895.26	8,629.30
USBH1	USWO Stay & Play SH/SB 1	BSF3	1	1	0	Governors Suite	2793.99	2,490.66	771.45	7,471.99
USBH2	USWO Stay & Play SH/SB 2	BRO7	16	5	0	Spanish Bay Ocean	1872.84	1,266.20	329.94	3,798.60
USBH2	USWO Stay & Play SH/SB 2	BSF5	9	9	0	Forest Executive	2118.04	1,511.40	408.63	4,534.20
USBH2	USWO Stay & Play SH/SB 2	BSO4	1	1	0	Ocean Executive	2339.32	1,732.68	479.61	5,198.04

HOW TO SEARCH FOR PACKAGE GOLF AVAILABILITY

- **All Day Part Codes** are eligible for the Package
- Choose the Rate Description that includes the words "**Stay & Play**"

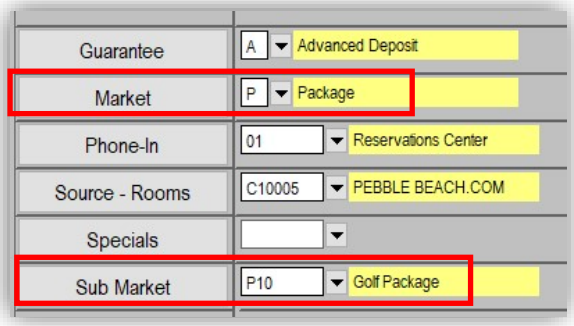
Do not quote the greens fees because the golf rate is already accounted for in the Package Price

Course	Date	Time	DPt	HL	Open	Specific Group Bloc
20SB10	07/03/23	06:20	P	01	4	
20SB10	07/03/23	12:30	G	01	4	
20SB10	07/03/23	12:40	G	01	4	
20SB10	07/03/23	12:50	G	01	4	

Rate Description	Per Player	Total
GTF $100 Special Individ	100.00	200.00
GTF $95 Rate	95.00	190.00
GTF USWO Stay & Play	335.00	670.00
GTF USWO	190.00	380.00

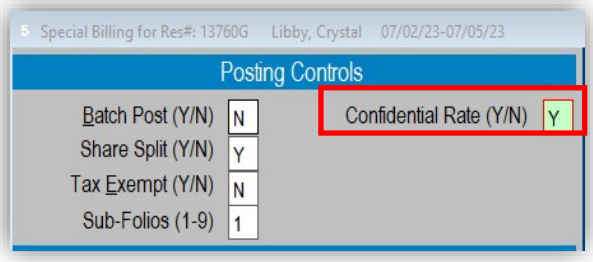
PACKAGE BOOKING SETTINGS

- Instead of "Rack" or "R", select "**Package**" or "**P**"
- Instead of "Rack" or "R10," select "**Golf Package**" or "**P10**"



MARK AS CONFIDENTIAL

- Enter Special Billing
- Ensure that the **Confidential Rate** field is "**Y**" (SMS defaults to Y when a Package is booked)
- **Deposit #1** = the required package deposit



LEAVE A K NOTE

- If guest books more than the package and declines to prepay the additional nights and/or recreation.
- That you advised the guest that the 4th (& 5th) night and any additional recreation outside of the package will be due upon checkout.

Complete the remainder of your booking according to the Booking Checklist

Convert from Rack to Package

CRITERIA

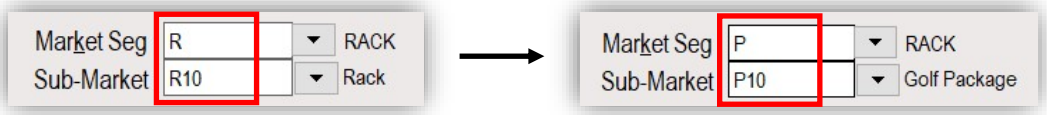
- As long as the guest is more than 14 days prior to arrival, we can convert rack to package
- The guest will need to pay additional funds because a package requires full prepayment
- The booking must match the structure of the package offer

ON THE CALL

1. Quote the full package rate using the Package sheet in the Digital Binder
2. Charge the difference between the package rate and the guest's original deposit
3. Quote the CXL and close the call per normal procedures

WRAP UP

1. Use the dropdowns to edit the Market and Sub-Market from Rack to Package / Golf Package

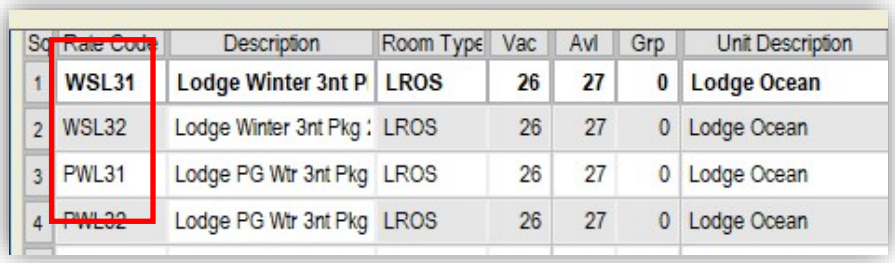


2. Page Down to Save

3. Select Today

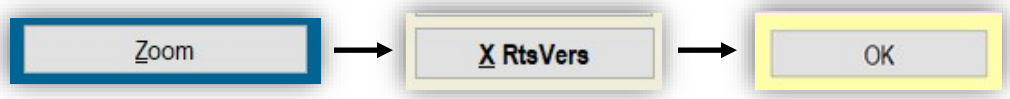


4. Select the appropriate Package Rate Code from the Rate Calculator



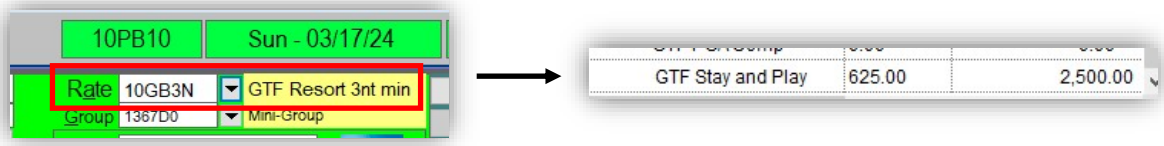
	Rate Code	Description	Room Type	Vac	Avl	Grp	Unit Description
1	WSL31	Lodge Winter 3nt P	LROS	26	27	0	Lodge Ocean
2	WSL32	Lodge Winter 3nt Pkg :	LROS	26	27	0	Lodge Ocean
3	PWL31	Lodge PG Wtr 3nt Pkg	LROS	26	27	0	Lodge Ocean
4	PWL32	Lodge PG Wtr 3nt Pkg	LROS	26	27	0	Lodge Ocean

5. Update the Rate Version with the Hot Keys Z + X, then Page Down to Save



6. Mark the rates Confidential in Special Billing

7. Change the rates of all Package Golf to the "Stay & Play" rate code



8. Complete wrap up per your standard change/revise checklist

Multiple Packages

What do we mean by "Multiple Packages"?

Example #1: 2 Golfers staying in 2 separate rooms will book 2 Single Golfer Packages

Example #2 : 4 Golfers staying in 2 separate rooms will book 2 Double Golfer Packages

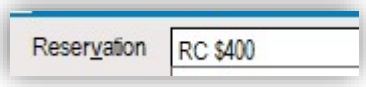
What must we consider when booking multiple packages?

RESORT CREDIT

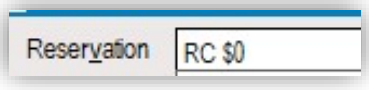
If a guest books multiple packages that come with resort credit, we must determine who will receive the credit

- **Primary pays deposit as guarantee only:**
  The resort credit must be applied to each package individually
- **Primary is covering all charges for all packages:**
  The primary can choose to have the resort credit for all packages applied to their room only. Notate this on the Reservations Line of each room.

Primary:



Secondary:



PAST GUEST BENEFITS

If the Primary is a past guest, we can apply the Past Guest rates and benefits to all packages on the booking, regardless of billing scenario

Back to Back Packages

In instances where guests book extended stays, they can choose to book **Back to Back Packages.**

Example: A guest is staying for 8 nights

Night 1	Night 2	Night 3	Night 4	Night 5	Night 6	Night 7	Night 8
Base 3 Night Package			Package 4th &5th Nights		2nd Base 3 Night Package		

2nd Package must be Special Billed by a Supervisor

How Do I Book A Back to Back Package?

1. Book 1 package per room for the entire duration of the extended stay
2. Collect the required deposit for both packages
3. Off the phone, contact a supervisor to Special Bill the second package

C9 4.27.23

Charity Gift Certificates

DO NOT DISCLOSE RATES

Charity Gift Certificates are purchased at auctions held by charity organizations. The winner of the auction will call into the Reservations Center to book their trip.

It is the job of the Reservations Agent to book the stay using rack rates, then pass the booking information to the Charity Team for "clean up."

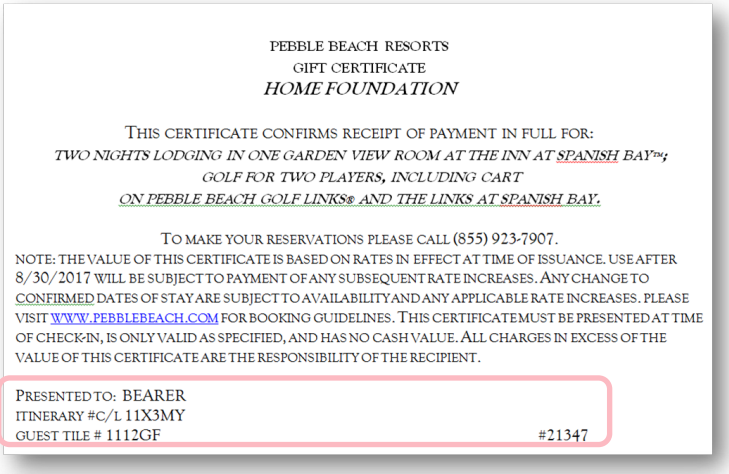
1. Ask the guest for all numbers listed on their gift certificate

- City Ledger #
- Guest Tile #
- Certificate #

2. Locate the matching City Ledger in SMS

3. Open the K Note

- This will tell you what the winner is entitled to receive

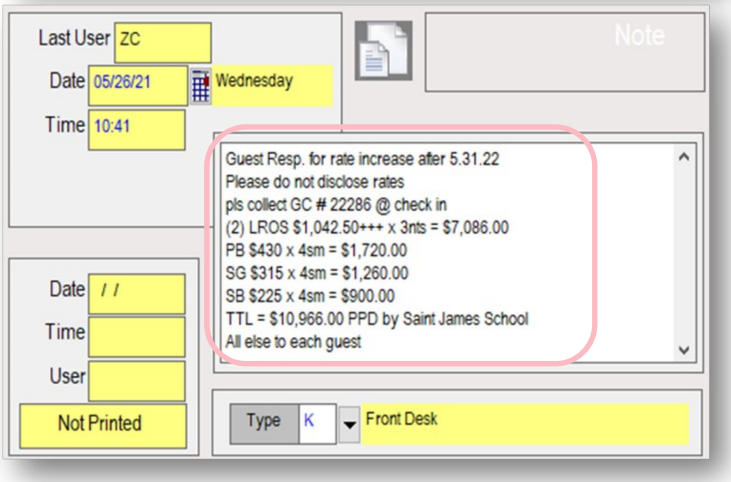


PEBBLE BEACH RESORTS
GIFT CERTIFICATE
HOME FOUNDATION

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



The guest can book exactly what the Gift Certificate is for—or, they can choose to upgrade their room and golf

4. Create an Itinerary for the guest

- Reserve whatever room and golf the guest wants
- Book using rack rates
- Collect a credit card
- Do not charge a deposit
- Do not send a confirmation email
- Quote the 14 day CXL Policy

If the guest decided to upgrade room or golf:

- Inform the guest that the Charity Team will reach out to them to collect all upgrade charges
- Do not quote upgrade prices

5. Create a Booked REVINATE Lead Form

6. Email the Charity Desk the Itinerary Number and Guest Name

Charity Certificate Rules:

- All charity funds must be used within one stay
- All surcharges and upgrade fees are due at the time the booking is confirmed by the Charity Team
- Additional golf or rooms will be booked at rack rate with applicable deposits due at time of booking
- The Gift Certificates do not expire, but a surcharge will incur if redeemed more than 1 year from the date the certificate was won
- If a guest has more than one charity certificate, use the newest one. Include the numbers of the other certificates in your email to Charity Desk so they can merge them.

Donation Gift Certificates

While a Charity Certificate is purchased by charities at a discounted rate from the Charity Desk and typically auctioned at a charity event, a Donation Gift Certificate is donated to a local charity by The Pebble Beach Company without collecting funds.

- Donation Certificates are approved/issued by Community Affairs
- Most Donation Gift Certificates will be for golf or dining, but may include rooms
- All Donation Gift Certificates will state City Ledger #10149K
- Donation Certificates will not state a specific Room Category that can be redeemed

It is the job of the Reservations Agent to book the stay using rack rates, then pass the booking information to the Charity Team for "clean up" by emailing booking details to charitydesk@pebblebeach.com.

1. Have the guest read out the certificate to you:
    - Ask the guest to read to you what the Gift Certificate covers—This will later be confirmed by the Charity Desk
    - Notate the Gift Certificate #

2. Book the guest according to the Donation Certificate:
    - There will be no "Bearer" Guest Tile—Create or locate an existing Guest Tile
    - If the certificate includes a room, book the lowest view category available at the certificate's designated property (Lodge Garden View, Inn Garden View, Casa Estate Room)
    - The guest can choose to upgrade their room and golf
        - Do not quote surcharges/rate increases—The charity desk will quote all pricing and collect the funds

3. Create an Itinerary for the guest:
    - Book using rack rates codes
    - Collect a credit card for both room and golf reservations
    - Do not charge a deposit
    - Do not send a confirmation email
    - Quote standard cancellation policy *(There is no financial penalty for donation certificates, but we want to encourage them to let us know of changes in advance.)*

4. If the guest decided to upgrade room or golf:
    - Inform the guest that the Charity Team will reach out to collect all upgrade charges
    - The Charity Desk will confirm that the booking meets the Donation Certificate guidelines

5. Create a Booked REVINATE Lead Form

6. Email the booking details to the Charity Desk
    - Include the guest's full name, Itinerary number, and Gift Certificate number
    - Explicitly state if the guest upgraded their room or golf

Club Pro Program

Note—The Club Pro Program should only be discussed if the guest inquires. Do not advertise.

HOW TO HANDLE A CLUB PRO INQUIRY:

1. Review the stipulations below to determine if the pro is eligible for this program
2. Take down the pro's name, phone number, and email address, and basic details of their desired trip
3. Let the guest know that they will be contacted shortly by an agent who can assist them with their stay
4. Send an email to the Group Sales Business Development Coordinator who will delegate the lead to the appropriate PBP agent

Latest Revision of Program: 12/21/2022

Overview:

Club Pro Program was established in March 2003 as a solution to PGA Professionals who were expecting to play PBGL complimentary as part of their PGA benefits. The Program has been updated over time with the latest version outlined below.

Club Pro Program will be receptive vs. prospecting and **be handled by PBP Managers.**

Club Pro Program:

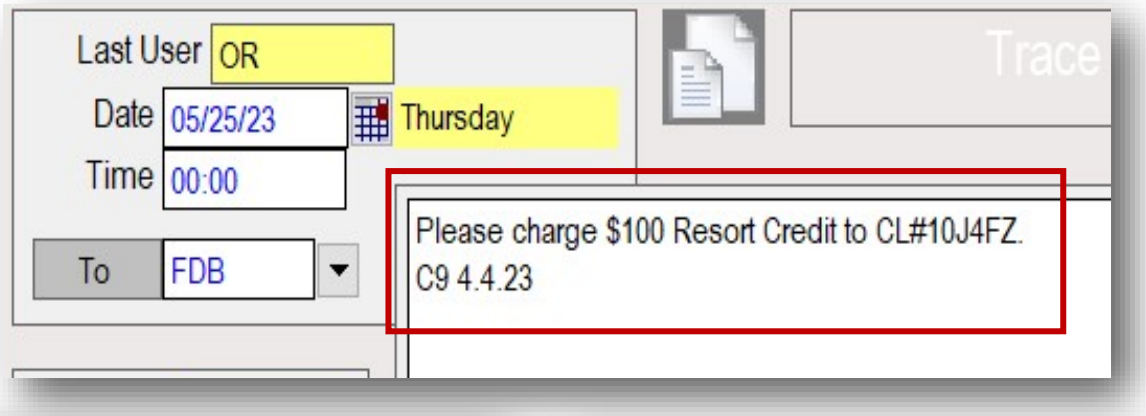
* Club Professionals who bring **7-15** additional golfers receive complimentary golf when playing with their guests
* Club Professionals who bring **16 or more** additional golfers will receive both their guest room and golf complimentary when staying and playing with their guests

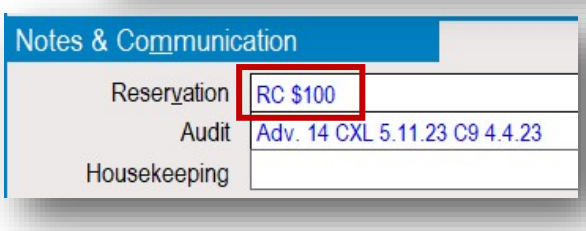
- All rooms and golf must be booked at published rack rate at time of travel
- Black-out dates occur annually from post August aeration to mid-November
- Room rates must be net, non-commissionable
- Guest rooms can be single or double occupancy only
- Negotiated Tour Operator rates do not apply to this program
- Length of stay must abide by rules set by Director of Revenue at time of booking
- All non-conforming groups will be a PBP Golf outing without Club Pro privileges

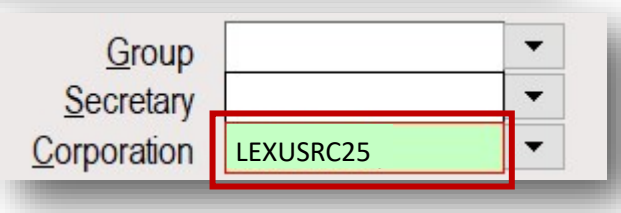
2025 Lexus Owner Offer

Pebble Beach Resorts along with our Brand Partner, **Lexus**, is offering a promotion to **Lexus Owners** or **Lessees**. These guests will receive a $100 Resort Credit when they book a two-night rack rate stay.

OFFER DATES	January 1st, 2025—December 31st, 2025
REQUIREMENTS	Minimum 2 Night Stay at Rack Rate
GUIDELINES	• Cannot be combined with any other promotion or offer • Offer may be applied to rooms at any property • Standard room and golf guidelines apply • The offer may be applied to existing reservations • The Front Desk is also able to honor the credit onsite if the guest qualifies • The Resort Credit may be used for any charges excluding room charges and greens fees • If booking multiple rooms, the Resort Credit will only be applied to rooms being occupied by a Lexus owner/lessee
HOW TO BOOK	• Create an **FDB Trace** advising the Resort Credit to be billed to the Lexus City Ledger CL#10J4FZ • Notate the Resort Credit on the **Reservation Line** of the Reservation Tile belonging to the Lexus owner/lessee. • Type **LEXUSRC25** in the corporation field.



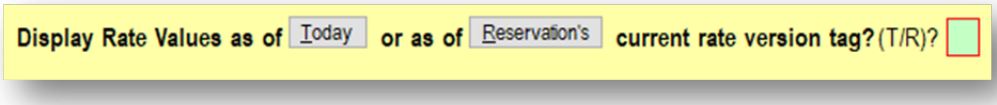




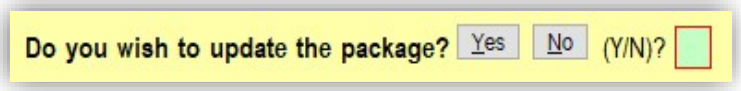
Rate Versions | Today or Reservation

Due to Pebble Beach Resorts' Dynamic Pricing and Fiscal Year Rate Updates, any date change made to an existing booking is subject to potential rate increases.

Each time you make a date or room category change to a room reservation, you will be prompted with the following question:



If you have SMS Access above the Agent level, you will be prompted with the same question, but slightly different phrasing:



Today or Yes

The Agent wants to apply the most current rate for the applicable dates and room category.

Reservation or No

The Agent wants to grandfather the rate that was most recently applied to the Reservation.

When to choose Today or Yes

- The guest is voluntarily making a change to their room reservation

**If the rate changes, you will need to either collect or refund the difference in the deposit*

When to choose Reservation or No

- A supervisor or manager has approved to grandfather a guest's previous rate

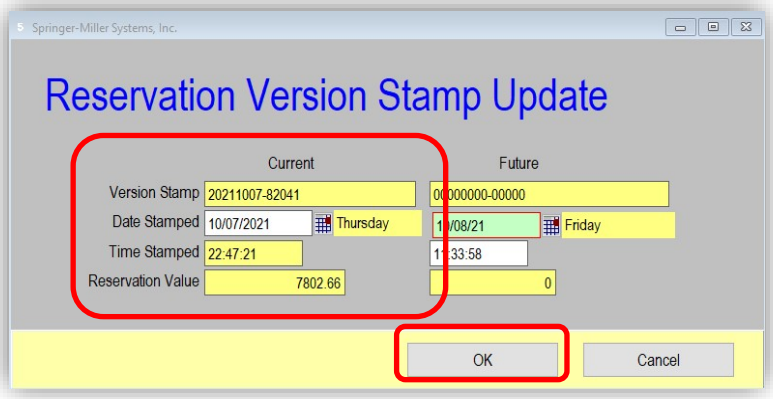
**This requires a D Note*

- You are making edits for the purpose of preparing the booking for arrival.

Zoom X

To "Zoom X" a booking is to manually update the rate version. You might need to do this if you accidentally click the wrong option when prompted to select "Reservation" or "Today".

1. Enter the face of the reservation
2. Click Z for Zoom
3. X for RtsVers
4. A new window will open
   - ⇒ If you want to apply the most recent rate to your booking—click OK
   - ⇒ If you want to honor a previous rate, set "Date Stamped" to the date that the grandfathered rate applied, then click OK

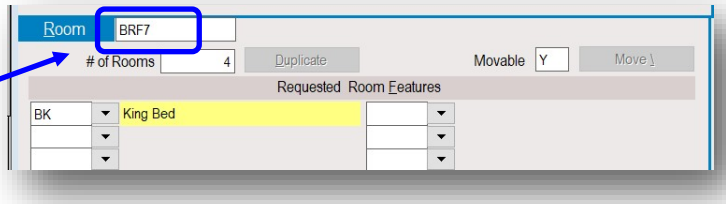


Change Room Type (1/2)

1.) Check availability in the **Booking Center** for the room the guest wants, but do not pull the room into your booking center.

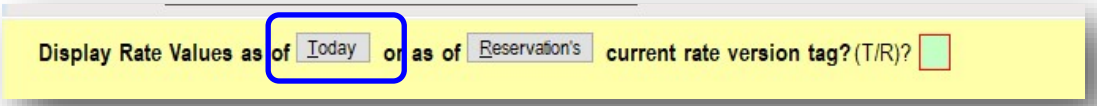
2.) Enter the **Reservation Tile**

3.) In Edit Mode, **type the code of the new room** over the original room code



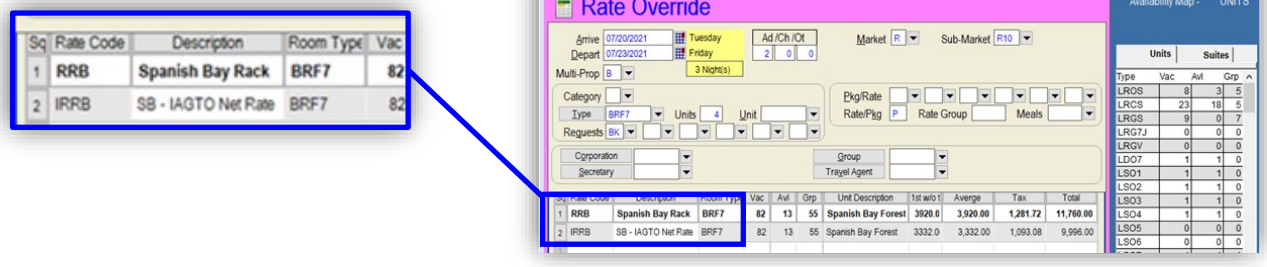
4.) **Page Down** to Save

5.) Click **Today** to indicate that we want to update the rate

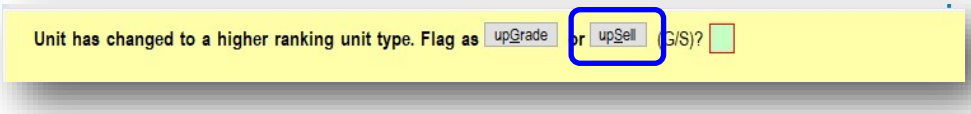


6.) Be patient while the **Rate Calculator** screen loads

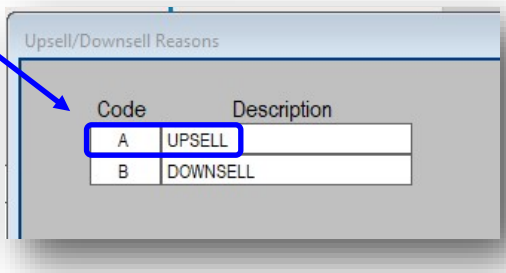
7.) **Select** the **Rack Rate** option from your choice of Rate Codes



8.) You will be asked if you want to up/downGRADE or up/downSELL
Always choose **SELL**.



9.) Select the same response in the new pop-up window



Change Room Type (2/2)

10.) Follow the instructions below depending on if you **UP**sold or **DOWN**sold.

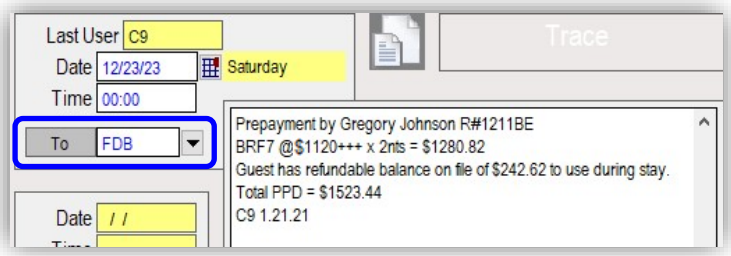
IF YOU UPSOLD:

- ON THE CALL: Collect the difference in the deposit
- IN WRAP UP: Edit **Special Billing** to the new deposit requirement

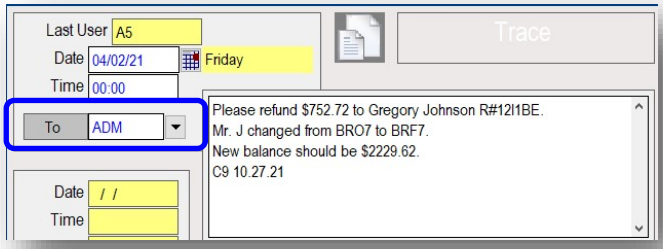
IF YOU DOWNSOLD:

- ON THE CALL: Ask the guest if they wish to keep the difference in the deposit on file to use during their stay or if they prefer to have it refunded now.
- IN WRAP UP: Edit **Special Billing** to the new deposit requirement

If you guest wants to keep their funds on file, add an **FDB Trace** for the date of arrival:



If the guest wants to be refunded now, set an **ADM Trace** for tomorrow:



11.) Follow your **Change/Revise Checklist** to compete this change.

Move Dates

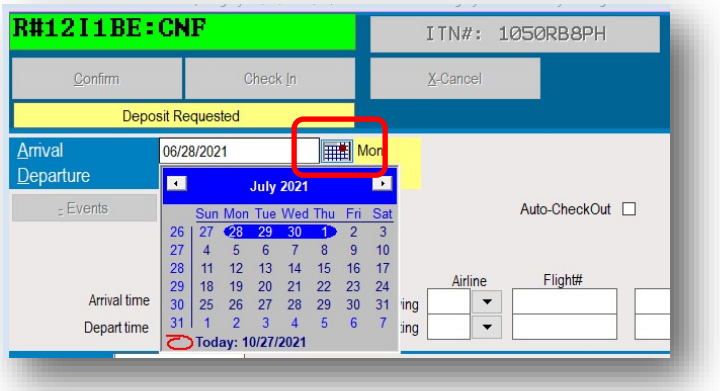
Search in the **Booking Center** for availability, but do not pull new rooms into the Itinerary.

Enter the **Reservation Tile**

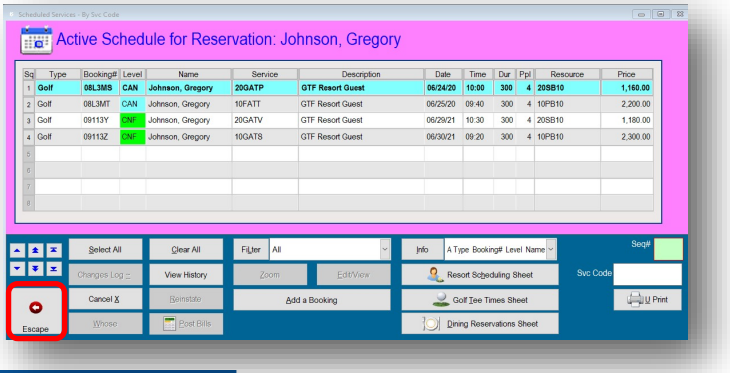
Type **E** for Edit

Click the **calendar button** to the right of the arrival and departure dates to adjust the range.

Page Down to save.



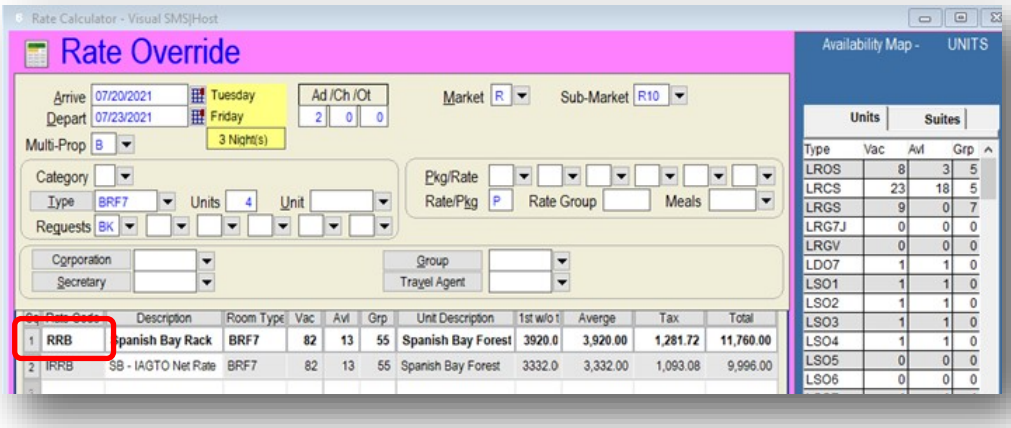
If the guest has recreation, their **Active Schedule** will open. Make note of any recreation you will need to move to new dates as well, then **escape** this window.



Click **Today** to select the most current rate for the guest's room type.



The Rate Calculator window will open. Select the **correct rate** for your guest's room type.



Leave a detailed **R Note** that you will copy to your **REVINATE Lead** explaining:

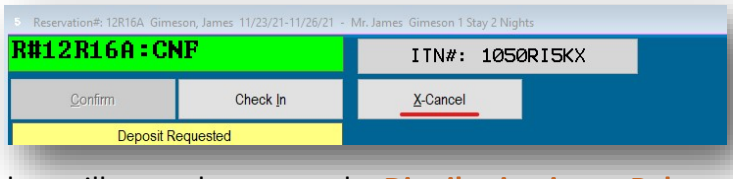
- **Who** you spoke to
- **What** you changed
- **Why** the guest changed it

Room Cancellations 1/2

To cancel a full Itinerary, you must start by cancelling the rooms.

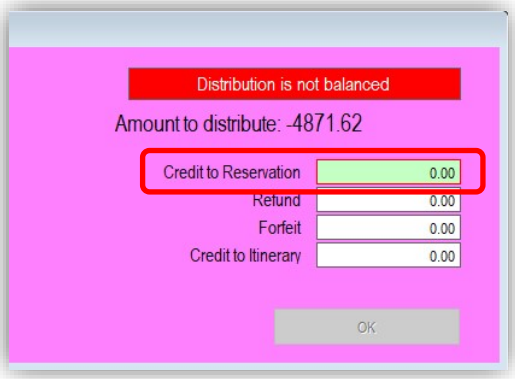
Each room will need to be cancelled separately.

1. Click the **Cancel** button in the top left corner of the Reservation Tile



NOTE: A window will open that states the **Distribution is not Balanced**. This means we must decide what to do with the funds on file.

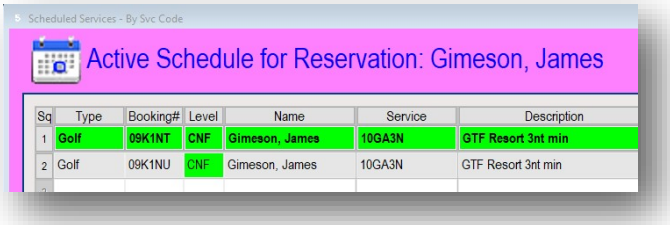
2. To refund the guest, **type the amount** they have on file in the top line **Credit to Reservation**, then click **OK**

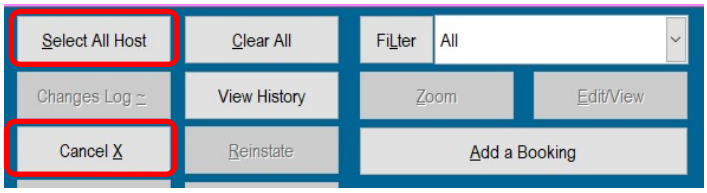


Do not use the Refund line.
Accounting manually processes all refunds and they will only see this booking on their reports if the dollar amount is inputted into the top line.

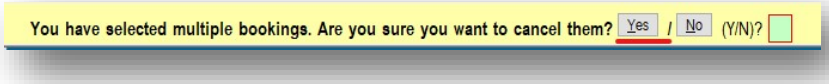
NOTE: A new window called Active Schedule will display all recreation that is attached to the room you are cancelling.

3. To cancel the recreation, click **Select All,** then **Cancel**

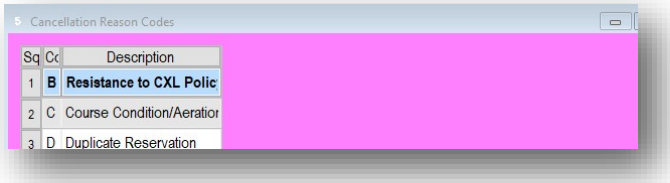


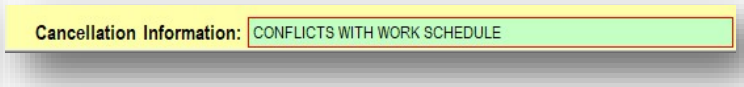


4. Click **Yes** to confirm



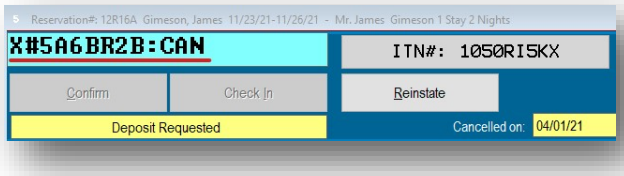
5. Select the appropriate **reason code** for the recreation cancellation
6. Type a short **reason** in the **Cancellation Information** field - Copy the reason so you can paste it later



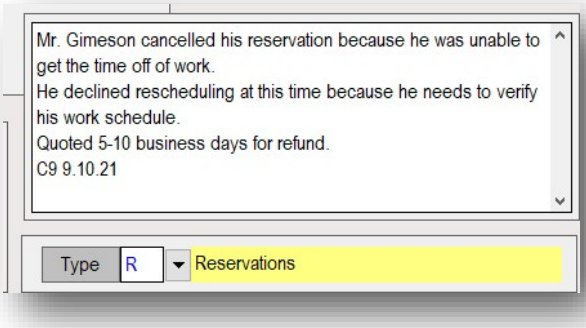


Room Cancellations 2/2

7. Click **Escape** to exit the Recreation Schedule
   - ⇒ After exiting the Recreation Schedule, the Cancellation Reason menu will open again.
   - ⇒ This time, SMS is asking for the reason the room is being cancelled.
8. Select the same **reason code** and paste the same **cancellation description** that you entered for the recreation.
9. The top left corner of the Reservation Tile should now be blue with the **CAN** abbreviation for cancelled.



10. Leave a detailed closed **R Note** to explain:
    - **Who** you spoke to
    - **Why** the guest is cancelling
    - What **alternatives** to cancelling you presented
    - Your advisement that their refund will be visible on their statement within **5-10 business days**.

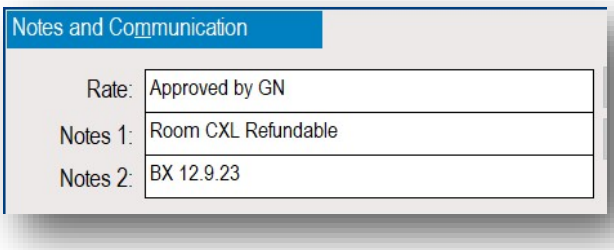


11. Copy this R Note to your **REVINATE Lead.**

- If this is the final room to be cancelled on the booking, mark your Lead Form and call Disposition as Cancelled.
- If any rooms still remain on the Itinerary, leave your Lead Form as Booked and select "Change/Revise" for your call disposition.

If a guest would like to keep their funds on file:

1. **Cancel** the room per SOP above
2. Create a **City Ledger** - Use City Ledger SOP for assistance
3. In the **City Ledger notes**, state:
   - Who approved it
   - The reason the funds are being held and 'Refundable' (since we are outside of the cancelation window)
   - Agent initials and todays date
4. Click the **More Notes** button, click **A** to add a new note, and **paste** the **R note**



R Note Example:

Mr. Jeff Downy cancelled his trip due to a work conflict. He opted to keep funds on file. He has $2185.36 on file for 1 year, we will refund on or after 12.28.24. Approved by GN. KW 12.28.23

City Ledgers

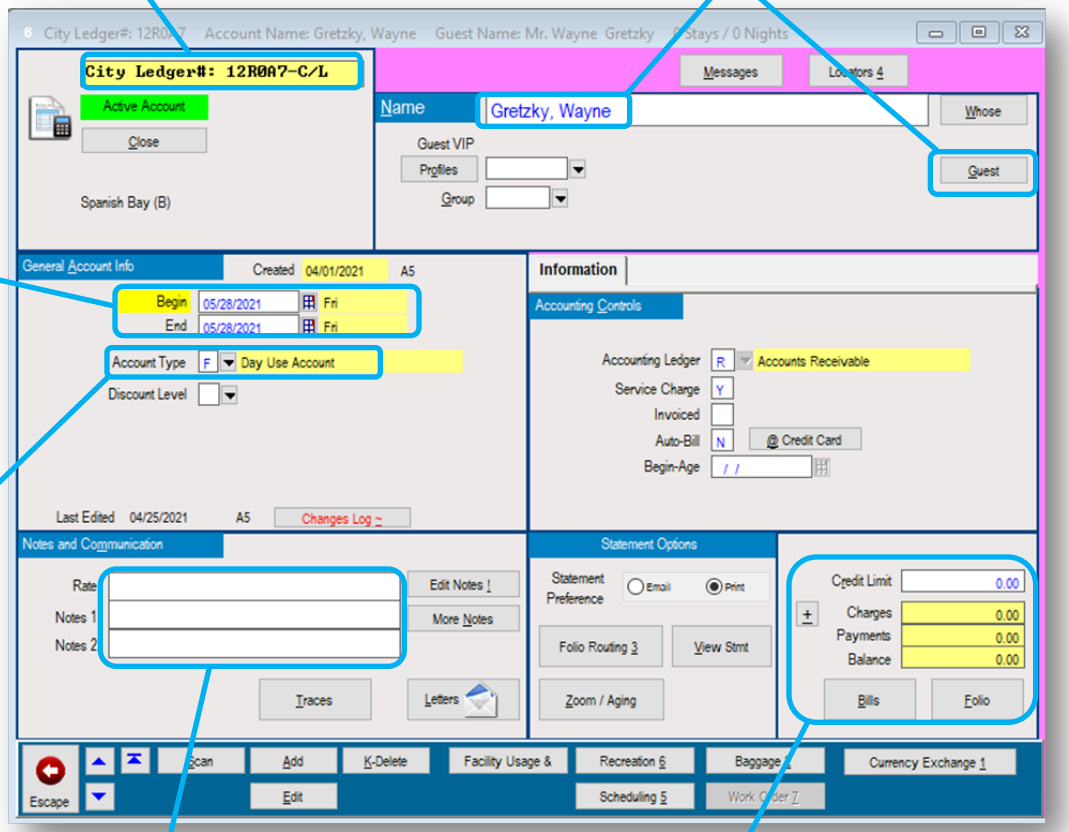
A **City Ledger** is an In-House account that can hold money. The money held on a City Ledger is tied to guest's name (Guest Tile) and is not associated with any particular booking.

City Ledger Number
The identifying number for the City Ledger Account. You can search this number in Universal Lookup.

Guest
Click the Guest button to open the Guest Tile of the person to whom the City Ledger belongs.

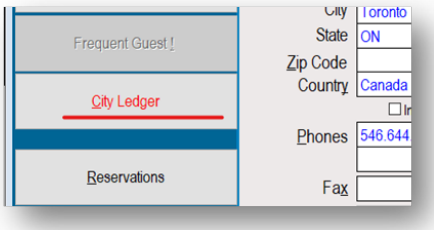
Dates
Both the Begin and End Dates should be set to the final day that the guest has to use the funds.

Account Type
Reservations Agents will always use F—Day Use Account



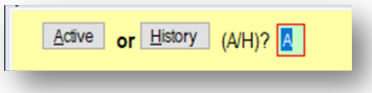
Notes & Communications.
The notes section is where you will find information about the reason the funds are on the City Ledger, what they can be used for, and the time constraint given to the guest to use the funds.

Funds
The Balance is where you will see how much money is being held on the City Ledger.

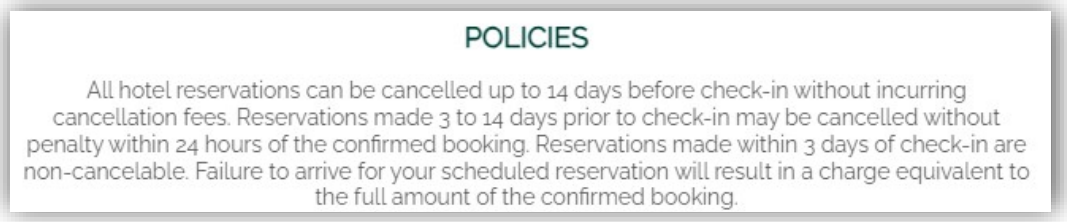


If a Guest has a City Ledger, the City Ledger button in their Guest Tile will be red.

Click this red button and select "Active" to open their Active City Ledger.



Create a City Ledger | Room Cancellation inside Policy (1/2)

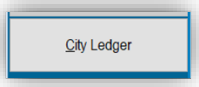


EXPLAIN TO THE GUEST

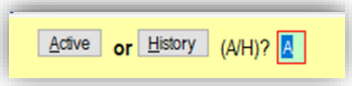
- This is a one time exception to our cancellation policy.
- Their next booking will be **non-cancellable, non-changeable, non-refundable.**
- They must complete their stay by the approved deadline.
- Their funds will be held on file under their name.

CREATE THE CITY LEDGER

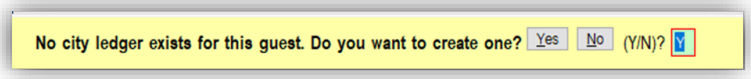
1. Access the **Guest Tile and c**lick the **City Ledger** button



2. Type A for **Active**



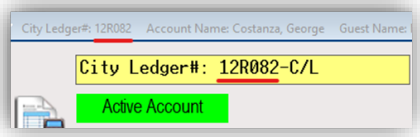
3. Type **Yes** to create a new City Ledger



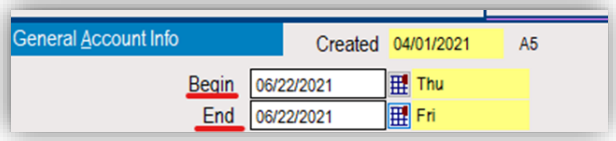
4. Type **B** to select The Inn at Spanish Bay
   - ◊ You will always select B because our **Accounting** department is at The Inn at Spanish Bay



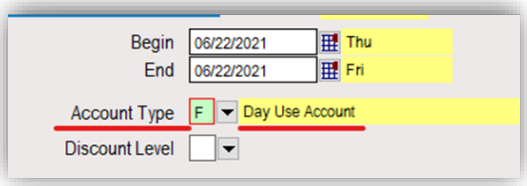
5. Write down the City Ledger number



6. Set the **Begin and End Dates** for the final date by which the guest must complete their new reservation



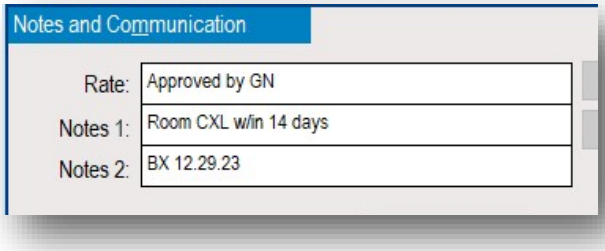
7. Set the **Account Type** to **F - Day Use Account**



Create a City Ledger | Room Cancellation inside Policy (2/2)

DOCUMENTATION

10. In the **City Ledger Notes**, state:
    - Who approved this
    - The reason why the funds are being held
    - Agents initials and todays date



11. Create a detailed **R Note** on the **City Ledger** that states:
    - The reason for the cancellation
    - Why and by whom the exception was approved
    - Exception timeframe/stipulations

R Note Example:

> Mr. John Smith cancelled his trip due to a broken leg. He has $2185.36 on file for 1 year, expiring 12.29.24 on CL#1258GN. New res non-cxl/non-chng. Approved by GN. KW 12.29.23

12. Copy this R Note to:
    - The Room Reservation Tile
    - The REVINATE Lead Form

13. **Contact your Supervisor**:
    Ask them to move the balance from the Reservation Tile to the newly created City Ledger

14. **Once the funds are moved:**
    Cancel the booking in SMS per usual procedures.

15. Change the **REVINATE Lead Status** to **Cancelled**.

16. Send a **cancellation confirmation email** to your guest via REVINATE that states the **amount** of money on file and the **timeframe** in which they must use their funds

Room Cancellation Scripting

OUTSIDE OF CANCELATION POLICY (OUTSIDE 14 DAYS BEFORE ARRIVAL)

1. A guest has called to cancel their stay:
   I understand you would like to cancel your room stay.
   For our records may I ask the reason for the cancellation?
2. If the reason would allow the guest to possibly reschedule:
   I know no one wants to cancel their vacation.
   Would you be able to reschedule? We can look at different dates and push the trip out a bit.
   a. If guest can reschedule, find new dates for their trip
   b. If the guest is unable to reschedule:
   To confirm we will be canceling room, golf, and dining correct? You will receive your refund of [dollar mount] *in 5-10 business days.*
   Do you have any spa or transportation that you need to cancel as well?
   c. If yes, email departments on behalf of guest.
3. Cancel their itinerary per their request in Wrap Up

INSIDE OF CANCELATION POLICY (INSIDE 14 DAYS BEFORE ARRIVAL)

Note: If the guest booked their room stay 3-14 days prior to arrival, they have 24 hours to cancel without penalty.

A guest has called to cancel their stay:
I understand you would like to cancel your stay. For our records, may I have the reason for the cancellation?

⇒ If the reason is a **non-emergency** or non-critical:
- *"I understand. I see that we are inside of our 14 day cancellation policy, which means if we cancel, you would forfeit the deposit that you placed at the time of booking."*

Let the guest respond after stating cancellation policy. Let the guest ask if there is an exception, please do not offer one immediately.

⇒ If the reason is an **emergency** or critical situation:
- *"I am so sorry to hear about___. I know no one wants to cancel their vacation.*
- *I see that we are inside of our 14 day cancellation policy, which means if we cancel, you would forfeit the deposit that you placed at the time of booking.*
- *If I am able to get an exception based on your extenuating circumstance, would you be able to reschedule your trip on the phone with me now?*
- (Yes or No) *Ok, thank you. Would you mind holding for a brief moment while I look into this?*

⇒ Yes I **Can Reschedule** Today

Obtain approval from a supervisor to offer to reschedule their trip - find new dates for the guest
- *Thank you for your patience. Instead of forfeiting the funds, I was able to get a one time exception to allow you to reschedule your trip.*
- *Once we reschedule, the new trip will be non-changeable, non-cancelable, and non-refundable.*
- *Do you want to proceed with rescheduling?*

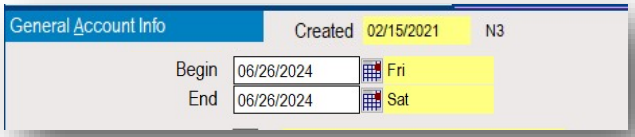
⇒ No, I **Cannot Reschedule** Today

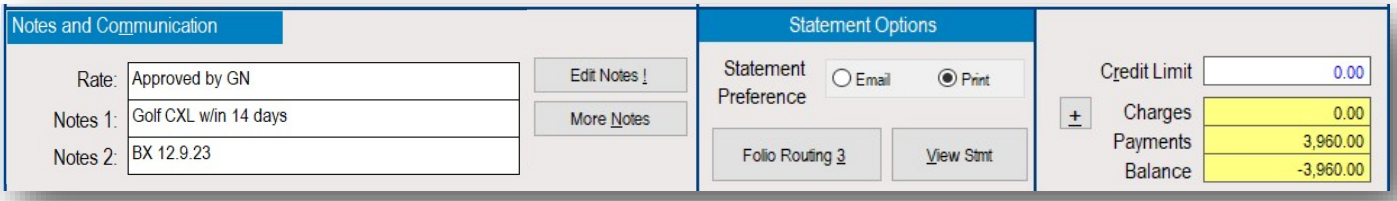
Obtain approval from a supervisor to put the funds on file for a future stay. This future stay would be non-changeable, non-cancelable, non-refundable.
- *I understand you are unable to reschedule at this time. With that in mind, I can offer you a one time exception to the cancelation policy.*
- *Instead of forfeiting your deposit, we can keep these funds on file under your name so you can use them for a future trip.*
- *You would need to complete your stay within the next __ months, and your new trip would be non-changeable, non-cancelable, and non-refundable.*
- *Would you like to proceed with the cancellation?*

Apply City Ledger Funds to A New Booking

Locate the Guest Tile and open the City Ledger

- Check the expiration date:
  - ⇒ If it is past the expiration date - Check with your supervisor to get a solution before proceeding
- Check the balance that the guest has on file
- Write down the City Ledger Number and balance



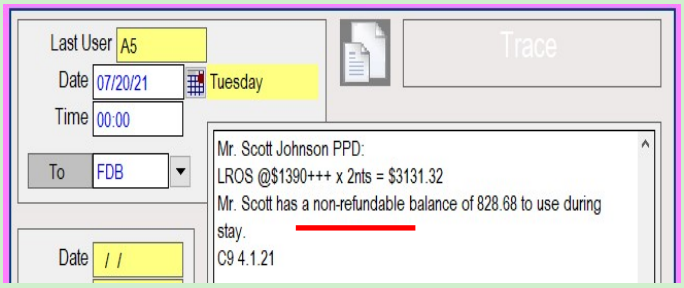


Use the Booking Center to build a new trip for your guest

- The guest does not need to rebook the exact trip they previously cancelled. They can book whatever they'd like, and we will simply apply the dollar amount from their City Ledger to their new booking
- They must use all funds on file in one trip
- The new reservation will be non-cancellable, non-changeable, non-refundable

If the City Ledger funds exceed the new deposit

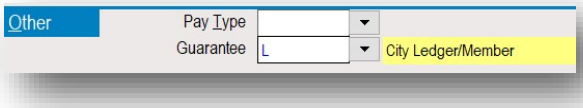
- Let the guest know that they will have a non-refundable balance on file that they must use during their stay
- Set Special Billing to the total amount of the City Ledger
- Create an itemized FDB Trace:



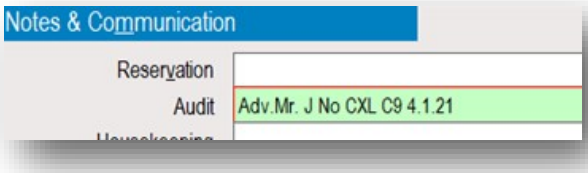
If the City Ledger Funds are less than the required deposit

- Charge the difference to the room
- Set Special Billing to the current room's two night deposit amount

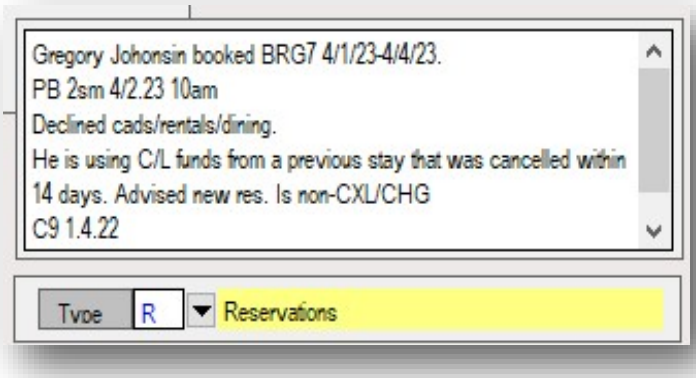
Set the Guarantee Code to L for City Ledger



Write your No-CXL/CHG advisement in the Audit line



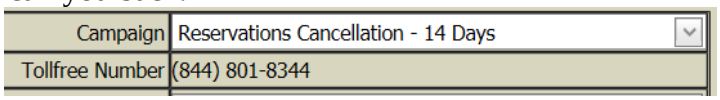
Leave a detailed R Note / Lead Form Note



Contact your Supervisor—
Ask them to move the balance from the City Ledger to the newly created Reservation Tile

City Ledger – Cancellation Follow-Up Procedures

The leads will be assigned to the original booking agent, or the agent who cancelled the reservation, or any agent if none of the previous are present. The lead will have the below campaign and phone number. Provide this number to your guest to call you back.



The leads will have the guest's name, phone number(s) and/or email address. The notes will include the amount we have on file, when it expires and any other details about the money.

DO NOT USE THE TERM *CITY LEDGER* WITH THE GUEST. Please say "House Account."

Any new reservations booked must be non-cancelable; you must be sure to advise your guest.

You will need to contact your guest, for any of the below scenarios, by both a phone call and an email. Please use the "City Ledger Expiration Email Template" for you email.

Future City Ledgers with Due Dates 30+ days

Call Scripting - If the city ledger has not expired:

*In reviewing our records, I show you were not able to make your last trip to Pebble Beach. I wanted to inform you that a non-refundable credit from this previous cancellation is still on file with us. The amount on file is $XXXXXXXX and is set to expire on XXXXXXXX.** **Start with offering an arrival date within 6 months. You may offer up to 1 year if receiving pushback**

If your guest does not book during this contact, mark your lead In-Process with a follow-up date of 30 days prior to expiration. At 30 days give one more courtesy call, set the next follow-up date for the expiration day.

Future City Ledgers with Due Dates less than 30 days

Call Scripting - If the city ledger has not expired:

*In reviewing our records, I show you were not able to make your last trip to Pebble Beach. I wanted to inform you that a non-refundable credit from this previous cancellation is still on file with us. The amount on file is $XXXXXXXX and is set to expire on XXXXXXXX.** **Start with offering an arrival date within 6 months. You may offer up to 1 year if receiving pushback**

If your guest does not book during this contact, mark your lead In-Process with a follow-up date of 14 days prior to expiration. At 14 days give one more courtesy call, set the next follow-up date for the expiration day.

Expired City Ledgers

Call Scripting - If the city ledger has expired:

In reviewing our records, I show you were not able to make your last trip to Pebble Beach. I wanted to inform you that a non-refundable credit from this previous cancellation is still on file with us. The amount on file of $XXXXX is set to be forfeited. I would like to extend a courtesy to you and offer six (6) more months to secure a reservation with us. The new reservation must be completed within 18 months of booking and will be non-cancellable and non-changeable.

If your guest does not book during this contact, mark your lead In-Process with a follow-up date of 6 months later. **Change the expiration date on the city ledger to 6 months from the date you contact the guest via phone and/or email.**

For all of the above scenarios, if the guest has not contacted you by the specified date, keep the lead In Process and assign the lead to Suzanne Kent with the Needs Attention activated. Be sure to make a note in the lead to forfeit the money.

*Any exceptions to this guideline will need to be approved by your leadership team.

Prepare for Arrival

When we first book rooms, we keep everything in SMS as simple and consolidated as possible. We do this so we can easily make changes or cancel as we near the guest's dates of stay.

Once we are within 14 days, and the guest is no longer allowed to make changes, we full "prepare" our bookings for arrival. Agents do not have to track these arrival timeframes because the Reservations Auditors will send agents an email advising them that the booking is ready to be prepared.

At Time of Booking	Prepare for Arrival
◊ Keep Rooms consolidated into groups ◊ Keep Tee Times consolidated into groups ◊ Leave a Y Note with the Rooming List ◊ Set an FDB Trace with the Billing Scenario	1.) Read your FDB Trace, Y Note, and R Note 2.) Duplicate all rooms 3.) On all secondary rooms without a deposit: • Zero out Special Billing • Change the Guarantee Code to J • Ensure that all rooms are mini-grouped to the Primary • Clear out the Audit line 4.) Split the FDB Trace: • Leave the primary message on the primary room • Move the secondary message to all secondary rooms 5.) If any guests will be covering their own charges: • Split shares as appropriate • Create C/O Guest Tiles for each Payer • Split golf and whose it to the Reservation Tile of each Payer 6.) If secondary guests will not be covering their own charges • Use the Y Note to rename the rooms • Add PBX names as appropriate 7.) Add Babynotes and Chargeback notes to recreation as appropriate 8.) Review your standard Booking Checklist to ensure completion 9.) Reply to your Arrival Email

HELPFUL SOPS

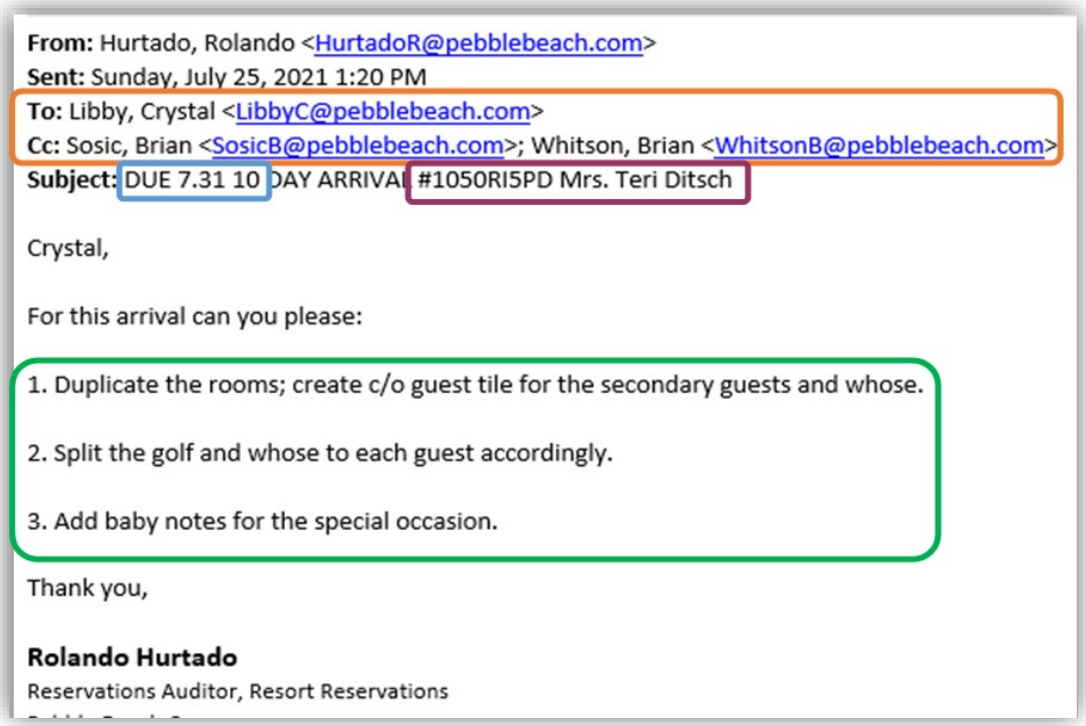
C/O Guest Tiles

Split A Room Into Shares

How to Split and Whose Golf

Billing Scenarios: Prepayments

Booking Checklist



From: Hurtado, Rolando <HurtadoR@pebblebeach.com>
Sent: Sunday, July 25, 2021 1:20 PM
To: Libby, Crystal <LibbyC@pebblebeach.com>
Cc: Sosic, Brian <SosicB@pebblebeach.com>; Whitson, Brian <WhitsonB@pebblebeach.com>
Subject: DUE 7.31 10 DAY ARRIVAL #1050RI5PD Mrs. Teri Ditsch

Crystal,

For this arrival can you please:

1. Duplicate the rooms; create c/o guest tile for the secondary guests and whose.

2. Split the golf and whose to each guest accordingly.

3. Add baby notes for the special occasion.

Thank you,

Rolando Hurtado
Reservations Auditor, Resort Reservations

How to Split and Whose Golf

When preparing for arrival via the method below, we ensure that the golf rates remain the same as they were at the time of booking.

1. **Split** out and **whose** the **rooms** appropriately according to FDB Trace/R Note.

2. **Split** out the **tee times** accordingly.

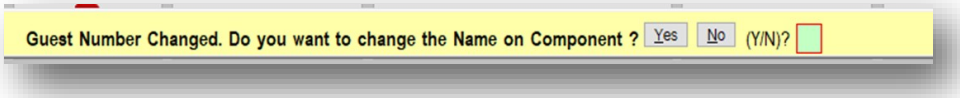


3. **Click** the **down arrow** in the Profile (**Prf**) column to whose the tee time to the appropriate profile.

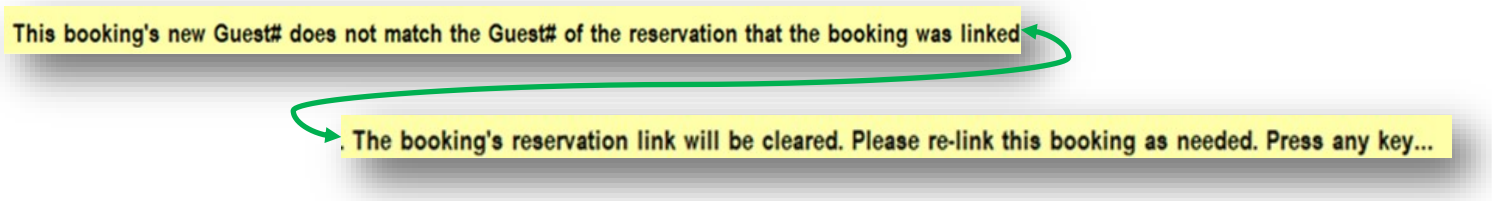


4. Click **Tab** on your keyboard to update.

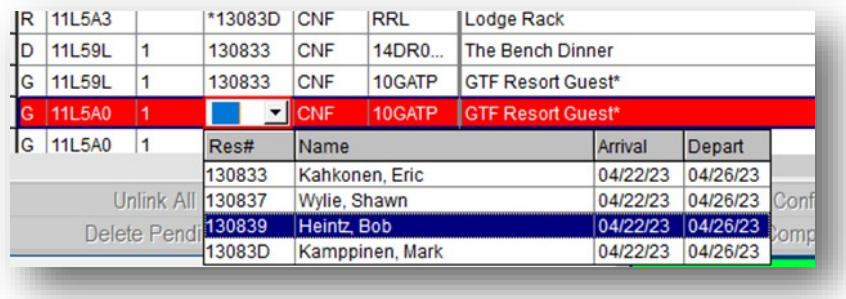
5. You will get a prompt at the bottom of the page. **Select Yes.**



6. The system will inform you that the Guest #'s don't match. That's okay!
   Press any key to continue.



7. The tee time will now appear in red because the room is not yet attached.
   Click the **down arrow** in the Reservation (**Res**) column to select the correct Room Reservation.



Resell a Tee Time

A **Resort Guest** may call **within the cancelation period** to **cancel** one or a combination of **tee times** during their stay. They still intend to utilize the room stay.
We need to first reiterate the cancelation policy, that they are fully responsible for the greens fees, next we can offer to **reschedule the golf**, than lastly we can offer to **resell** the tee time.

Reselling a tee time means that we 'release' the tee time back into inventory with the hopes that another guest will reserve that tee time, thus allowing the initial guest to no longer be financially responsible for said tee time.
Resort Guests only (not Day Guests) are eligible for this exception.

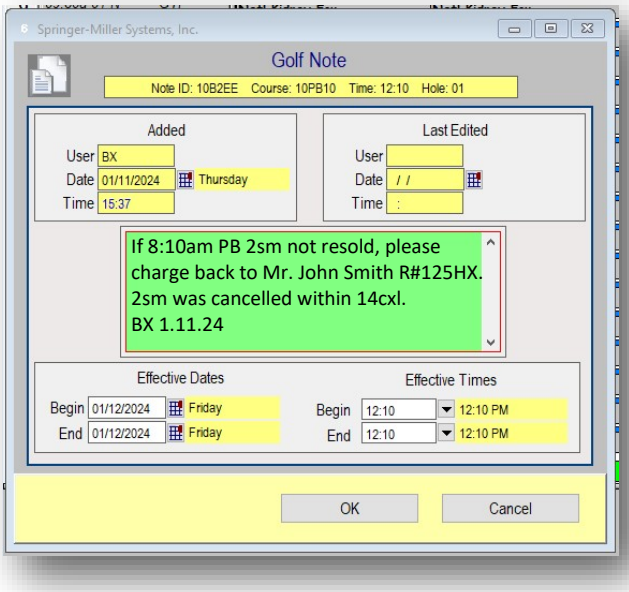
Solution Progression:

1. Check to see *if* the guest can play golf on a different day during their stay:
    - Seek approval from a supervisor to reschedule the golf during the stay
2. If the guest cannot reschedule:
    - Seek approval from a supervisor to resell the tee time

Resell Tee Time:

Once you have approve to resell the tee time - the rest of the process can be done in **Wrap Up**

1. Notate the **course**, **time**, and **date** of the tee time
2. **Cancel** the tee time in SMS
3. Leave a **tee sheet note** stating:
4. Leave a closed detailed **R note** on the Reservation
5. Copy the R note to the **Revinate note**



Leaving a tee sheet note:

⇒ Open tee sheet
⇒ Select the golf course and date
⇒ Double click the blank space between the time and GTF / NGTF
⇒ Select Notes
⇒ Write your note
⇒ Click OK or Press Page Down on the keyboard to Save

6. You *can* reach out to the team via email or chat to notify them in an effort to get that tee time resold for the guest.

Call Dispositions

CREATE A NEW LEAD FORM

Booked	Any new room and/or golf booking. (Unless it is recreation booked for a Group guest.)
Booked Call—Add On Spa	A guest has booked golf and wants to be immediately transferred to the Spa
Hot Lead	A guest who has expressed interest in booking rooms but cannot commit on the first call *and* has agreed to a follow up call.
Not Booked	A guest expressed interest in a room stay (not day Guest Recreation), but ultimately did not book and declined a follow up.
Special Event Inquiry	Guest wants to book over a major PBC event, but rooms are sold out. Lead Status = Not Booked, Not Booked Reason = Name of PBC Special Event, enter requested ITN items. Qualifying events: AT&T, Food & Wine, Concours, Pure Insurance, PB Invitational, USGA Am, US Open

EXISTING BOOKING—FIND THE CORRECT LEAD FORM

(IF THE BOOKING IS DINING-ONLY, THERE WILL NOT BE A LEAD FORM)

Reconfirm	You have spoken to a guest about their booking but did not make any changes.
Change/Revise	You have modified an existing booking or Guest Tile
CXL Reservation	You cancelled a full Itinerary
Outbound Call – Left Voicemail	You placed an outbound call to a guest, but they did not answer, so you left a voicemail.
Agent Call Back	A guest wants to speak to a specific agent, but that agent is unavailable, so you have arranged for said agent to call the guest back later.

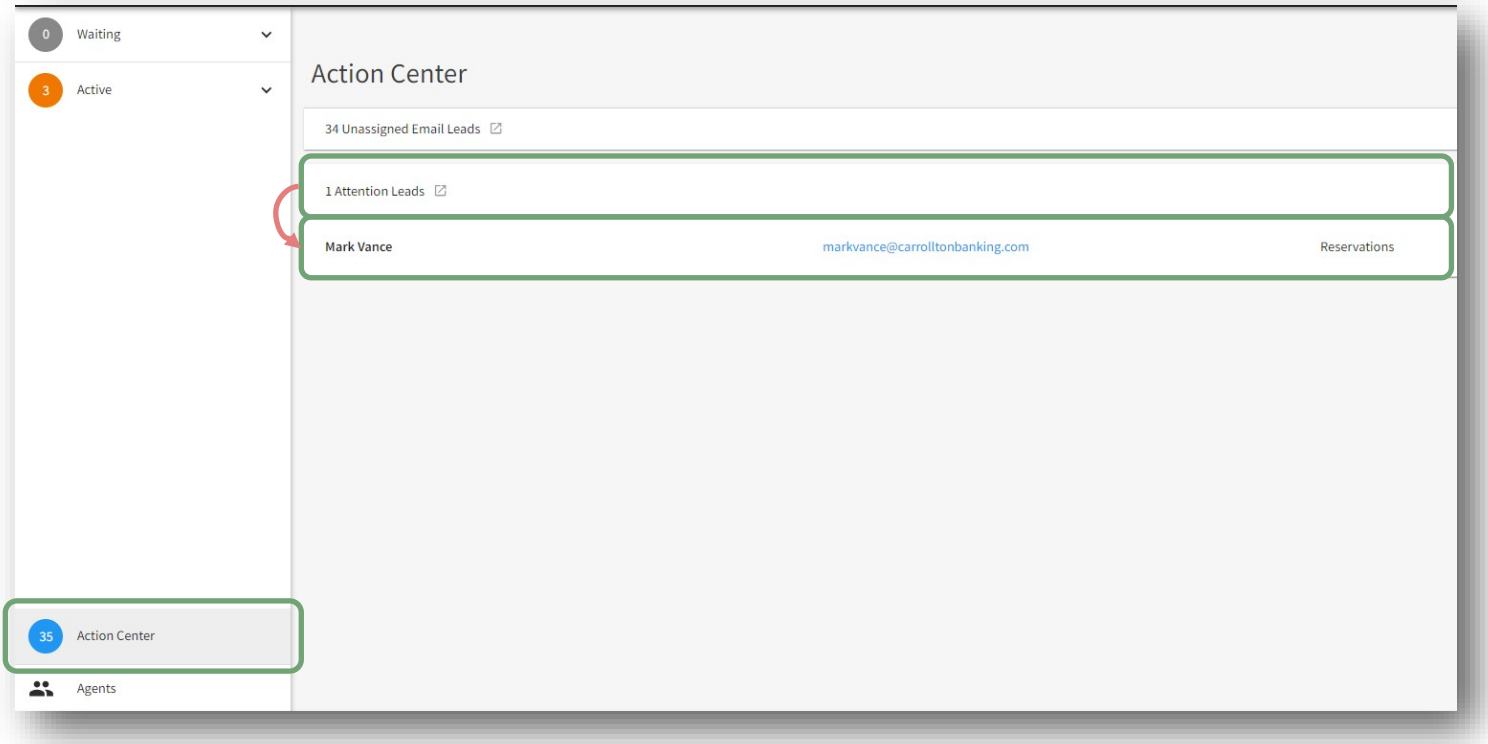
NO LEAD FORM IS REQUIRED

Rest-Only Booking	You created a new restaurant booking—no golf
Large Party Inquiry	A guest is asking about or has booked a restaurant reservation for 9+ guests
Day Guest Recreation	A Day Guest called to talk about restaurants or other Day Guest recreation, but did not book anything.
Transfer to Another Dept.	You transferred the guest to a more appropriate department.
Misdialed/Disconnected	Your call is inadvertently disconnected or you dialed the incorrect number.
General Inquiry	A caller asked a question that has nothing to do with new or existing reservations *(ex. Pebble Beach Gate Fees)*
Day Guest Golf	A Day Guest Golfer called about a tee time outside of our Day Guest Golf Guidelines and thus could not book.
24 Hour PB Golf	A guest called about PBGL within Day Guest Guidelines, but did not book
90 Day SG Golf	A guest called about Spyglass Hill Golf Course within Day Guest Guidelines, but did not book
6 Month SB/DM Golf	A guest called about The Links at Spanish Bay within Day Guest Guidelines, but did not book
Dukes Hay Golf	A Duke's Member calls to book The Hay and they intend to use their voucher at the Pro Shop
Group Reservation Inquiry	A Group Sales guest called to get information
Group Guest Booking Rec.	A Group Sales guest added golf and/or dining to their existing Group Sales room booking.

Action Center

The **Action Center** is a view within the Revinate Hub that allows an agent to track their leads. They will be able to track any **Attention Leads** and **In-Process** Leads.

1. Navigate to **Revinate** > Click **Action Center**
2. Your view will change from the list of Agents to the **list of Leads**
3. Click on **Attention Leads** to expand the list
4. Click on the **Lead** you need to view and address



Attention Leads are leads that the agent needs to follow up or take action on. Supervisors or fellow agents may mark a lead as an Attention Lead (a.k.a. “star” the lead) to alert the original agent that they need to review the lead notes or make an outreach to the guest.

In-Process Leads are leads with the in-process status where an agent has offered a follow up call and the guest has accepted. That call disposition will be Hot Lead and a the agent should set a reminder for the date and time of the follow up call.

Unassigned Leads are leads that have been created by our online vacation planner submission. These are managed by our **E-Desk team**.

Lead Form Required Fields

Booked Lead
(All Information will Interface from SMS)

- Select DNA or RTG
- Select Reason for Stay
- Enter the appropriate Country
- Choose Lead Status – "Booked"
- Enter the Itinerary Number from SMS
- Add a note (same as R Note)

Existing Lead

- Stay on the correct Lead if it popped for your call *OR* Search for it using the Itinerary number
- Add a Detailed note—Same as R Note

Not Booked

- 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
- Enter the appropriate Country
- Choose Lead Status – "Not Booked"
- Choose the Not-Booked Reason
- Add a Detailed note—focus on their reason for visit and what exactly you offered, why they did not book
- Unit—When applicable, enter the Unit Type that the guest wanted that was not available over their desired dates

Hot Lead

- 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
- Enter the appropriate Country
- Choose Lead Status – "In-Process"
- Set a Reminder Email day & time
- Add a Detailed note – focus on their reason for visit and what exactly you offered, and your follow-up time.

Common Not-Booked Reason Codes

Property Not Available	No availability at their desired Resort Property
Room Type Not Available	No availability for any room types they wish to book
Golf Guidelines	The guest does not meet Resort Golf booking guidelines
3 Night Minimum for Pebble Beach	The guests cannot meet the minimum night stay requirement.
Desired Time Not Available	A resort guest declined to book due to golf unavailability
No Response	A Vacation Planner Lead has not received a response after three attempts at outreach
Interested Guest Refused Follow Up	A guest wants to continue planning their trip but has declined the agent's offer for a follow up call or email.

Project Time

Agents will periodically be given uninterrupted off-the-phone time, which is referred to as **Project Time**.



Project Time Checklist

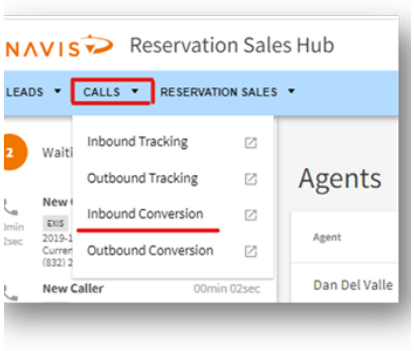
- Complete your 10 Day Arrivals from Auditors
- Correct any Audits or Itinerary corrections that have been emailed to you
- Correct your Call Compliance
- Follow up with Unread Email Replies
- Review your Daily Bookings Report
- Check for Auto-Complete Leads (Follow Up Leads that have been neglected for 4+ days)
- Clean Up Your Action Center

Performance Improvement

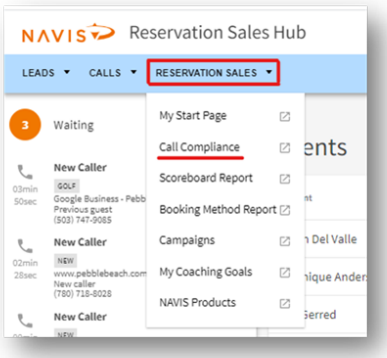
- Check your Call Conversion for the month
- Listen to your Booked Calls to work on your sales skills
- Study your Resort Knowledge and SOP Materials

When looking at any of the following stats/reports, set the start date for the 1st day of the current month. The end date should be today's date.

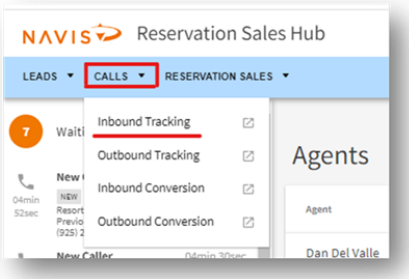
Locate your Call Conversion Stats:

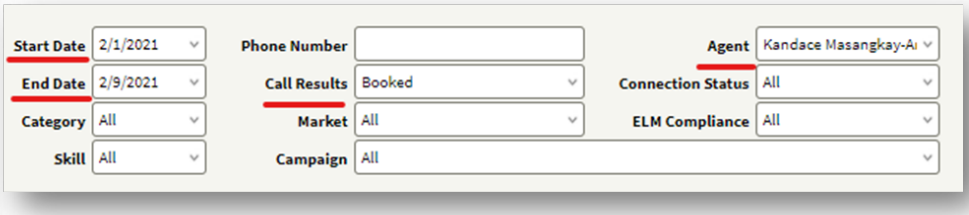


Call Compliance:

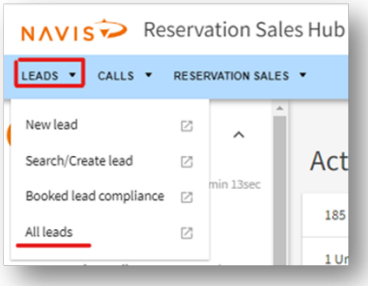


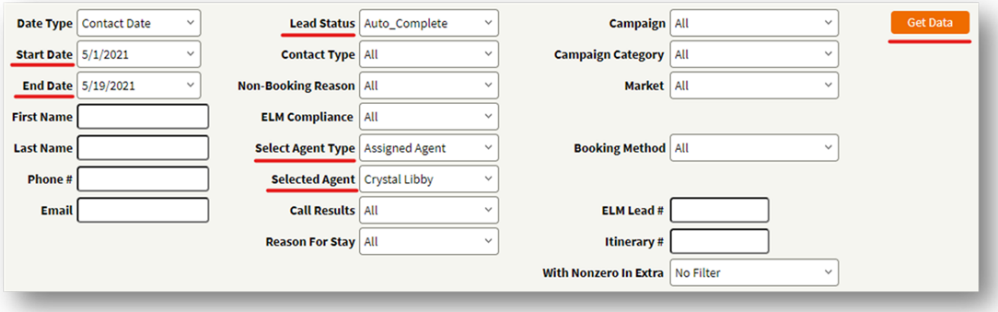
Listen to your Recorded Calls:



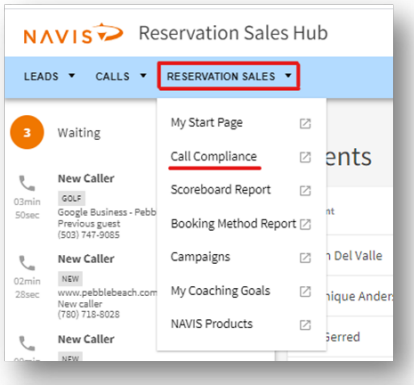


Check for Auto Complete Leads:





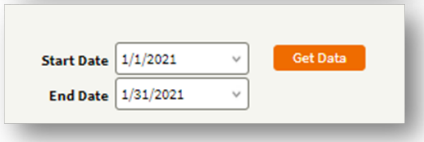
Call Compliance



The **Call Compliance** feature of REVINATE checks for discrepancies between Reservation Center phone calls and Lead Forms.



By regularly reviewing the Call Compliance Report, we can ensure that key data points on our Lead Forms are complete and match appropriately with our Call Dispositions so we can provide clean data to our **Marketing** and **Revenue Management** teams.



Always set the start date of this report for the first day of the current month. The End Date should be today.

The number of Lead Forms each agent has created.

The number of call dispositions each agent has marked as booked.

The categories of Compliance each agent needs to maintain.

Agent	Res|Lead Calls	Res|Lead Calls W/O ELM	Res|Lead Calls With ELM W/O Dates	Res|Lead Calls With ELM W/O Email	Res|Lead Calls With ELM W/O Reason	Booked Calls	Booked Calls W/O ELM	Booked Calls With Non-Booked ELM	Booked Calls With Booked ELM W/O Revenue	Not First Booked Call
A. Gerred	115				1	99				
Adam Barnett	164	2		11	1	134			1	
Angela Birkett	5					5				
Annique Anderson	146					114				
Anthony Pearce	16		2	2		15			4	
Bill Crockett	112			1	2	81				
Brian Sosic	5					5				

Res|Lead Calls W/O ELM

Issue: A call was saved with a Disposition Code that requires a Lead Form, but your call is not attached to a Lead.

Res|Lead Calls With ELM W/O Dates

Issue: A Lead has been saved, but the date fields have not been filled out

Res|Lead Calls With ELM W/O Email

Issue: A Lead has been saved, but the Email field is blank without the RTG box being checked.

Res|Lead Calls With ELM W/O Reason

Issue: A Lead has been saved, but the reason dropdown has not been selected

Booked Calls W/O ELM

Issue: A call was saved with a "Booked" Call Disposition, but your call is not attached to a Lead Form.

Booked Calls With Non-Booked ELM

Issue: A call disposition has been saved as "Booked," but the Lead's "Status" field is not set to "Booked."

Booked Calls With Booked ELM W/O Revenue

Issue: A Lead has been marked "Booked," but no revenue has been pulled from SMS. (Your ITN may have a typo or your SMS booking has not been confirmed.)

Not First Booked Call

Issue: You saved a call with a "Booked" Call Disposition, but another agent already marked a call from that same Lead as "Booked" before you. Two agents cannot both claim to have booked the same lead.

"Complete" Lead Status

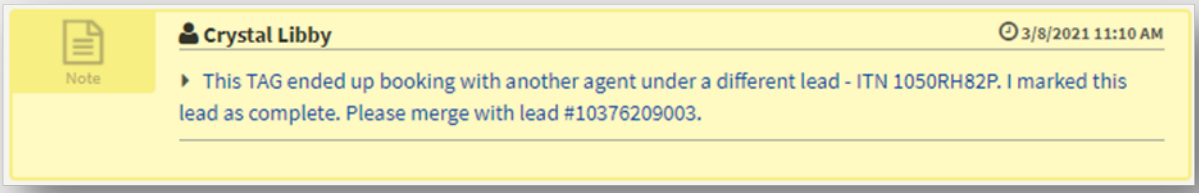
Complete is a very uncommon lead status that is only used when the lead itself is invalid, such as a Vacation Planner that does not have valid contact information and therefore cannot be addressed. It is good practice to consult a supervisor before marking any lead as "Complete."



Complete and Merge

The most common scenario that will require you to mark a lead as Complete is when a guest you have been working with ends up booking with another agent on a separate lead form than the one you created.

We cannot have two lead forms for one booking, so the leads will need to be merged together. To have your lead merged into the lead that contains that guest's booking, you should mark your lead as Complete then leave a Note that states "*Please merge with Lead #xxxxxxxx*." Supervisors and managers will sort through Complete leads on a regular basis to merge these leads.

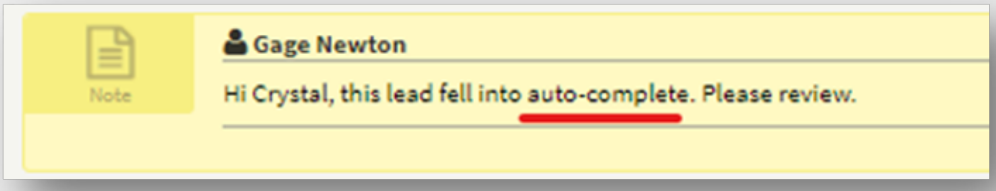


"Auto-Complete" Lead Status

The **Auto-Complete** status is automatically generated by REVINATE when a saved Follow Up lead has not been addressed within four days.

A lead should never be saved with a Follow Up status.
As soon as you talk to a guest about rooms, you should save a lead with either **Booked, Not Booked, or In-Process**.

Supervisors will regularly check to see if leads have fallen into Auto-Complete status to make sure they are addressed. If they find a lead of yours in this status, you will receive a message like the following:



REVINATE Waitlist

In most instances, if a guest asks to be placed on a waitlist, the answer is no:

"Due to the frequency in which our availability changes, we do not keep a waitlist, but you are welcome to call in periodically to check if anything has opened up. You can make any changes to your reservation up until 14 days prior to arrival."

We do, however, keep a **waitlist in REVINATE** for guests who wish to visit during our big **Pebble Beach Special Events.**

PBC SPECIAL EVENTS INCLUDE:

- AT&T Pro Am
- Food & Wine Festival
- Concours d'Elegance
- Pure Insurance Championship,
- Pebble Beach Invitational
- US Open / US Women's Open

HOW TO CREATE A REVINATE WAITLIST

Collect all **contact information** for your guest on your Lead Form

Set the Reason for Stay to: **17—PBC Special Event**

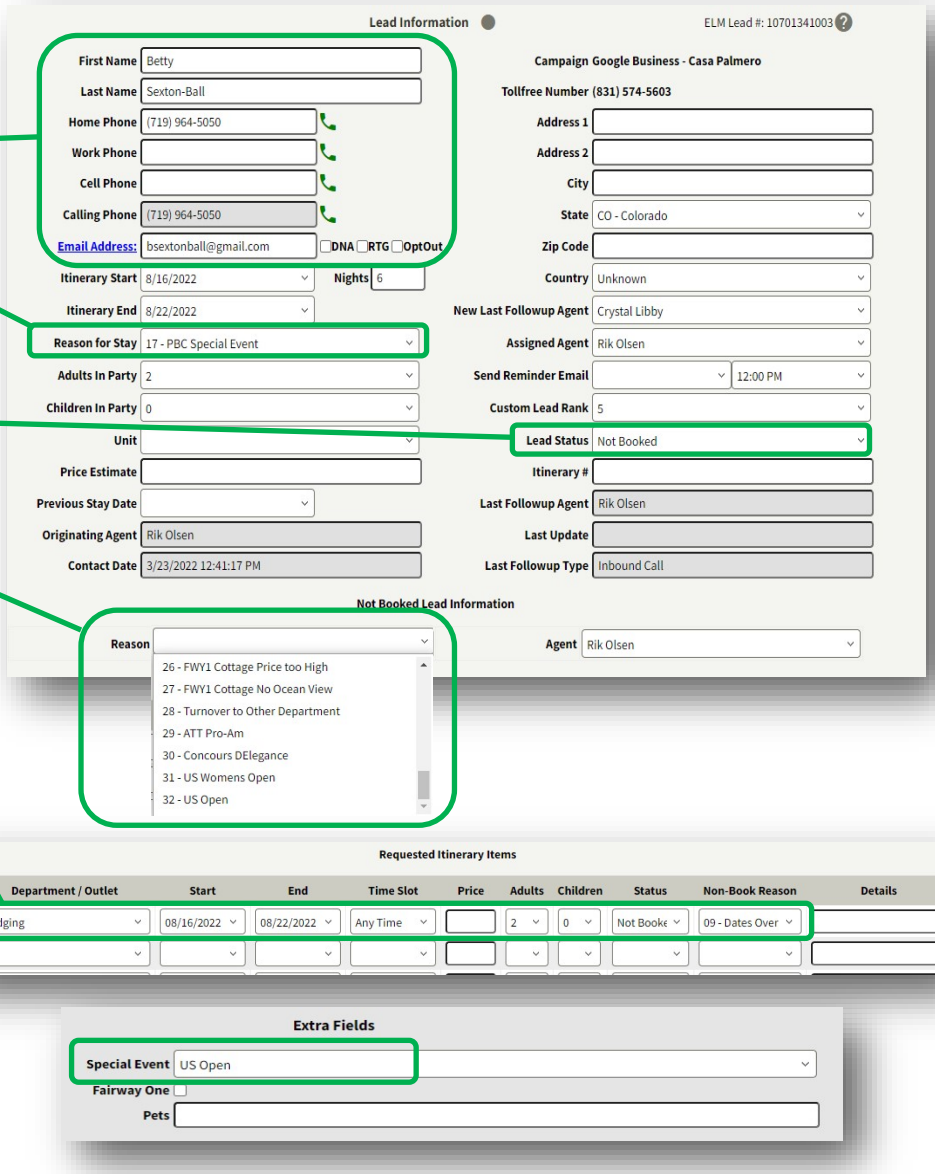
Mark your Lead as **Not Booked**

Set your **Not Booked Reason** as to the **name of the event**

Enter in the desired booking details in the "**Requested Itinerary Items**" section of the Lead Form

Set your Call Disposition to "**Special Event Inquiry**"

Select the specific special event from the Extra Fields dropdown.



As the Reservations Agent, you do not need to personally monitor this waitlist for your guests.

When we are closer to the event dates and are able to open rooms to the public, management will pull reports of those on these waitlists so our Reservations Agents can reach out to fill any available rooms.

Effective Booking Process

GAIN UNDERSTANDING OF THE GUEST'S IDEAL TRIP:

- Why are they visiting and what is most important to them?
- What type of guest are they? *(Family/Couple/Friends/Colleagues)*
- What are their trip logistics? *(How many people/nights/rooms/golfers)*

EXPLAIN HOW WE CAN MAKE THEIR IDEAL TRIP HAPPEN WITHIN PEBBLE BEACH GUIDELINES:

- Would they need to extend their stay or add additional rooms?
- Would they need to adjust their dates?

PROVIDE THE GUEST WITH A CUSTOMIZED PITCH:

- Explain why you are recommending each item based on the guest's needs and your anticipatory recommendations.
- Explain the value of each recommendation before stating the rate.

ASK FOR THE SALE:

- Would you like to reserve this right now?
- I suggest we reserve these rooms and tee times now while they're still available. Do you want to go ahead and do that?

Tip: Do not interrupt the guest with guidelines or availability in the 1st stage.

If the guest starts by asking for guidelines, redirect them to your probing questions.

"Our guidelines depend on a few different factors, so, before we begin, I'd like to gather some additional information about your stay."

Tip: Turn any "no, we can't do that" statements into "yes, we can do that *if*…"

"Yes, I can book Pebble Beach Golf Links for you right now with a two/three night stay at our resort."

"Yes, I can hold this reservation for you with a two night room deposit."

Effective Lead Follow Up Process

Sympathize with their situation—
"I understand it takes a great deal of planning to put together a trip like this, particularly when you have to coordinate with several others."

Convey urgency—
"I want to let you know that, since our courses are in such high demand, it is very likely that these particular tee times will not be available when you call back."

Ease their mind with the cancellation policy—
"If you do decide to book right now, we could lock in your rooms and golf, but you would still have up until 14 days prior to your date of arrival to change or cancel any aspect of this trip without penalty."

If the guest still declines to book, offer a follow up phone call on a specific date 2-3 days out:
"Would you like me to give you a call around this same time on Friday to follow up after you've had a chance to talk to your friends/spouse/family?"

If the guest agrees to a follow up call:
- Ask for the guest's email address:

"Great. Can I please get your email address so I can send you a quick note about what we discussed today?"
- Send an email with a brief synopsis of what the guest is interested in as well as the date and time of your scheduled callback.
- Leave a REVINATE note that includes the date/time of your callback and clear details about what your guest is interested in booking.
- Set your Lead Status to In-Process
- Save your call disposition as Hot Lead

If the guest declines a follow up call, offer an email with your contact information:
"In that case, I can send you an email with my contact information and some details about what we discussed today, then you can reach back out to me when you are ready to proceed."
- Notate the details of what the guest was interested in booking in case they call back later to book.
- Set your Lead Status to Not Booked
- Set your Not Booked Reason
- Set your call disposition as Not Booked

Call the guest back at your scheduled day/time:

If you reach the guest, but do not close the sale:
- Offer one more callback within 2-3 days

If the guest agrees:
- Send another email to the guest
- Leave notes of the conversation
- Keep your Lead Status as In-Process
- Set your call disposition as Reconfirm

If the guest declines:
- Make notes of the guest's objections.
- Send a thank you email.
- Set your Lead Status as Not Booked
- Set your Not Booked Reason
- Set your call disposition as Not Booked

If you reach a voicemail
- Let the guest know you will try calling them again at a later time and will also send another email so they can easily get back in touch with you.
- Set your call disposition as Outbound call—Left Voicemail
- Keep Lead Status as In-Process

Make your 2nd Callback:

If you reach the guest, but do not close the sale:
- Make notes of the guest's objections to booking.
- Send a thank you email.
- Set your Lead Status as Not Booked
- Set your call disposition as Not Booked

If you reach a voicemail:
- let the guest know you will send one more email to reach you when they are ready to get back in touch.
- Set your Lead Status as Not Booked
- Set your Not Booked Reason as whatever the guest's initial objection was to booking on the first call.
- Send a thank you email.
- Set your call disposition as Outbound Call—Left VM

How to Earn Lead Ownership and Revenue Credit

There are many variables to consider regarding who earns credit for a reservation, each bearing a different weight. The list below contains the major variables used when deciding who has earned revenue credit, the majority of value being placed on the Call Disposition and the proper working of the lead. There is no black and white answer as it takes a team at times to secure a reservation. Not all of these points are applicable to every situation.

Hot Lead: A guest who has expressed interest in booking rooms but cannot commit on the first call *and* has agreed to a follow up call. The agent is working the lead.	**Not Booked:** A guest expressed interest in a room stay, but ultimately did not book and declined a follow up. The agent is finished working the lead.

CALL DISPOSITIONS
The Lead form is marked as Hot Lead – This displays understanding of the guest's interest to book, and the agents follow up intentions.
A follow up call has been scheduled within 3-4 days of the original conversation (unless an extended timeline for the follow-up is stated in the lead form notes.)

LEAD FORM QUALITY
The initial conversation with the guest was thoroughly notated with information to help the next agent.
A quote email was sent that reflects what the guest ultimately booked.
A scheduled follow up call is notated.
If the scheduled follow up date has past, there is record of a contact attempt.

CONTACTS WITH THE GUEST
A follow up email was sent to the guest with contact information after the original conversation.
The guest called and booked prior to the date/time of the original agent's scheduled follow up.
The guest requested to speak with the original agent.
The guest's emails and callback requests were responded to by the original agent in a timely manner (the agent's next working shift)
The original agent handled the majority of the guest's contacts.

QUOTE VS. BOOKING
The guest booked the same trip that was notated by the original agent.
The guest's trip is not significantly upsold from the original agent's quote.
The guest booked essentially the same trip that was quoted by the original agent, with a minor date change (within 1 month)

Give Credit to Another Agent

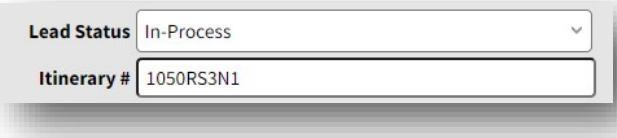
Revenue and **Booking Credit** is managed through Revinate. When an agent changes the status of the lead to 'Booked' (aka marking the lead booked) that agent will receive revenue credit for the booking.

However, there are instances in which it makes sense to give credit to an agent who didn't end up being the one to book the reservation.

Example: If Agent 1 has properly planned and is currently working a lead, then the guest calls in and books that same trip with a Agent 2, Agent 1 will get revenue credit.

How to Give Another Agent Credit

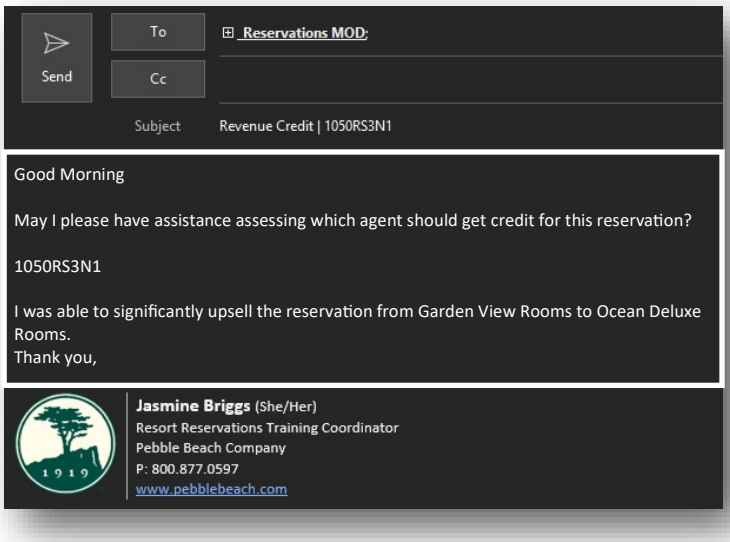
1. Book the trip using the planning agents notes as a reference
2. Fill in the lead with the required fields and leave a detailed Revinate note
3. Fill in the itinerary number
4. Leave the Lead Status as In-Process
5. Reach out to a supervisor via chat or email asking them to mark the lead booked for the original planning agent



Credit Decisions

If multiple agents put in equal planning/booking work, and you are unsure of where credit should go or if the booking agent significantly upsold from the original trip planning:

1. Seek the opinion of your supervisor
2. If the supervisor is also unsure of who should receive credit, email _ResMOD
3. CC your supervisor
4. Explain why you believe you should receive credit



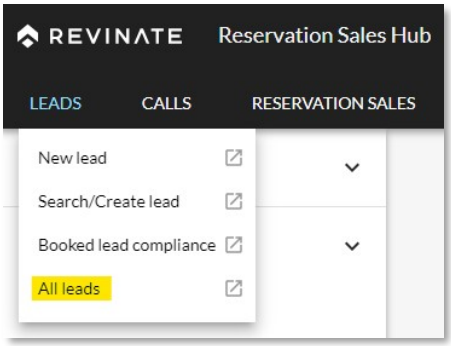
Reviewing Not Booked Leads 1/5

Outbound Initiative

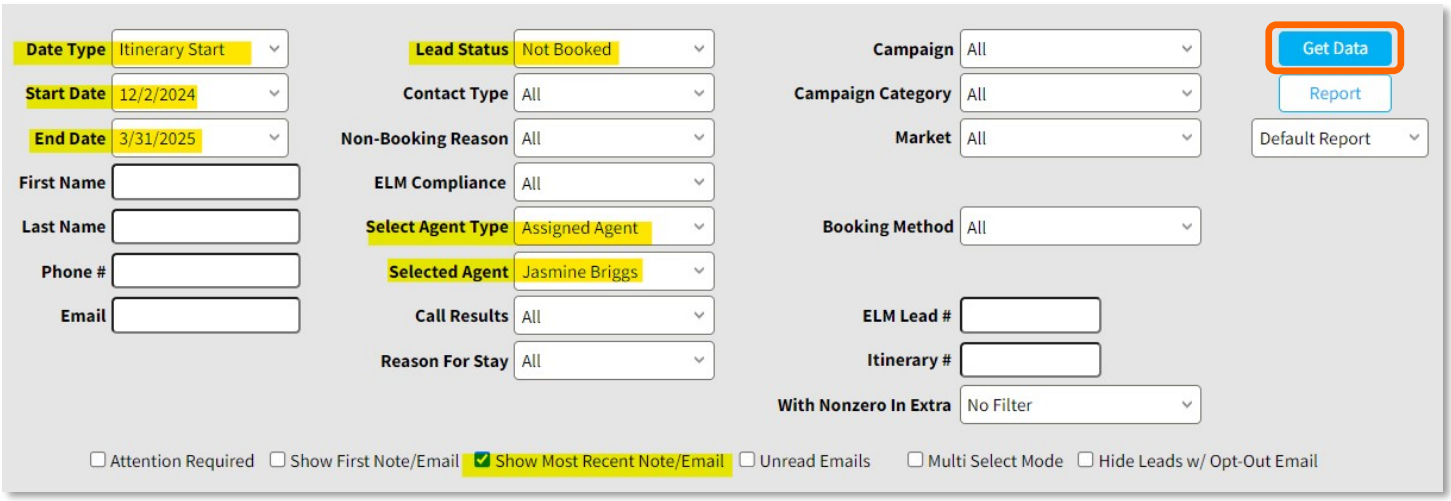
Management will task agents with making outbound calls to past not booked guests as an Outbound Initiative to drive sales. A specific date range will be provided according to our highest dates of need.

Not Booked Lead Report

1. Access **Revinate Sales Hub**
2. Click **Leads** > Click **All Leads**



3. Change **Date Type** to **Itinerary Start**
4. Set the **Start** and **End Dates** as defined by management
5. Set the **Lead Status** as **Not Booked**
6. **Select Agent Type** should be set as **Assigned Agent**
7. **Selected Agent** should be set as **your name**
8. Check the box to **Show Most Recent Note/Email**
9. Click **Get Data**



10. **Review** each Not Booked lead with a **Contact Date/Time between 4 and 60 days ago** and qualify if an outbound call should be made to the guest.

Reviewing Not Booked Leads 2/5

Outbound Initiative

Qualifying Leads | 'Will Call Back'

1. Leads that include '**Will Call Back**' in the notes qualify for an outbound call; we will reach back out to the guest to see if they are ready to book.
    a. **Check** room and golf **availability**; Make an **outbound call**
        - *"Good* **[Morning/Afternoon]** *This is* **[your name]** *calling from Pebble Beach Resorts on a recorded line. Is this* **[guest first and last name]***?"*
        - *"Excellent! How are you doing today?"*
        - *"Have you had a chance to check with* **[spouse/family/other golfers]***?"*
        - *"Are you still looking to put together the same trip we planned previously or have any details of the trip changed?"*
        - **[Plan trip accordingly]**
        - *"This looks like an amazing trip that you and* **[spouse/family/other golfers]** *would greatly enjoy, lets secure this ideal trip with a two night deposit (per room)."*
    b. If the guest does not answer:
        - **Leave a voicemail** and send a **"No Response Reply" email** in Revinate
        - *This is* **[your name]** *calling from Pebble Beach Resorts regarding the trip you are planning for* **[Dates or Month of Stay].** *We would love to continue planning this trip and securing ideal room(s) and golf. Please call in at 800-877-0597 and ask for* **[your name].** *Have a wonderful rest of your day.*

Reviewing Not Booked Leads 3/5

Outbound Initiative

Qualifying Leads | Price Conscious Guest

2. Leads that are marked Not Booked due to a **price conscious** guest qualify for an outbound call; we will reach out to the guest to offer any promotions or packages we have.
    a. **Check** room and golf **availability**; Make an **outbound call**
        - *"Good* **[Morning/Afternoon]**, *This is* **[your name]** *calling from Pebble Beach Resorts on a recorded line. Is this* **[guest first and last name]***?"*
        - *"Excellent! How are you doing today?"*
        - *"Do you have time to speak about the trip we planned previously?"*
        - *"I understand you were looking for a more economical trip, I have an additional option I would like to offer you. We have* **[explain and offer any promotions or packages we have]***."*
        - **[Plan trip accordingly]**
        - *"This is a great solution for your trip, lets get the room(s) and golf secured with a deposit of* **[full package amount or two night deposit for promotional offers]***."*
    b. If the guest does not answer:
        - **Leave a voicemail** and send a **"No Response Reply" email** in Revinate
        - *This is* **[your name]** *calling from Pebble Beach Resorts regarding the trip you are planning for* **[Dates or Month of Stay].** *We have promotions and packages including room and golf that we would like to go over with you. Please call in at 800-877-0597 and ask for* **[your name].** *Have a wonderful rest of your day.*

Reviewing Not Booked Leads 4/5

Outbound Initiative

Qualifying Leads | Dates over limited or no availability

3. Leads with **dates over limited or no availability** might qualify for an outbound call.

    a. **Research in SMS** if availability has opened up. Alternatively check to see if the guest was flexible with their dates and if there is availability across those dates.

    b. If there is availability, make an **outbound call**

        - *"Good* **[Morning/Afternoon]** *This is* **[your name]** *calling from Pebble Beach Resorts on a recorded line. Is this* **[guest first and last name]***?"*
        - *"Excellent! How are you doing today?"*
        - *"Are you still looking to put together the same trip we planned previously?*

          I have checked availability and those dates you were previously interested in have opened up!"
        - *"I have also checked alternate dates as well if you are flexible with your dates?"*
        - **[Plan trip accordingly]**
        - *"Since we know availability can change quickly, let's get this trip secured with a two night deposit (per room)."*

    b. If the guest does not answer:

        - **Leave a voicemail** and send a **"No Response Reply" email** in Revinate
        - *This is* **[your name]** *calling from Pebble Beach Resorts regarding the trip you are planning for* **[Dates or Month of Stay].** *We have more availability for room and golf during your dates. This can change quickly so please call in at 800-877-0597 and ask for* **[your name]** *to secure this trip. Have a wonderful rest of your day.*

Reviewing Not Booked Leads 5/5

Outbound Initiative

Qualifying Leads | Dates over Special Event

4. Leads with **dates over a special event** only qualify for an outbound call if sales has released rooms over those dates. Management will advise when this occurs.

    a. **Check** room and golf **availability**; If there is availability make an **outbound call**

        - *"Good* **[Morning/Afternoon]** *This is* **[your name]** *calling from Pebble Beach Resorts on a recorded line. Is this* **[guest first and last name]***?"*
        - *"Excellent! How are you doing today?"*
        - *"Are you still looking to put together the same trip we planned previously?*

          I have checked availability and those dates you were previously interested in have opened up!"
        - *"***[Advise of view obstruction if applicable]** *As these dates fall during* **[PBC Event]** *your view of the ocean and 18th green will be obstructed by grandstand and tents. Its an exciting time to be here and I wanted to make sure you knew about this import aspect of your stay."*
        - **[Plan trip accordingly]**
        - *"The number of rooms that were released are limited so lets get this trip secured with a two night deposit (per room)."*

    b. If the guest does not answer:

        - **Leave a voicemail** and send a **"No Response Reply" email** in Revinate
        - *This is* **[your name]** *calling from Pebble Beach Resorts regarding the trip you are planning for* **[Dates or Month of Stay].** *Rooms are now available during your requested dates. This can change quickly so please call in at 800-877-0597 and ask for* **[your name]** *to secure this trip. Have a wonderful rest of your day.*

E-Desk Agent

Resort Reservations

2024 Training Binder



E-Desk Team Overview

The E-Desk Agent is responsible for handling all reservation inquiries that come into the department through various electronic streams.

E-Desk Agent Duties

Inbound Phone Calls:
- Incoming TAG Calls
- Incoming Wedding Desk Calls
- Reservations Dept. Overflow Calls

Email Management:
- Travel Desk
- Res Leads
- Wedding Desk
- GDS Reservations
- Vacation Planner submissions
- In-Process Lead Follow Ups
- Public Folder Emails

Travel Desk Bookings
- IATA Bookings
- IAGTO Bookings
- Direct Billing
- Bonotel Bookings
- Inspirato Bookings

Audit Reports:
- On the Books Report (“BOB”)
- Deposit Dues #4 Report (“Packet”)
- Deposit Dues #4 Daily 4 IAGTO
- Deposit Dues #4 Daily 1A IAGTO

E-Desk Supervisor Duties

- Assigning Duties Daily
- Workload Forecasting
- Hosting Team Assessment Meetings
- Generating/Sending Audit Reports
- Approving Reservation Holds
- Researching Commission Inquiries
- Processing Signed TAG Applications

Frequently used documents Located in Travel Desk Folder on Z Drive

- _Accounting Note
- _IAGTO Agency List
- IAGTO - Billing

Team Communication

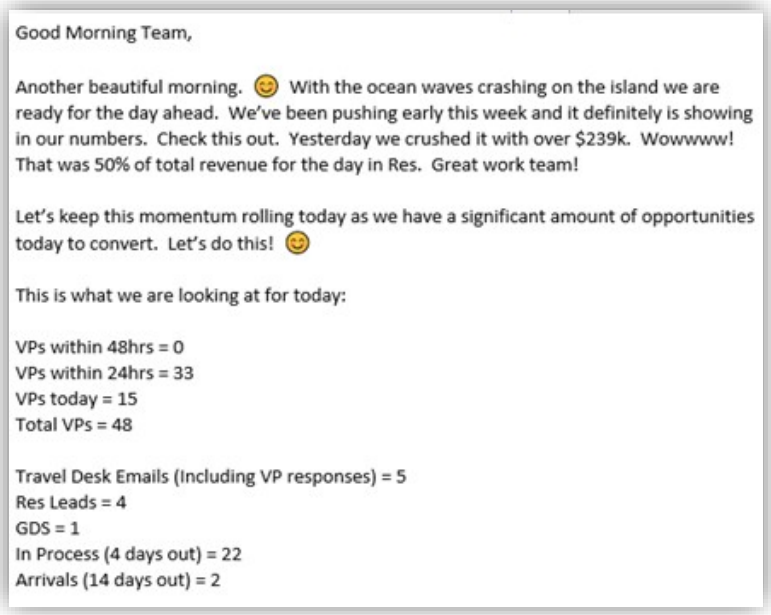
The E-Desk team needs to be in constant communication throughout the day.

Proper communication helps to:

- Avoid duplicating tasks
- Ensure all emails are answered in a timely manner
- Keep up with tasks by redistributing duties as needed

Each Morning, the E-Desk Supervisor will send an email to the team which will include:

- Statistics of the team's progress
- The day's projected workload
- Which agents are out that day
- Duty assignments.



Good Morning Team,

Another beautiful morning. 😊 With the ocean waves crashing on the island we are ready for the day ahead. We've been pushing early this week and it definitely is showing in our numbers. Check this out. Yesterday we crushed it with over $239k. Wowwww! That was 50% of total revenue for the day in Res. Great work team!

Let's keep this momentum rolling today as we have a significant amount of opportunities today to convert. Let's do this! 😊

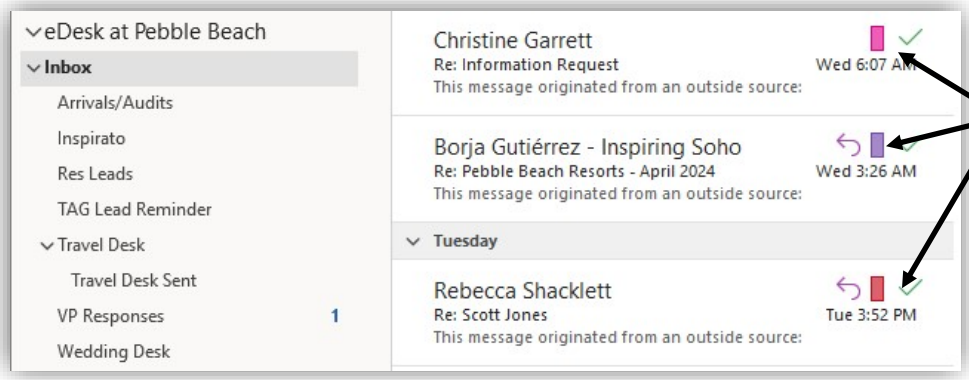
This is what we are looking at for today:

VPs within 48hrs = 0
VPs within 24hrs = 33
VPs today = 15
Total VPs = 48

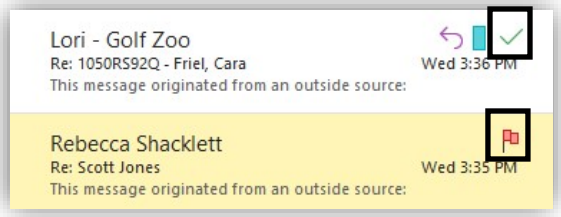
Travel Desk Emails (Including VP responses) = 5
Res Leads = 4
GDS = 1
In Process (4 days out) = 22
Arrivals (14 days out) = 2

Outlook Management

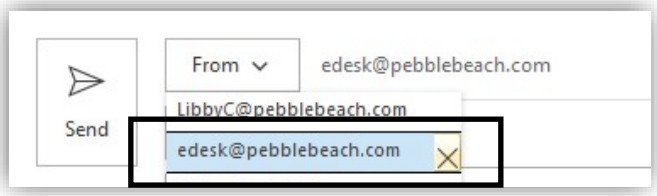
The E-Desk handles email correspondences as a team via their shared E-Desk inbox.



Agents are assigned a personal color which they apply to any emails they are handling.



A checkbox means that the email has been responded to.
A flag means the email needs to be responded to.
If the email has a color and a flag, that means that an E-Desk agent has indicated that they are working on that email, but have not sent the reply yet.



When replying to emails, the E-Desk team will toggle the From address to edesk@pebblebeach.com to ensure that all replies are seen by the entire team.

E-Desk Glossary

	WHAT IT MEANS	HOW E-DESK HANDLES IT
IATA	IATA stands for International Air Transport Association. This is a Travel Agent Accreditation.	The Travel Desk collects IATA numbers from every travel agent which we use to identify the headquarters of each agency.
Travel Agent	Travel Agents book on behalf of their clients, typically using the client's credit card. Travel Agents pay rack rate, but receive a 10% commission off rooms (not golf/recreation).	Most Travel Agencies send inquiries to the _Travel Desk inbox, but they will also call our general reservations line to make adjustments and check availability.
IAGTO	IAGTO is the International Association of Golf Tour Operators. It is the global trade organization of the golf tourism industry. IAGTO agents do not receive commission, but instead receive a 15% discount off rack rate rooms and must prepay all rooms and golf 14 days prior to arrival using the agency's credit card.	IAGTO Agencies send inquiries to the _Travel Desk inbox. E-Desk agents do not need to quote prices, but the Net Rates are available in the Digital Binder. If IAGTO book LROD or suites, they prepay at rack but receive the standard TAG 10% commission.
Direct Billing	Wholesale Tour Operators who participate in direct billing do not pay deposits or pre-pay any part of the stay. Pebble Beach instead sends a bill to the agency after the stay is completed.	Direct Billing Agencies send inquiries to the _Travel Desk inbox. These agencies have City Ledgers that must be attached to their bookings. Depending on the agency, they receive either a 15 or 20% discount off rack rates.
GDS	Pebble Beach allots a certain number of rooms for online sales. These rooms are booked through online portals into a Global Distribution System (GDS). The bookings made online will automatically populate in SMS Host.	GDS Inquiries and notifications are sent to the GDS Reservations inbox. E-Desk will make sure the GDS emails match the SMS bookings, create Lead Forms for all bookings, and confirm that cancellations submitted through GDS are processed correctly in SMS.
BONOTEL	BONOTEL is a wholesale tour operator that specializes in exclusive luxury travel. BONOTEL receives a 25% discount off rack rate rooms and, like PB Tour Operators, book via Direct Billing using the BONOTEL City Ledger instead of paying a deposit.	BONOTEL will typically book online via GDS, but if the BONOTEL agent does not see availability online, they may email the Travel Desk to ask us to provide them with availability. E-Desk agents will set these bookings up the same way Wholesaler Tour Operators are booked.
Virtuoso	Travel Agents can be members of a Luxury Travel Agent Program. TAGs who are members of Virtuoso will receive special benefits for their clients.	Virtuoso benefits are only applicable to Casa Palmero. The E-Desk agent must look up the program in the Digital Binder to apply said benefits.
Inspirato	Inspirato is a luxury travel membership that allows members exclusive access to luxury hotels all over the world, including Casa Palmero.	Inspirato agents book Casa Palmero rooms for their clients through GDS. E-Desk agents manage all GDS bookings and ensure that the Inspirato guidelines and policies are followed.

Email Leads

The E-Desk works leads as a team and follows up with leads as a team. The inboxes listed below must be monitored every day.

The E-Desk team works together to ensure that all inquiries are responded to and followed up with by maintaining constant communication about who is working on which messages.

Travel Desk Inbox	This inbox will receive inquiries from Travel Agents and IAGTO agents. All communication will remain within the Travel Desk inbox until a booking is secured. At that point, the conversation will be inputted into a Booked Lead Form. This inbox will also contain Travel Agent/IAGTO leads that have been forwarded from the Director of Leisure Travel Sales, Karlyn Hawke. In those instances, when we respond to the agent in Outlook, we CC the director, but delete all internal correspondences from the email chain.
ResLeads Inbox	This inbox will receive an array of guest types who have sent emails into various Pebble Beach departments that need a response by the Reservations Department. When booking leads are sent to this inbox, the E-Desk team immediately creates an In Process Lead Form so they can call or email the guest. The Assigned Agent will be "ResLeads" so all responses and reminders will continue to come to the ResLeads inbox. If a Travel Agent/IAGTO inquiry ever comes to this inbox, when responding, the agent should CC Travel Desk to move the conversation to the more appropriate inbox.
GDS Inbox	This inbox is located within the Public Folder and will contain automated messages from the online GDS portal whenever a new online booking is made, changed, or cancelled. E-Desk agents are responsible for double checking the bookings in SMS, ensuring cancellation refunds are processed, and creating lead forms in REVINATE. No email replies will ever be made through this inbox.
Public Folder Inbox	Guests will occasionally reply to the automated SMS confirmation emails despite the subject line stating "DO NOT REPLY." These replies end up in the "Public Folder" which we monitor to ensure we do not miss any important questions or requests.
Vacation Planners	The team works together to make initial and follow up outreaches to Vacation Planners. These leads do not initially appear in any inbox, but since the Assigned Agent for VPs will always be the Travel Desk, all VP responses from guests and reminder emails will appear in the Travel Desk inbox.

RETURN TO TABLE OF CONTENTS

2024 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, 2024 – December 31, 2024,*** 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 at arrival	Continental up to 2 persons	Yes	K10020	VIRTUOSO	IATA#
Preferred Platinum Partner	PPP	$100	1 level based on availability at arrival	Continental up to 2 persons	Yes	K10040	PREFPLAT	IATA#
Signature Travel	STP	$100	1 level based on availability at arrival	Continental up to 2 persons	Yes	K10050	SIGTRVL	IATA#
Signature Travel Suite & Villa Privileges (Direct) (2)	STP	$200	1 level based on availability at arrival	Continental up to 2 persons	Yes	K10050	SIGTRVL	IATA#
Internova SELECT	TZE	$100	1 level based on availability at arrival	Continental up to 2 persons	Yes	K10060	TRVLLEAD	IATA#
ALTOUR SELECT (Part of Internova SELECT)	AHC	$100	1 level based on availability at arrival	Continental up to 2 persons	Yes	K10060	TRVLLEAD	IATA#
Serandipians (formerly Traveller Made)	TMP	$100	1 level based on availability at arrival	Continental up to 2 persons	Yes	K10070	TRVLRMADE	IATA#
Hyundai The Black Card	HYB	$100	1 level based on availability at arrival	Continental up to 2 persons	Yes	K10120	HYBLACK	IATA#

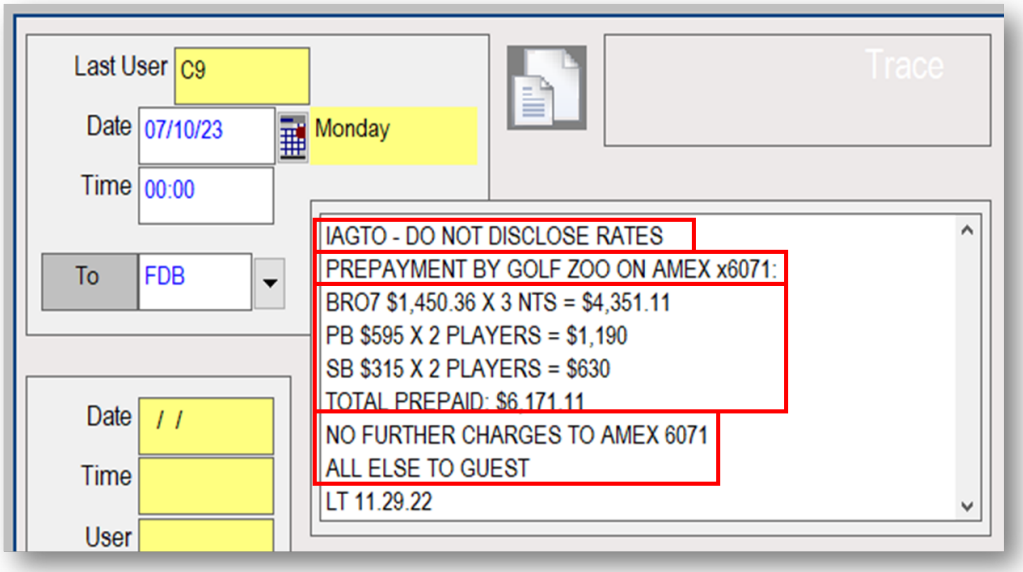
(1) Resort Credit per stay (Credit cannot be used for Room or Golf at Pebble Beach Golf Links/Spyglass Hill Golf Course).
Create FDB Trace for date of departure: ***"Pls apply [$Amount] Resort Credit at checkout."***

(2) Signature Travel Suite & Villa Privileges (Direct) – applies only to Courtyard Suites and Palmero Suite, and must be booked directly with PB Reservations (not available on GDS); comp upgrade only applies to Courtyard Suite

Understanding IAGTO

Pre-Payments by IAGTO

Tip: Create the Cost Breakdown *before* writing the FDB to ensure all math is correct.



An FDB is set for the date of arrival, therefore, the information within the FDB needs to reflect the state that the reservation will be in on the arrival date.

IAGTO agents will only pay the 2-night deposit at the time of booking, but by the time the guest arrives, they will have prepaid all room nights and golf greens fees.

Letter of Authorization

An LOA is **required** in the following two situations:

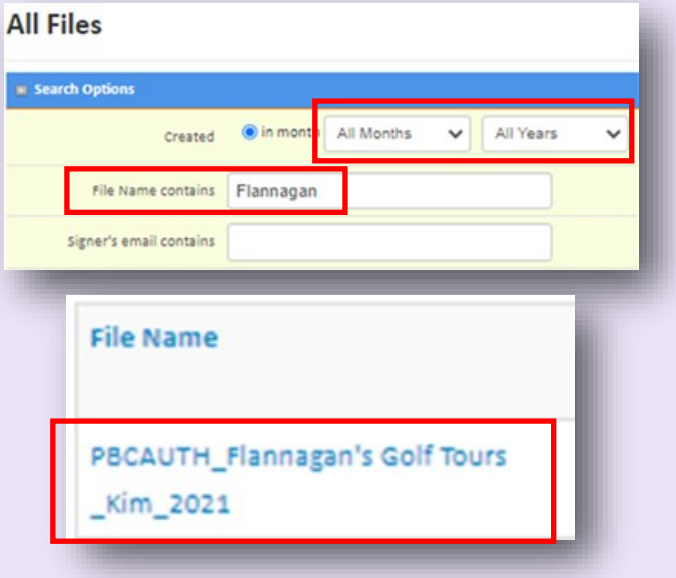
- The date of arrival is within 30 days
- A 3rd party credit card will be charged at checkout

An **E-Desk Team** uses LOAs for the following *additional* situations:

- A Travel Agent is communicating via email and needs to send their credit card information electronically.
- An international TAG or VP in a different time zone needs to send their credit card information electronically since we cannot speak to them on the phone.
- The agent made an IAGTO booking which will always require an LOA.

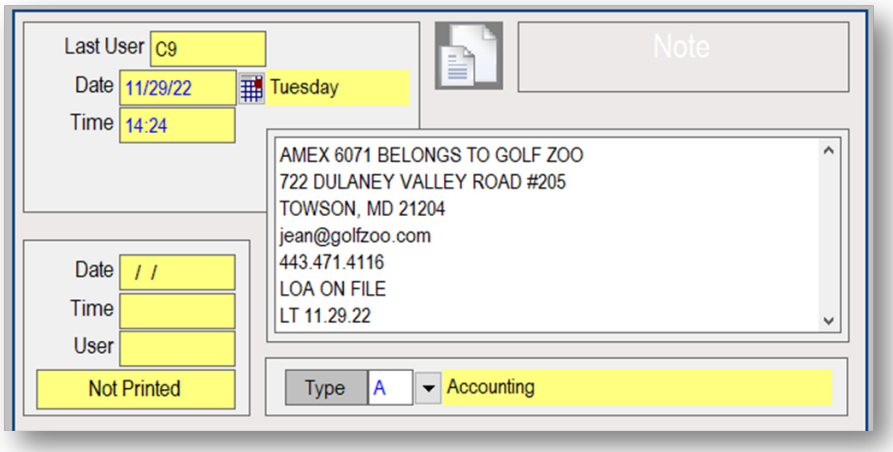
IAGTO Agencies will keep an LOA on file that is valid for the entire year—as opposed to signing an LOA for each booking.

You can find the annual LOA forms in Sertify by searching "All Files"



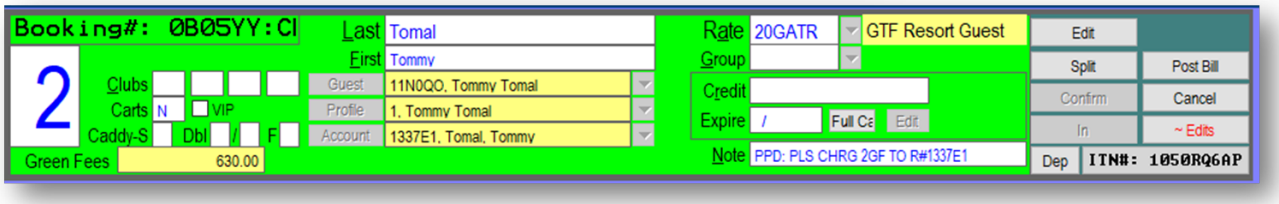
Understanding IAGTO

Pre-Payment Documentation



The owner of the CC will not be present to sign for charges at checkout, so we must collect:

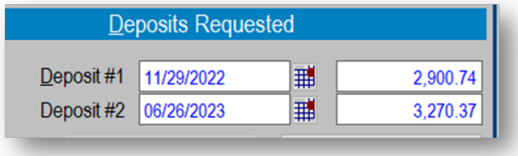
- *Card owner's name*
- *Billing address*
- *Email / phone*
- *Document that an LOA has been signed*
- *Document all prepaid recreation in babynotes*



Deposit & Final Prepayment

AT TIME OF BOOKING

Deposit #1 & #2

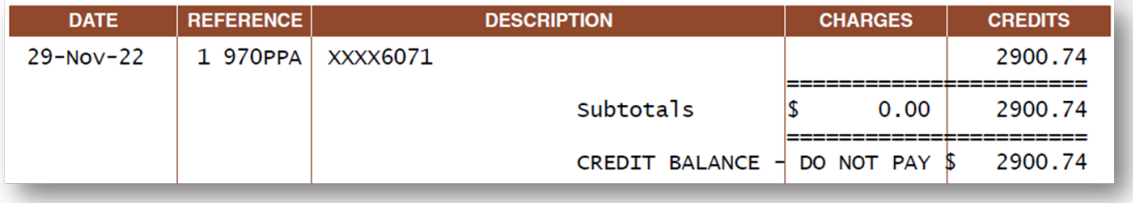


Cost Breakdown



Total Charges		$12,366.27
Deposit on File	*Paid Dec. 1, 2022*	$4,484.18
Total Due for Prepayment	*Due July 24, 2023*	***$7,882.09***

Folio Receipt



DATE	REFERENCE	DESCRIPTION	CHARGES	CREDITS
29-Nov-22	1 970PPA	XXXX6071		2900.74
		Subtotals	$ 0.00	2900.74
		CREDIT BALANCE -	DO NOT PAY	$ 2900.74

Travel Desk Email Templates

THE QUOTE

Arrive: [DATE / DAY OF THE WEEK]
Depart: [DATE / DAY OF THE WEEK]

The Lodge at Pebble Beach
(1) **Ocean View** room at the rate of $1,465 which includes service fee.
Nightly Rate = $1,651.69 which includes tax, service fee and assessment.

Tee Times (2 players)
January 21, 2024- 11:40am- The Links at Spanish Bay
January 22, 2024- 10:50am- Spyglass Hill Golf Course
January 24, 2024- 9:40am- Pebble Beach Golf Links

Greens Fees
Pebble Beach Golf Links = $675 per player
Spyglass Hill Golf Course = $495 per player
The Links at Spanish Bay = $350 per player
Del Monte Golf Course = $130 per player
The Hay = $75 per player

In order to confirm reservations, we would need to collect a deposit equal to the first two night's room, tax, and service fee. Any additional nights or recreation are due upon departure. You may cancel a reservation up until 14 days prior to arrival to receive a full refund of your deposit.

THE HOLD

Attach Cost Breakdown

This reservation is on hold under **[GUEST NAME/ ITINERARY NUMBER]** and a Cost Breakdown is attached.

In order to confirm this reservation, we will need to collect a deposit for the first two nights of their room stay which totals to **$XXXX.XX**

You will still be able to cancel or change this reservation up until 14 days prior to the guest's date of arrival for a full refund of the deposit.

We have sent a letter of authorization to you for guest's credit card. Once we receive the completed form, we will charge the deposit. We can hold these rooms until end of day today, 5pm PST.

THE CONFIRMATION

Attach the Folio Receipt if IAGTO or TAG's CC

Thank you for sending the completed authorization form. The deposit has been charged and a confirmation email has been sent.

Will your client be covering all charges for this stay or should we plan to divide charges between guests at checkout?
In order make our check-in process run smoothly, would you mind providing the names of all guests who will occupying rooms on this trip?

OUTLOOK—INITIAL QUOTE

Hello All,

Do you have any dates left available for September 2023 on Pebble Beach Golf Links? I have a group of 8 looking for any dates in September for 3 rounds and 3 nights.

Thank you!

Kara Guthrie
Golf Travel Specialist

CC _Travel Desk any time you reply to an inquiry to alert other E-Desk Agents of the response.

Hi Kara,

We no longer have the availability to accommodate 8 golfers on Pebble Beach Golf Links over these dates (September 15 – 18, 2023).

Here is an alternate option for your clients:

Arrive: Friday, November 10, 2023
Depart: Monday, November 13, 2023

The Inn at Spanish Bay
(4) **Forest View** rooms

Tee Times (8 players)
November 11, 2023- 8:00am, 8:10am- Pebble Beach Golf Links
November 12, 2023- 10:30am, 10:40am- The Links at Spanish Bay
November 13, 2023- 9:20am, 9:30am- Spyglass Hill Golf Course

Kind Regards,

OUTLOOK—CONFIRMATION TO BOOK

NOTE: If the agent is **IAGTO** or **Direct Billing**, you can book the trip as soon as you receive email approval, but if it is a regular **Travel Agent,** you will need to create the booking as a "Hold" while the agent/client fills out an LOA Form

Hi Tanya,

Excellent, thank you.

Could you go ahead and book this please?

Can we move the Links at Spanish Bay to 08.30 on the 9th April please?

Thanks

Kind regards,

Richard Tidman
Head of YGT Select
richard.tidman@yourgolftravel.com , 020 7157 1553
Cloister Court, 22-26 Farringdon Lane, London, EC1R 3AJ

1050RQ6R9 - Rashley, Brian.pdf
125 KB

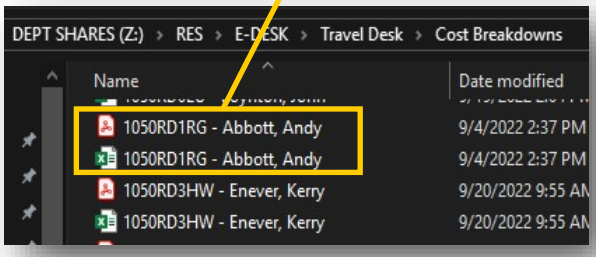
Hi Craig,

The reservation is confirmed under Mr. Brian Rashley / 1050RQ6R9 with the cost breakdown attached!

The initial deposit has been processed with the details of the itinerary being sent through shortly.

Kind Regards,

Cost Breakdowns are stored as both PDFs and Excel Sheets so edits can easily be made if the booking changes.



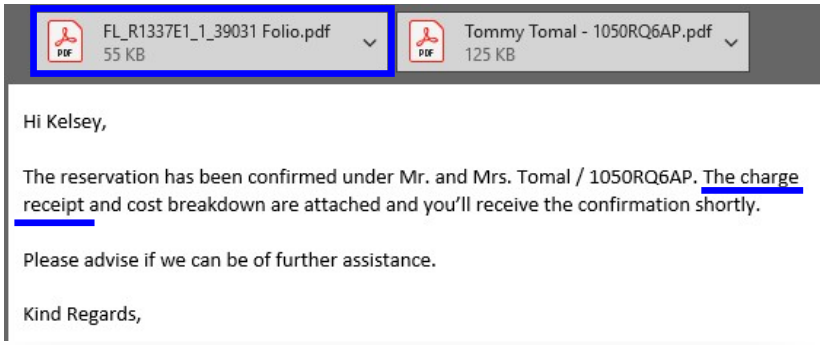
Pebble Beach Resorts

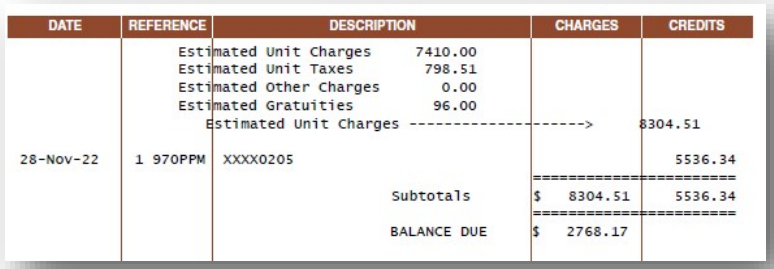
Pebble Beach Resorts Cost Break Down

ITINERARY	Arrival Date	Guest Name	From
1050RQ6R9	8.7.23	Rashley, Brian	Kelley M.

Room Nights						
Forest View	The Inn at Spanish Bay					$977.50
Room Tax						$102.64
California Assessment						$1.91
Nightly Service Charge						$32.00
Monterey County Assessment						$7.00
Total Room Charge per Night						*$1,121.04*
Nights Booked						3
Rooms Booked						2
Total						**$6,726.27**
Total Room Charges						**$6,726.27**
GOLF CHARGES						
Pebble Beach	$595 per player		X	4	=	$2,380
Spyglass Hill	$435 per player		X	4	=	$1,740
Spanish Bay	$315 per player		X	4	=	$1,260
The Hay	$65 per player		X	4	=	$260
Total Golf Charges						**$5,640.00**
Total Charges						**$12,366.27**
Deposit on File	*Paid Dec. 1, 2022*					**$4,484.18**
Total Due for Prepayment	*Due July 24, 2023*					***$7,882.09***

RECEIPT / FOLIO — *Send this to IAGTO and any TAG using their company CC*





DATE	REFERENCE	DESCRIPTION	CHARGES	CREDITS
		Estimated Unit Charges 7410.00		
		Estimated Unit Taxes 798.51		
		Estimated Other Charges 0.00		
		Estimated Gratuities 96.00		
		Estimated Unit Charges ---------->	8304.51	
28-Nov-22	1 970PPM	XXXX0205		5536.34
			==========	==========
		Subtotals	$ 8304.51	5536.34
			==========	==========
		BALANCE DUE	$ 2768.17	

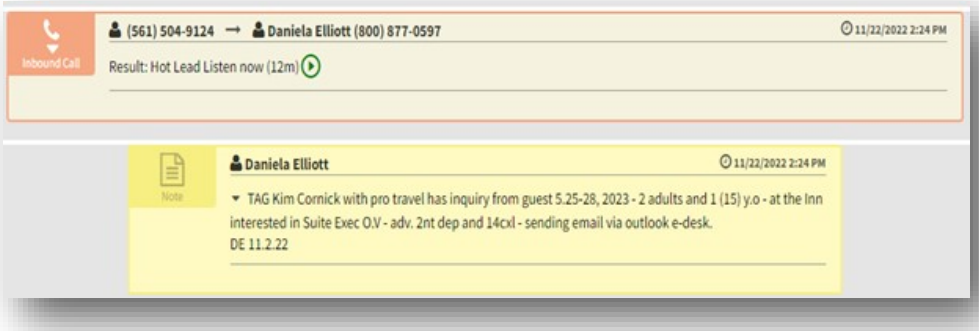
Send a Folio (Receipt):

- Click Folios
- E-Mail Folio 3
- Choose the property at which the guest is booked
- Input your personal work email into the Send To field
- OK to send
- You will be prompted to say yes or no to adding your email to the reservation. *Always say no.*
- You will receive the Folio in your person inbox at which point you can attach it to an email to the IAGTO agent.

REVINATE

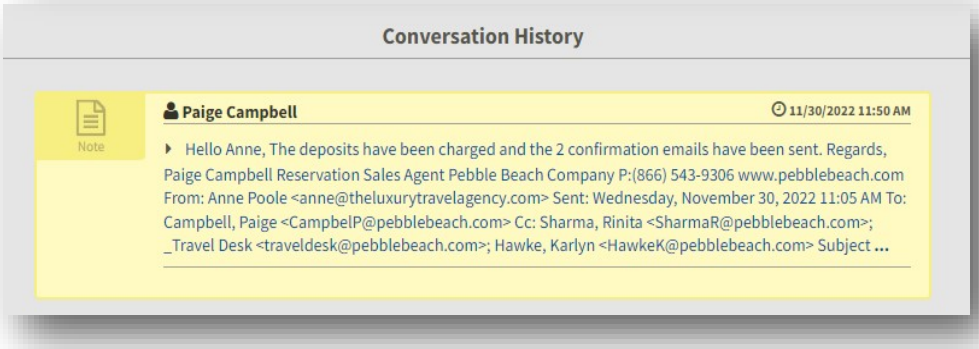
If a TAG inquiry comes to you via phone:

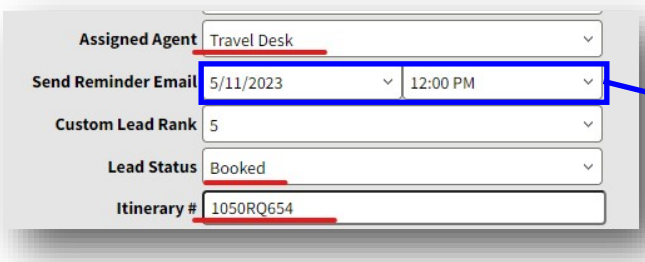
- Create a lead form in Revinate to track your conversation from In-Process to Booking.
- The Assigned agent should be "Travel Desk"



If a TAG inquiry comes to you via the Travel Desk Inbox:

- Keep the conversation in Outlook until the agent gives confirmation to book.
- Once booked, create a booked lead form assigned to the Travel Desk.
- Paste the email conversation into the notes.



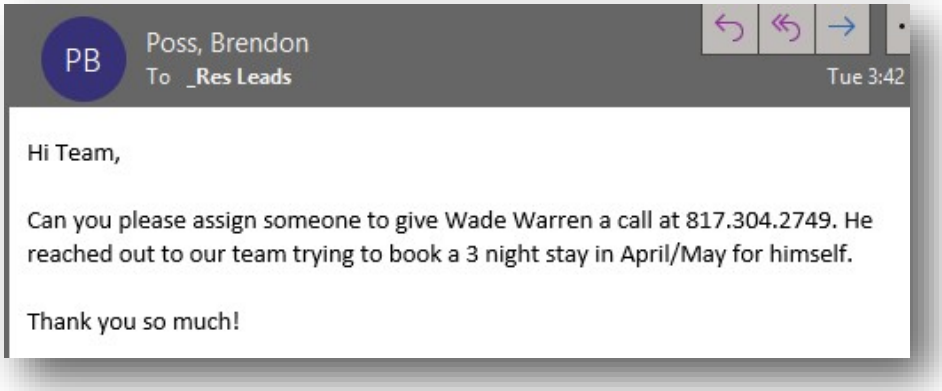


IAGTO ONLY
Set a reminder email for 14 days prior to the date of arrival so you can reach out to charge the final prepayment.

ResLeads Inbox

This inbox can contain simple questions from guests that the E-Desk team can answer via a quick reply or phone call.

However, if a ResLeads email contains information about a prospective guest looking to book rooms, we must immediately create a Lead Form and respond via REVINATE.

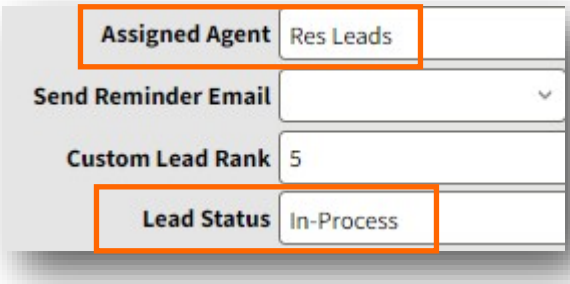


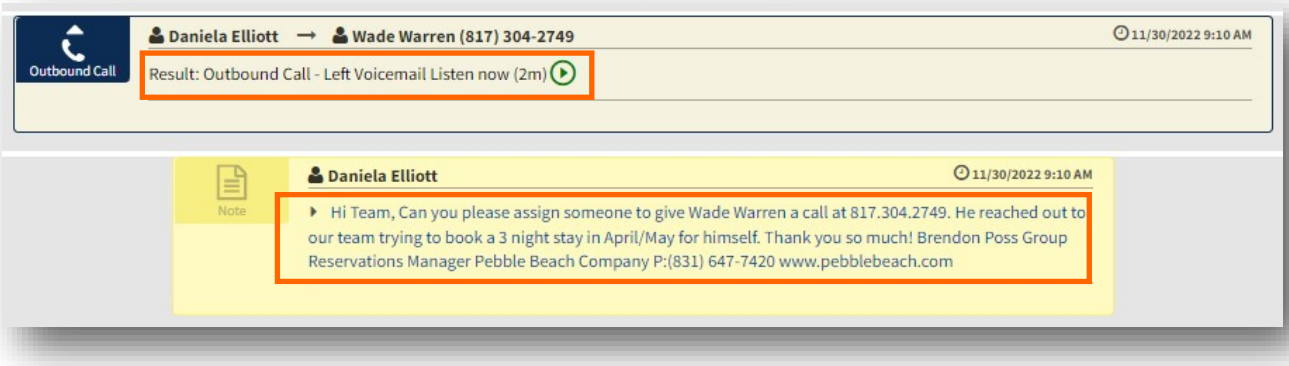
NOTE:
When an internal Pebble Beach employee sends an email to ResLeads, reply to that person and CC ResLeads to let them know it is being handled.

If the email is from a PBC Operator, you do not need to reply to them.

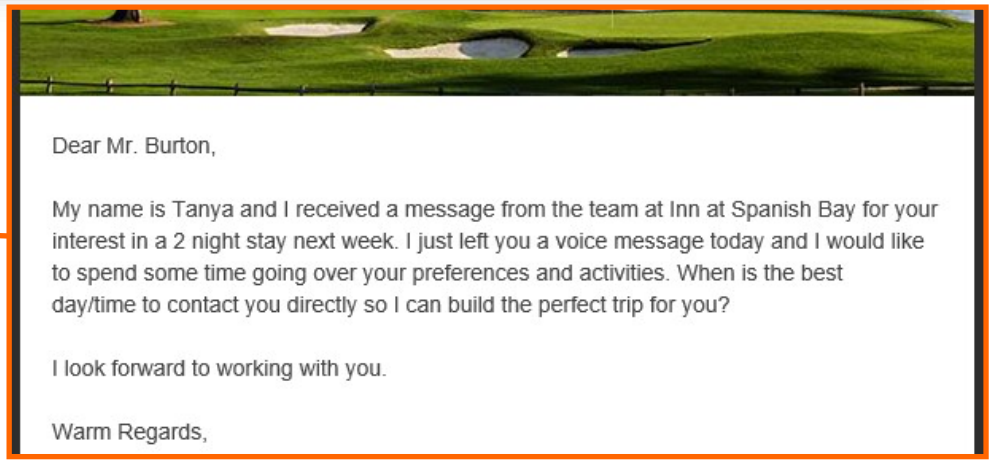
THE E-DESK AGENT WILL:

- Create a new Lead Form assigned to "**ResLeads**"
- Set the status to "**In-Process**"
- Paste the **original email** into the Lead Note
- **Call** the guest and follow normal lead procedures.



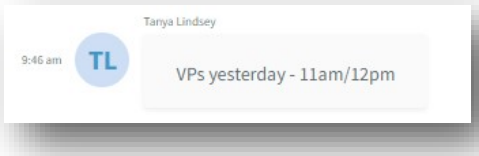


If the guest only provided an email address, you should **email the guest through REVINATE**



Vacation Planners

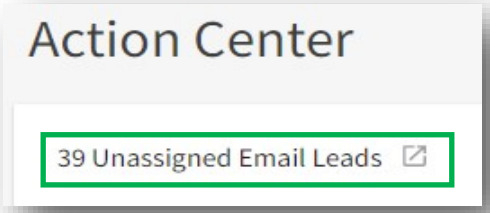
Since multiple agents will be working on VPs at the same time, you must **indicate in the chat** what hour segment you are working on to avoid overlap.



You will do the same if you are working on specific **VP Response emails** that come into the Travel Desk inbox.

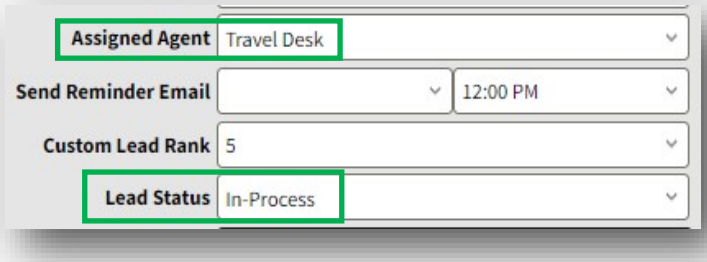


Only work on/assign one VP at a time.
This ensures that management can accurately see how many VPs remain to be worked throughout the day.



VACATION PLANNER OUTREACH

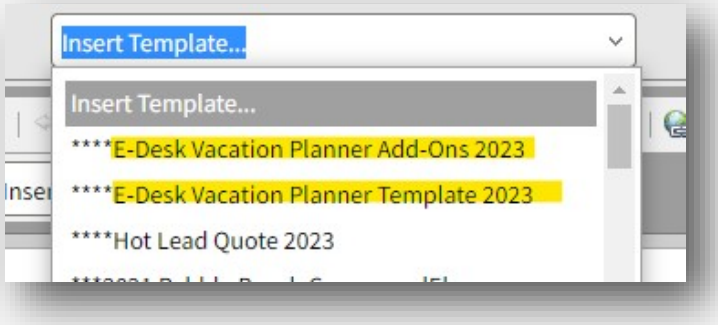
1. Assign the Lead to the **Travel Desk**
2. Mark the Lead Form as **In-Process**
3. Place a **phone call** to the guest



Note— Only call guests between the hours of 8am-6pm their time and be conscious of time zones/states/countries

If you reach a voicemail:

- **Leave a message** without giving your name, but provide the general reservations phone number
- Send the **E-Desk Vacation Planner** email



If the guest calls back, they should complete the conversation with a Resort Sales Agent—they will not transfer the call back to the E-Desk

Wedding Desk (1/2)

Communication

New wedding desk inquiries should be sent to _Weddings. CCS (Catering and Conference Services) will work with initial guest wedding inquiry and determine if the rooms and golf portion will be handled by Sales or by Reservations (E-Desk) depending on the size of the potential reservation.

1. CCS will email _Res Wedding Desk with guest's contact information and basic logistics of their request

> **Subject:** RE: Pebble Beach l Elopement Plans l April 2022
>
> Good Afternoon Ms. Smith,
>
> I have copied our Wedding Reservations Desk so they can reach out to you with pricing for your wedding week-end. This will be a great place to start with room and golf availability. I will be in my office this weekend, so if you have any questions, please reach out. Thank you.

2. Respond to CCS in outlook that you will reach out to the guest to assist
3. Reach out to the guest (via email or phone) and book their room and golf
    - The first contact is an opportunity to ask probing questions and build rapport. You want to find out their preferences for both rooms and golf, then follow up with a quote in your second contact.
    - Rooms and Golf Resort Guidelines still apply for weddings. If guest asks for an exception this needs to go through supervisors/managers for approval.

> **Subject:** RE: Pebble Beach l Elopement Plans l April 2022
>
> Good Afternoon Ms. Smith,
>
> Congratulations on your engagement! My name is Krysjen and I will be assisting you with your room and golf reservations for April 2022.
>
> We have availability in Mid-April for Pebble Beach Golf Links. Are you familiar with the type of room you would like to reserve? If not, I would be happy to recommend some based on your preferences.
>
> Please let me know if you have any questions or what information I can provide to help you plan.
>
> I look forward to working with you!
>
> Warm Regards,

4. Create a REVINATE Lead Form
    - Keep the Lead Status as In-Process until the booking is confirmed—The guest could be in "info seeking" phase of planning wedding and may not have committed yet, in this case we answer any room and golf questions they may have and copy any communication into the Revinate lead.
    - Apply the *Wedding Inquiry campaign
    - Assign the Lead to _ResLeads
    - Copy any email communication from outlook into the Lead notes
    - Do not send any emails from REVINATE—All communication should stay within _Res Wedding Desk
5. When room(s) are booked, notify the CCS via outlook, providing the ITN#, and send them an SMS confirmation email
6. For any questions regarding banquets, floral, private dining, or anything else not rooms and golf related, please refer back to CCS.

Wedding Desk (2/2)

SMS Procedures

All standard room booking procedures and guidelines apply.

1. Book any rooms, golf, or dining the guest is looking for.
2. In **booking settings**, set Phone-In source to **Weddings - 18**
3. Add **WEDDING RESERVATION** in all caps into the **Reservation line** on the room tile. Indicate relation to betrothed couple.
4. Add the CCS contact email into the **Housekeeping line** as **COPY: CCS's email**



5. Leave an additional **open R note** stating:

- Names of betrothed
- CCS contact
- Wedding date
- Wedding location
- Any pertinent information specific to the wedding

R Note Example:

Wedding Reservation
Bride: Sophia Doloresco
Groom: Tyler Roknipour
Wedding date: April 20, 2024
CCS: Barry Peterson
KF 5.1.23

6. Leave a **Y Note** (rooming list) on primary's room stating:

- Guests staying in each room
- Their role in the wedding (if applicable)
- Their relation to the betrothed
- Any bedding/ADA/room requests

Y Note Example:

R/L
LROS
1. M/M Parviz Roknipour - BQ
2. M/M Matthew and Sheena Roknipour (son and daughter in law) - BQ
Ella (5 years) & Madison (2 years) - grandchildren/flower girls
3. M/M Al and Mary Robles (parents of Deborah) - ADA BQ
4. Sylvie DesLauriers - BK
LROD
1. Tyler & Sophia
Inn Rooms - TBD
KF 5.1.23

7. Input a comp **amenity** trace set for the **date of the wedding**. Champagne is a great option.
8. Add Honeymoon code into **meal plan field** and **special field** on the room of the betrothed.

NOTE: We can hold wedding reservations without a deposit for up to 2 days without supervisor/manager approval.

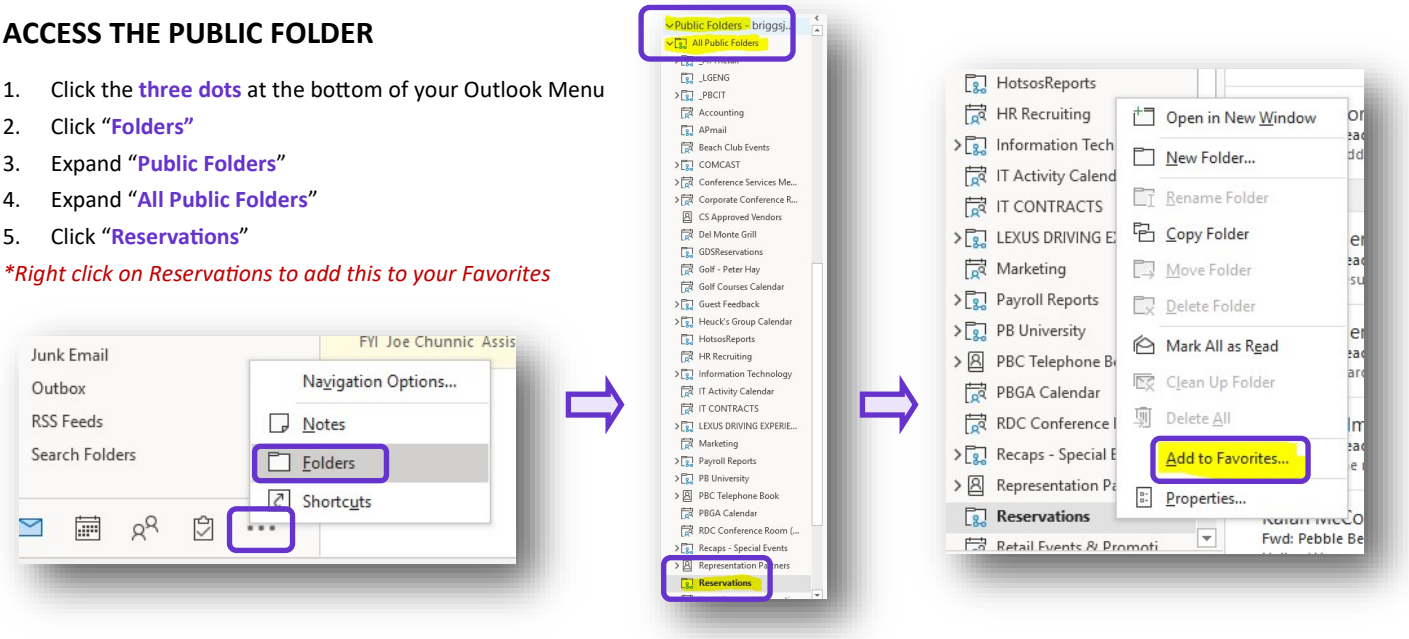
Public Folder Inbox

Guests will occasionally reply to the automated SMS confirmation emails despite the subject line stating "**DO NOT REPLY**" These replies end up in the "**Public Folder**" which we monitor to ensure we do not miss any important questions or requests.

ACCESS THE PUBLIC FOLDER

1. Click the **three dots** at the bottom of your Outlook Menu
2. Click "**Folders**"
3. Expand "**Public Folders**"
4. Expand "**All Public Folders**"
5. Click "**Reservations**"

**Right click on Reservations to add this to your Favorites*



DELETE THE FOLLOWING

- Out of Office Emails
- Postmaster Notifications

EMAILS TO OUTSIDE DEPARTMENTS

- Forward the email to the appropriate department
- Mark the email **YELLOW** to indicate that it has been forwarded outside Reservations

EMAILS PERTAINING TO RESERVATIONS

Look up the booking in both **SMS** and **NAVIS**

⇒ If the edit has already been taken care of:
- Disregard the email and delete it from the Public Folder

⇒ If the required edit is a Day Guest Task:
- Forward to the Day Guest Distribution Email
- Mark the email **BLUE** to indicate that it was sent to someone within our department

⇒ If the required edit is simple:
- Make the change
- Send a new Confirmation Email
- Update the NAVIS/SMS Notes

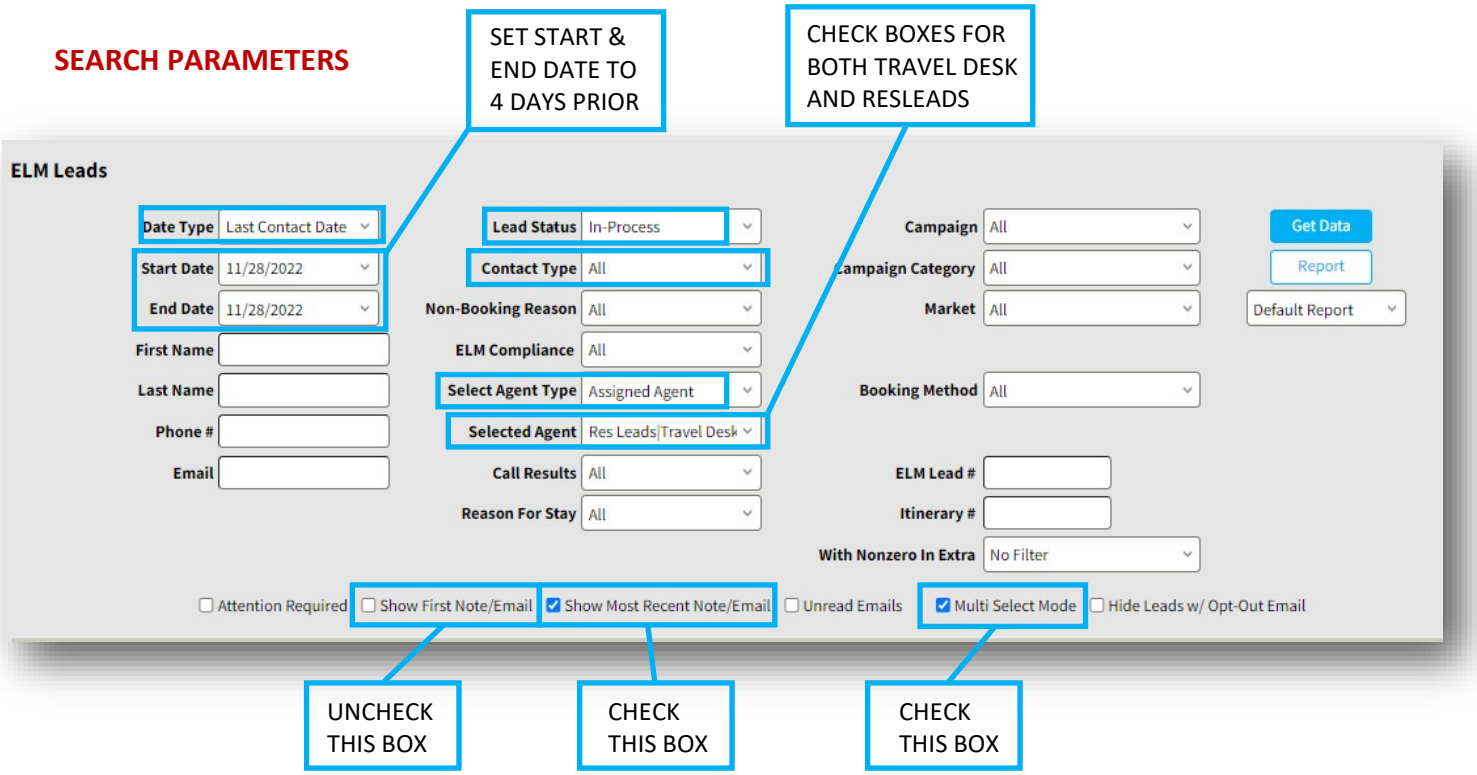
⇒ If the required edit is complex:
- Forward the email to the Assigned Agent and CC their Supervisor

In-Process Lead Follow Up

Each day, the E-Desk Team follows up with all In-Process Leads that have not been "touched" in 4 days.

1. Start by stating in the **E-Desk Chat** *"I'm doing In-Process Leads"*
2. Set the **Lead Search Criteria** as shown below
3. Open each lead and make a second phone call attempt
   - If the guest answers, continue to work the lead
   - If the guest does not answer, send one last "**No Response**" email and mark that Lead Form as **Not Booked**
4. Once all leads have been worked, state in the **E-Desk Chat** *"In-Process Leads are complete"*

SEARCH PARAMETERS

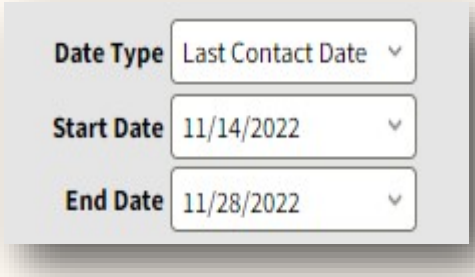


IN-PROCESS AUDIT

To catch any In-Process Leads that may have slipped through the cracks—meaning they have been left In-Process beyond 4 days—you can **extend your start date even further back**.

For example, you can set your start date to 2 weeks prior to today while leaving your end date on 4 days prior to today.

This should be done periodically to ensure we do not have In-Process Leads in that status indefinitely.



Food & Wine (1/2)

The E-Desk will be notified via a spreadsheet when a guest purchases a Diamond or Platinum Package to the Pebble Beach Food & Wine. The E-Desk will make outbound calls to these guests to offer a discounted room stay at The Inn at Spanish Bay for 04/04/24 - 04/07/24.

Special Offer Guidelines:

- Guests must be on the spreadsheet to receive this offer.
  (If we receive inquiries, advise that we will contact them once they are on the list)
- 2 Night Deposit
- 14 Day Cancellation Policy
- Shoulder Dates may be booked at a 20% discount (Mon 4/1 - Wed 4/3 and Mon 4/8)
- Additional nights may be booked at rack rate
- If a ticketholder wants fewer than 3 nights, book at The Lodge at Pebble Beach at rack rate

Pre-Blocked Suites & Rooms

BSO5	Ocean Honeymoon Suite
BSO4	Ocean Executive Suite
BSC5	Scenic Executive Suite
BSF5	Forest Executive Suite
BRO7	Ocean View
BRL7	Ocean Loft

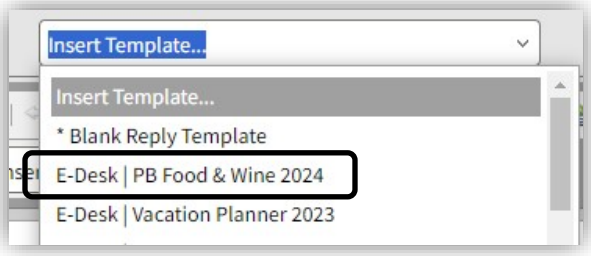
Voicemail:

"Good morning/afternoon. My name is _____ and I am calling from Pebble Beach Resorts. I hope you are excited to attend our Pebble Beach Food & Wine event this April. I am reaching out to offer you a special room stay package at our resort that is exclusive to Food & Wine ticket holders. I will send you an email with my contact information. Please feel free to respond to that email or call 1-800-877-0597 and ask for _____. Have a wonderful day."

- Save an In-Process Lead Form assigned to ResLeads
- Add all guest contact information to the Lead Form data fields
- Set the campaign to PB Food & Wine Email

Email:

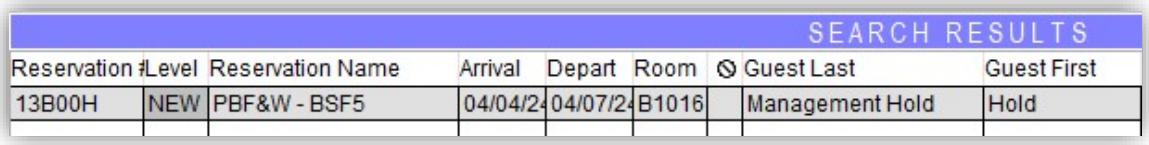
Send the email template "E-DESK—PB Food & Wine 2024"



Food & Wine (2/2)

Create The Booking:

1. Click Lookup Itinerary and search R#13B00H using the search type All Reservations

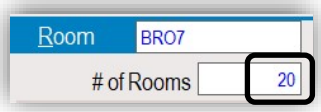


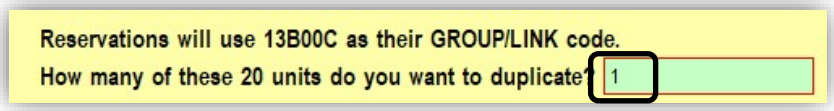
2. Open the Reservation Tile and Scan + Link
   Your guest may choose from any of the room categories that are not yet assigned to a guest
   The suites will already be pre-blocked, but you can see the suite code in the name field



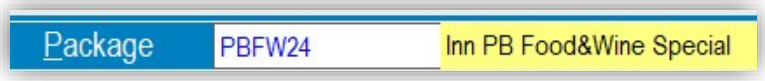
3. When your guest selects their room, open that Reservation Tile

4. If the guest selects a standard room, duplicate out 1 room to book for your guest





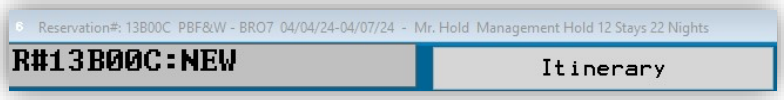
5. Value+Zoom to quote the nightly rate, 2 night deposit, and 14 day cancellation policy
   A special rate is pre-built on the room with the Food and Wine Package Code



6. Click Whose to find/create a Guest Tile

7. Charge the deposit

8. Click the Itinerary button to open the Booking Center



9. You can now add any rack rate golf or dining

10. Close the call

11. Wrap up per your booking checklist and send an IEMAIL
    - Contact your supervisor to Special Bill additional rack rate nights
    - Do not remove the mini-group code

12. Save a Lead Form using the Campaign PB Food & Wine Email

Travel Desk Booking Checklist

1. AGENT ASKS FOR A QUOTE

- CC Travel Desk
- Quote the lowest room rate
- Quote golf availability around 10am if no times given
- Quote an alternative set of dates if we do not have availability
- Ask for the guest's name if not provided

2. AGENT AGREES TO BOOK

- Create the booking on hold
  - ◊ F guarantee
  - ◊ RBT
  - ◊ Deposit #2
- Create a Cost Breakdown
- Send the LOA to the agent
- Create an Lead Form
  - ◊ Assign the lead to Travel Desk
  - ◊ Status = In Process
  - ◊ Paste email conversation into notes
  - ◊ Set a reminder to follow up at the hold deadline
- Reply to the agent's email
  - ◊ Advise of the 14 day CXL
  - ◊ Advise of deposit amount
  - ◊ Advise of deadline to sign LOA
  - ◊ Attach Cost Breakdown

3. LOA IS SIGNED

- Update the Guest Tile
- Charge the deposit
- Update booking from hold to confirmed
- Send a TAIEMAIL
- Update the Lead Form
  - ◊ Change Lead Status to Booked
  - ◊ Paste email into Lead Notes
- Reply to the agent
  - ◊ Advise that booking is confirmed
  - ◊ Advise that Confirmation email has been sent

IAGTO

- LOA will already be on file for the year
- You do not need to quote rates or the cancellation policy when booking
- You must include a Folio receipt in your email when booking

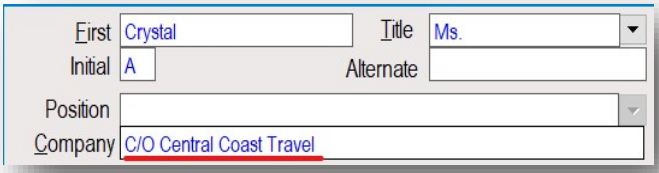
DIRECT BILLING

- No LOA is required

Travel Agent Bookings

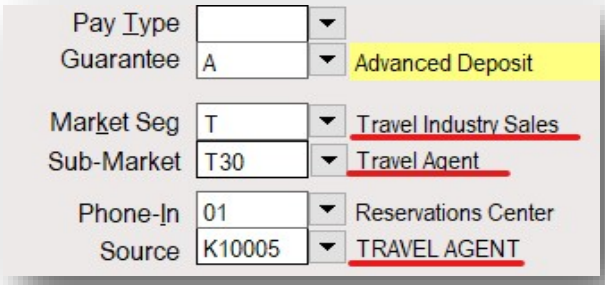
GUEST TILE

Create the Guest Tile **C/O the Travel Agency** (not the individual agent). Do not enter any Travel Agent Contact Information on this Guest Tile.



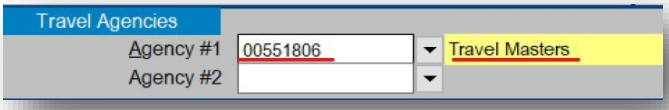
RESERVATION TILE CODING

Set the **Market** and **Source** Codes



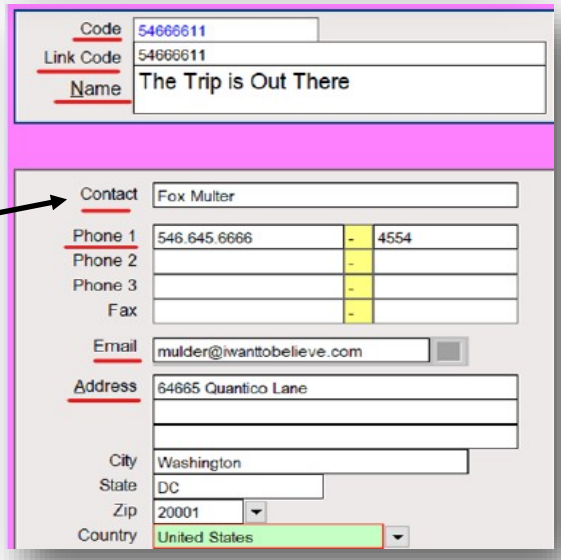
SPECIAL BILLING

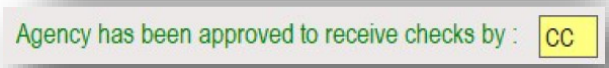
Enter the **IATA number** into the Agency #1 line



After saving the IATA in Special Billing, the Travel Agency Tile will open:

- Verify the **contact information** with the agent (This will be headquarters, not their specific branch)
- Verify that the agency is approved to **receive checks** (Initials in the box mean yes)
- Click "**Yes**" to confirm the agency







If you are prompted to select the commission structures, select Yes to confirm the 10% default:

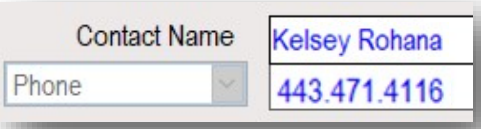


If the TAG used their own CC:

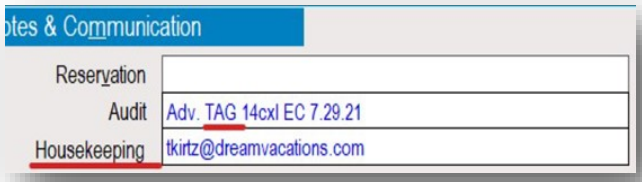
- Write "Do not disclose rates" in the Reservation Line
- Mark the booking as Confidential
- Create a 3rd Party FDB Trace
- Remove CC from GT after charging deposit

CONTACT INFORMATION

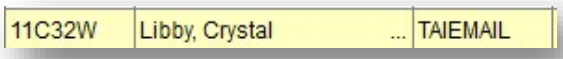
The **Travel Agent's contact information** should be entered onto face of the reservation.



The Audit Line should state that you advised the **TAG** of the **CXL** policy.



CONFIRMATION EMAIL



IAGTO Bookings

BILLING

- Charge 2 night deposit at time of booking
- Book the stay using **IAGTO net rates**
  - ◊ **Package** codes are **IRRB/IRRL/IRRP**

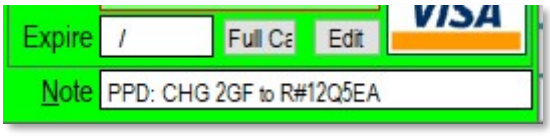


- These reflect a 15% discount off rack rate
- Reach out to the TAG 21 days prior to arrival to receive approval for final prepayment
- Charge the final prepayment of room and golf 14 days prior to arrival.
- If IAGTO books **LROD or Suites**:
  - ◊ Book the stay at **rack rate**
  - ◊ Ask Managers to adjust to **10% commission**
- Cancellation policy 14 days
- If cancellation inside 14 days, they forfeit 2 night deposit

RESERVATION TILE



CHARGEBACK NOTES



REVINATE

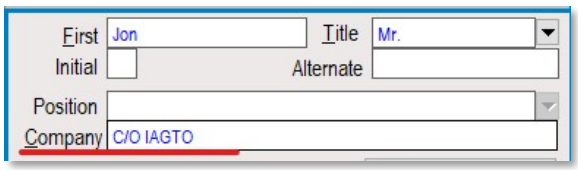
- Create a lead in Revinate assigned to "Travel Desk"
- Paste your email conversation into the Lead Form
- Set an email reminder for 14 days prior to arrival to collect the final prepayment
  - ◊ Notate to collect final prepayment

EMAIL TAG

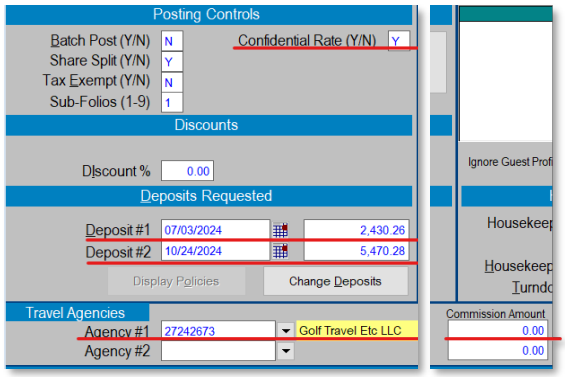
- Attach Cost Breakdown
- Attach Folio

GUEST TILE

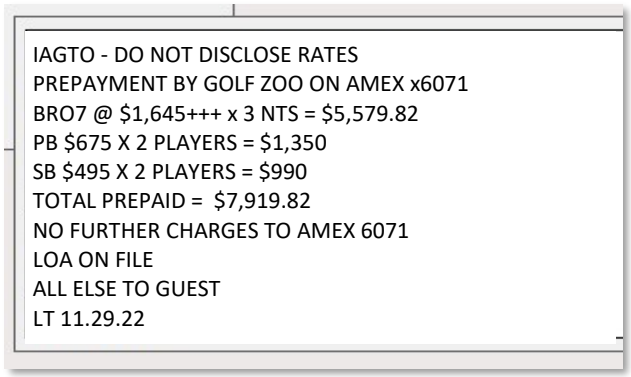
- Create the Guest Tile **C/O the IAGTO Agency**
- After charging the 2 night deposit, delete the TAG's CC from the Guest Tile
- If the IAGTO agent did not give you the guest's name, you can temporarily use the IAGTO agency's Guest Tile.



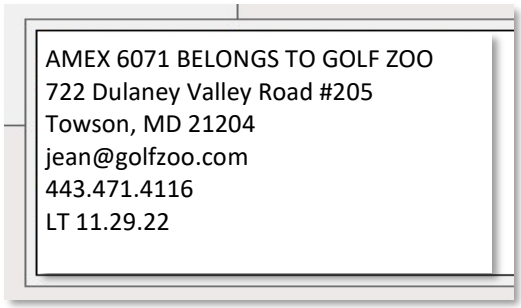
SPECIAL BILLING



FDB TRACE



ACCOUNTING NOTE



CHANGES / REVISIONS

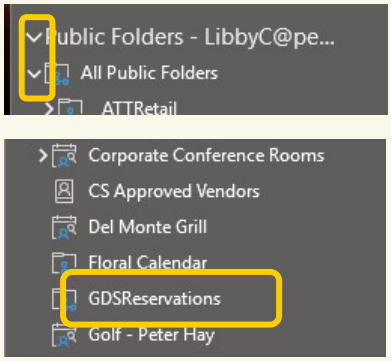
If you ever modify an IAGTO Booking:

- Send a new Cost Breakdown
- Update the FDB Trace
- Update Special Billing

G.D.S. Inbox

Global Distribution System

GDS Inquiries are sent to the **GDSReservations** Inbox within the Public Folders.



Drag this inbox into your "**Favorites**" folder

E-Desk Agents are responsible for reviewing these emails and double-checking that the SMS booking matches the confirmation from the online GDS portal.

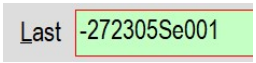


LOCATE THE BOOKING (2 ways)

1. Lookup Itinerary using the "3rd Party Booking" Search Type



2. Workslate using (-) search

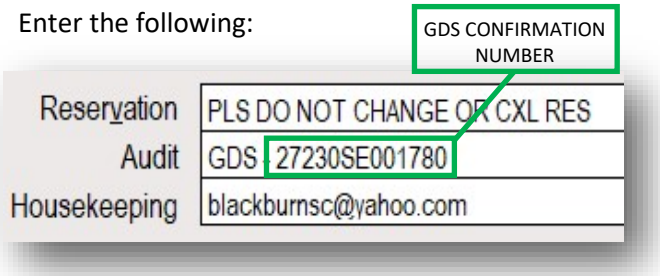


GUEST TILE

- Ensure that the last 4 digits of the credit card match the card noted in the email
- If TAG CC, remove it after charging deposit
- Enter a period into both the Address and Phone number fields
- Complete all profiles

RESERVATION TILE

- Delete the Mini-Group Code
- Charge the 2 Night Deposit to the CC on file
- Enter the following:



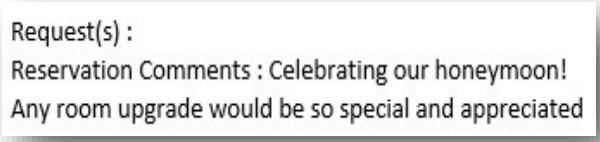
- Send a TAIEMAIL

SPECIAL BILLING

- Ensure that deposit line #1 matches the 1st two nights of the room stay

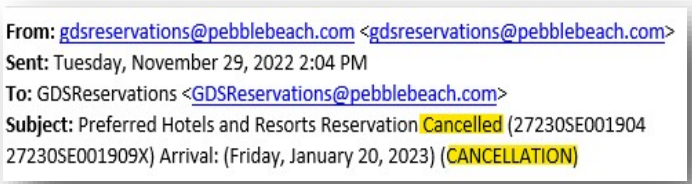
NOTES

- Check for an X Note—This may contain information about special occasions, room features, etc. that you will need to note/add as a Room Feature request



LEAD FORM

- Create a Booked Lead Form
- The Assigned Agent should be Travel Desk
- Paste the GDS email into the notes



In the case of GDS **cancellation** emails, E-Desk agents must make sure that refunds have been processed. If not, the agent must manually cancel the booking.

Direct Billing — GolfBreaks

BILLING

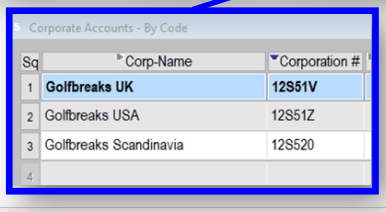
- Do not collect a deposit
- Accounting will direct-bill the agency after the stay is complete
- Book the stay using **IAGTO Net Rates**
    - ◊ **Package** codes are **IRRB/IRRL/IRRP**

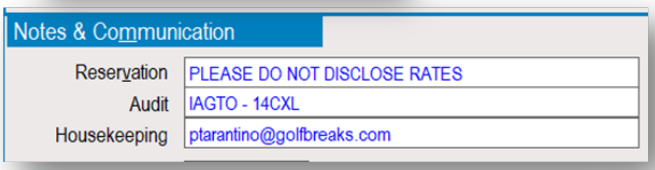


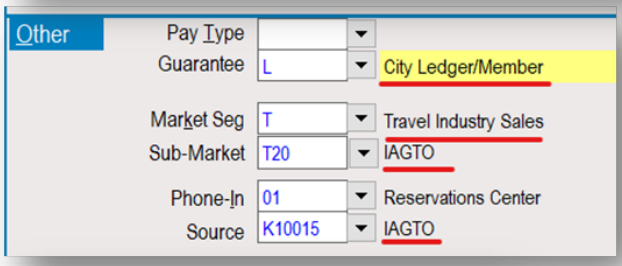
- These reflect a 15% discount off rack rate
- Cancellation policy 14 days
- If cancellation inside 14 days, they forfeit 2 night deposit - Charge amount to TAG's CL#

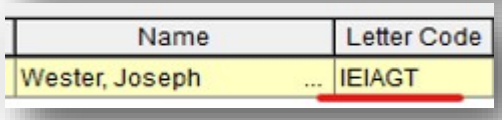
RESERVATION TILE







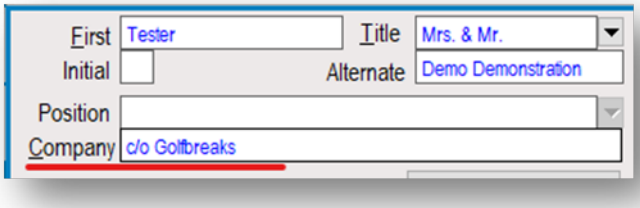




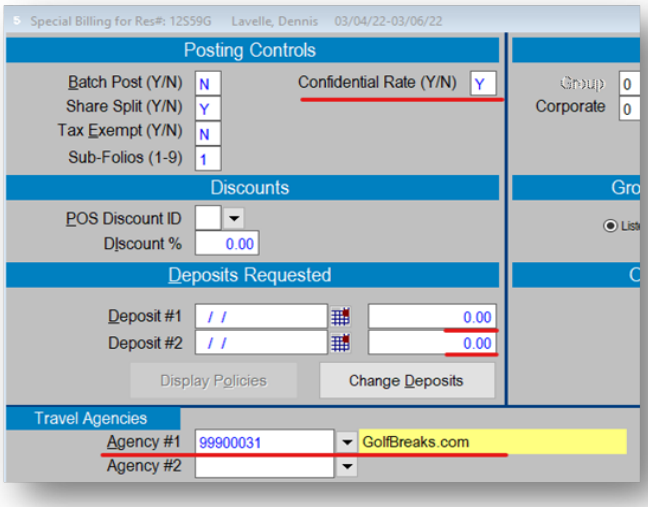
EMAIL TAG

- Attach Cost Breakdown

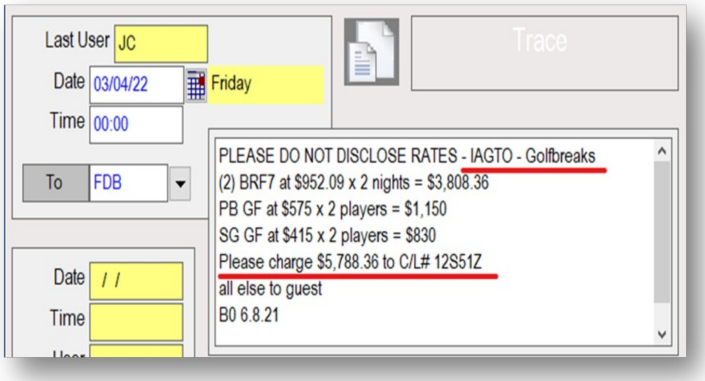
GUEST TILE



SPECIAL BILLING



FDB TRACE



CHARGEBACK NOTES



REVINATE

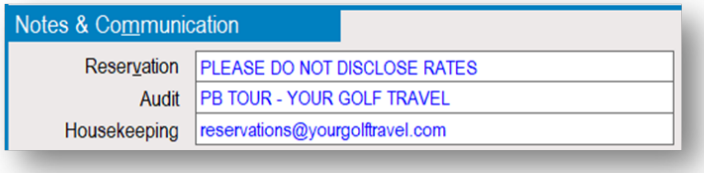
- Create a lead in Revinate assigned to "Travel Desk"
- Paste your email conversation into the Lead Form

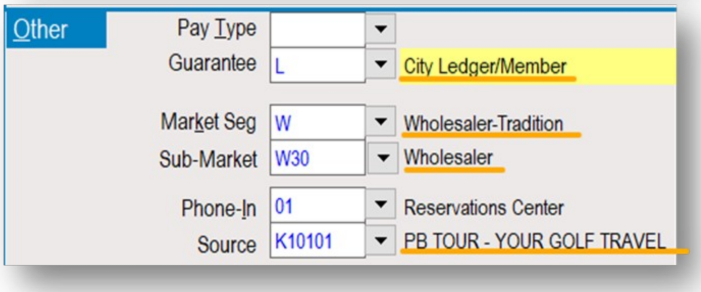
Direct Billing - Premier Golf / Your Golf Travel

BILLING

- Do not collect a deposit.
- Accounting will direct-bill the agency after the stay is complete.
- Book the stay using **PB Tour Net Rates**
  - ◊ **Package Codes** will be the **INB/INL/INP**
- These rates reflect at 20% discount off rack rate
- Cancellation policy 14 days
- If cancellation inside 14 days, they forfeit 2 night deposit. Charge amount to TAG's CL#

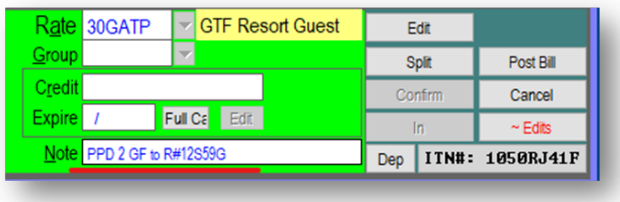
RESERVATION TILE







CHARGEBACK NOTES



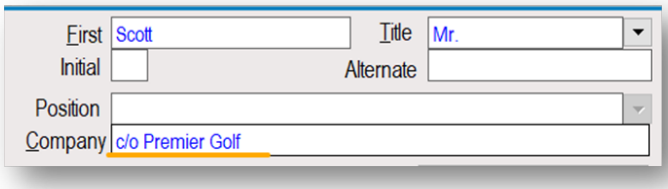
REVINATE

- Create a lead in Revinate assigned to "Travel Desk"
- Paste your email conversation into the Lead Form

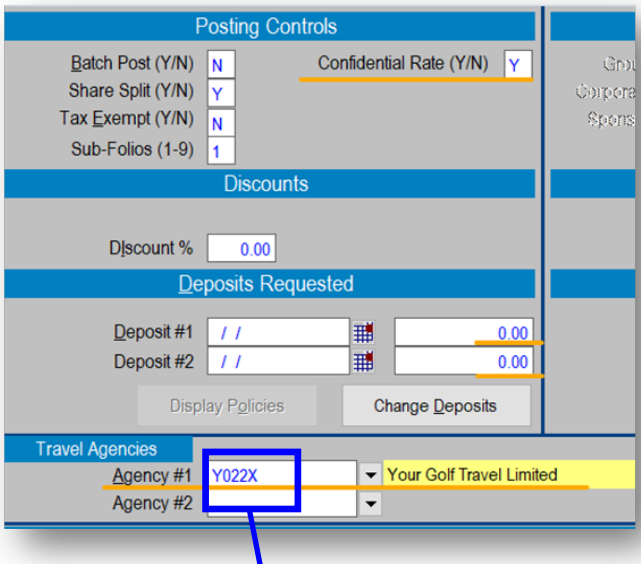
EMAIL TAG

- Attach Cost Breakdown

GUEST TILE

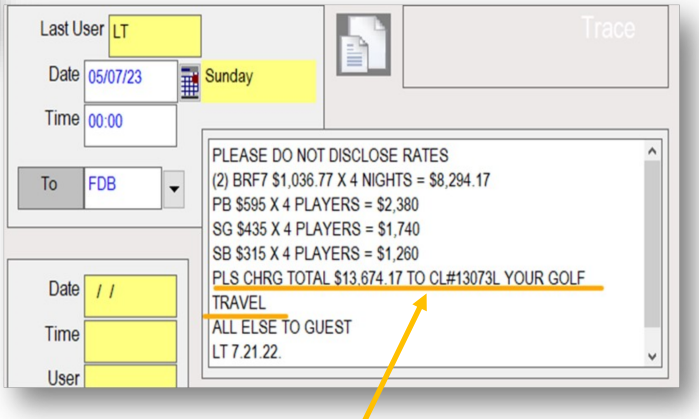


SPECIAL BILLING



Your Golf Travel **IATA Y022X**
Premier Golf **IATA 11570764**

FDB TRACE



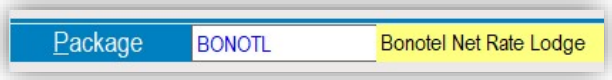
Unlike Golfbreaks, the City Ledger does not need to be entered into the Corporate Line.
However, it still must be entered into the FDB Trace.

Premier Golf (USA) – C/L# **13073M**
Your Golf (UK/International) – C/L# **13073L**

Direct Billing — Bonotel via GDS

BILLING

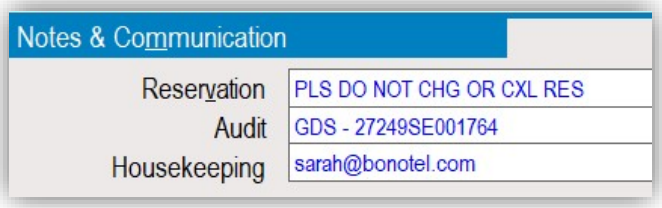
- Do not collect a deposit.
- Accounting will direct-bill the agency after the stay is complete.
- Verify **Package Code** is Bonotel Net Rates:
  - ◊ **BONOTB/BONOTL/BONOTP**



- These rates reflect a 25% discount off rack rate
- Cancellation policy 14 days
- If cancellation inside 14 days, they forfeit 2 night deposit. Charge amount to TAG's CL#

RESERVATION TILE





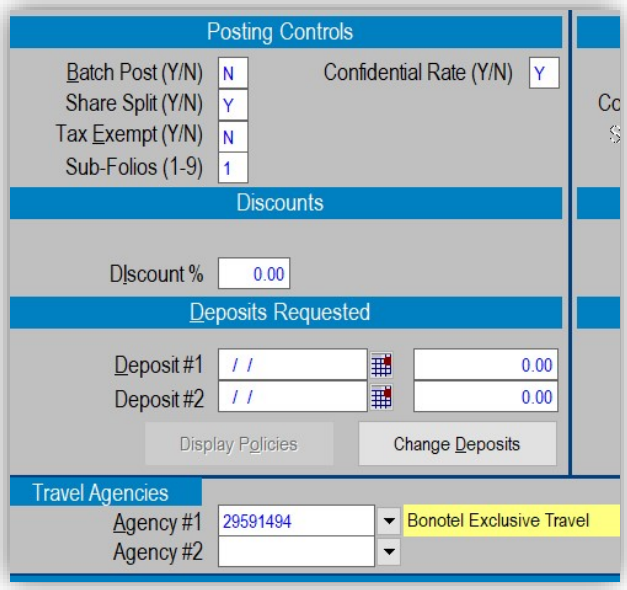




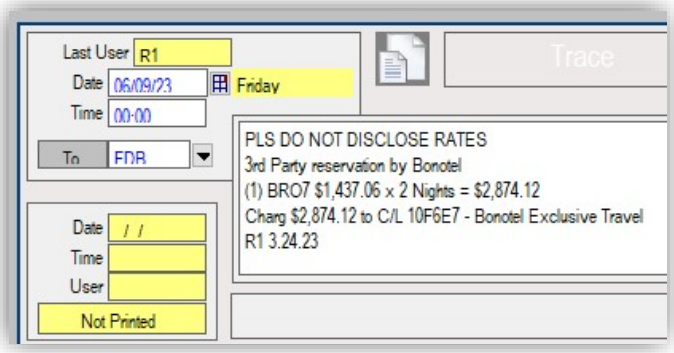
GUEST TILE

Verify the information on the Guest Tile interfaced correctly from GDS

SPECIAL BILLING



FDB TRACE



REVINATE

- Create a lead in Revinate assigned to "Travel Desk"
- Paste your email conversation into the Lead Form

Inspirato via GDS

Inspirato agents will book their clients through GDS. This will create a shell Guest Tile and shell Reservation Tile that the E-Desk team will need to edit.

Inspirato may send requests to Karlyn/Marie if no availability in GDS; accepting request in this case will be at Reservation Manager's discretion

Casa Palmero front desk will utilize x4500 when connecting Inspirato guests to Reservations. This extension is connected to the Inspirato campaign number (844) 809-9962. Agents can then assist booking golf and dining.

DO NOT DISCLOSE THESE RATES TO THE GUEST

	Non Peak	R.T.S.A.	Disc. Off Rack	Peak	R.T.S.A.	Disc. Off Rack
Estate Room (PRX5)	$650	$756.52	(52%)	$750	$867.21	(49%)
Spa Room (PRX3J)	$800	$922.56	(50%)	$900	$1033.26	(49%)

Room Guidelines:

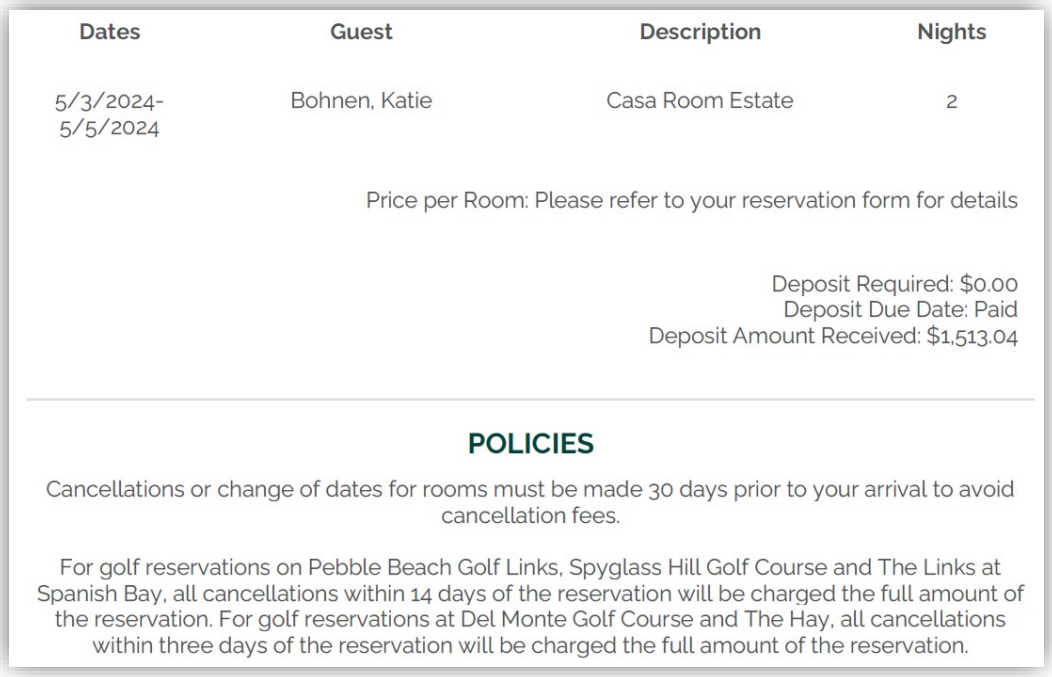
- 30 day CXL policy prior to date of arrival
- Guests are required to pay all room charges at time of booking
- Guests may only reserve Spa Rooms and/or Estate Rooms
- Inspirato Agent can transfer a confirmed booking to another Inspirato member prior to arrival

Golf Guidelines:

- Standard Resort Guest golf guidelines
- Standard Resort Guest golf cancellation policies
    - ◊ 14 day cancellation | Pebble Beach Golf Links | Spyglass Hill Golf Course | The Links at Spanish Bay
    - ◊ 3 day cancellation | Del Monte | The Hay

INSPIRAT Confirmation Email

- The nightly rate will be suppressed
- The email refers guests to their Inspirato form for further room details
- States the 30 day cancellation policy for the room and our standard golf cancellation policy



Dates	Guest	Description	Nights
5/3/2024-5/5/2024	Bohnen, Katie	Casa Room Estate	2

Price per Room: Please refer to your reservation form for details

Deposit Required: $0.00
Deposit Due Date: Paid
Deposit Amount Received: $1,513.04

POLICIES

Cancellations or change of dates for rooms must be made 30 days prior to your arrival to avoid cancellation fees.

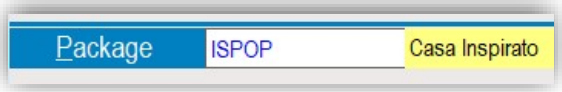
For golf reservations on Pebble Beach Golf Links, Spyglass Hill Golf Course and The Links at Spanish Bay, all cancellations within 14 days of the reservation will be charged the full amount of the reservation. For golf reservations at Del Monte Golf Course and The Hay, all cancellations within three days of the reservation will be charged the full amount of the reservation.

Book Inspirato via GDS

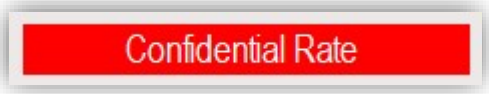
1. Locate GDS Booking in SMS
   - Type into workslate - [GDS confirmation number] then page down to search
   - Click the itinerary number to open the reservation in the booking center

1. Complete the Guest Tile
   - Apply the Source Code - K10090
   - Correct the email address to hotelops@inspirato.com
   - Remove TAG's CC from the guest tile after charging the full room nights stay

2. Charge the full room nights stay as the deposit
   - Make sure package code is ISPOP



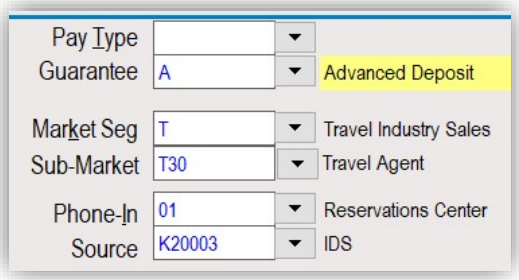
3. Special Billing
   - Deposit #1 must equal all room charges
   - Make sure reservation is marked as Confidential



4. Notes & Communication
   - Reservation: PLS DO NOT CHG OR CLX ROOM
   - Audit: GDS [GDS Confirmation #]
   - Housekeeping: hotelops@inspirato.com



5. Booking Settings:
   - Market Seg: T - Travel Industry Sales
   - Sub Market: T30 - Travel Agent



6. Remove the Mini Group code PSABRE
   - If guest is **booking multiple rooms,** connect them with their mini group code and keep them on separate itineraries.

7. Leave an A Note with last 4 digits of CC:

A Note
VISA x____ belongs to Inspirato
1544 Wazee Street
Suite 400
Denver , CO 80202
P9 12.1.23

8. Add appropriate FDB Trace:

FDB – No Golf
PLEASE DO NOT DISCLOSE RATES
PPD by Inspirato
(1) PRX3J $922.56 x 5nts = $4,612.80
Total PPD = $4,612.80
All else to each guest.
No further charges to VISA x____
P9 12.1.23

9. Send INSPIRAT confirmation email

10. Create a Lead Form with "Inspirato Reservation" as the campaign
    - Copy and paste GDS email from outlook into the lead notes

Add Golf | Inspirato via GDS

If **Inspirato agents email or call in** to add on golf to an Inspirato room:

1. Ask if Inspirato will pay for the room only or both room and golf.
2. Ask which courses Inspirato wants to pay for.

If Inspirato agent is covering golf:

1. Send LOA via Sertifi to collect CC - Inspirato uses a virtual CC so we need to collect a new one each time we need to charge it.
2. Add golf at rack rate within standard guidelines
3. Charge the amount for golf
4. Update A Note to include last four digits of additional CC
5. Update FDB Trace to include golf PPD by Inspirato
6. Send INSPIRAT confirmation

A Note – Multiple CC
VISA x8514 & VISA x2597 belongs to Inspirato
1544 Wazee Street
Suite 400
Denver , CO 80202
K6 12.1.23 / P9 12.1.23

FDB – With Golf
PLEASE DO NOT DISCLOSE RATES
PPD by Inspirato:
(1) PRX3J $1,033.26 x 3nts = $3,099.78
PB $625 x 2sm = $1,250
Total PPD = $4,349.78
All else to each guest.
No further charges to VISA x8514 and VISA x2597
K6 12.1.23 / P9 12.1.23

If guest will be covering golf:

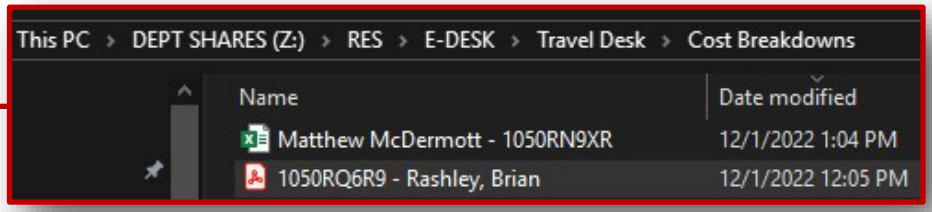
1. Add golf at rack rate within standard guidelines
2. Send INSPIRAT confirmation
3. Since guest will be covering golf, make sure that FDB clearly states:
    - "All else to guest. No further charges to [Inspirato CC]"

If the **guest emails or calls** in to add golf:

1. Add golf at rack rate within standard guidelines
2. Since we are speaking directly with the guest, we *can* ask for CC but it is not required. Front Desk will collect a CC at check-in.
    ⇒ If you do ask for CC - Whose it to the tee time via the account button
    ⇒ If guest is emailing we can send sertifi to collect CC
3. Advise 14cxl or 3cxl and add baby note of advisement in the tee time
4. Send INSPIRAT confirmation
5. Since guest will be covering golf, make sure that FDB clearly states:
    - "All else to guest. No further charges to [Inspirato CC]"

Cost Breakdowns

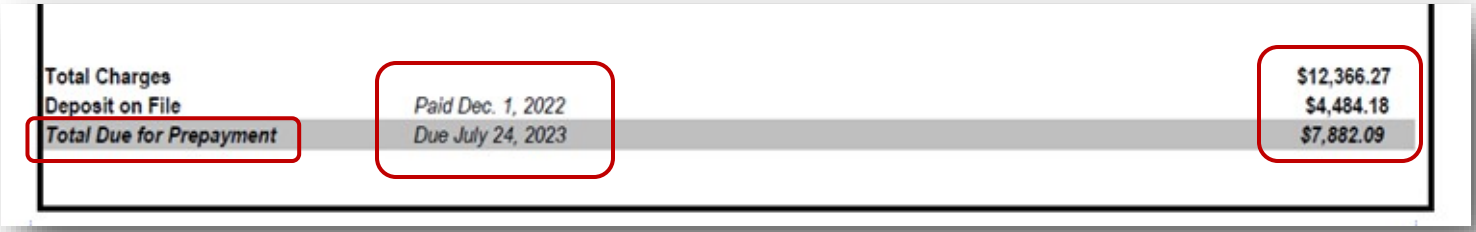
Cost Breakdowns are stored in both **PDF** and **Excel** format within the following folder:



THERE ARE 3 DIFFERENT VERSIONS OF COST BREAKDOWNS

The IAGTO Cost Breakdown

This breakdown lists the deposit paid and the amount that will be due at 14 days prior to arrival



Total Charges		$12,366.27
Deposit on File	*Paid Dec. 1, 2022*	$4,484.18
Total Due for Prepayment	*Due July 24, 2023*	***$7,882.09***

The Direct Billing Cost Breakdown

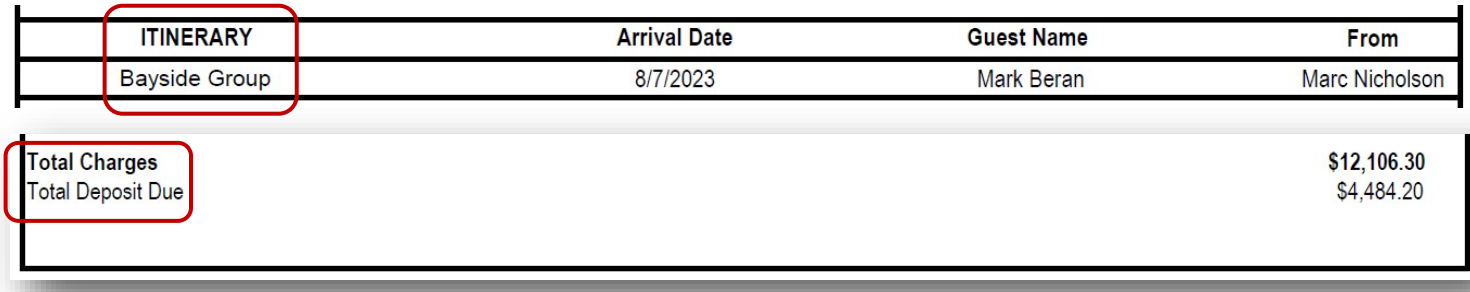
This breakdown will only list the total charges of the booking because agencies who are direct-billed do not pay any deposit up front or at 14 days prior to arrival.



Total Charges	$16,793.50

The "Quote" Cost Breakdown

This breakdown lists all charges for a prospective trip and the deposit that will be due upon booking. This breakdown will not contain an Itinerary number as the booking has not yet been confirmed.



ITINERARY	Arrival Date	Guest Name	From
Bayside Group	8/7/2023	Mark Beran	Marc Nicholson

Total Charges	$12,106.30
Total Deposit Due	$4,484.20

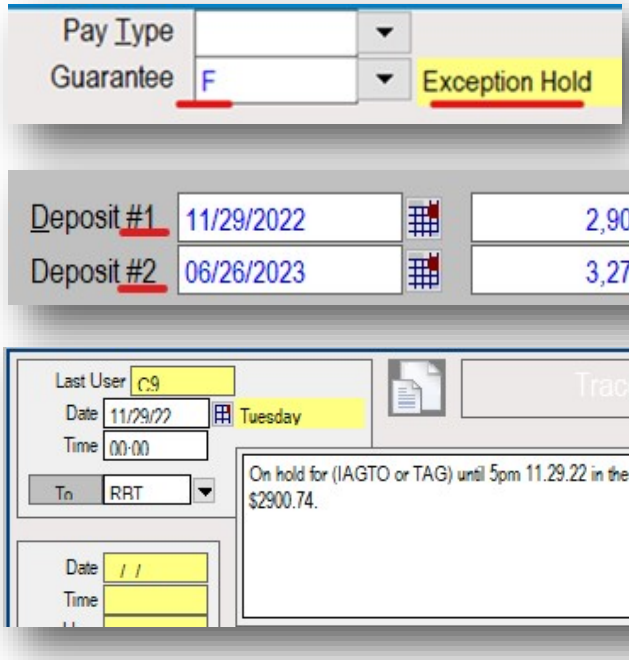
LOA Exception Holds
SMS & REVINATE

SMS Exception Hold — There are three components to an Exception Hold in SMS

1. The Guarantee Code
- Set this code to "F" for "Exception Hold" while we wait to charge the funds

2. The Deposit Lines
- Set the date of Deposit Line #1 to the deadline date of the deposit
- Set Deposit #2 to the final prepayment date and amount

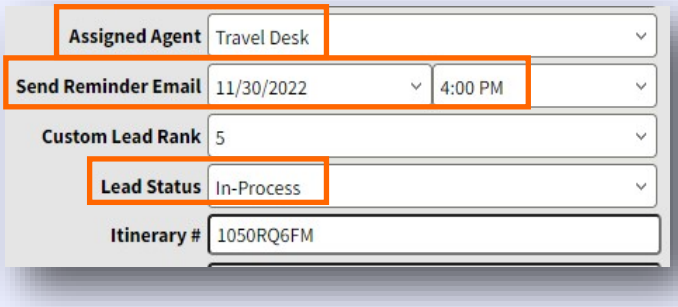
3. The RBT Trace
- Set the Trace date to the due date of the required deposit
- Document who approved the hold, the deadline date/time to release the booking, and the amount that needs to be paid



***Note:** You will complete the booking, but not confirm it. Do not send a confirmation email.*

In REVINATE:

- The Assigned Agent for you Lead Form should be the Travel Desk.
- The Lead Status will be In-Process until the funds are received.
- Paste your email response into the Lead Notes
- Set a reminder on the Lead Form 2-3 hours before the deadline so you can reach out to them before releasing the booking.



Once You Have Permission to Charge the Deposit:

SMS	REVINATE
• Enter the CC information from the LOA onto the Guest Tile • Charge the Deposit on the room • Close the RBT Trace • Change the Guarantee Code t A • Delete Deposit Line #2 • Enter paid deposit into Deposit Line #1 • Confirm the booking • Send a confirmation email	• Change the Lead Status to Booked • Copy your email conversation into the Lead Form Notes

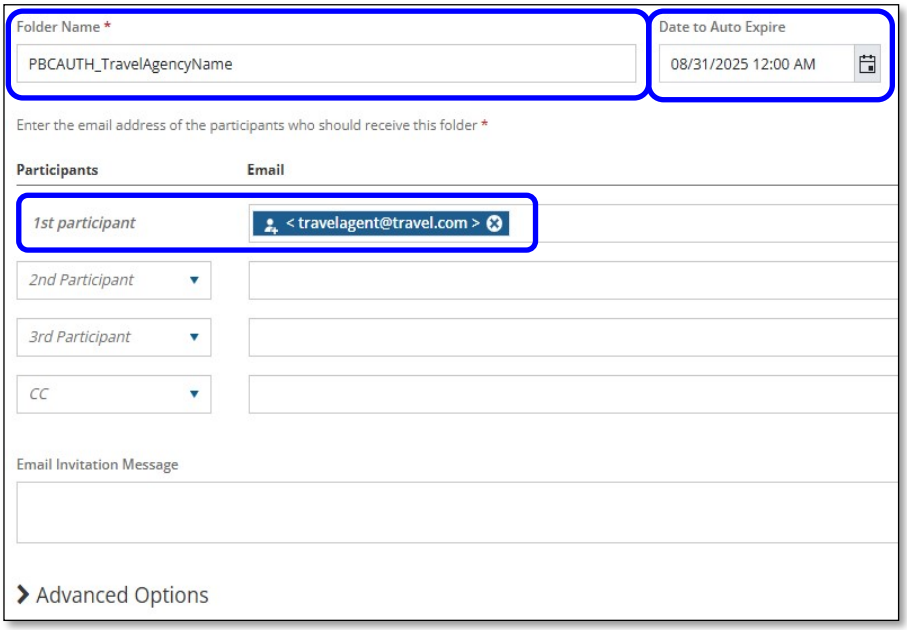
NOTE:
Holds can only be offered without prior approval if:
- It is a **same day** hold
- It is an **IAGTO** hold within **72 hours**

All other situations must be discussed with/approved by the **E-Desk Coordinator**.

LOA Exception Holds

Sertifi

Send an LOA in Sertifi:



1. Log in as:

EDESK@PEBBLEBEACH.COM

2. Fill in the file name:

LOA with specific Itinerary: PBCAUTH_1050QQ123
LOA Revision: PBCAUTH_1050QQ123_REV1
Annual LOA (IAGTO): PBCAUTH_2017_Flannagan

3. Fill in the 1st level singer

- Email address of the Travel Agent

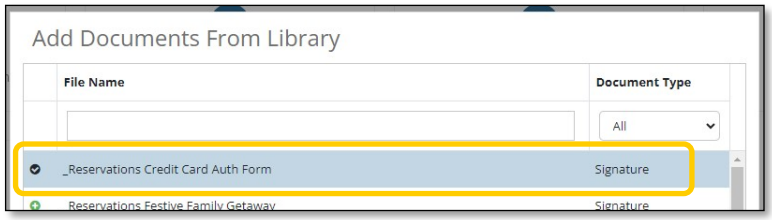
4. Fill in the expiration date

- Date of Arrival

5. Click Next 

6. Select the form

- Click Add Document From Library
- Click on the form you want to send and click add/remove



7. Prefill the form

- Click Pre-fill Form and fill in the fields in the image below.
- All else should be left for the Travel Agent.





8. Click Next then Click Send Now 

Note—When sending an LOA form, it is your responsibility to ensure the form is signed by the deadline you set with the travel agent. If it is not signed, you are responsible for releasing the items you have on hold in SMS.

Travel Desk Arrivals

Travel Desk Arrival Checklist

GUEST TILES
- For IAGTO or TAG using their own CC—delete the CC from the Guest Tile
- C/O Guest Tiles are created for paying secondary guests

RESERVATION TILE
- TAG contact information is on face of reservation
- Check that the room rates are accurate
- Rooms are duplicated / shares are created
- Guarantee codes are accurate for both primary and secondary rooms

TRACE
- FDB Trace reflects the current state of the booking
- Secondary FDBs are listed on all secondary rooms

NOTES
- A Note—Includes all billing/contact information for the IAGTO or travel agents who booked with their own CC
- Y Note—We have a full rooming list
- Babynotes—Chargeback notes matching the FDB Trace are listed on recreation

SPECIAL BILLING
- Deposit Lines #1 and #2 are correct
- Booking is marked as confidential
- The IATA number is entered on every room
- If standard TAG, make sure the 10% commission is listed by the Agency

COST BREAKDOWN
- The cost breakdown reflects the current state of the reservation

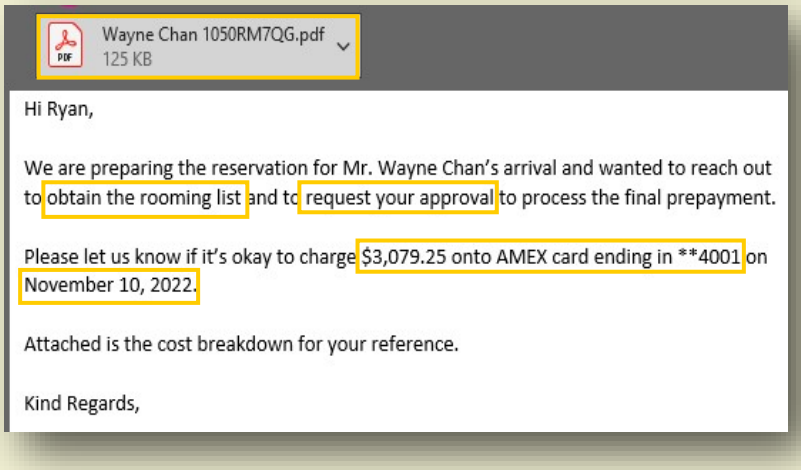
Final Prepayment / Rooming List

IF THE FINAL PREPAYMENT MUST BE COLLECTED:

The E-Desk agent must send an email to the agency:
- Attach a new cost breakdown
- Ask permission to charge the final prepayment
- Ask for the full party's rooming list

When the TAG responds with approval to charge their card on the specific date:
- Set a REVINATE reminder for the due date
- Leave a REVINATE note: OK per (TAG name) to charge (DEP $) to MCxxxx on xx/xx/xx.

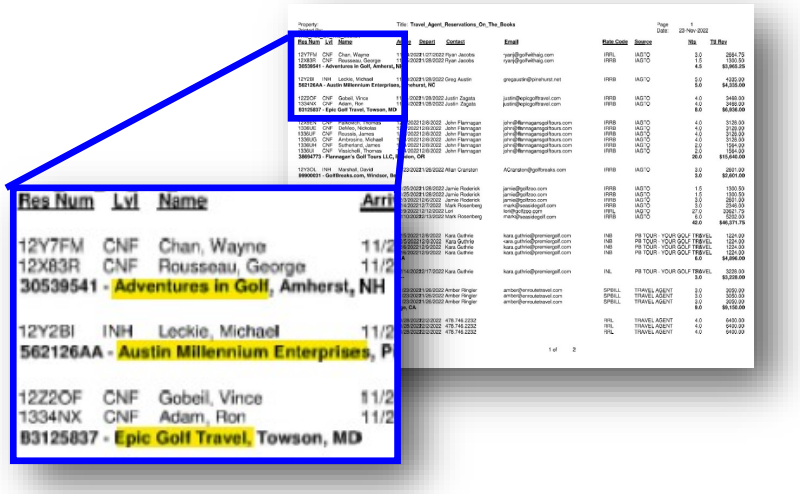
Once the prepayment is charged, send an email to the TAG with a Folio receipt.



Booking Reports

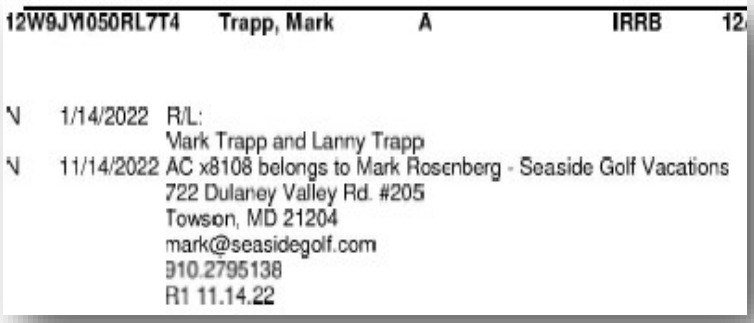
The B.O.B: Travel Agent Reservations

- ◊ This report will be printed and handed out to the E-Desk team each Thursday so it can be worked on throughout the week.
- ◊ The "**B.O.B**" (Business on the Books) report will list all Travel Agency or Tour Operator bookings arriving within the next 21 days.
- ◊ E-Desk Agents are responsible for reviewing the report and ensuring that it is prepared for arrival.



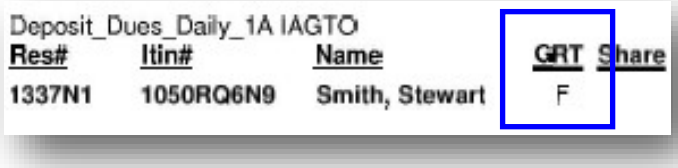
Deposit Dues: Daily 4 IAGTO

- ◊ This report lists all IAGTO bookings that are due for arrival within the next 21 days.
- ◊ It is reviewed by the E-Desk Supervisor Daily.
- ◊ E-Desk Agents must reach out to IAGTO agents for their Final Prepayment and prepare the booking for arrival.



Deposit Dues: Daily 1A IAGTO

- ◊ This report lists all IAGTO bookings that are currently on hold with an F Guarantee Code.
- ◊ It is reviewed by the E-Desk Supervisor Daily.
- ◊ E-Desk Agents must follow up with the IAGTO agent about prepayment or fix the booking if the Guarantee code was left on F by mistake.



Alternative Payment Methods

Payment By Check

AT TIME OF BOOKING

- Place the booking on a D Exception Hold—Check
- Set Deposit #2 due date for 5 business days in the future
- Provide RDC address:

  PBC Reservations
  Attention: [PBC Agent's Name]
  2136 Sunset Drive
  2nd Floor
  Pacific Grove, CA 93950
- If requested, we can send them a Cost Breakdown

INSTRUCT THE GUEST/AGENCY

- Overnight the check -

  We can negotiate to certified 1st class
- Write the R# on the check

ONCE CHECK ARRIVES

- Verify that the R# is on the check
- Scan check and email it to _Billing Office include R# and Guest Name in email
- Take the original to the Accounting office and place in "Advanced Deposit" folder

  You cannot interoffice the check—you must walk it to the office
- Set a reminder to check on the reservation in a week to ensure that payment has been posted

WHEN PAYMENT IS POSTED

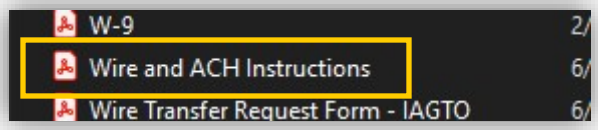
- Change the Guarantee Code to A
- Delete your copy of the check
- Send a confirmation email to the guest/agency

ACH Wire Transfer

AT TIME OF BOOKING

- Place the booking on an F—Exception Hold
- Set Deposit #2 due date for 5 business days in the future
- Email the guest/agency the PBC Account information
- Attach the Wire Transfer Form to your email

  Z:\RES\E-DESK\Travel Desk\Wire Transfer Information



INSTRUCT THE GUEST/AGENCY

- Send funds by EOD or following day by 12pm
- Email you a receipt when they send the funds

WHEN FUNDS ARE SENT

- Forward the emailed receipt to _Billing Office
- Instruct Accounting to apply the funds to the appropriate R# once the money arrived

WHEN PAYMENT IS POSTED

- Change the guarantee code to A
- Send a confirmation email to the guest/agency

PBC ACCOUNT INFORMATION

Pebble Beach Company 2700 17-Mile Dr.
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

Wells Fargo Bank Carmel-by-the-Sea
San Carlos & Ocean
Carmel-by-the-Sea, CA 93921
Attention: William Meidl
P: (831) 624-5302

New Travel Agency Application

BEFORE SENDING A NEW TRAVEL AGENCY APPLICATION:

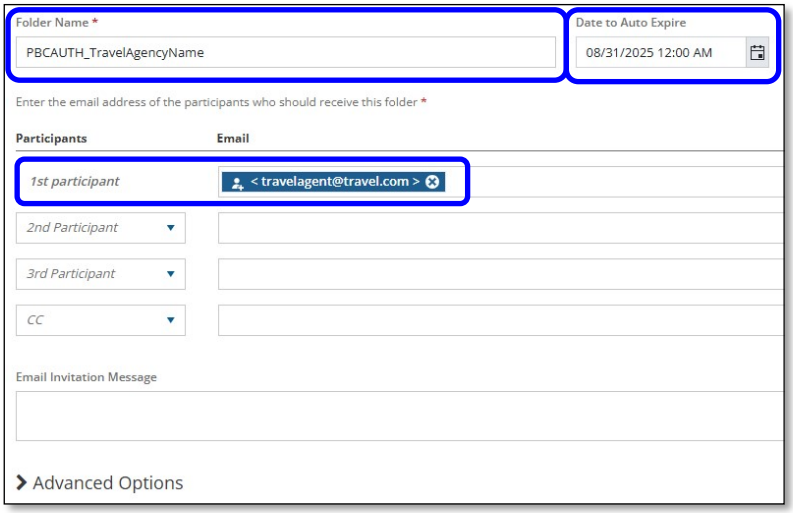
- Clarify that the IATA we need must be that of their agency's headquarters
- Try searching the agency by name instead of IATA
- Ask if the agent has booked any other clients with us before—you can then search for that booking and see what IATA number is on file.

Send a New Travel Agent Application in Sertifi:

1. Using the EDESK Sertifi account Click Create New

2. Fill in the file name

- ***US Agency:***
  PBCUSATA_(The Travel Agency's Name)
- ***International Agency:***
  PBCINTTA_(The Travel Agency's Name)



3. Fill in the 1st level signer

- Email address of the Travel Agent

4. Fill in the expiration date

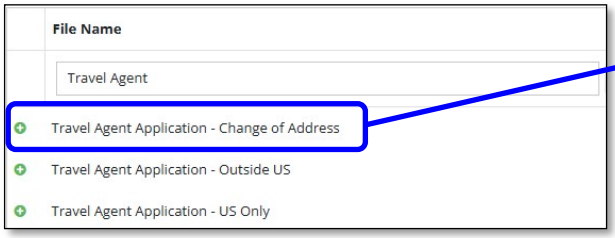
- Date of Arrival of the booking you created

5. Click Next



6. Select the form

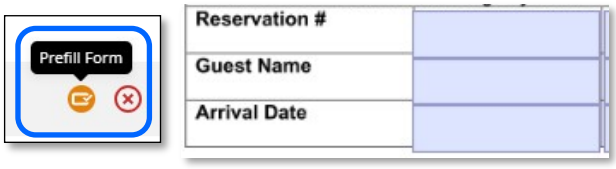
- Click Add Document From Library
- Type 'Travel Agent' into the search bar
- Click on the form you want to send and click add/remove



You can send this form if an existing Travel Agency needs to change their contact information.

7. Pre-fill the form

- Pre-Fill only the fields in the image below
- All else should be left for the Travel Agent



8. Click Next then Click Send Now



AFTER APPLICATION IS SENT

Set a reminder in your REVINATE Lead Form to ensure that this document is signed by the agency.

The sertifi email notification that the form has been signed will go to the Travel Desk inbox.

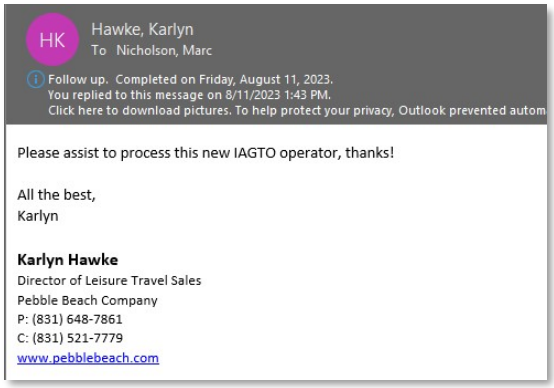
E-Desk will then:

- Create a TAG Tile in SMS - add IATA number
- Book requested reservation
- Leave a closed R Note indicating application sent
- Pass the agency information to Accounts Payable.

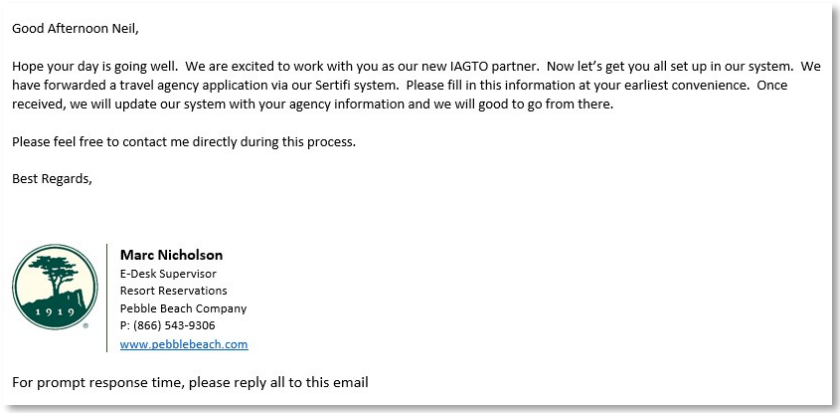
Adding New IAGTO Agency 1/2

Adding new approved IAGTO agency:

1. We will receive an email from Karlyn Hawke (to the E-Desk Supervisor Marc) after the IAGTO Agency has been approved asking us to add the IAGTO agency into our system.



2. Email the IAGTO Agency welcoming them to the program and notifying them of the application form in Sertifi.



3. Send TAG application through Sertifi.



4. Title the form according to the formula:
   PBCINTTA_Infinity_Tour_Service_IAGTO (international)
   PBCUSATA_Infinity_Tour_Service_IAGTO (domestic)

5. You do not need to:
   Set an expiration date for the form
   Prefill the form before sending it

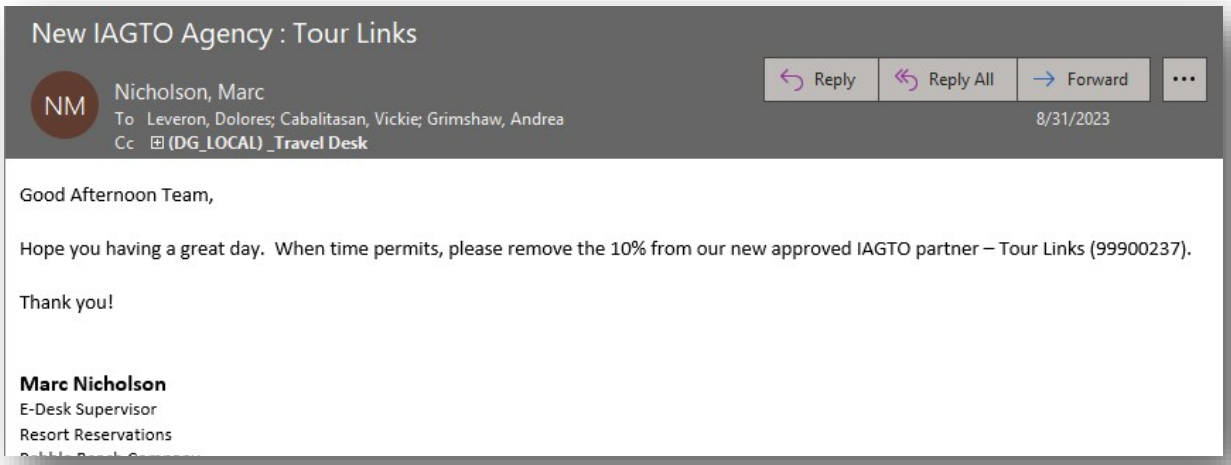
6. Wait until the Sertifi is completed by the IAGTO Agency and received by E-Desk, then we can assign them a unique account number.

Adding New IAGTO Agency 2/2

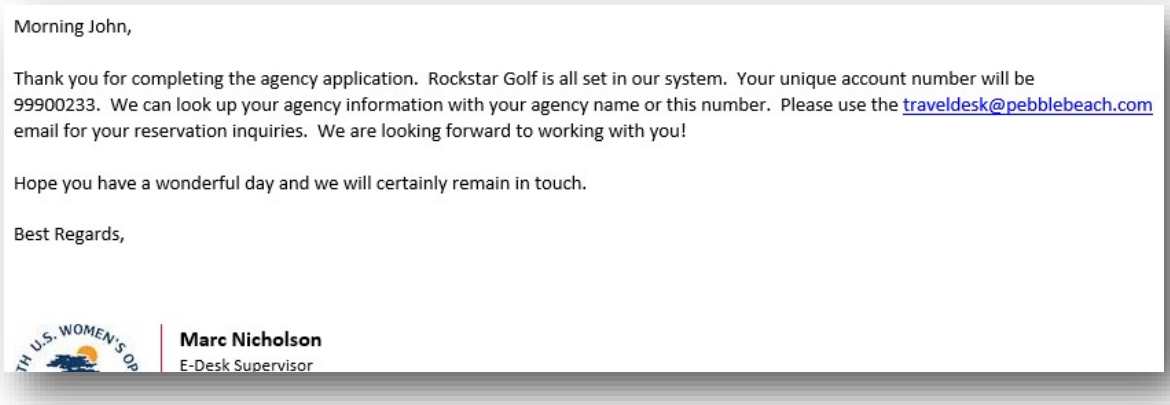
7. Open the PBC Assigned IATA Tracker located: \\falcon\DEPT SHARES\RES\E-DESK\Travel Desk.
8. Fill in the new IAGTO Agency's information and assign then the next number in the sequence as their unique account number.

	A	B	C	D	E	F
1	IATA #	Agency Name	Address	City	Country	
239	99900240	**Morton Golf Holidays**		Edingburgh	UK	IAGTO
240						
241						

9. Create a new Travel Agency Tile (Use Travel Agency Tile SOP as reference)
10. Fill in SMS Number into Code > Fill in the IAGTO Agency's address, phone number, and contact name > Add 'IAGTO' into Notes field
11. Send email to accounting to remove 10% commission that is defaulted in the Travel Agency Tile.
    - APPayments which will include: Cabalitasan, Vickie <cabalitv@pebblebeach.com>; Grimshaw, Andrea <Grimshawa@pebblebeach.com>; Leveron, Dolores <leverond@pebblebeach.com>



12. Send a follow up email to the agent/agency with their unique account number.



13. Update PBC Assigned IATA Tracker and add to IAGTO Agency List both located: \\falcon\DEPT SHARES\RES\E-DESK\Travel Desk.

Travel Agency Change of Address

1. Send the Change of Address Form in Sertifi:

a. Using the EDESK Sertifi account Click Create New

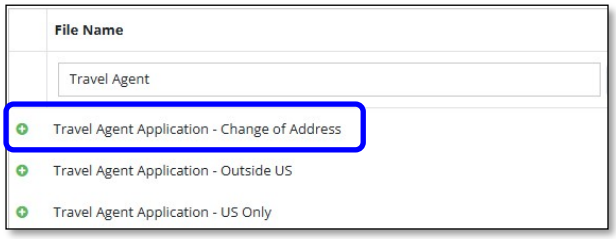
b. Fill out the data fields:

- FILE NAME—
  - US Agency: PBCUSATA_(The Travel Agency's Name)
  - International Agency: PBCINTTA_(The Travel Agency's Name)
- 1ST LEVEL SIGNER—Email address of the Travel Agent
- EXPIRATION DATE—Date of Arrival of the booking you created

c. Click Next

d. Select the form:

- Click Add Document From Library
- Type 'Travel Agent' into the search bar
- Click on the Change of Address form and click add/remove



e. Click Next then Send Now

2. Once the form is signed:

a. Download the signed form Sertifi

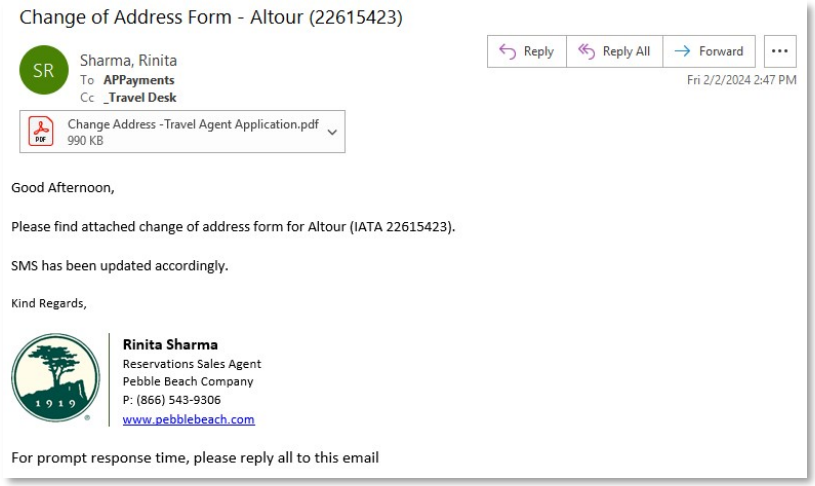
b. Update the address on the SMS TAG Tile

c. Leave a T note (TA Revision) detailing the request and the change that was made

3. Email the Form to Accounts Payable:

a. Send to APPayments

b. Let them know you already updated the TAG Tile in SMS



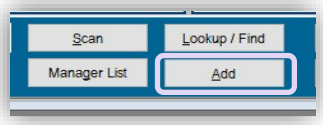
Travel Agency Tile

When it has been determined that a Travel Agency has not been set up in our system we send them an application through Sertifi. Once this is complete and received we can create a Travel Agency Tile.

Build New Travel Agency Tile:

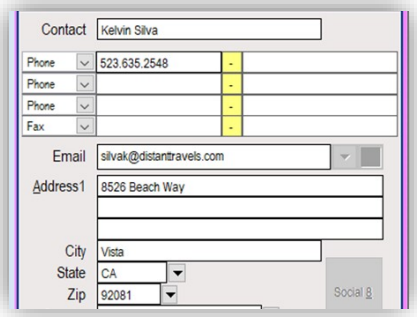
1. From the Homescreen of SMS > Click Travel Agents
   If "Travel Agents" is not a default on your Home Screen:
   a. Click Main Menu (Q)
   b. Click Configuration
   c. Double click Accounting Travel Agencies

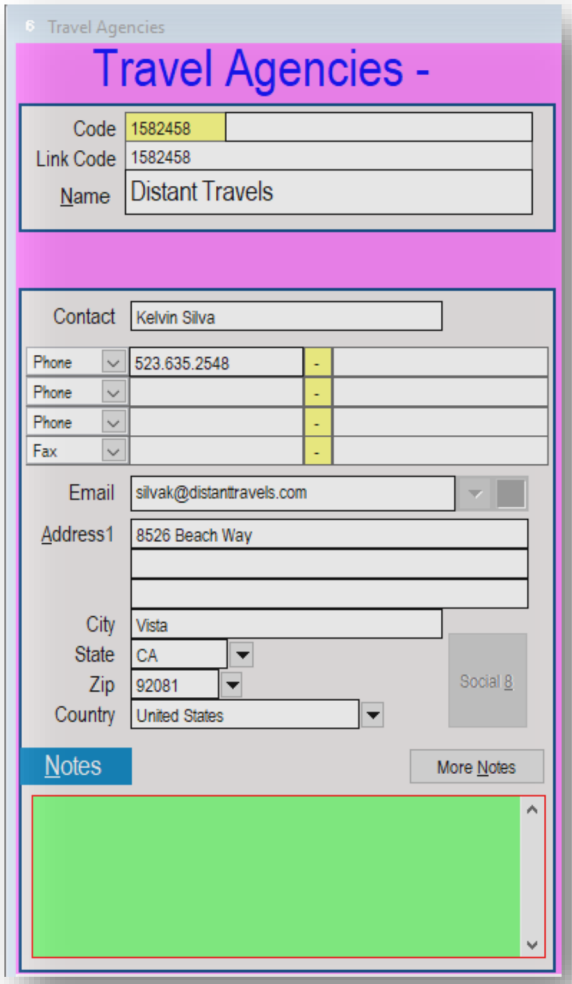
2. Click A to Add



3. Input the Agency's IATA number from the New Travel Agency Application Form

4. Fill out the Agency name, contact name, phone number email, and billing address.





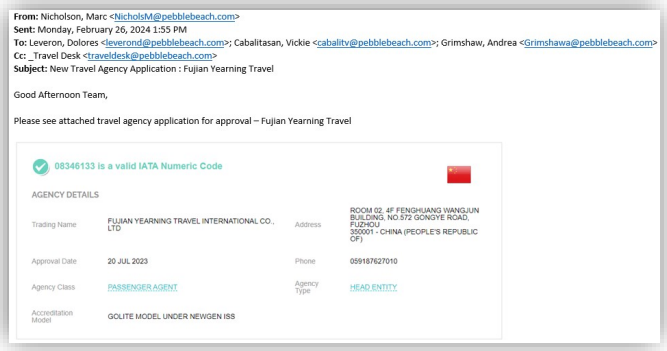
5. Click OK or Page Down on your keyboard to save it.

6. Input the IATA in Special Billing on any future applicable reservation(s)

7. Save the application as PDF
   - Save to: Z:\RES\E-DESK\Travel Desk\TAG Approval\TA Applications
   - Label the PDF: TA App | [Agency Name]

8. Run the IATA number through check a code.
   - Verify that the address in your results matches the application
   - Take a screenshot of the results
   - If Check A Code says the IATA cannot be found, screenshot that result

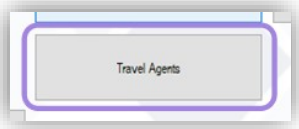
9. Email the Travel Agency Application and your screenshot to Accounts Payable for approval



Look Up Commission (1/3)

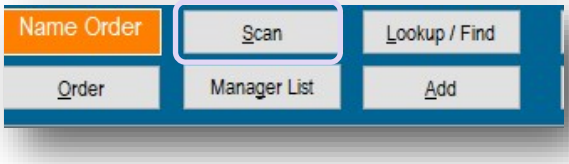
Travel Agents may reach out to check on past commission checks. We look this up in SMS to determine if a check has been sent or not, and how long ago it was sent.

1. From the Homescreen of SMS > Click **Travel Agents**

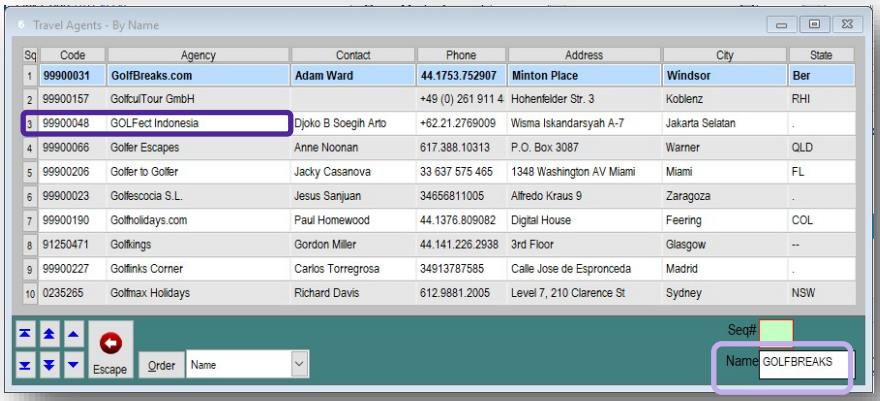


Alternatively
1. Click Main Menu (Q)
2. Click Configuration
3. Double click Accounting Travel Agencies

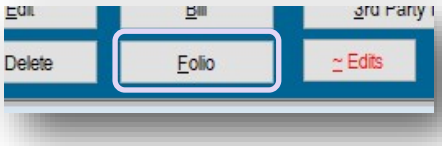
2. Click Scan (The hotkey is S on your keyboard)



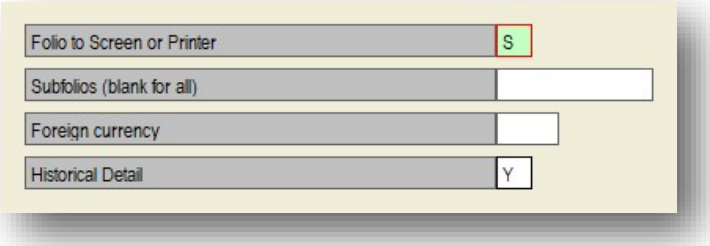
3. In the Order field select name or IATA. Type in the Travel Agency's name or IATA/Account number, hit enter to search.



4. Select the Travel Agency to open their Travel Agency Tile
5. Click Folio



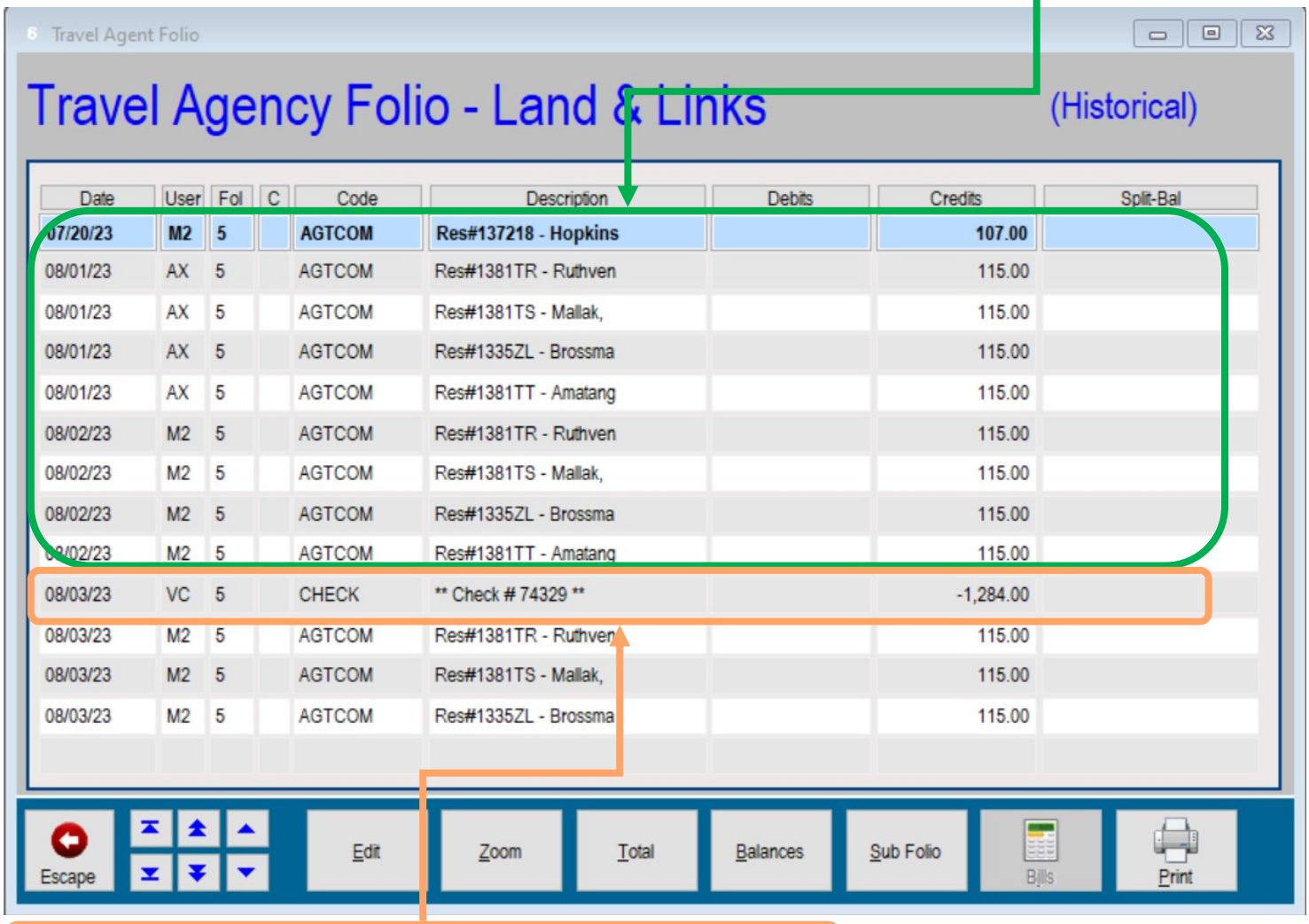
6. Leave **S** for Screen > Leave Subfolios **blank** > Leave Foreign currency **blank** > Type **Y** for Historical Detail > Page Down
7. Set **Begin Date** to the **first of the month** of the **itinerary** date range > Set the **End Date** as **Today's Date > Page Down**



Look Up Commission (2/3)

This will give us a list of all commission that has been requested through reservations, the checks that were cut for them, and the dates for each.

These lines detail the commission pulled from the R# on the reservation.
They include the commissions from all reservations listed above the “Check” Line.

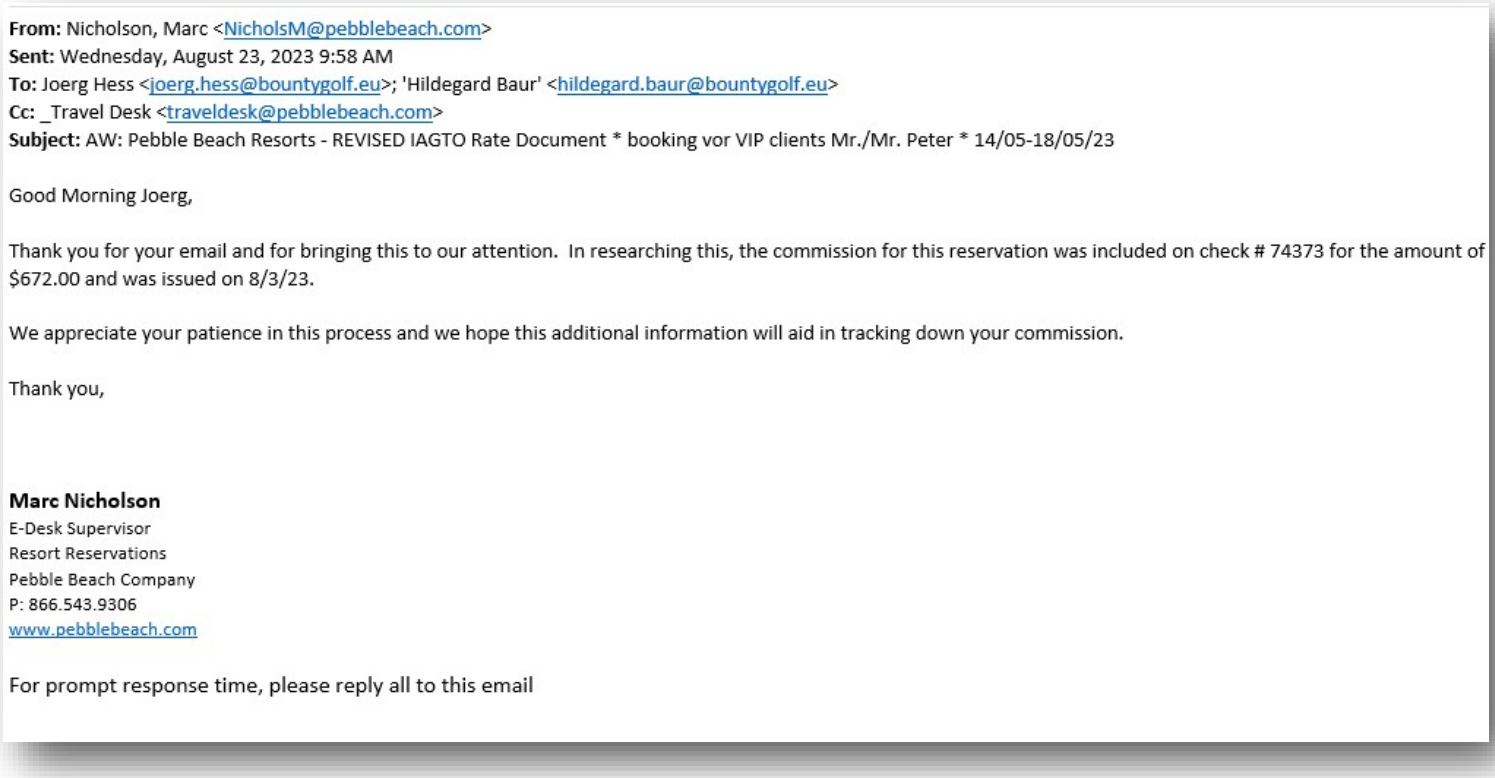


This details the check number, the amount, and the date it was issued.

8. Search through the list to find the commission the Travel Agent is asking about, or to verify if a commission check has been sent.

Look Up Commission (3/3)

9. If commission has been located, send a follow up email to explain your findings to the Travel Agent. Make sure the follow up email includes:
    - Check number
    - Check amount
    - Issue Date



From: Nicholson, Marc <NicholsM@pebblebeach.com>
Sent: Wednesday, August 23, 2023 9:58 AM
To: Joerg Hess <joerg.hess@bountygolf.eu>; 'Hildegard Baur' <hildegard.baur@bountygolf.eu>
Cc: _Travel Desk <traveldesk@pebblebeach.com>
Subject: AW: Pebble Beach Resorts - REVISED IAGTO Rate Document * booking vor VIP clients Mr./Mr. Peter * 14/05-18/05/23

Good Morning Joerg,

Thank you for your email and for bringing this to our attention. In researching this, the commission for this reservation was included on check # 74373 for the amount of $672.00 and was issued on 8/3/23.

We appreciate your patience in this process and we hope this additional information will aid in tracking down your commission.

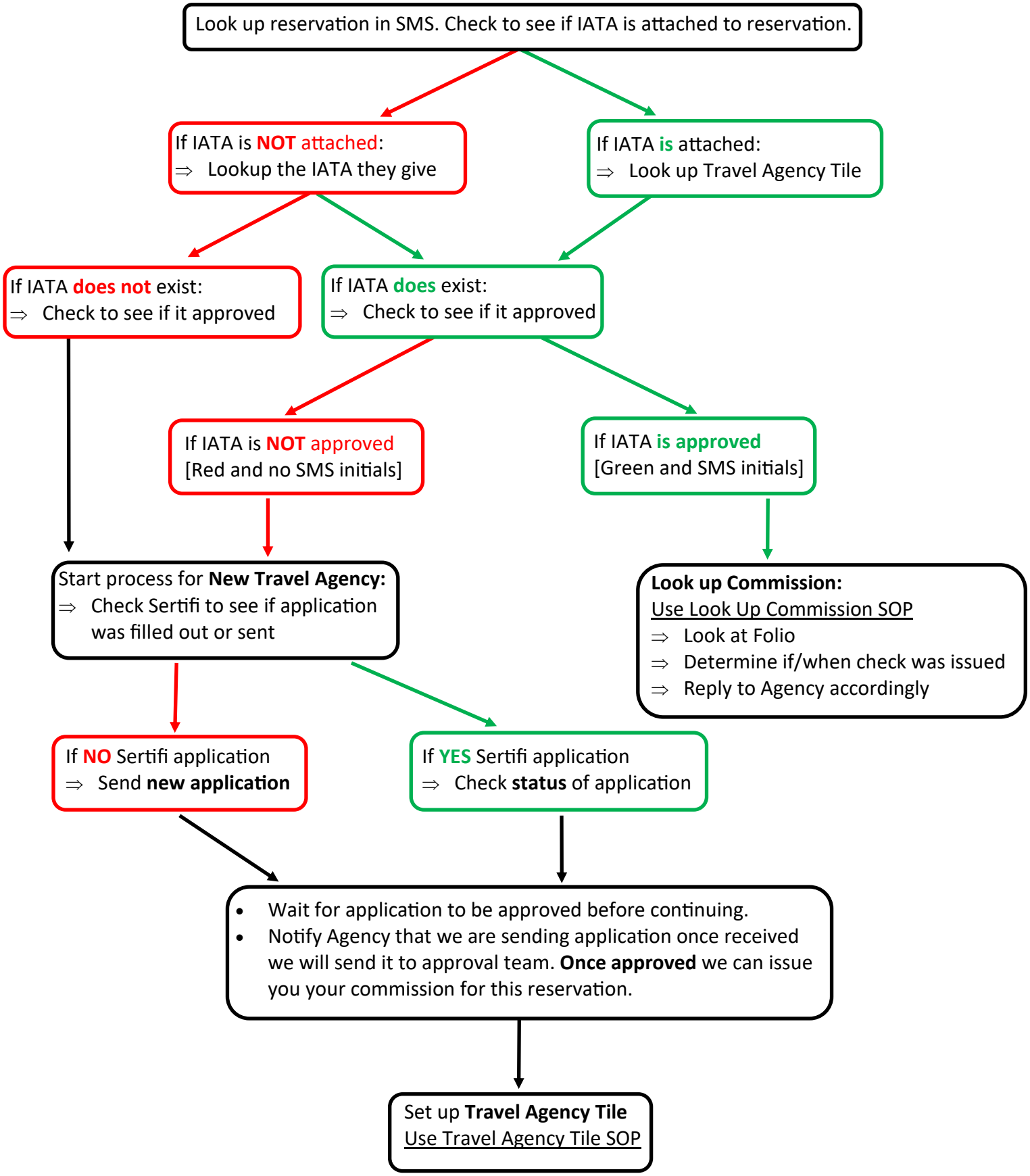
Thank you,

Marc Nicholson
E-Desk Supervisor
Resort Reservations
Pebble Beach Company
P: 866.543.9306
www.pebblebeach.com

For prompt response time, please reply all to this email

10. If commission has not been located (no check has been issued or Res# does not show up in the folio), work with your supervisor to email accounting for further assistance on locating the commission.

Troubleshooting Commission



If you encounter 3rd party commission service inquiry (inquiring on behalf of another agency) please see supervisor for further assistance.

Reservations Auditor

Resort Reservations

2024 Training Binder



Auditor Duties

The Reservations Auditor is responsible for actively monitoring and influencing the Reservations Call Center team's quality performance, ensuring that the quality requirements in place are fulfilled and the goals are consistently achieved.

AUDITS

- Maintain a high level of knowledge on Reservations Operations and Customer Needs
- Manage and review audit reports
- Analyze Reservations in SMS with an analytical and audit-based approach
- Communicate tasks to Reservations Agents and, when necessary, make corrections to bookings

COACHING/TRAINING

- Make recommendations for individual and team training and retraining programs and process improvements
- Assist in the development of training materials.

ESCALATION

- Take calls during peak times, periods of high call volumes, and as needed

Most audits will fall under the following categories:

Unintentional	Training Opportunities	Guest Impact	Incomplete
Auditors will correct minor errors if it does not become a pattern for an agent Examples include but are not limited to, spelling, guarantee codes, special bill line 1, changing dates on traces, changing note and trace types (i.e. R note should be K note; FDB should be LFD trace)	If the same error is corrected multiple times by the auditors for the same agent, an email will be sent to the supervisor to review directly with the agent	Errors that could result in guest impact. Send an email to _Auditors, the agent and supervisor. The Assistant Manager and Supervisor should coach the agent on the best way to handle the issue and how to avoid it in the future Examples include, but are not limited to, any rate discrepancies, incorrect package or rate codes, incorrect deposit on file, room category or bedding issues, timing conflicts, 3rd party prepayments, tee time and course issues, any special requests from guests	This reservation does not have enough information attached to properly and clearly advise the agent how to precede Send itinerary to the supervisor to prepare with agent

Auditor Resources

SMS Host is a hospitality management system. SMS is where the hotel and golf reservations are created and managed.

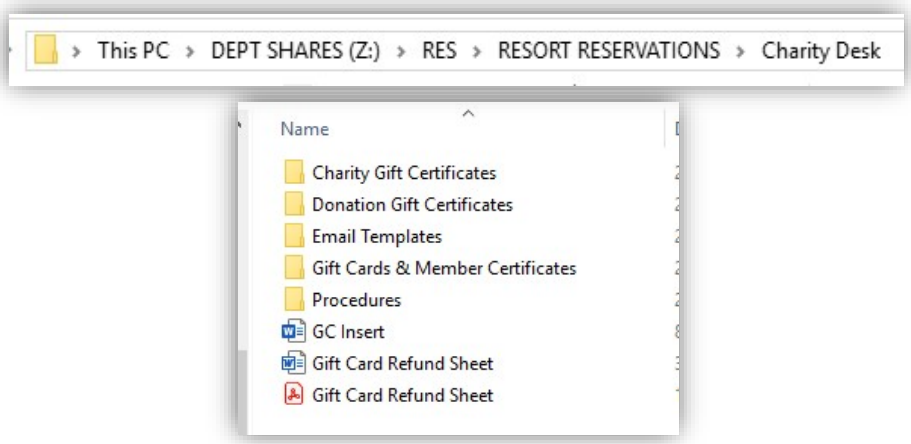
Revinate Reservation Sales is a voice-based, lead management solution. It is used to track and manage call volume, convert leads into bookings, and document guest-agent communication.

Sertifi is program that we use to securely collect confidential information, such as credit card numbers, electronically.

The Pebble Beach Company has a **Network Server** on which various departments can store documents, reports, and historical documentation.

Resort Reservations utilizes:

- **The Z Drive**—This drive holds documents saved by Resort Reservations which includes procedural resources
- A multitude of resources and templates for Auditors live within the **Charity Desk folder**:



- Documents most often accessed by Auditors are linked within the **Digital Binder:**



Auditor Glossary

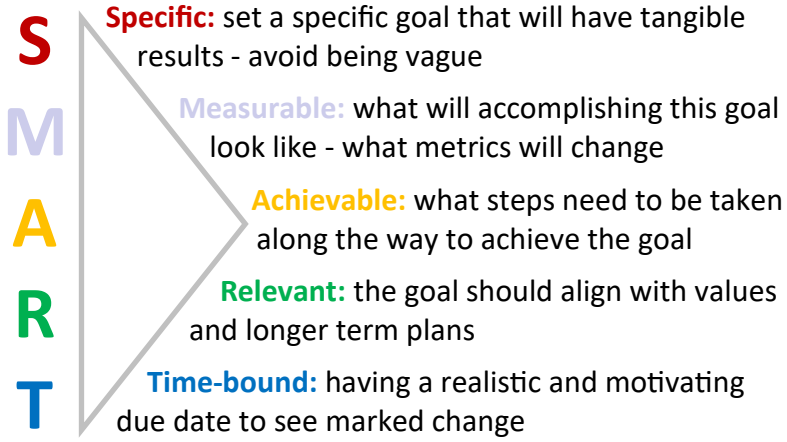
	WHAT IT IS	HOW AUDITORS HANDLE IT
ARRIVALS	Every day, Auditors will pull a report from SMS that lists all bookings for guests who will be arriving ten days from the current date.	Auditors use a standard booking checklist to review each of these bookings to identify what edits need to be done prior to the guest arriving. They will correct menial mistakes or send an email to the agent/ agent's supervisor instructing them to complete any remaining edits.
AUDIT REPORTS	Auditors receive various Audit Reports via email each day that list reservations that with specific features or recent edits that are outside of the norm, i.e. Special Billed rates, 1 night stays, cancellations within 14 days, etc.	These bookings do not necessary have mistakes, but warrant a second look to ensure it is set up correctly. Auditors will review each of these bookings for accuracy.
DEPOSIT DUES	On Tuesdays and Thursdays, Auditors review "Deposit Due" reports that list all reservations that indicate a deposit is overdue, which could be the result of a Hold deadline that has been exceeded or a coding error.	Auditors investigate these overdue deposits and either fix menial mistakes or send an email to the agent/agent's supervisor to correct or clarify the booking.
EMPLOYEE VALUE SEASON	Each winter, employees can submit forms for discounted resort stays.	Auditors will evaluate these forms to ensure that the requested dates do not overlap with blackout dates and that the occupancy on their dates is low enough per the EVS guidelines. They make any needed adjustments and book the stay.
CHARITY INQUIRY	Representatives of 501c3 charitable organizations can receive donated or discounted certificates for resort stays that they subsequently auction off at charity events.	Auditors will verify the charity, create gift certificates, and prepare SMS so the certificate can be redeemed by the auction winner.
CHARITY CERTIFICATE REDEMPTION	Guests who have purchased gift certificates to Pebble Beach at a charity auction will call to redeem their certificate for a resort stay.	Auditors will create the booking per the certificate details and potentially collect surcharges and fees if the guest wants to upgrade or redeem more than 1 year from the auction date.
RAS	RAS is a program that generates customized reports.	This system automates delivery of these reports to auditors via email every day.

Auditor Communication

Communication Etiquette

Develop and maintain healthy relationships with teammates through "SMART" verbal and written correspondence.

- ◊ Write in a clear, concise, and professional manner
- ◊ Be positive and supportive
- ◊ Ask engaging questions versus making assumptions
- ◊ Offer support should any questions arise
- ◊ When point out an oversite—offer an explanation and solution



Task Itemization

Auditors will send arrival emails to agents. In these emails, standard arrival steps do not need to be listed out. Any omissions or inaccuracies should be listed in bullet point format for the Agent to address before arrival.

Directing Emails

- If an agent who is not the owner of the booking makes a significant oversight, the audit email should include that agent, the agent who owns the booking, and both agent's supervisors. Supervisors will determine which agent will perform the correction.

- Any reservations with more than (4) errors that would result in an overwhelming email to the agent will be sent solely to the Supervisor and Assistant Manager marked as High Importance (!) so they can have a thorough discussion with the agent.

Standardized Email Subject

Subject lines should contain the following:

- ◊ Due xx.xx.xx | Arrival |Itinerary # | Name
- ◊ Deposit Due | Itinerary # | Name
- ◊ Audit #x | Itinerary # | Name

Auditor Email Examples

Arrival Email:

Subject Due xx.xx.xx | Arrival | Itinerary # | Name

Good Morning/Afternoon _____,

For this arrival please:

1. Prepare for arrival according to the arrival checklist
2. Can you please confirm: I see (3) guests on the R/L and (4) golfers, did Mr. K want (4) golfers?
    a. If so, split and whose golf 2-1-1

Thank you,

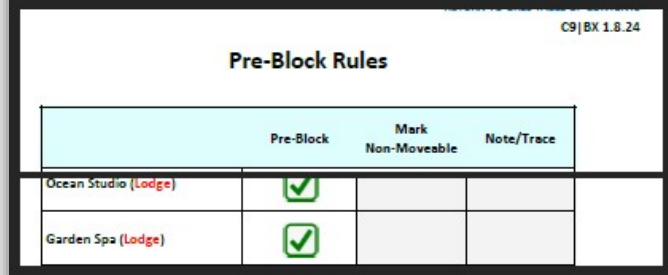
Standard Correction—Audit #4:

Subject Audit #X | Itinerary # | Name

Good Morning/Afternoon_____,

I don't know if you advised guest of dynamic pricing, but if not please contact guest and add a K note.
Also, please remember that Garden Spa rooms need to be pre-blocked.

In the Digital Reference Guide, we have our pre-blocking rules for reference.



C9|BX 1.8.24

Pre-Block Rules

	Pre-Block	Mark Non-Moveable	Note/Trace
Ocean Studio (Lodge)	☑		
Garden Spa (Lodge)	☑		

If you have any questions or concerns, please let us know.

Thanks,

Looping in multiple agents and their supervisors:

Subject Audit #X | Itinerary# | Name

Good Morning/Afternoon,

We are reaching out to both the booking agent and the agent that made a change to this reservation.
Looks like Mr. S called, and his room was upgraded. There were no notes as to the reason or approval for the upgrade.

[Agent A] please add an R note with the reason for the upgrade and which supervisor approved it.

[Agent B] Once this is done, please:

1. Prepare for arrival according to the arrival checklist
2. Can you please confirm: I see (3) guests on the R/L and (4) golfers, did Mr. K want (4) golfers?
    a. If so, split and whose golf 2-1-1

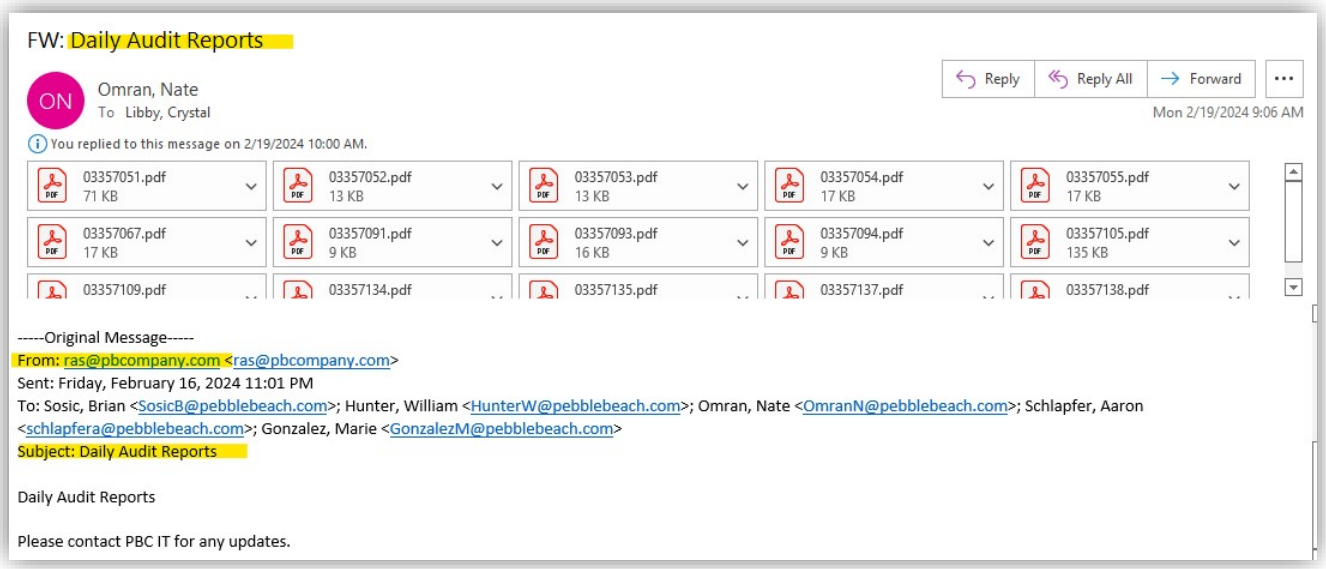
Thank you,

Report Master List

	REPORT	FREQUENCY	AUTOMATED
ARRIVAL REPORTS			
	Casa Palmero	Daily	No
	Lodge	Daily	No
	Spanish Bay	Daily	No
AUDIT REPORTS			
3	PB Golf with 1 Nigh Stay or Less	Daily	Yes
4	Package Golf Agrees to Package Rate Code	Daily	Yes
7	Share bookings (Need to ensure "Share Y/N" is correct)	Daily	Yes
8	Package Golf Agrees to Package Rate Code-by arrival	Daily	Yes
MISCELLANEOUS AUDIT REPORTS			
	Suites Not Pre-Blocked (Includes LROD QQ not preblocked)	Daily	Yes
	Scenic QQ Not Preblocked		Yes
	Traces > RBT Reservations Auditor	S/M/W/F/S	No
DEPOSIT DUE REPORTS			
1A	Any res with Exception Hold for a guarantee code	Tue/Thur	Yes
1B	Payments Equal to Zero and Dep Amt#2 Request Greater than Zero - Guar Code A, D and J	Tue/Thur	Yes
2	Payments Greater than Zero and Gura Code of F, J, D, K, L	Tue/Thur	Yes
3	Payments Equal to Zero and Dep Amt#1 Request Greater than Zero - need Mini-Group code or DepAmt moved to DepAmt2	Tue/Thur	Yes
4	Payments Greater than Zero and Guar Code of A and Dep amt2 Greater than Zero	Tue/Thur	Yes
6	Payments Equal to Zero and no DepAmt and no Dep Amt#2 and No Mini-Group Comp, Gift Certificate, City Ledger, Donation, Charity	Tue/Thur	Yes
7	Payments Equal to Zero and Dep Amt#1 Request Greater than Zero - mini-group in rez	Tue/Thur	Yes
VIEW OBSTRUCTION REPORTS			
	AT&T	Daily	Yes
	AT&T FWY1	Daily	Yes
	Concourse	Daily	Yes
	First Tee Open / Pure Insurance Championship	Daily	Yes
	U.S. Open	Daily	Yes
	U.S. Women's Open	Daily	Yes

RAS Report Automation

Most Auditor Reports are automated, meaning they are emailed via RAS as a group of PDF attachments to the Auditors each morning.



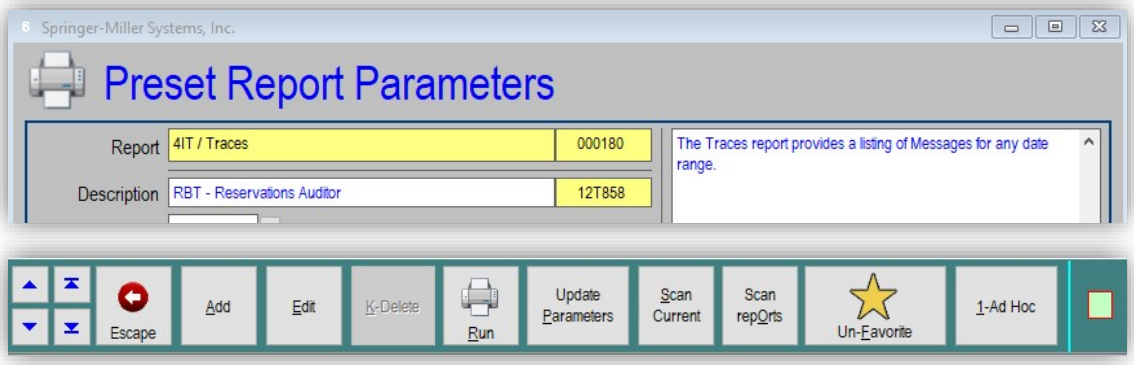
SMS Report Favorites

The only reports excluded from automation (that must be manually run) are:

- Arrivals
- RBT Traces

Since we must run these reports manually, it is convenient to add these reports to your SMS Favorites.

1. Begin running your report manually.
2. Once you reach the “Present Report Parameters screen, click the “Favorites” star at the bottom of the window.

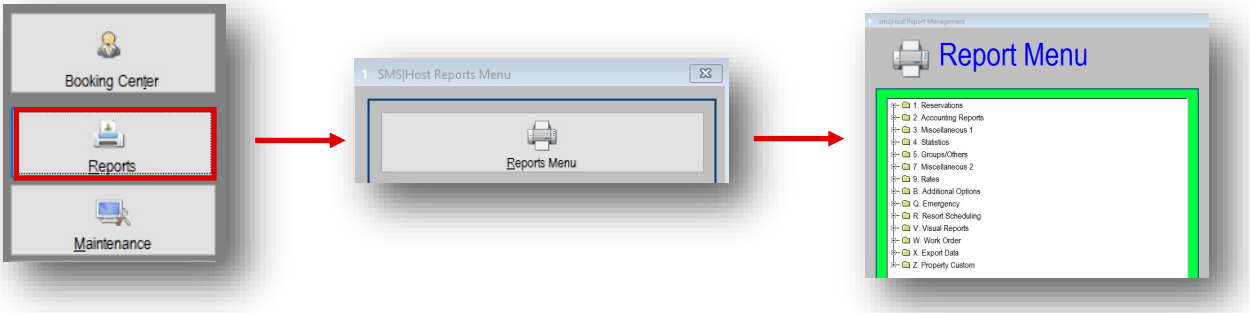


The report will now be accessible from your Home Screen under “My Favorite Reports”:

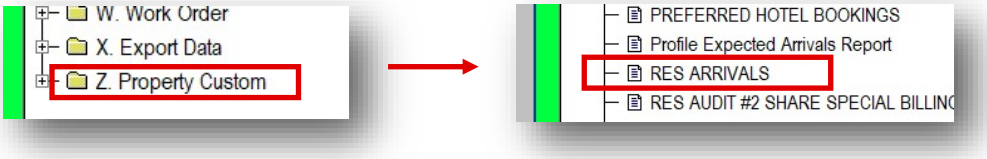


SMS | Run An Arrival Report

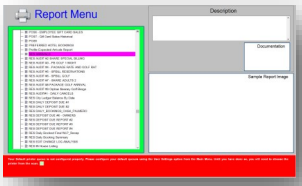
1. Access the Reports Menu



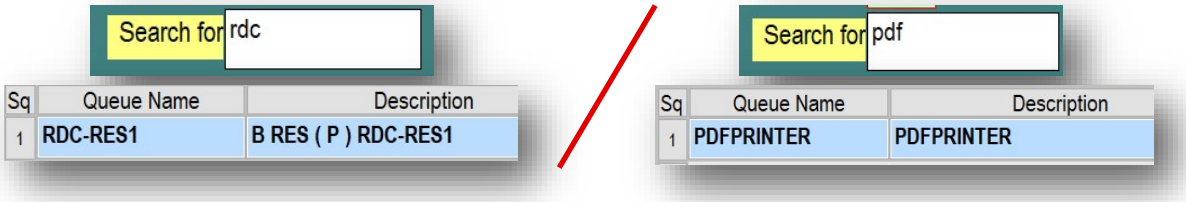
2. Select Z. Property Custom > RES ARRIVALS



3. Hit Enter to Bypass the Red Message



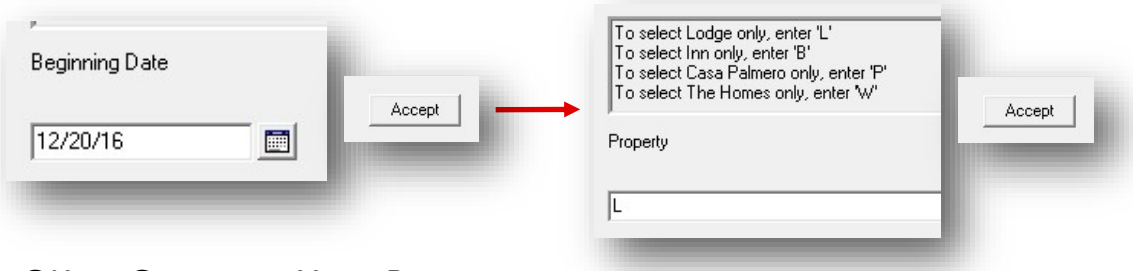
4. Select RDC-RES1 to Print the Report / PDFPRINTER to view a PDF



5. Enter the Number of Copies Needed



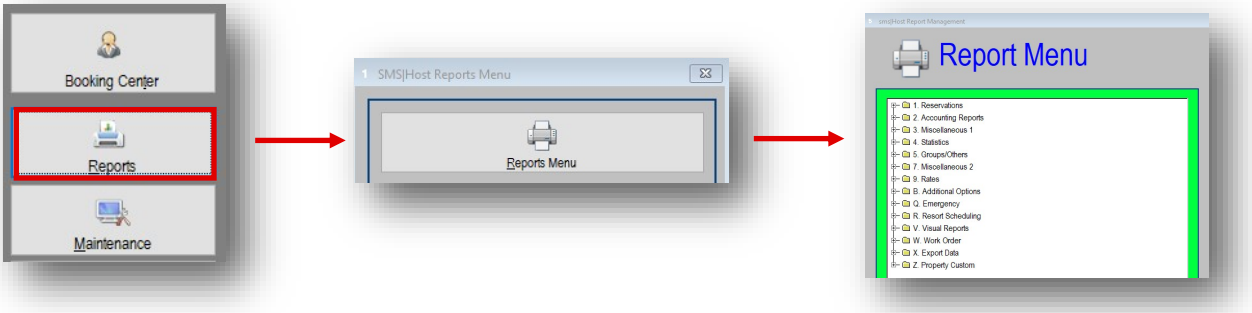
6. Select the Date > Accept, then Property > Accept



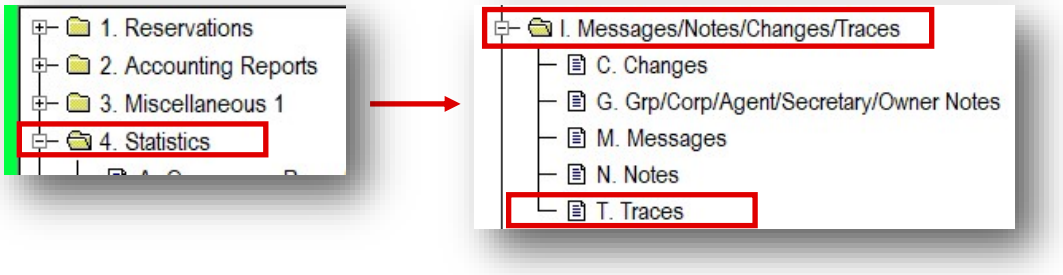
7. Click OK to Generate Your Report

SMS | Run An RBT Report

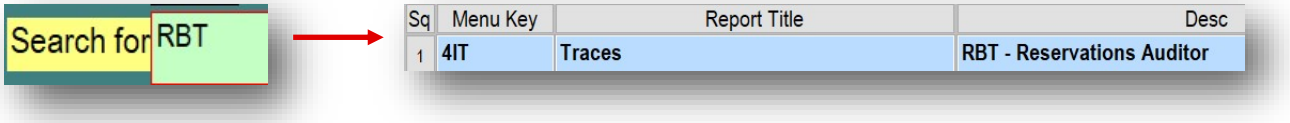
1. Access the Reports Menu



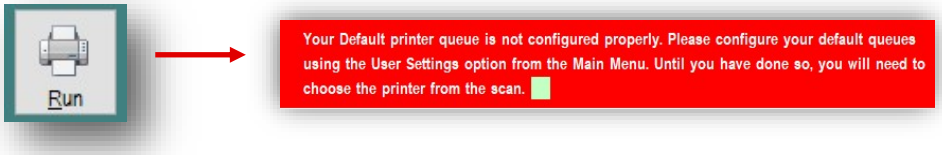
2. Select 4. Statistics > I. Messages/Notes/Changes/Traces > T.T races



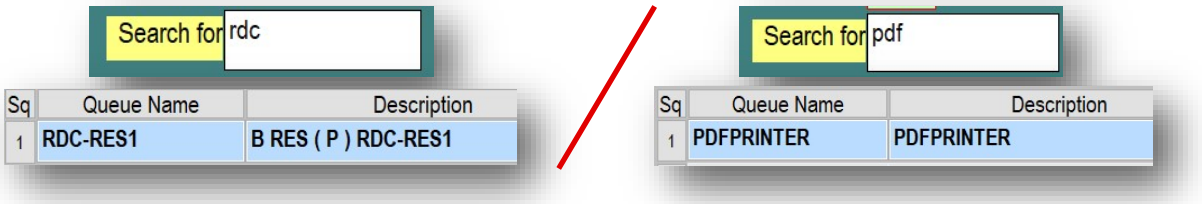
3. Search for "RBT" > Enter > Select 01



4. R to Run the report > Enter to bypass the red message (if applicable)



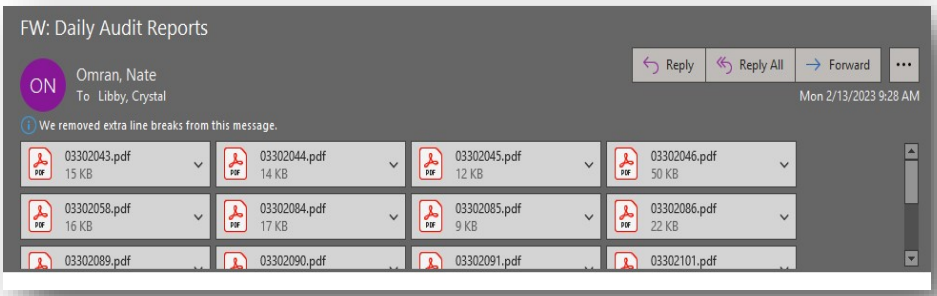
5. Select RDC-RES1 to <u>Print</u> the Report / PDFPRINTER to view a <u>PDF</u>

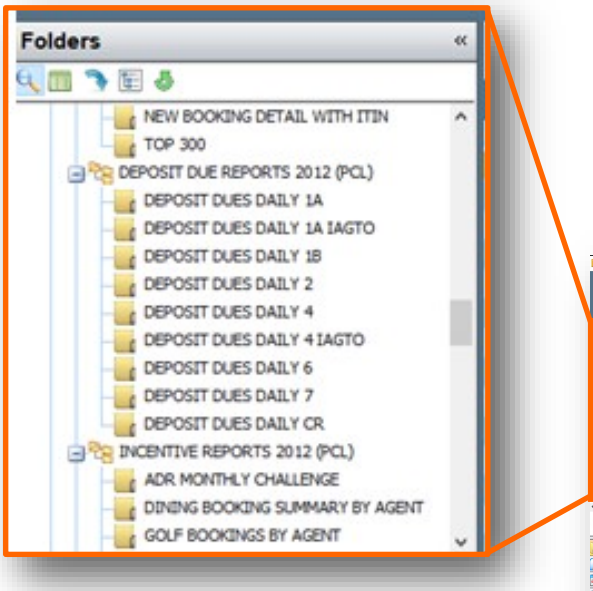


6. Wait for your report to generate / print

How to Pull RAS Reports

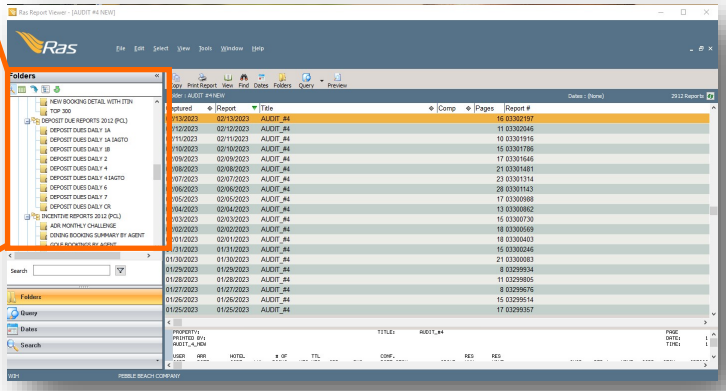
RAS Reports are sent to Auditors each day via email, but Auditors are still able to pull reports manually directly from RAS if needed.





As soon as you log into **RAS**, you will be able to see the list of available reports from the **Folders** menu on the left side of the screen.

Double click on any of these reports to open them.



Note: If you do not receive the daily RAS email, it is likely that the reports will not be available to manually locate. In these instances, contact Reservations Management so an IT Ticket can be created.

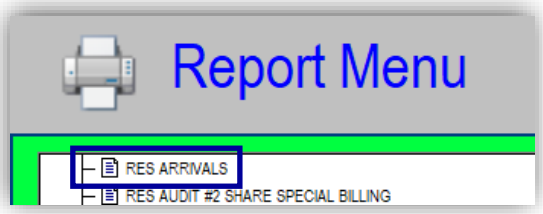
Arrivals

Auditors will review all room reservations inside the 14-day cancellation period and send an itemized list of remaining tasks to the agent responsible for the booking.

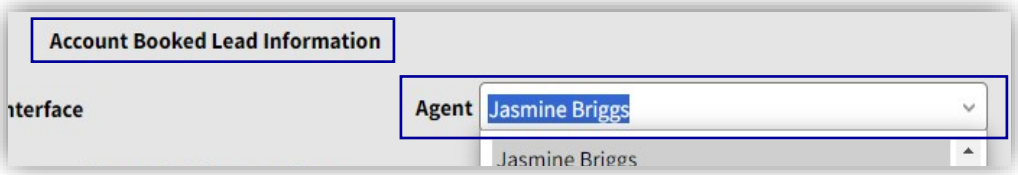
The expectation is that the agent will complete these tasks at least 8 days prior to arrival which allows time for the front desk to handle their pre-arrival procedures.

Audit Procedure

1. Run Arrival Report in SMS for all bookings arriving 13 days from today, per property



2. Check the "Agent" field on the lead form—This agent will prepare the booking for arrival



3. Use Arrival Checklist as a guide to audit bookings

- Read your FDB Trace, Y Note, and R Note
- Duplicate all rooms
- On all secondary rooms without a deposit:
  - ◊ Zero out Special Billing
  - ◊ Change the Guarantee Code to J
  - ◊ Ensure that all rooms are mini-grouped to the Primary
  - ◊ Clear out the Audit line
- Split the FDB Trace:
  - ◊ Leave the primary message on the primary room
  - ◊ Move the secondary message to all secondary rooms
- If any guests will be covering their own charges:
  - ◊ Split shares as appropriate
  - ◊ Create C/O Guest Tiles for each Payer
  - ◊ Split golf and whose it to the Reservation Tile of each Payer
- If secondary guests will not be covering their own charges
  - ◊ Use the Y Note to rename the rooms
  - ◊ Add PBX names as appropriate
- Add Babynotes and Chargeback notes to recreation as appropriate
- Review your standard Booking Checklist to ensure completion
- Reply to your Arrival Email

4. Send an Arrival email to the booking agent and CC their supervisor

Audit Checklists

AUDIT REPORT #3— Golf with 1 night stay or less

- One night stays with PB: Is the exception documented
- Free Sell PB: Is the exception documented

AUDIT REPORT #4— Package rate and golf rate (Yesterday's New Bookings)

- Standard Booking Checklist
- Non-Standard Billing / Prepayments / 3rd Party
- Chargeback Notes
- Golf baby notes: Advisement of NGTF and AER
- Notation of any exceptions

AUDIT REPORT #7—Shares that still have "2" in the Adult Field

- Double check that the room requires 3 or 4 adults.
- "K" note advising additional $50 per night per adult.

AUDIT REPORT #8—Package golf Arrival – 2 days

- Golf rate codes ("Stay and Play" vs. "Resort Guest") must match the package code booked.
- Number of players must also match rate (package) booked.
- Multiple packages must have all package golf split and re-linked to appropriate reservations
- Packages and Charity Bookings should be "Confidential Rate" = Y

Deposit Dues

DEPOSIT DUES #1A—Reservations with no deposit	
Guarantee Codes	
F or D	All guarantee codes should be "F" (Exception Hold) or "D" (Check Holds) with the deposit amount in SPBILL on line two ("Deposit Requested") with appropriate due date. The RBT trace needs to be set for due date of deposit with the note indicating which supervisor/ manager approved the hold.
O	"Direct Bill" codes need to be checked by a manager to confirm the approval by accounting. Once this is approved a closed RBT trace should exist with the manager's approval. The SPBILL line 2 should also be blank.

DEPOSIT DUES #1B—Reservations with no deposit	
Guarantee Codes	
A	Check for correct deposit and correct amount in Special Billing
J	Check if res. is either supposed to be on hold or the Special Bill field is not correct.
D	Check to see if check has been posted and is the Special Bill field correct. If check has been posted; Duty agent must change guarantee code to "A."
Any deviation from the above 3 scenarios must be double checked by the management staff.	

Deposit Dues

DEPOSIT DUES #2—Transaction activity on reservation regardless of guarantee code		
Guarantee Codes		
F	Check for deposit and the Special Bill field correct.	
J	Check if deposit is on another room and an ADM trace exists to explain the move of money. Leave as is – this will continue to show on report until checked out.	
D	The check has been posted and the guarantee code needs to be changed by the Duty agent to "A". The Special Bill should reflect what is required for the deposit.	
K	There is a balance on the res. to cover the difference for an upgrade or additional nights requested by guest. The FDB trace should indicate the Donation Certificate number, what it covers, and the City Ledger (CL#10149K) that should be charged. The total on the Special Bill field should reflect the deposit required according to approved room rate.	
L	Charity: Additional Funds	There is a balance on the res. to cover the difference for the deposit which is not covered fully by the Certificate. The ADM trace should indicate the City Ledger balance to be moved two weeks prior to arrival date. The total on the Special Bill field should reflect the deposit required according to approved room rate.
	Charity: Money Transferred	When the balance from the City Ledger has been moved (2 weeks to arrival) the guarantee code should be changed by the Duty agent to "A". The package rate should be "Charity." The total on the Special Bill field should reflect the deposit required according to approved rate.
	Previous Cancel: Additional Funds	There is a balance on the res. to cover the difference needed which is not covered fully by the City Ledger. The ADM trace should indicate the City Ledger balance (full amount) that will be moved the day after booking. Check to make sure the total on the Special Bill field reflects the total forfeited amount from City Ledger.
	Previous Cancel: Money Transferred	When the balance from the City Ledger has been moved (the day after booking) the guarantee code should be changed by the Duty agent to "A". Check to make sure the total on the Special Bill field reflects the total forfeited amount from City Ledger. Be sure the agent noted that the res. is non cancelable; booking agent needs to contact guest if not advised.

DEPOSIT DUES #3—No Deposit		
Guarantee Codes		
A	There is no deposit on file. The booking agent either has not charged the credit card or the guarantee code should be "F." The deposit amount in Special Bill should reflect the correct scenario.	
J	Both Special Bill fields need to be cleared out.	
F	The deposit amount needs to be moved from line one to line two in Special Bill.	
L	Charity	These will always show on the report. Be sure to double check for the ADM trace indicating the City Ledger balance will be moved two weeks prior to arrival date. Check to make sure the total on the Special Bill field reflects the deposit required according to approved room rate and the room has the "Charity" package code. When funds are moved change GTD code to "A."
	Previous Cancel	These will always show on the report. Check for the ADM trace indicating the City Ledger balance (full amount) will be moved the day after booking. Check to make sure the total on the Special Bill field reflects the total forfeited amount from City Ledger.
	Club Member	These will always show on the report. Check for the FDB trace indicating the Membership Account that should be charged. Check to make sure the total on the Special Bill field reflects the total deposit required.
"Room Move" reservations for same or following day booked by a FD agent is their responsibility. Please keep an eye on those that have been booked by your management staff for the future. Only question if it has been showing on report for over 3 months.		

Deposit Dues

DEPOSIT DUES #4—Multiple Payment Deposits	
Guarantee Codes	
A	• Booking agents should have a Reservations note indicating which supervisor/manager approved more than one payment to be made and the exact payment schedule. Verify the Special Bill fields match the schedule note. • If all payments have been made check that the amount in the Special Bill field is equal to the entire deposit required and the Requested field has been deleted. Print screen the agent who took the last payment to make any updates to the above fields.

DEPOSIT DUES #6—No Deposit and all Special Bill fields blank		
Guarantee Codes		
A	There is no deposit on file. The booking agent either has not charged the credit card or the guarantee code should be "F." The deposit amount in Special Bill should reflect the correct scenario.	
K or L	Check for the FDB trace, check the package code is correct, and all Special Bill fields are blank.	
C	Take reservation to the VIP coordinators immediately.	
J	The booking agent or arrivals duty agent must add the mini-group code.	
T	These will always show on the report. Notify the VIP coordinators immediately to verify no deposit is required. Add RBT trace with approval information to the attention of the Duty agent.	
S	Take reservation to the VIP coordinators immediately.	
L	Bonotel	Check that the FDB trace has the City Ledger number (CL#10F6E7) to charge back to and the note for Rate Suppression. The package code should read "BONOTL" if booked at the Lodge, "BONOTB" if at the Inn and "BONOTP" if at Casa. All Special Bill fields should be blank.

DEPOSIT DUES #7—Overall incorrect reservation
This report will show any discrepancies between deposit/no deposit and the subsequent Special Bill fields. Check everything.

VIEW & NOISE OBSTRUCTION
PBC Special Events that require us to advise the guests of view/noise obstruction require the View Obstruction code to be inputted into the Secretary field of each Reservation Tile.

Packages During Aeration

When Pebble Beach Resorts offers Stay & Play Packages, the dates will sometimes overlap with aeration. The Package Rate codes are designed to account for the aeration discount, but Auditors must manually ensure that the aeration discount is being correctly applied to the booking.

WHAT COULD GO WRONG?

Aeration discounts will automatically apply to the booking if the guest's arrival date falls within the 10 Day Aeration period. This can result in the aeration discount being applied incorrectly or the discount being missing when it should be applied.

Aeration Discount Applied In Error:
If a guest arrives on April 12th (the last day of aeration), but they play Pebble Beach Golf Links on April 14th, the Package Code will apply an aeration discount despite the guest not playing on an aeration date.

Aeration Discount Missing:
If a guest arrives on March 25th and they play Pebble Beach Golf Links on March 28th (the 1st day of aeration), the Package Code will not give the guest the aeration discount because the arrival date does not overlap with the 10 day aeration period.

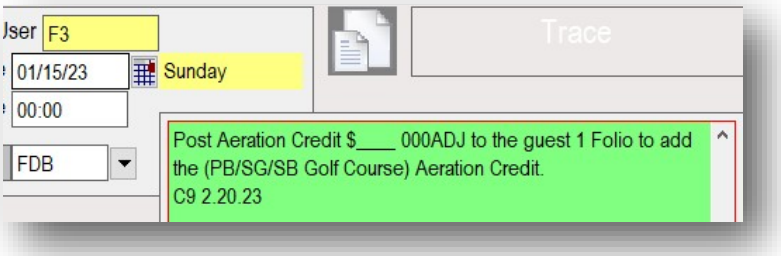
HOW TO RESOLVE PACKAGE AERATION CREDIT ERRORS

1. Pull Arrival Reports 1 month in advance of package dates
2. Review all Package Bookings to locate any bookings with aeration credit errors
3. Calculate the aeration discount dollar amount
4. Set an FDB Trace advising the Front Desk to either add or remove the aeration credit

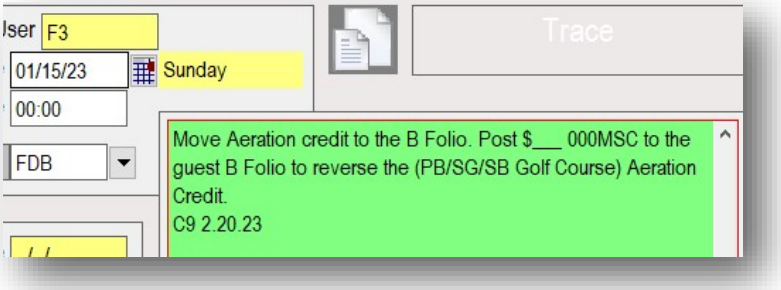
CALCULATE THE AERATION DISCOUNT

Current Rack Greens Fee
\- Current Aeration Greens Fee
Aeration Credit

ADD THE AERATION CREDIT



REMOVE THE AERATION CREDIT



Employee Value Season Guidelines

Rack Rate Stays:

Search the guest's name in SMS to see if they have previously stayed with us at rack rate. If they have, that excludes the guest from the Employee Value Season rate.

Blackout Dates:

Blackout Dates are set by Revenue Management and may be periodically updated. Always check the most recent Employee Value Season guidelines on the Back Nine.

> The Employee, Friends, and Family Rate program will not be available on the following dates:
>
> **The Inn at Spanish Bay:** Dec 11 – 12, Jan 3 – 6, Jan 11 – 14, Jan 31, Feb 1 – 3, Mar 6 – 7, Mar 21, Mar 24 – 28
>
> **The Lodge at Pebble Beach:** Dec 2 – 4, Dec 15 – 16, Jan 3 – 6, Jan 28 – 31, Feb 1 – 4, Mar 6, Mar 14 – 16, Mar 22 – 23

Calculate EVS Occupancy %:

1. S—Summary
2. ^—MultProp
3. Select your property
4. K
5. Divide the number of Booked rooms by the number of Net rooms possible to reserve
6 Check the EVS Guideline Sheet to ensure that this % is below the EVS threshold

Example: On 1/23/24, we have net 258 net rooms that are possible to reserve. Out of those 258, 118 rooms are booked. Divide 118 by 258 to find the Occupancy Percentage: **45.7%.**

Note—The Inn has 269 total rooms, but the "NET" number is 258 due to some rooms being OOO.

Date	NET	$OLD	%SLD	VACANT	%VAC	BOOKED	%BKD	AVAIL	%AVL	Day
01/23/2024	258	118	43.87	140	52.04	118	43.87	140	52.04	Tue
01/24/2024	253	157	58.36	96	35.69	157	58.36	96	35.69	Wed

Employee Name: _____ **Dept. Name**: _____ **Phone**: _____

ROOM RATES: Rates listed below are per night, subject to 10.5% tax, 0.195% California Tourism Assessment, nightly Monterey County Tourism Assessment of $7 and a gratuity (Spanish Bay $32/Lodge $28). All charges must be settled at time of check-out. ***All reservations are subject to availability. Hotel occupancy must be below 90% weekdays or 85% Friday and Saturday; availability is at the discretion of Reservations management.***

Golf:

Pebble Beach Golf Links and Spyglass Hill Golf Course may only be booked under Outside Guest Guidelines.
EVS Resort Guests may book The Links at Spanish Bay at a discounted EVS rate
If not booking a room, The Links at Spanish Bay may be booked at the discounted EVS rate within 14 days of play

Changes/Cancellations:

EVS Room Changes must be submitted via the EVS form and signed by their manager
Cancellations may be done at any time

Employee Value Season

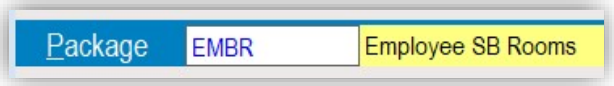
Employees are responsible for filling out the EVS form, acquiring a signature from their manager, and sending the form via email to eeres@pebblebeach.com.

BEFORE BEGINNING THE BOOKING PROCESS:

1. Check SMS to see if the guest has a previous rack rate stay that would disqualify them from EVS
2. Ensure the guest has not requested Blackout Dates
3. Verify that the Occupancy Percentage meets EVS Guidelines

1) Book a Garden View room

2) Use the EVS Package Code



EVS Package Codes		
	Lodge	**Spanish Bay**
Employee	EMLR	EMBR
Family	EFAMLR	EFAMBR
Friends	EFLR	EFBR

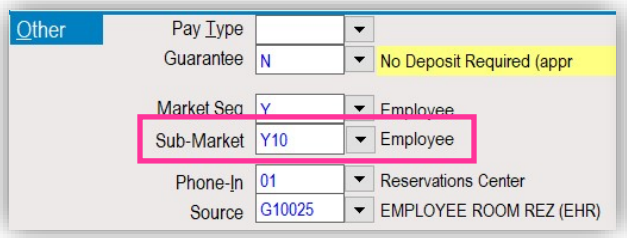
3) Set the Meal Plan code to EMP

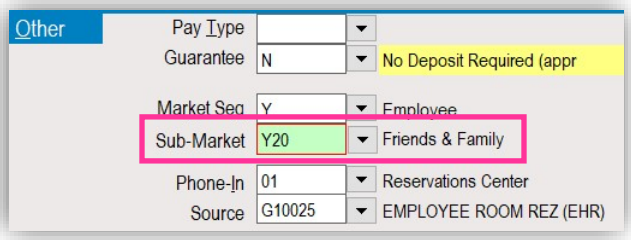


4) Clear out Special Billing

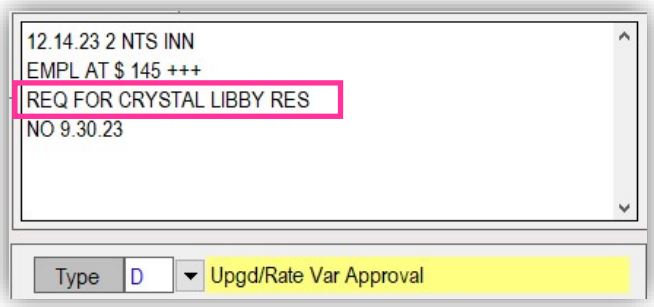


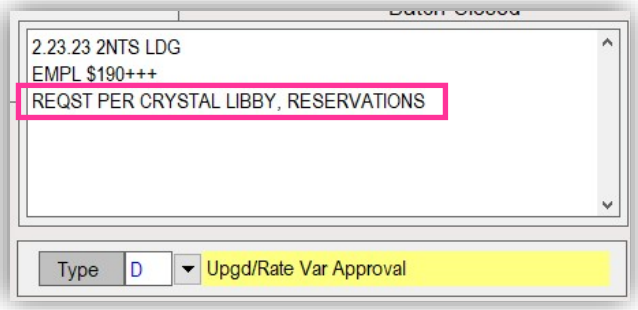
5) Edit the "Other" Codes based on the type of guest: Employee or Friends/Family





6) Leave A D Note based on the type of guest: Employee or Friends/Family





Gift Certificate Introduction

The Community Affairs Department—This department manages requests from local Charities and Schools within Monterey County. Charities and Schools outside of Monterey County looking for a
Donation are referred to the Charity Desk.

The PBX Department—PBX will forward charity inquiries received via the Pebble Beach Inbox. Do not reply to or copy PBX in emails.

501c3 Charity—Organizations will contact the Charity Desk directly because they have previously purchased a Pebble Beach Certificate, have heard about the Program from a 3rd party, or are inquiring to see if a program exists.

Charity Certificate

Non-profit organizations with a 501(c)(3) holding a charitable event are eligible to purchase a Gift Certificate at 25% off of rack rate for all properties and our 3 main golf courses. This offer is not applicable to golf-only.

A charity "Custom Golf Experience" usually includes both room and golf, but can be room only if desired. All standard booking guidelines apply.

Contact
Charity Desk
Email: charitydesk@pebblebeach.com
Phone: (844) 314-8908

Donation Certificate

Organizations inside Monterey County may apply for a donation certificate from Pebble Beach Company at no cost. All certificates and any exceptions to outside counties/cities are approved and produced through our Community Affairs office. Community Affairs will send weekly emails to the Charity Desk with an attachment of all the recent gift certificates issued.

Typical services that are donated would be golf, dining, spa, or stay at one of our properties. Room certificates are based on Garden View/Estate Rooms at each property. All of the donation gift certificates are billed to CL# 10149K. You may also hear "Prom926" and these will be setup to CL# 10149K as well.

Charities who receive donation consideration are judged with the following criteria in mind:

- How long the Charity has been established in Monterey County
- The impact it has on the community

Many of our guests visit us for the day without making a reservation in advance and bring their donation certificate for use. The outlets are fully aware of how to process them. Accounting will email copies of the redeemed certificates each month so we may still keep track of them.

Contact
Kathleen Lee
Dir. of Gov & Comm Affairs, Exec Dir. of PBC Foundation
Phone: 831-625-8502
Email: leek@pebblebeach.com

Charity Program Guidelines

The information below can be emailed to qualified 501(c)3 organizations

The Pebble Beach Resorts is very proud to extend a charity discount to non-profit organizations, registered 501c3.
Please review the guidelines below and let me know if you have any questions:

- We extend a 25% discount off the cost of published rates for rooms or rooms with golf.
- Prior to the event, the Charity "must" request an Invoice from the Charity Desk to confirm the package (s) they wish to purchase.
- The Gift Certificate(s) "must be" purchased no later than thirty days after the auction/event takes place.
- For the Certificate(s) to be redeemed, the name(s) of the winner(s) must be forwarded to the Charity Desk.
- Reservations will not be booked/confirmed under the Charity Rate for Certificate Holders unless the Guest Tile # and or the Itinerary C/L # on the Certificate is given at time of booking.
- We issue the actual Gift Certificate upon payment.
- Payment for all Certificates must come directly from the Charity.
- *Though we do not generally provide photography of Pebble Beach Resorts to external organizations, we do make an exception for charity and nonprofit organizations. If you are interested in using photography to promote your package and have completed your package purchase, we are happy to connect you with our Marketing team to sign a licensing agreement and access mandated trademark language to be used on all collateral alongside the images. All language and/or image(s) pertaining to Pebble Beach Resorts must be approved by Pebble Beach Company.*
- The pricing of the Gift Certificate is valid for one year from the date of the **event**. However, Gift Certificates do not expire. The recipient is responsible for any additional charges above and beyond what is set in the original package at the current published rate.
- To play one round on the Pebble Beach Golf Links requires either a two or three-night stay.
- Charity Certificates cannot be combined with other Pebble Beach offers or discounted rates
- We allow up to two golfers per room.
- Travel Agents are more than welcome to book reservations for Certificate holders, but they will not receive commission on the booking.
- If the certificate does not sell, the Charity may return the original certificate for a 100% refund.

Here are samples of our most popular packages. The rates below include the 25% discount.
If you would like further options, including a round of golf at the Pebble Beach Golf Links with a two-night stay, please let me know. Be advised, availability for a two night stay with a round at Pebble Beach is extremely limited.

RATES –

[Use current Charity Guidelines Template and Current Charity Rates Sheet to build this section before emailing to Charity]

Process A Charity Inquiry

1. When an inquiry is sent to Charity Desk, respond with the initial email to determine their interest.

2. Verify the Organization:

a. Verify the Charity's 501(c)3 status
   - Look up the Charity's name on Charity Navigator—https://www.charitynavigator.org
   - Check the Charity's website for self identification as a 501(c)3
   - Ask the Charity for their 501(c)3 IRS documentation
   - Verify Contact is working for Charity/School

b. Verify the Event Date
   - Look at the Charity's website or event flyer

c. Update the Charity Verification Excel Sheet located: \\falcon\DEPT SHARES\RES\RESORT RESERVATIONS\Charity Desk\Charity Gift Certificates

3. Email Charity Guidelines & Package Options:

a. Copy the text from the word document into the email located: \\falcon\DEPT SHARES\RES\RESORT RESERVATIONS\Charity Desk\Charity Gift Certificates\CHARITY INFO

b. Verify the Package Options in the email are the current Charity Rates located \\falcon\DEPT SHARES\RES\RESORT RESERVATIONS\Charity Desk\Charity Gift Certificates\CHARITY RATES

4. Issue An Invoice:

a. Once the Package has been selected for the event, email an invoice

b. Invoice Sample Template is located: \\falcon\DEPT SHARES\RES\RESORT RESERVATIONS\Charity Desk\Charity Gift Certificates\CHARITY INVOICES

c. Update the Date, Contact, Package, Charity Rate, and Retail Value

d. In the verification section add 'Yes' after 'office use only' to confirm the 501(c)3 status is verified

e. Save as Word in folder Charity Invoices—Word [Current Year]

f. Save as PDF in folder Invoices Sent & Purchased [Current Year]

g. Print & File in Charity Cabinet

5. Collect Payment: Payment must be received before the Gift Certificate can be mailed out

If the Charity pays with a **credit card**:
- Credit Card must belong to Charity
- Send a credit card authorization form through Sertifi
  - Check box for Defined Package
  - Add dollar amount of purchased package

If the Charity pays with a **check**:
- Make a copy of the check
- Attach copy to Invoice in the Charity Cabinet

6. Create the Charity's:

a. Guest Tile

b. City Ledger

c. Certificate

7. Process Payment

If the Charity pays with **credit card**:
- Charge the credit card on the C/L
- Check that the CC did not save on the GT—If so, delete the CC

If the Charity pays with **check**:
- Scan check and email it to _Billing Office include CL# and Charity Name in email
- Write the C/L# and Charity Name on check
- Take check to Accounting and place in "Advanced Deposit" folder

Charity Email Templates

CHARITY REQUESTING A DONATION:

Thank you for your e-mail regarding a Donation. The Pebble Beach Company offers numerous donations to Charities & Schools within Monterey County. For Charities & Schools outside of Monterey County we have established a Program which offers discounts for rooms or rooms with golf. If this would be of interest to you, ((please forward a link to your webpage & confirmation of your 501c3 status. Once I receive this information)) I would be more than happy to send you details about the Pebble Beach Charity Program.

CHARITY RATE INCREASE

My colleague _____, asked me to reach out to you regarding the reservation you booked using a Charity Certificate from: _____

Since the Certificate has a date of____ and your reservation is booked for ____, there would be a rate increase associated with your reservation. The increase for the:
Room(s) is: $
Golf is: $
Grand Total =

We do require payment in advance for all increases. Would you like to use the Credit Card on file or an alternate Credit Card?

ORDERING GIFT CARD FROM RETAIL

Could you please charge C/L#_____ (Name of Charity) the amount of: $_____ and put it on a Gift Card.

Please let me know if you need further information.

CHARITY IS REQUESTING TO USE PB IMAGES / MARKETING MATERIAL FOR THEIR EVENT

_____, who works with and represents the above Charity, would like to receive the licensing agreement to use an images for their event. Attached is the invoice.

_____ email address is: ____

*Attach the invoice

CHARITY UPGRADE FEE

My colleague _____, requested that I reach out to you regarding the reservation you booked using a Charity Certificate from: _____

I believe_____, mentioned that there would be an upgrade fee due to the _____ room not being available over the dates you selected. This fee is based on the # of rooms and nights confirmed on the Certificate.

For your reservation, the Grand total for the upgrade fee is **= $**_____
We do require payment in advance for upgrade fees. Would you like to use the Credit Card on file or an alternate credit card?

CHARITY FOLLOW UP (AFTER THE EVENT)

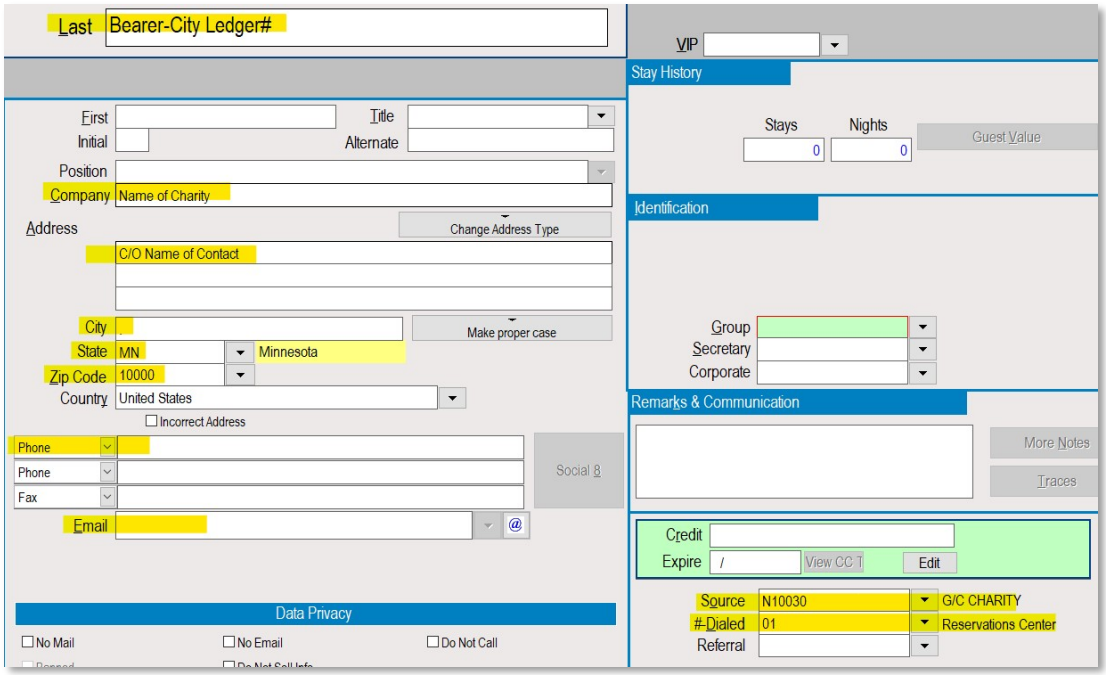
I hope your event was a great success! I wanted to follow up and see whether there was a winner for the Pebble Beach Charity Package and if so, may I get the winner's name.

Create A Charity Guest Tile

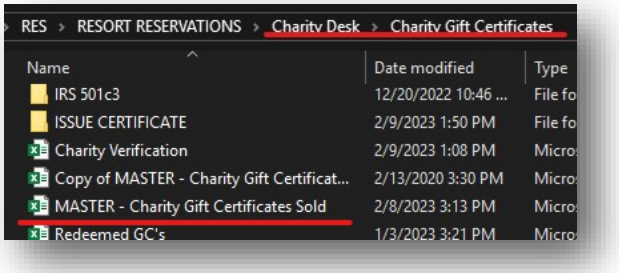
1. **Create** and **fill** in the guest tile:

Last name	Bearer—[Add the Charity City Ledger # after creating it]
First name	Please leave blank
Company	[Charity Name]
Address	C/O [Charity Contact Name]
City	[.]
State	The state the Charity is in
Zip	10000
Phone	[.]
Email	Please leave blank
Page Down to Save	• Select #01 (Reservation Center) • Select #13 (Brand Awareness) • Select #05 (G/C Charity)

Example Guest Tile:



2. Once the Guest Tile is created; update the **MASTER— Charity Gift Certificates Sold** spreadsheet

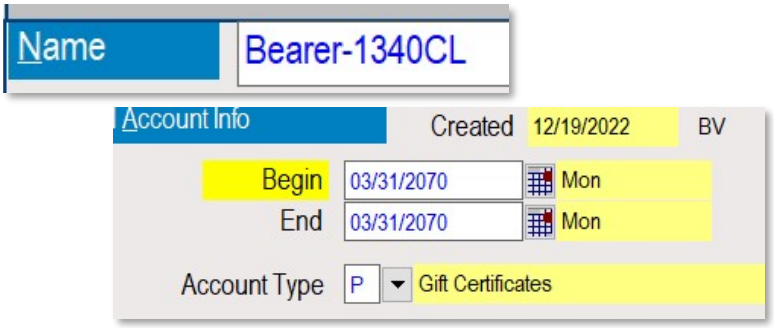


3. In the top right corner of both the digital and physical **Invoice**(s); add the **Gift Certificate number** and the **Guest Tile number**

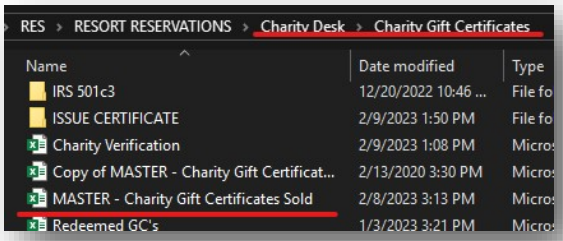
Create A Charity City Ledger

1. **Create** and **fill** in the City Ledger:

Last name	Bearer—[Charity City Ledger #]
Start Date	03/21/2070
End Date	03/21/2070
Account	P—Gift Certificates



2. Once the City Ledger is created; update the **MASTER—Charity Gift Certificates Sold** spreadsheet.



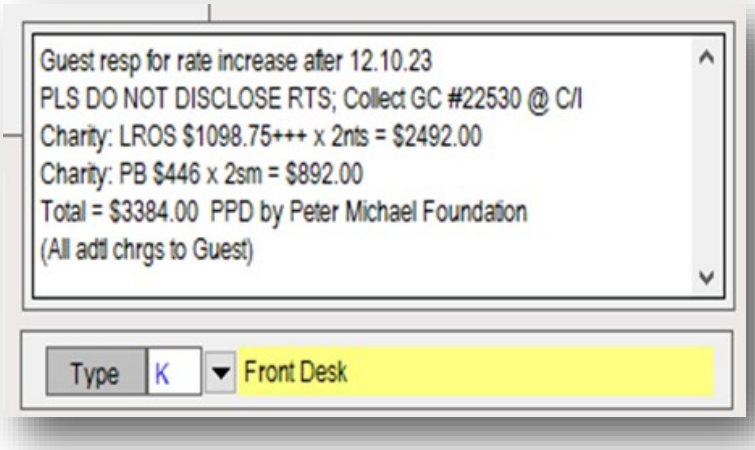
3. In the **Notes and Communication** section, detail:

Rate:	A DESCRIPTION of what was purchased
Notes 1:	The total prepaid and the name of the charity
Notes 2:	The Charity GC#



4. Leave a **K note** on the City ledger:

Guest resp for rate increase after [1 year after event date]
Please do not disclose rates; collect G/C #____ @ C/I (check-in)
Property/room cost breakdown
Course, number of golfers, cost breakdown
Total amount prepaid and the name of the Charity
Guest responsible for additional incidentals



5. Process payment:

IF PAYING BY CC:

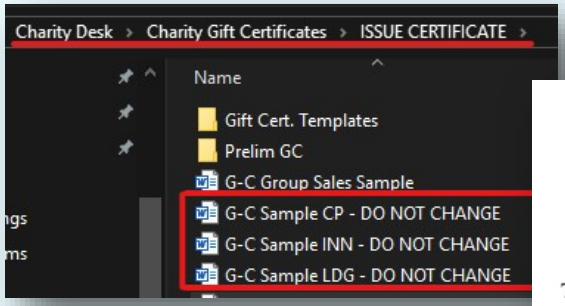
- Charge the credit card on the C/L
- Check the GT to ensure the CC did not save in the CC field—If so, delete the CC

IF PAYING BY CHECK:

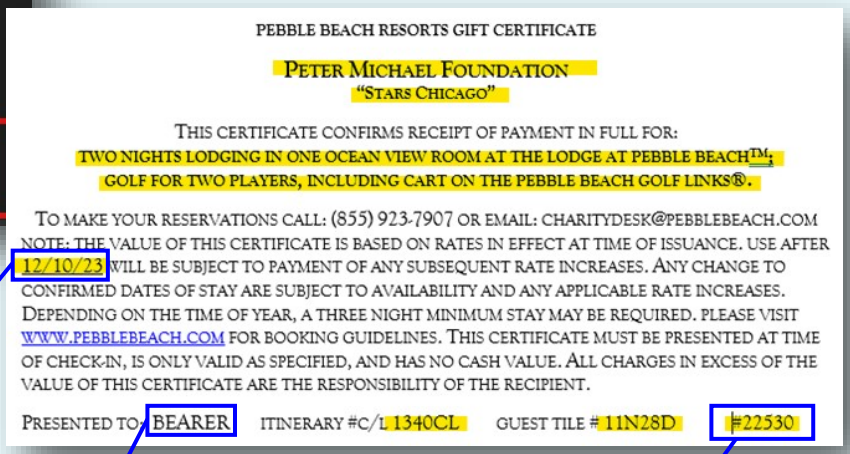
- Take the check to Accounting
- Include the C/L# and charity name so Accounting knows where to post funds

Create A Charity Certificate

The Charity Certificate Templates are located in the Z Drive:



Use the charity's Invoice to edit the following certificate fields:



PEBBLE BEACH RESORTS GIFT CERTIFICATE

PETER MICHAEL FOUNDATION
"STARS CHICAGO"

THIS CERTIFICATE CONFIRMS RECEIPT OF PAYMENT IN FULL FOR:
TWO NIGHTS LODGING IN ONE OCEAN VIEW ROOM AT THE LODGE AT PEBBLE BEACH™;
GOLF FOR TWO PLAYERS, INCLUDING CART ON THE PEBBLE BEACH GOLF LINKS®.

TO MAKE YOUR RESERVATIONS CALL: (855) 923-7907 OR EMAIL: CHARITYDESK@PEBBLEBEACH.COM
NOTE: THE VALUE OF THIS CERTIFICATE IS BASED ON RATES IN EFFECT AT TIME OF ISSUANCE. USE AFTER 12/10/23 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. DEPENDING ON THE TIME OF YEAR, A THREE NIGHT MINIMUM STAY MAY BE REQUIRED. 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 1340CL GUEST TILE # 11N28D #22530

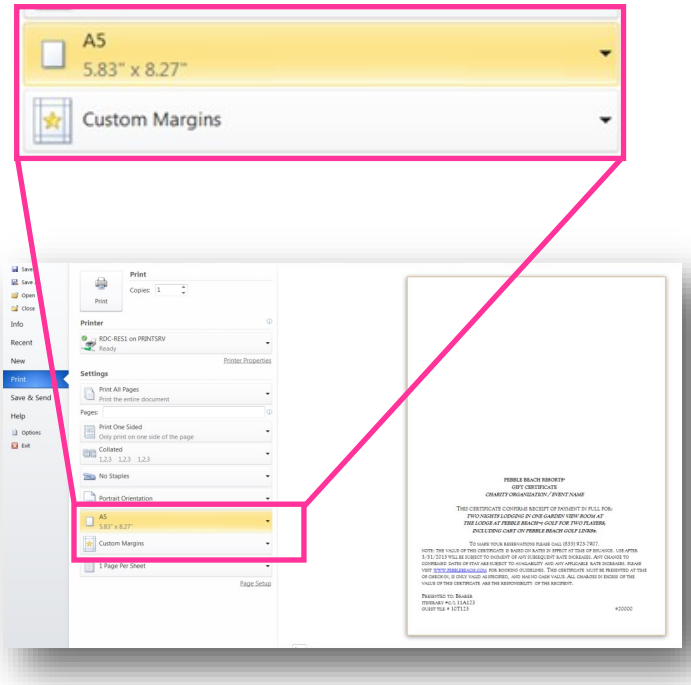
Date should be one year from the date of the event

*If the certificate has been purchased post-event, "**BEARER**" can be changed to the name of the winner*

*Input the Gift Certificate number from the **Charity Gift Certificate Sold** Excel Sheet*

SAVE & PRINT THE CERTIFICATE

- **Do not save over the certificate template**
- Print a copy of the certificate to be stored in the Charity Desk Cabinet
- Change the printer settings to print the charity's copy of the certificate on card stock—You will need to adjust the size and manually feed the card stock



MAIL THE CERTIFICATE

- Pack the envelope with:
  - ◊ Gift Certificate Card
  - ◊ PBGL scorecard for each player
- Seal with Pebble Beach sticker
- Place in a FedEx envelope with a completed Fed-Ex order form (located in the cabinet)
- Deliver to Shipping (Online Retail Office) before noon

MARKETING

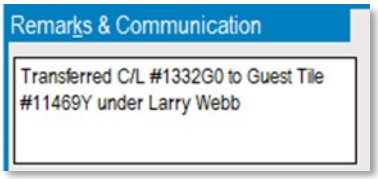
- If the Organization requests specific Pebble Beach Branded Materials, email the request to Marketing.

Charity Certificate Redemption

GUEST TILE

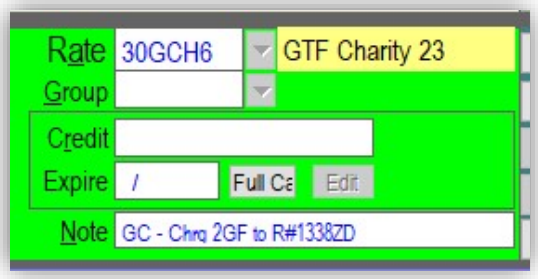
You may utilize the Bearer Guest Tile for your booking or use an existing Guest Tile.

When using an existing guest tile, re-whose the City Ledger and leave a transfer note in the Remarks and Communication box or the original guest tile

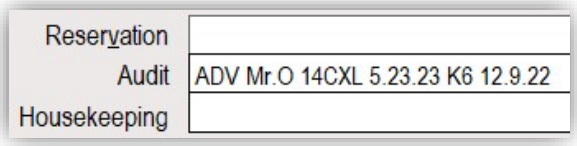


GOLF RATE CODE & BABYNOTE

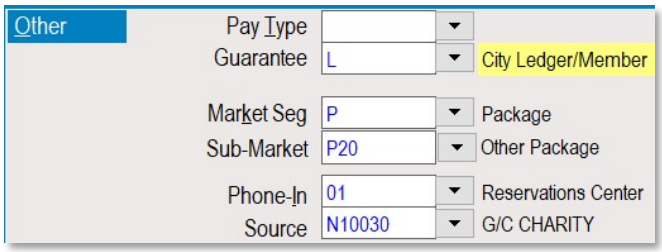
Golf should also be under the name of the guest, not 'Bearer'



CXL POLICY

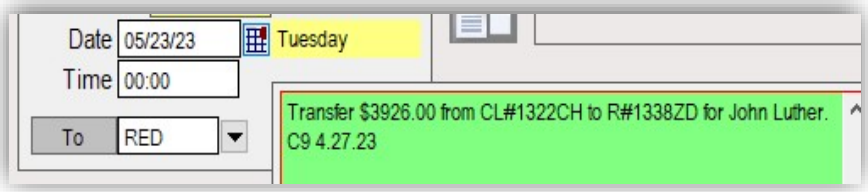


OTHER CODES

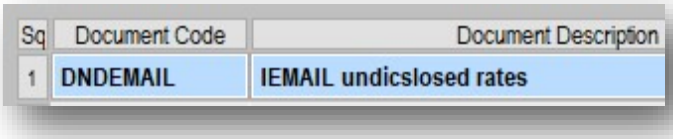


RED TRACE (Reminder to transfer funds)

SET 2 WKS PRIOR TO ARRIVAL

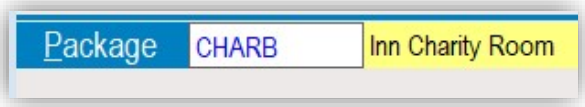


CONFIRMATION EMAIL

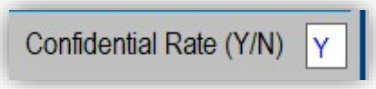


Sq	Document Code	Document Description
1	DNDEMAIL	IEMAIL undicslosed rates

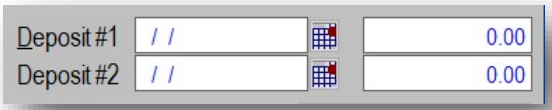
PACKAGE CODES = CHAR[B/L/P]



VERIFY CONFIDENTIAL RATE



DEPOSIT = $0 + SURCHARGES/FEES

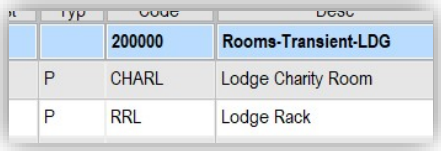


An example of no surcharges



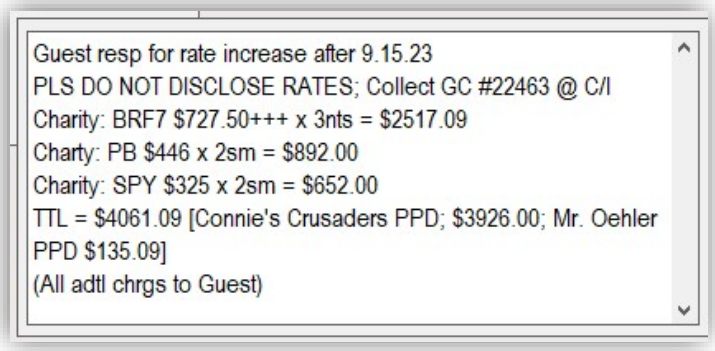
An example with surcharges

SPBILL THE CHARITY NIGHTLY RATES



		200000	Rooms-Transient-LDG
	P	CHARL	Lodge Charity Room
	P	RRL	Lodge Rack

FDB TRACE BASED ON C/L K NOTE



FILE CABINET RECORDS

Pull the certificate from the Charity Cabinet and write the following in the top right corner:

- The ITN #
- Name of Guest
- Date of Arrival

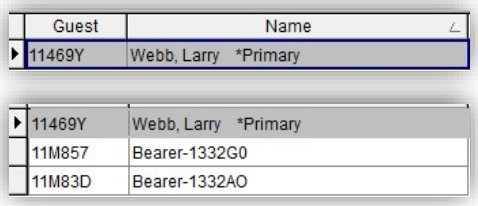
The hard copy of the Certificate will be placed back in the Filing Cabinet under Booked Certificates.

Multiple Charity Certificates Redemption

A guest may provide multiple Charity Certificates to be used towards a single trip. We can accommodate this by connecting all of the Certificates to one Guest Tile. Once the booking agent has created the itinerary, they may either use the Guest Tile's associated with the Gift Certificate or an existing Guest Tile for the guest.

Guest Tile(s): Add the additional Charity Guest Tiles to the Itinerary

1. Click the **drop down** arrow in the Guest Tile section of the booking center
2. **Search** for each **additional Charity Guest Tile** and select them
3. **Verify** that you have added all Guest Tiles in the guest tile window

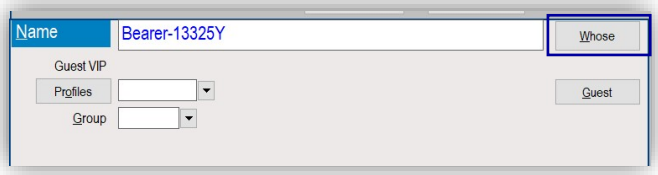


Guest	Name
11469Y	Webb, Larry *Primary

11469Y	Webb, Larry *Primary
11M857	Bearer-1332G0
11M83D	Bearer-1332AO

City Ledger(s): Whose each City Ledger to the original Guest Tile under the certificate holder's name.

1. Open the **City Ledger accounts** on one of the additional Charity Guest Tiles
2. Click **Whose**

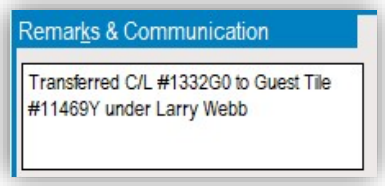


3. **Select** the correct original Guest Tile

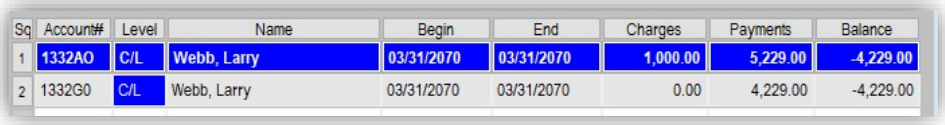


Guest	11469Y			Webb	Larry	Joan				949.35			219 Golden Ro	Corona D	CA	926	US

4. Click **Yes** to update account name to new guest name; press **any key** to continue
5. Type in the **"Remarks & Communication"** field on the additional Charity Guest Tile a note specifying the transfer of the City Ledger account



6. **Repeat** this for each additional City Ledger account
7. Check the original Guest Tile and **verify** that the City Ledger(s) were transferred correctly



Sq	Account#	Level	Name	Begin	End	Charges	Payments	Balance
1	1332AO	C/L	Webb, Larry	03/31/2070	03/31/2070	1,000.00	5,229.00	-4,229.00
2	1332G0	C/L	Webb, Larry	03/31/2070	03/31/2070	0.00	4,229.00	-4,229.00

8. **Transfer** the funds from the additional City Ledgers to the City Ledger on the original Guest Tile
9. Check the City Ledger on the original Guest Tile to **verify** that the funds were moved correctly

NOTE use 1050RO90E as example

Donation Certificate Redemption | Golf & Dining

Redemption of a Donation Certificate should only be done by the Charity Desk.

If a guest brings their Donation Certificate without making a reservation in advance, Community Affairs will email Charity Desk to inform us that the certificate has been redeemed so we can update our Donation Certificates Rendered spreadsheet.

Advanced booking with Donation Certificate:

1. Ask for **Donation Certificate** number

(Donation Certificates will not have a city ledger or guest tile number)

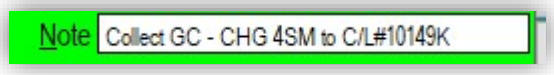
2. **Verify** on the **Donation Certificates Rendered** spreadsheet if the certificate has been redeemed

F	G	H	I	J	K	
Item	Value	Booking Agent	Date Booked	Date of Service	Itinerary #	
Golf for 2 @ The Hay; Dinner for 2 @ Hay's Place	$ 260.00					Not Redeemed
Golf for 4 @ SB	$ 1,560.00	WH	6.6.23	8.6.23	1050RT6WI	Redeemed

3. After verifying it has not been redeemed, **create** the **booking** according to what the guest wants and what the certificate dictates
    - Golf Only: Book with the **Promotional/Donation** rate code
4. Guarantee the Booking:
    - Golf—Collect a credit card to hold the tee time and advise standard cancellation accordingly
        - ◊ If the guest 'No Shows' get permission from the VP of Community Affairs for guest to reuse the certificate.
    - Dining—Only collect a credit card and advise of 48hr cancellation during events & holidays
5. Advise the guest they must bring the Donation Certificate otherwise they are fully responsible for charges

6. Write **chargeback notes** only for what is included in the certificate charging to CL#10149K / PROM926

Dining 

Golf 

7. Fill out the **Donation Certificates Rendered** spreadsheet with:
    - Booking Agent [Your SMS initials]
    - Date Booked
    - Date of Service
    - Itinerary number
8. **Email Community Affairs** to inform them that the Donation Certificate has been redeemed and the spreadsheet has been updated

Donation Certificate Redemption | Rooms 1/2

Donation Certificates will not have a city ledger or guest tile number.
Room certificates are based on Garden View/Estate Rooms at each property. Dependent on availability, we can extend a 1 level upgrade for special occasions.

Booking Room with Donation Certificate:

1. Ask for **Donation Certificate number**

2. **Verify** on the Donation Certificates Rendered spreadsheet if the certificate has been redeemed

F	G	H	I	J	K	
Item	**Value**	**Booking Agent**	**Date Booked**	**Date of Service**	**Itinerary #**	
Golf for 2 @ The Hay; Dinner for 2 @ Hay's Place	$ 260.00					Not Redeemed
Golf for 4 @ SB	$ 1,560.00	WH	6.6.23	8.6.23	1050RT6WI	Redeemed

3. After verifying it has not been redeemed, **create** the **booking** according to what the guest wants and what the certificate dictates

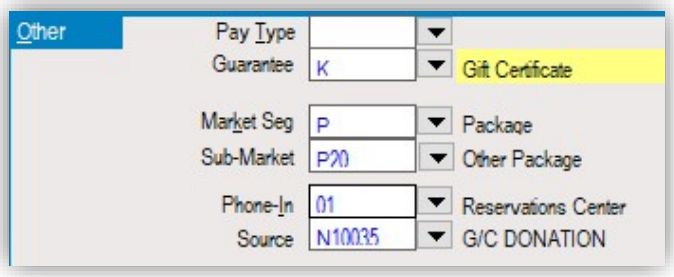
   - Book Garden View / Estate Studio, if not available book the most economical room available
   - If only Partial Ocean / Scenic View and above is available, the guest is responsible for surcharge
   - Surcharge = [Rack Rate of room booked] - [Rack Rate of Garden View / Estate Studio]

4. **Advise** the guest:

   - Collect a credit card for guarantee or incidentals if not included on certificate
   - 14 day Cancellation Policy
     - ◊ There is no cancellation fee nor deposit forfeiture, we just want to know if they wont be able to show up.
     - ◊ If the guest 'No Shows' get permission from the VP of Community Affairs for guest to reused the certificate. Guest would forfeit any rate increase fees.
   - Bring their Donation Certificate

5. The **Market and Source Codes** should be:

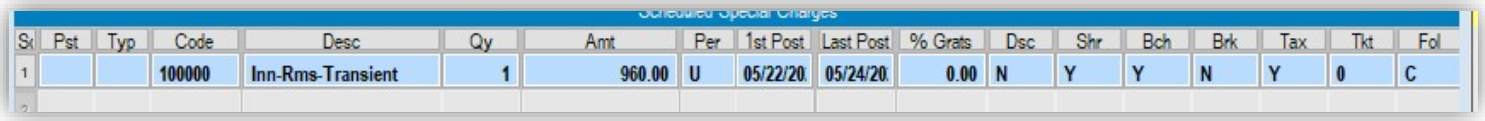
   - GUARANTEE: **K** Gift Certificate
   - MARKET: **P** Package
   - SUB-MARKET: **P20** Other Package
   - SOURCE: **13** Brand Awareness > **6** G/C Donation



Donation Certificate Redemption | Rooms 2/2

6. **Package Code** should be:
   - **DONATB** – The Inn at Spanish Bay
   - **DONATL** – The Lodge at Pebble Beach
   - **DONATP** – Casa Palmero at Pebble Beach

7. **Special Bill** the nightly rate as current rack rate for Garden View / Estate Room depending on property

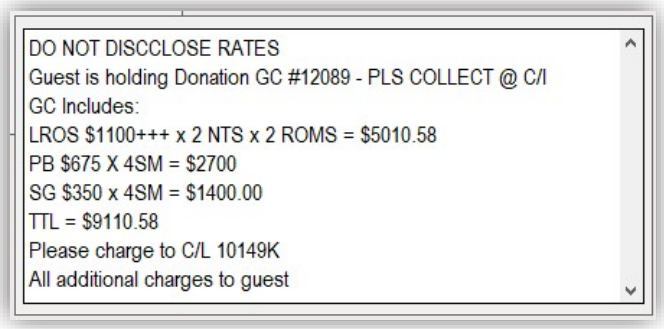


Sc	Pst	Typ	Code	Desc	Qty	Amt	Per	1st Post	Last Post	% Grats	Dsc	Shr	Bch	Brk	Tax	Tkt	Fol
1			100000	Inn-Rms-Transient	1	960.00	U	05/22/20	05/24/20	0.00	N	Y	Y	N	Y	0	C

8. Mark rates as **confidential**

9. **Clear** out the **deposit lines 1 and 2** in special billing

10. Write a detailed **FDB trace** documenting what is included in the donation certificate and to charge only for what included in the certificate to CL#10149K / PROM926



DO NOT DISCCLOSE RATES
Guest is holding Donation GC #12089 - PLS COLLECT @ C/I
GC Includes:
LROS $1100+++ x 2 NTS x 2 ROMS = $5010.58
PB $675 X 4SM = $2700
SG $350 x 4SM = $1400.00
TTL = $9110.58
Please charge to C/L 10149K
All additional charges to guest

11. For any recreation, write **chargeback notes** to charge back to the room

Dining 

Golf 

12. Send a **DNDEMAIL** confirmation

13. Fill out the **Donation Certificates Rendered** spreadsheet with:
    - Booking Agent [Your SMS initials]
    - Date Booked
    - Date of Service
    - Itinerary number

14. **Email Community Affairs** to inform them that the Donation Certificate has been redeemed and the spreadsheet has been updated

Donation Certificate Tracking

Introduction:

1. The **Donations Certificates Rendered** is an excel document where we keep track of the donation certificates that have been issued. Redeemed, or lost.
2. Since Donation Certificates will not have a city ledger number or a guest tile number, this spreadsheet also makes it possible to locate the information on the certificate to assist the guest.
3. The **Donations Certificates Rendered** spreadsheet is located **Z:\RES\RESORT RESERVATIONS\Charity Desk\Donation Gift Certificates.**

Donations Certificates Rendered spreadsheet:

GC #	Issued	Event Date	Non-Profit	Event	Item	Value	Booking Agent	Date Booked	Date of Service	Itinerary #
12112	1/4/24	1/20/24	American Legion Auxiliary, Monterey Cypress Unit 694	12th Annual Texas Hold-Em	Dinner for 2 @ The Bench	$ 125.00				
12113	1/4/24	6/7/24	Carmel High School	Sober Grad Night	Dinner for 2 @ The Bench	$ 125.00				
12114	1/4/24	3/16/24	Gil Basketball Academy	Court Heroes	Dinner for 2 @ The Bench	$ 125.00				
12115	1/4/24	3/4/24	Holy Cross School	Annual Auction Fundraiser	Dinner for 2 @ The Bench	$ 125.00				
12116	1/4/24	3/9/24	San Carlos School	Annual Auction	Dinner for 2 @ The Bench	$ 125.00				
12117	1/4/24	4/19/24	American Legion Post 512	Veterans Golf Tournament	Golf for 4 @ The Hay; Dinner for 4 @ Hay's Place	$ 460.00				
			American Cancer	Celebration of Life Fashion						

A redeemed certificate:

for 2 @ Hay's Place	$ 260.00					
Golf for 4 @ SB	$ 1,560.00	WH	6.6.23	8.6.23	1050RT6WI	

Spreadsheet Maintenance:

1. Community Affairs will send weekly emails with spreadsheet data of recently issued Donation Certificates.
   ⇒ Charity Desk will copy the data from the email into the **Donations Certificates Rendered** spreadsheet.
2. If a guest brings their Donation Certificate and does not have an advanced booking, Community Affairs will email Charity Desk to advise.
   ⇒ Charity Desk will update the **Donation Certificates Rendered** spreadsheet to mark those Certificates as 'redeemed.'
3. After booking a Donation Certificate
   ⇒ Charity Desk will update the **Donation Certificates Rendered** spreadsheet to mark those Certificates as 'redeemed.'

Create A Sales Gift Certificate (1/2)

Certain Groups will have complimentary rooms and golf built into their contracts as "concessions." These complimentary stays are given in the form of Gift Certificates. The Charity Desk is responsible for creating these Sales Gift Certificates and processing their redemption.

CONCESSIONS

- One complimentary package to include one (1) room for two (2) nights at The Inn at Spanish Bay and two (2) players on The Links at Spanish Bay. Subject to blackout dates and valid June 1, 2023 – June 30, 2024, excluding official program dates.
- Three (3) additional packages to each include:
  - One (1) room for two (2) nights at The Inn at Spanish Bay at a discounted room rate of $350.00++ and two (2) players complimentary on The Links at Spanish Bay. Subject to blackout dates and valid July 1, 2023 – June 30, 2024, excluding official program dates

1. A National Sales Manager or Sales Admin will email the Charity Desk with the certificate details. Make sure we have clear billing instructions:
   - Are incidentals included or the guest's responsibility?
   - Who is covering the gratuity on complimentary rooms? (typically the Sales Prom Account)

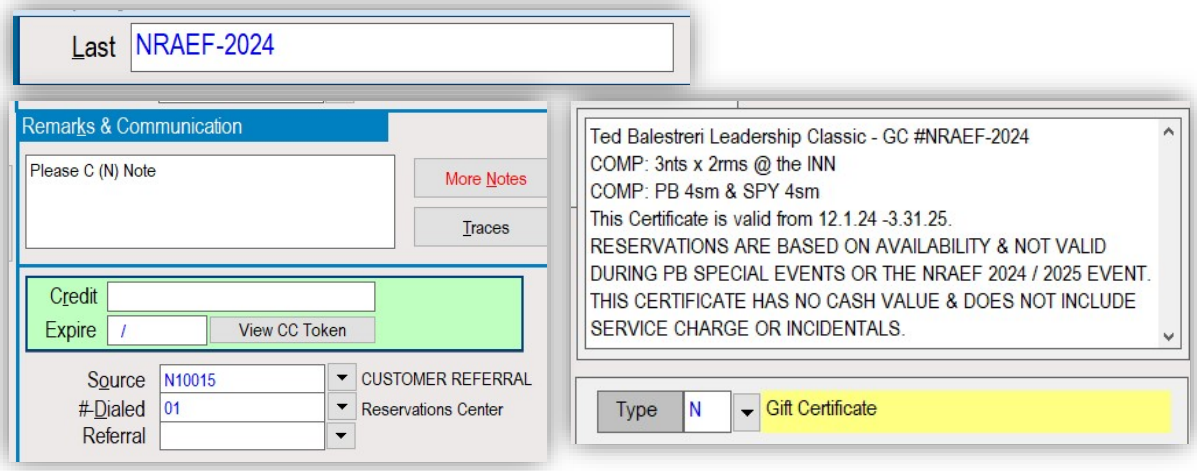
Good afternoon Brian and team!

The Ted J. Balestreri Leadership Classic receives a donation certificate each year during their program, please see below for the verbiage in their 2024 contract. I have also attached their 2023 certificate for your reference.

Two rooms for three nights at the Inn at Spanish Bay, golf for four players on Pebble Beach Golf Links and Spyglass Hill Golf Course
*These certificates are valid December 1, 2024 – March 31, 2025, excluding New Year's Eve and are not valid during Pebble Beach special events or the National Restaurant Association Educational Foundation's 2024 or 2025 event. Reservations will be made based on availability and does not include service charge or incidentals.

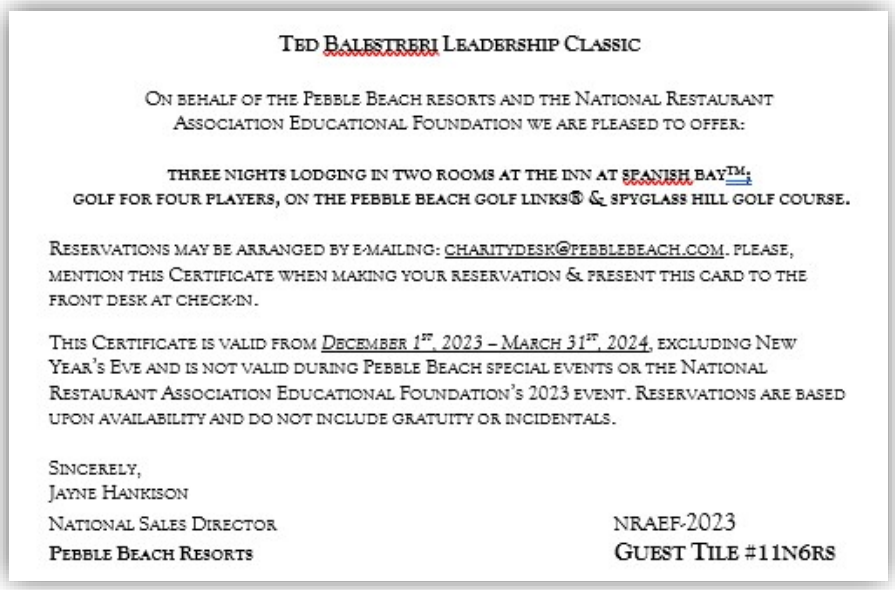
Would someone from your team be able to create their 2024 silent auction certificate?

2. Create the Guest Tile—
   - Input the Gift Certificate # into the Last Name field
   - Place a dot in the address field
   - Source = Customer Referral
   - #-Dialed = 01 Reservations Center
   - In "Remarks & Communication, write "Please see N Note"
   - Leave an N Note with the certificate details



Create A Sales Certificate (2/2)

3. Use the Grp Sales Sample GC to customize the certificate: Z:\RES\RESORT RESERVATIONS\Charity Desk\Charity Gift Certificates\ISSUE CERTIFICATE\GRP SALES SAMPLE GC



TED BALESTRERI LEADERSHIP CLASSIC

ON BEHALF OF THE PEBBLE BEACH RESORTS AND THE NATIONAL RESTAURANT ASSOCIATION EDUCATIONAL FOUNDATION WE ARE PLEASED TO OFFER:

THREE NIGHTS LODGING IN TWO ROOMS AT THE INN AT SPANISH BAY™;
GOLF FOR FOUR PLAYERS, ON THE PEBBLE BEACH GOLF LINKS® & SPYGLASS HILL GOLF COURSE.

RESERVATIONS MAY BE ARRANGED BY E-MAILING: CHARITYDESK@PEBBLEBEACH.COM. PLEASE, MENTION THIS CERTIFICATE WHEN MAKING YOUR RESERVATION & PRESENT THIS CARD TO THE FRONT DESK AT CHECK-IN.

THIS CERTIFICATE IS VALID FROM DECEMBER 1ST, 2023 – MARCH 31ST, 2024, EXCLUDING NEW YEAR'S EVE AND IS NOT VALID DURING PEBBLE BEACH SPECIAL EVENTS OR THE NATIONAL RESTAURANT ASSOCIATION EDUCATIONAL FOUNDATION'S 2023 EVENT. RESERVATIONS ARE BASED UPON AVAILABILITY AND DO NOT INCLUDE GRATUITY OR INCIDENTALS.

SINCERELY,
JAYNE HANKISON
NATIONAL SALES DIRECTOR
PEBBLE BEACH RESORTS

NRAEF-2023
GUEST TILE #11N6RS

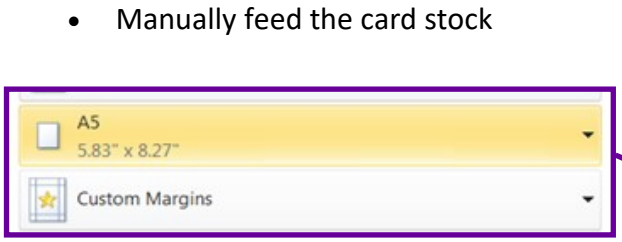
4. Save your certificate in the Group Sales folder—Do not save over the template Z:\RES\RESORT RESERVATIONS\Charity Desk\Charity Gift Certificates\Group Sales

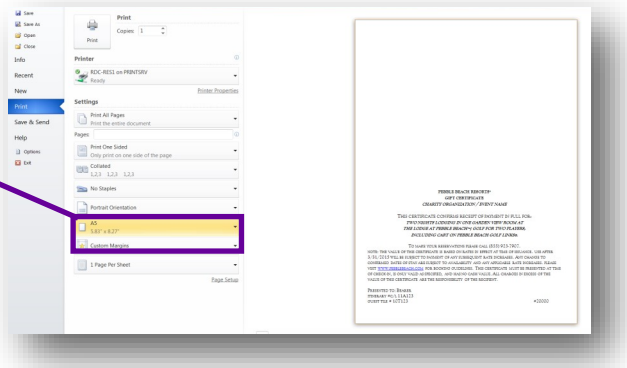
5. Document the certificate on the Group Sales Spreadsheet: Z:\RES\RESORT RESERVATIONS\Charity Desk\Charity Gift Certificates\Group Sales
   - Fill in columns A through I
   - J-M will be completed when the certificate is redeemed

A	B	C	D	E	F	G	H	I	J
GROUP SALES G/C - 2024									
Organization Name:	**L - RM-NTS**	**S-RM - NTS**	**C-RM-NTS**	**PB**	**SG**	**SB**	**G/C Number**	**Guest Tle #**	**Itinerary**
Ted Balestreri Leadership Classic		2rms x 3nts		4	4		NRAEF-2024	11R617	

6. Email the certificate to the NSM or Sales Admin for them to approve.

7. Once approved, print the certificate and inter-office it to the NSM or Sales Admin
   - Edit the printer settings
   - Manually feed the card stock

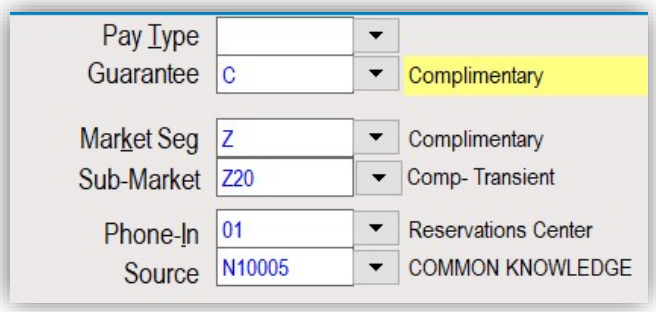




Sales Gift Certificate Redemption 1/2

Booking Room with a Complimentary Sales Gift Certificate:

1. Ask for **Guest Tile number** that appears on the certificate (There will not be a CL number)
2. Read the **N Note** in the Guest Tile to verify what can be booked
3. **Create** the **booking** according to the Sales Certificate
    - If no room category is specified, book into BRG7, LRGS, or PRX5.
4. **Advise** the Guest:
    - Collect a credit card for guarantee or any incidentals if not included on certificate
    - 14 day Cancellation Policy
        - ◊ There is no cancellation fee nor deposit forfeiture, we just want to know if they wont be able to show up.
        - ◊ If the guest 'No Shows' get permission from the National Sales Manager reused the certificate. Guest would forfeit any rate increase fees.
    - Bring their Sales Certificate
5. The **Market and Source Codes** should be:



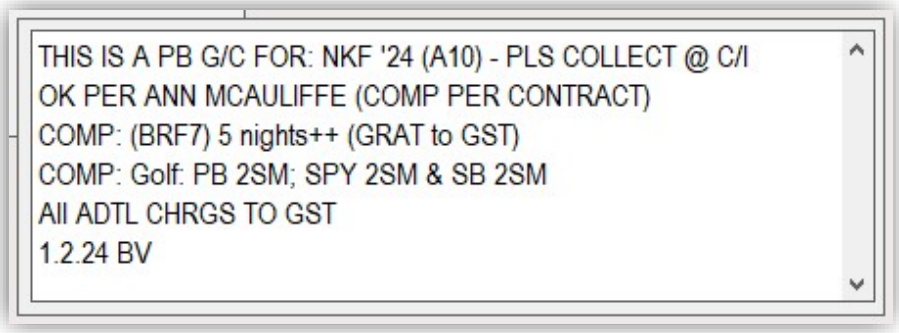
6. The **Package Codes** should be:
    - **VPCOBR** – The Inn at Spanish Bay
    - **VPCOLR** – The Lodge at Pebble Beach



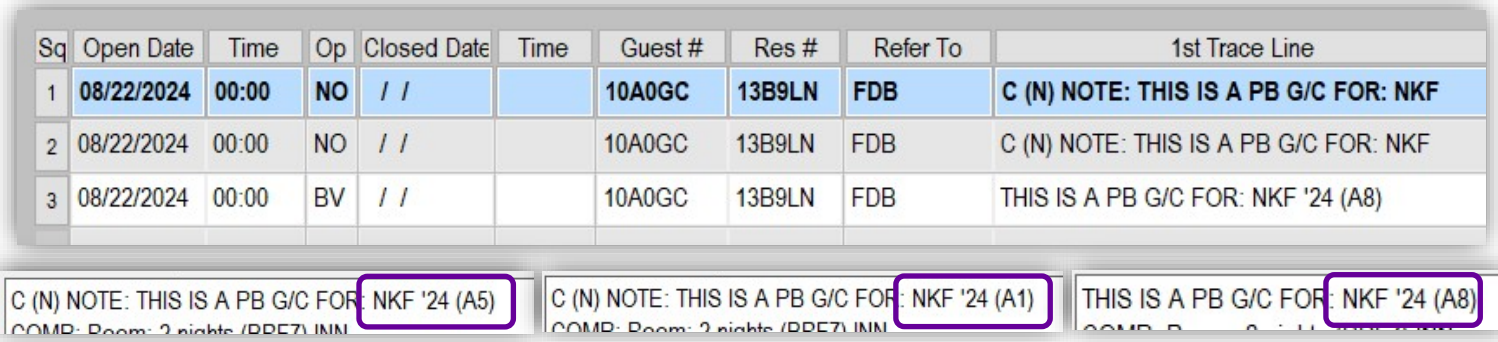
    - **VPCOPR** – Casa Palmero at Pebble Beach
7. The **Secretary** and **Corporation Codes** should be:
8. Mark rates as **confidential**
9. **Clear** out the **deposit lines 1 and 2** in special billing

Sales Gift Certificate Redemption 2/2

10. Create an **FDB Trace**—This will be a copy of the **N Note** on the Sales Certificate Guest Tile



- If an attendee is using **multiple sales certificates** for one reservation, create an **FDB trace** for **each certificate** being used



Sq	Open Date	Time	Op	Closed Date	Time	Guest #	Res #	Refer To	1st Trace Line
1	**08/22/2024**	**00:00**	**NO**	**/ /**		**10A0GC**	**13B9LN**	**FDB**	**C (N) NOTE: THIS IS A PB G/C FOR: NKF**
2	08/22/2024	00:00	NO	/ /		10A0GC	13B9LN	FDB	C (N) NOTE: THIS IS A PB G/C FOR: NKF
3	08/22/2024	00:00	BV	/ /		10A0GC	13B9LN	FDB	THIS IS A PB G/C FOR: NKF '24 (A8)

11. Complimentary golf should be booked with the GTF **Comp golf code**



12. For any recreation included in the sales certificate, write a **baby note** naming the corporate group affiliated with the certificate

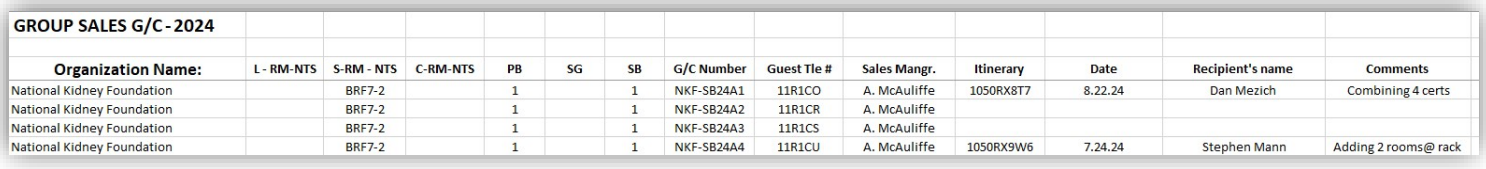


13. Send a **DNDEMAIL** confirmation

13. Fill in the **Group Sales Spreadsheet** located here:

Z:\RES\RESORT RESERVATIONS\Charity Desk\Charity Gift Certificates\Group Sales

- Ensure that rows A-I are accurate
- Fill in rows J-N

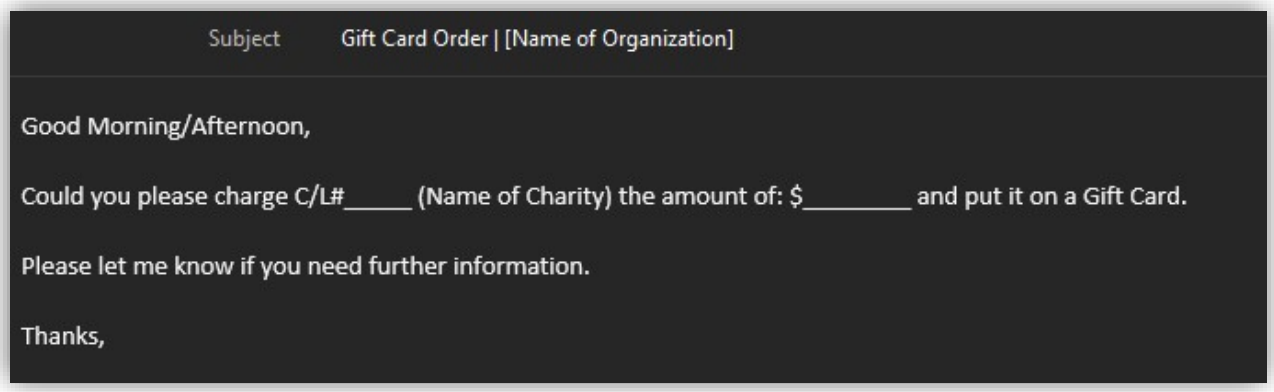


GROUP SALES G/C - 2024													
Organization Name:	**L - RM-NTS**	**S-RM - NTS**	**C-RM-NTS**	**PB**	**SG**	**SB**	**G/C Number**	**Guest Tle #**	**Sales Mangr.**	**Itinerary**	**Date**	**Recipient's name**	**Comments**
National Kidney Foundation		BRF7-2		1		1	NKF-SB24A1	11R1CO	A. McAuliffe	1050RX8T7	8.22.24	Dan Mezich	Combining 4 certs
National Kidney Foundation		BRF7-2		1		1	NKF-SB24A2	11R1CR	A. McAuliffe				
National Kidney Foundation		BRF7-2		1		1	NKF-SB24A3	11R1CS	A. McAuliffe				
National Kidney Foundation		BRF7-2		1		1	NKF-SB24A4	11R1CU	A. McAuliffe	1050RX9W6	7.24.24	Stephen Mann	Adding 2 rooms@ rack

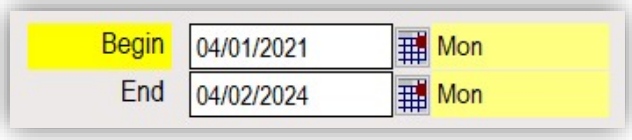
Gift Card Order

Charity Certificates may also include a Gift Card. When they do we request one from Retail.

1. **Fill in / Verify** the amount of the Gift Card on / from the **Master Charity Gift Certificate Sold spreadsheet**
2. Once the Certificate and Gift Card have been paid for and the City Ledger is created, **Email the E-Commerce Supervisor**



3. Change the **begin and end date** of the **City Ledger** to the date that the E-Commerce Supervisor is going to pull funds from the City Ledger to the Gift Card



4. After the E-Commerce Supervisor moves the funds, change the **begin and end date** of the **City Ledger** back to **3.31.70**

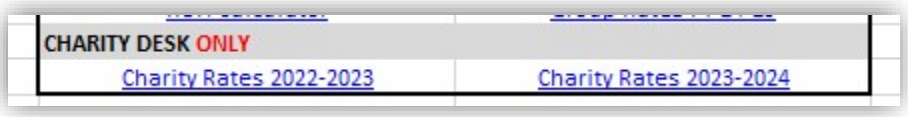


5. Walk over to the Online Retail Office and **pick up** the physical Gift Card
6. Include the **Gift Card** when **mailing out** the certificate

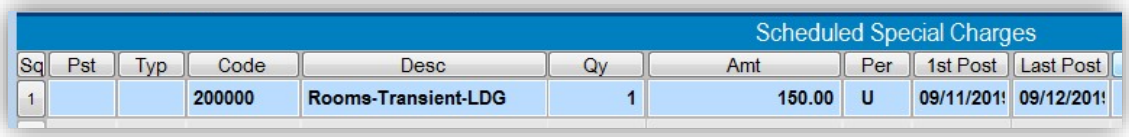
Special Bill A Charity Booking

Special Bill A Charity Room Rate

1. Create the room reservation using the Charity Package Code
2. Enter Special Billing
3. A for Add Extra Charges
4. Enter to bypass the Values question
5. Enter the appropriate billing Code:
   - INN: RMS-Transient: 100000
   - LDG: Rooms-Transient 200000
   - CPS: Rooms-Transient 700000
6. Enter the fee/surcharge into Amount Each
   - Charity Rates are linked in the Digital Binder
7. Be sure in the "Batch" field you key "N"



8. Change Folio from "1" to "C"
9. Page Down to save
10. Check that your rates are running correctly in Value+Zoom+Zoom



Sq	Pst	Typ	Code	Desc	Qy	Amt	Per	1st Post	Last Post
1			200000	Rooms-Transient-LDG	1	150.00	U	09/11/201	09/12/201

Additional Nights At Rack Rate

1. Create the room using the SPBILL Package Code
2. Apply the Charity Rate to all nights within the Certificate using above instructions
3. Add the Charity Package Code in Special Billing
   - A for Add Extra Charges
   - P for Package
   - Input the Charity Package Code (CHARB/CHARL/CHARP), Enter
   - Set the date range to the Charity Certificate nights
   - Page Down
   - Escape
4. Add the Rack Package Code in Special Billing
   - A for Add Extra Charges
   - P for Package
   - Input the Charity Package Code (RRB/RRL/RRP), Enter
   - Set the date range to the additional nights
   - Page Down
   - Escape

Pst	Typ	Code	Desc	Qy	Amt	Per	1st Post	Last Post
		200000	Rooms-Transient-LDG	1	1,098.75	U	04/08/2024	04/10/2024
	P	CHARL	Lodge Charity Room	1			04/08/2024	04/10/2024
	P	RRL	Lodge Rack	1			04/11/2024	04/12/2024

Upgrades & Surcharges

All Upgrade Fees and Surcharges are due at time of booking.

ANNUAL SURCHARGE

Certificates do not expire, but if the guest redeems their certificate more than 1 year from the date they won, they will be responsible for paying the difference in any charity rate increases.

1. Calculate the surcharge—Charity Rates are linked in the Digital Binder
2. Charge the credit card
3. Update the FDB Trace

CURRENT YEAR'S CHARITY RATE
— ORIGINAL YEAR'S CHARITY RATE
GUEST SURCHARGE

ROOM UPGRADE

Guests can choose to purchase a room type that differs from the room type indicated on their certificate.

1. Book the room category the guest has chosen
2. Calculate the surcharge—Charity Rates are linked in the Digital Binder
3. Charge the credit card
4. Update the FDB Trace

UPGRADED ROOM CHARITY RATE
— ORIGINAL ROOM CHARITY RATE
GUEST SURCHARGE

GOLF UPGRADE

Guests may choose to upgrade the golf courses on their certificates.

All standard booking guidelines apply.

1. Book the golf course they have chosen—use the Charity Golf Rates
2. Calculate the surcharge
3. Charge the credit card
4. Update the FDB Trace

UPGRADED COURSE CHARITY RATE
— ORIGINAL COURSE CHARITY RATE
GUEST SURCHARGE

DATE EXTENSIONS

Guests can extend their stays beyond the number of nights on the certificate.

1. Book their requested number of nights
2. Special Bill the additional nights at Rack Rate

Lost Charity Certificates

If the winner has lost their Charity Certificate, the Charity—not the winner—must contact the charity desk for a replacement. This is because the charity needs to confirm the identity of the winner.

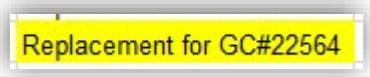
1. Confirm the charity winner's name and collect their address with the Charity

2. Locate the hard copy of the certificate from the filing cabinet

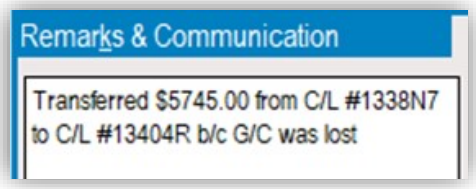
3. Open the Guest Tile and City Ledger in SMS to verify that the funds are still on file

4. Access the Master Charity Gift Certificates Sold spreadsheet
- ◊ Locate the row with information of the certificate
- ◊ Copy and paste this into the next available line at the bottom of the list

5. On the newly created line:
- ◊ Delete the Original Package Price—since this is a "replacement" the dollar amount should be left blank
- ◊ Delete existing City Ledger number
- ◊ Edit the Gift Certificate number to the next available number in the sequence
- ◊ In the "Winner" column add: Replace for GC# [Lost GC number]
- ◊ Highlight "Winner" box in yellow—this will make it easer to identify as a replacement



6. Duplicate the original Charity Guest Tile
- ◊ Add note in "Remarks & Communication" Field
- ◊ Copy this note to original Charity Guest Tile



7. Create new City Ledger Account on the New Guest Tile
- ◊ Copy K Note to new City Ledger Account
- ◊ Copy Notes and Communication field to new City Ledger Account
- ◊ Transfer funds from the Old City Ledger to the New City Ledger

8. Add the new City Ledger and Guest Tile numbers to the Master Charity Gift Certificates Sold spreadsheet

9. Create a new Gift Certificate
- ◊ Add the new City Ledger and Guest Tile numbers
- ◊ Ship it to the winner per standard procedures

Administrative Assistant

Resort Reservations

2024 Training Binder



Supervisor

Resort Reservations

2024 Training Binder



Programs

SMS Host is a hospitality management system. SMS is where the hotel and golf reservations are created and managed.

Revinate Reservation Sales is a voice-based, lead management solution. It is used to track and manage call volume, convert leads into bookings, and document guest-agent communication.

Amadeus is customer management system developed by Salesforce. Pebble Beach Resorts uses this program to manage our large group reservations, document contacts, track due dates, and make certain room block changes.

Sertifi is program that we use to securely collect confidential information, such as credit card numbers, electronically.

The Pebble Beach Company has a **Network Server** on which various departments can store documents, reports, and historical documentation.

Resort Reservations utilizes:

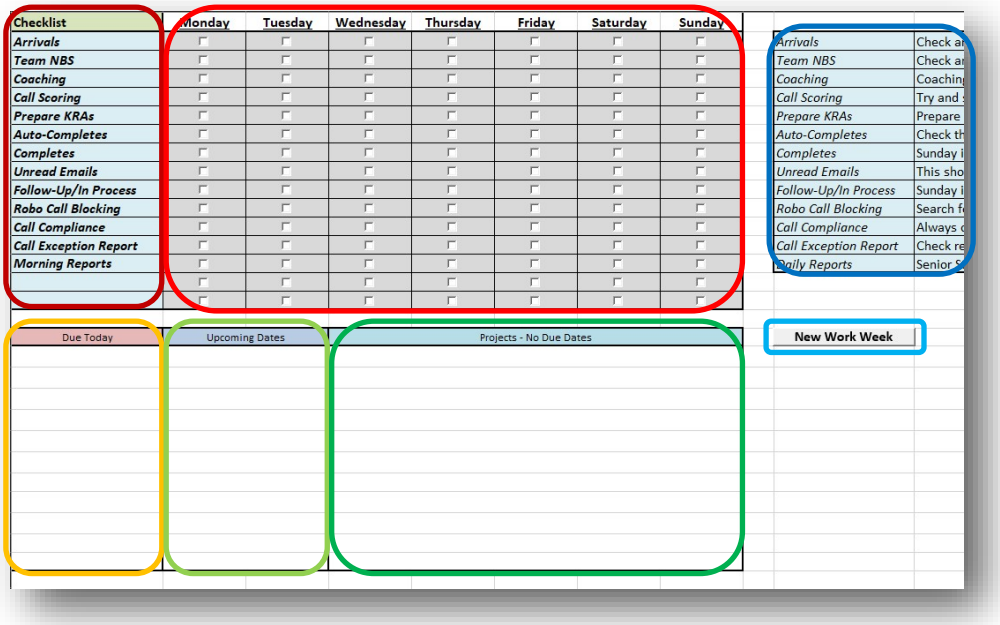
- **The Z Drive**—This drive holds documents saved by Resort Reservations which includes procedural resources

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Daily Checklist

To better assist supervisors in managing their daily / weekly duties, it is recommended to have a checklist. We have a template checklist that can be utilized. It also includes a tab to track call scoring and a tab to track 8888 calls as needed - any approved holds or other exceptions.

The checklist is located here:
\\falcon\DEPT SHARES\RES\RESORT RESERVATIONS\MANAGEMENT\SUPERVISORS



⇒ List of **common daily / weekly tasks** - can **check them off** once completed

⇒ Any **time sensitive tasks** not listed above can be added here

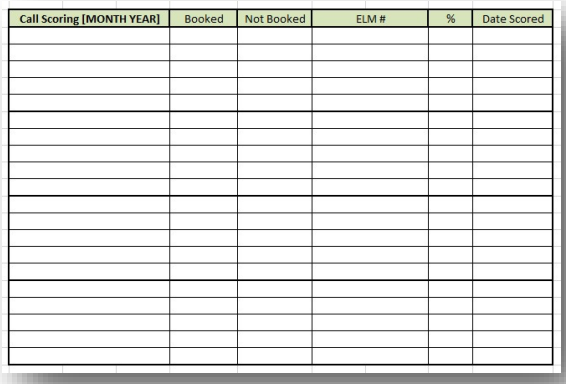
⇒ Any dates to be aware of like **events or restaurant / spa closures**

⇒ **Long term projects** that are being worked on

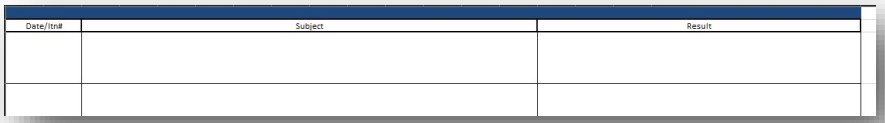
⇒ You can click **New Work Week** to clear out your checked off tasks for a new work week

⇒ Briefly **describes** each of the common tasks

Call Scoring Tracker



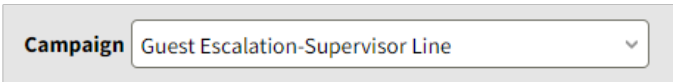
Supervisor Call Log - 7777 / 8888

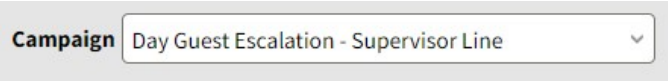


8888 Supervisor Line

When agents need assistance, they will dial x8888 on their physical phones in order to reach a supervisor. This will then become an inbound call through Revinate that reaches the next available supervisor.

When you receive the call, the campaign on the Lead that pops will say Escalation - Supervisor Line





1. Examples of common questions:
   - Can you help me check F7 over these dates? What should I offer?
   - Could you mark this lead booked for ___?
   - Could you update this tee-time to the military rate?
   - Could you add a mini group code or add/remove the meal plan for me?
   - I am trying to pre-block LROD BQ but it says no rooms are available. Can you help me?
   - What trace do I leave for ____?
   - Can you help me with an FDB for this complicated billing situation?

2. Examples of troubleshooting:
   - SMS crashed, can you mark my booking as complete?
   - My ID tech isn't working, can you input this card into the Guest Tile?
   - I lost my reservation and SMS closed, can you help me find it?

3. Examples of room hold exceptions:
   - Agents may receive an exception to hold a reservation without a deposit for end of business same day only.
     ⇒ Any hold past end of business same day, **must have at least one deposit on it**.
   - An international guest with intent to pay but is having issues that require them to call their bank, may have their room held without a deposit due to time differences.

4. Examples of cancelation exceptions:
   - We can make exceptions for cxl within 14days if circumstances are extenuating
     ⇒ Offer reschedule first
     ⇒ Then offer funds on file second

5. Examples of Pebble Beach Golf Guideline exceptions
   - We can make exceptions for a 1 or 2 night stay with PB golf **if all the follow is true:**
     ⇒ We are within ~45 days of check in
     ⇒ We have enough inventory rooms/golf
     ⇒ Agent is using it to close the sale after already offering what is within guidelines

Making Exceptions

When making an exception, as a supervisor think *"Does the exception make good business sense?".*

Ask the agent the following questions in order to make a decision:

1. When is the guest coming?
    - ⇒ If this is a shorter term booking and is during a timeframe when we need room nights (needs period) it would make sense to make an exception to close business.
    - ⇒ If this booking is much further out, we shouldn't make an exception. We have a high chance that another guest can book this trip within guidelines thus providing more revenue.

2. How many rooms/nights/people?
    - ⇒ If this a larger reservation with 4+ rooms and 3+ nights per room, AND we can get at least one deposit, we can make an exception to hold the other rooms for 24hr until the other guests call in.
    - ⇒ If we get a 1:1 ratio of golfers per room instead of 2:1 yielding more room nights and revenue it might be a good idea to make an exception. Take other factors into consideration along with this one to make a decision.

3. Will they be golfing?
    - ⇒ If the guest isn't golfing we can consider making an exception to maximize on room nights

4. Why should we make this exception?
    - ⇒ Is this a past guest?
    - ⇒ Are they celebrating anything?
    - ⇒ Does the guest have financial constraints?
    - ⇒ Are we fixing a past bad experience to keep this guest coming back?

Void Charge

REQUIRES SUPERVISOR CLEARANCE

SAME DAY TRANSACTIONS ONLY

When a guest is over or under-charged by an agent, it is standard procedure to charge the correct amount, then fully refund the incorrect charge.

This is done to avoid guest confusion and frustration by having multiple Pebble Beach transactions post to a guest's credit card that we then have to explain.

HOW TO RESOLVE AN INCORRECT CHARGE

1.**CHARGE** the correct amount to the Reservation Tile

- Click "Bills"
- Enter the Transaction Code of the credit card that will receive the refund
- Enter correct dollar amount
- Enter C for charge
- Page down to submit

NOTE*: If this charge does not clear*, you may need to charge/refund the difference between the incorrect and correct charge instead.

2**. REFUND** the initial incorrect transaction

- Click "Bills"
- Enter the Transaction Code of the credit card that will receive the refund
- Enter a minus sign (-) followed by the dollar amount that will be refunded
- Enter C to charge
- Page down to submit

3. **MOVE** the incorrect charge & refund to B Folio

- Enter Folios
- E—Edit Folios
- F—Sub-Folio
- Write "B" in the Folio Column on the lines that list the incorrect charge and refund
- Save

NOTE: The B folio will not been seen by the guest

Transfer Funds

RESERVATION TILE → RESERVATION TILE

1. Obtain the dollar amount and Reservation Number / City Ledger # that currently holds the funds
2. Click "Bills" within the Reservation Tile to which funds will be moved
3. Enter X/F for the Transaction Code
4. Page Down to submit
5. Enter the Reservation Number / City Ledger # that currently holds the funds
6. Click Y to confirm property is correct
7. Click Y to confirm R# / C/L# is correct
8. Enter the dollar amount
9. Page Down to Submit
10. Click Y to confirm the new balance
11. Esc to leave the Bills window
12. If moving funds from a CL: Close the C/L after removing funds
13. If moving funds to a room: Update room Guarantee Codes and Special Billing as needed

CITY LEDGER → CITY LEDGER

1. Obtain the dollar amount and City Ledger Number that currently holds the funds
2. Click "Bills" within the Reservation Tile to which funds will be moved
3. Enter C/L for the Transaction Code
4. Page Down to submit
5. Enter the City Ledger # that currently holds the funds
6. Click Y to confirm property is correct
7. Click Y to confirm C/L # is correct
8. Enter the dollar amount
9. Page Down to Submit
10. Click Y to confirm the new balance
11. Esc to leave the Bills window
12. If moving funds from a CL: Close the C/L after removing funds
13. If moving funds to a room: Update room Guarantee Codes and Special Billing as needed

RESERVATION TILE → CITY LEDGER

1. Obtain the dollar amount and Reservation Number that currently holds the funds
2. Click "Bills" within the City Ledger to which funds will be moved
3. Enter C/L for the Transaction Code
4. Page Down to submit
5. Enter the Reservation Number that currently holds the funds
6. Click Y to confirm property is correct
7. Click Y to confirm R# is correct
8. Enter the dollar amount
9. Page Down to Submit
10. Click Y to confirm the new balance
11. Esc to leave the Bills window

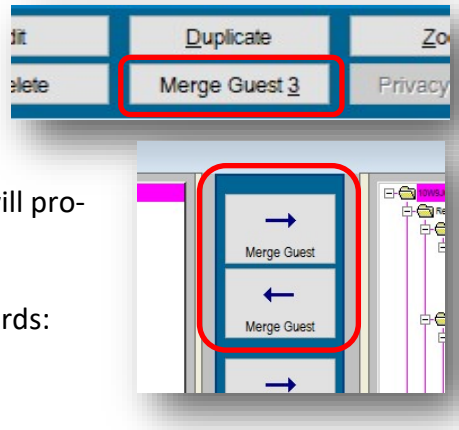
Merge / Delete Guest Tiles

Agents (or other departments) will email their coach (or reservations) and request to have two or more guest tiles merged or deleted.

A duplicate guest tile can happen a number of ways:

- It might have been made by the dining team under the name of the restaurant and has incomplete information.
- The spelling of the name might be off so when the agent searched it didn't come up and they created a new one.
- Maybe the address changed and we made a new tile instead of updating the existing one.

We want to make sure to merge the tiles so we can keep a clean system and have the most accurate information for our guests.



IN SMS:

1. Open the first guest tile that you would like to merge
2. Click **Merge Guest 3** or press 3 on the keyboard
3. Next you would search for the second guest tile, usually the agent will provide the guest tile number.
4. Then you would click **Merge Guest**
5. For Merging, click the Merge Guest that has the arrow pointed towards:
    - The most current CC
    - The Guest Tile that has a membership or C/L on it
    - The Guest Tile with the most history

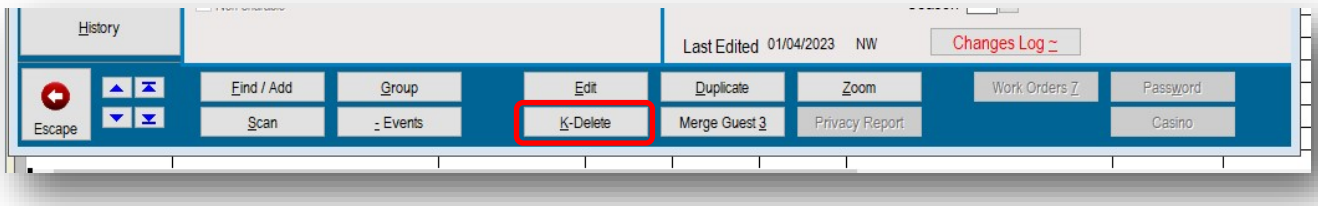


ADDITIONAL WAY TO MERGE GUEST TILES:

1. Accessing the main menu in SMS
2. Clicking **Maintenance**
3. Clicking **Dedupe Guest Tiles**
4. Then search for each guest tile(s)
5. Then you would click **Merge Guest**

DELETE A GUEST TILE:

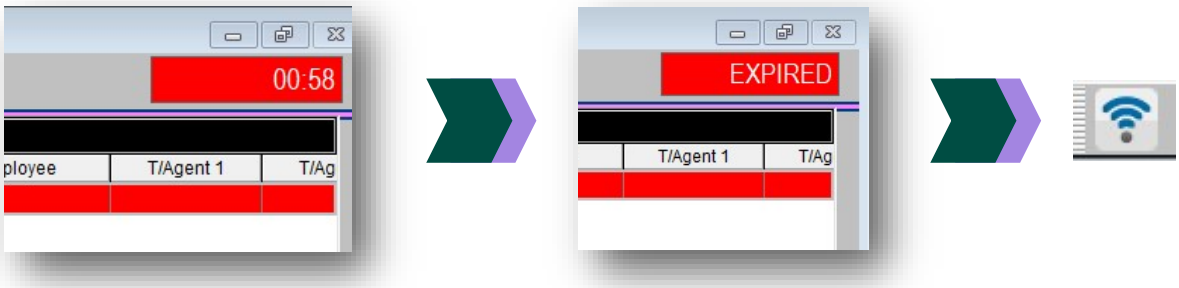
1. Access the Guest Tile
2. Either Click Delete on the face of the Guest tile or the hot key on your keyboard is K



Bulletins

When an agent does not click 'Complete' on a reservation in SMS, after an hour the reservation will time out. Once the reservation times out, what was booked will be released back into inventory.

We have an alert system called a **bulletin** that will pop up on all supervisor and manager active SMS sessions. This will allow us to take over the reservation and provide feedback to the agent.

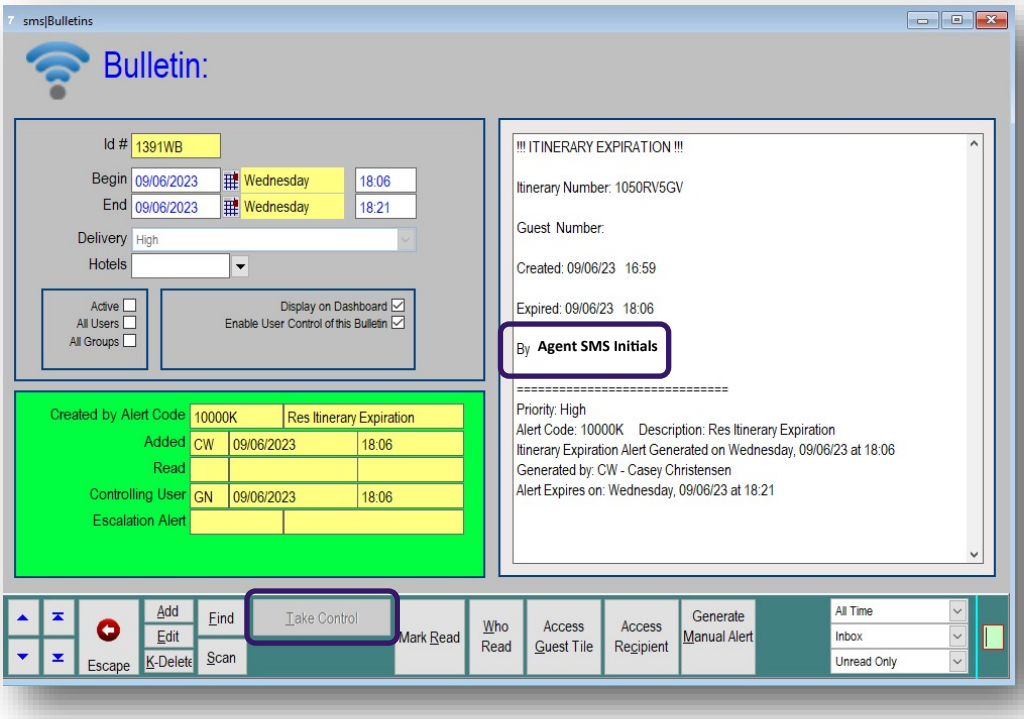


1. Click the **bulletin** icon that pops up in the middle of the screen



2. Look at the **SMS initials** of who made the reservation
3. Click **Take Control** of booking
4. **Send a Revinate chat** to inform the Reservation leadership Team that you are handling the bulletin
5. Go to the booking center and check to see if the items are still in the itinerary
6. If the items are **still in the itinerary** > Click **Complete** and **advise** the **agent** of non complete booking
7. If the items have already been **released back into inventory** > Reach out to the agent > Have the **agent listen to the call** and **rebook what was lost**
8. If the items **cannot be rebooked** > Have the **agent call the guest back** to advise and offer a **solution**

Example of Bulletin:



Negotiated Rates 1/2

Negotiated Rates: Rates that are lower than rack, are not published promotions or packages, and are approved by a supervisor or manager to offer the guest. A supervisor or manager will make adjustments in SMS.

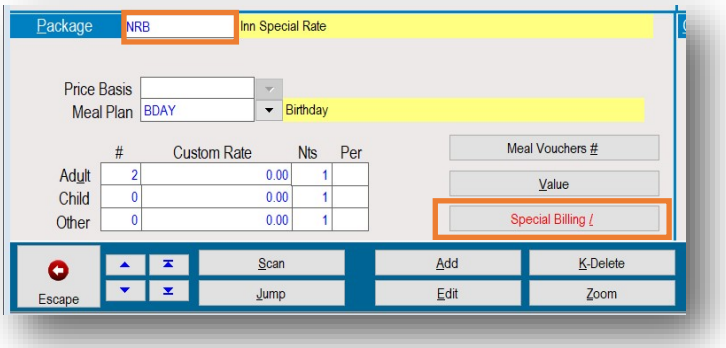
Things to note:

1. Any negotiations should go no lower than the "last chance rates" preapproved by revenue management. (See Management Negotiation Sheet).
2. Military rates are a specific example of negotiated rates as they have a separate structure from the negotiation sheet. These rates are found in the Digital Binder under Resort Reservation on the Z drive.
3. Agents asking for negotiations of any kind must display knowledge of pertinent guest information.
    - Example: Name(s) of guest and level, time frame, date flexibility, current availability, budget, special occasion, etc.

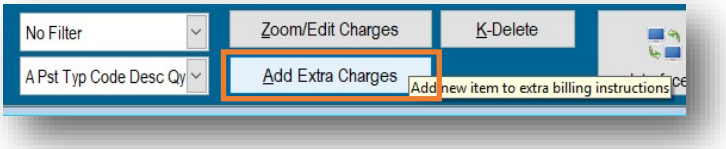
SMS Instructions:

After the agent has built the itinerary:

1. In SMS open the face of the reservation for the room you are adjusting.
2. Click **E** on the keyboard or Click **Edit** on the reservation.
3. In the **Package** code, type in either **NRB** for the Inn at Spanish Bay or **NRL** for The Lodge at Pebble Beach or **NRP** for Casa Palmero.
4. Press **Page Down** on the keyboard to save
5. Click **/** on the keyboard or Click **Special Billing.**



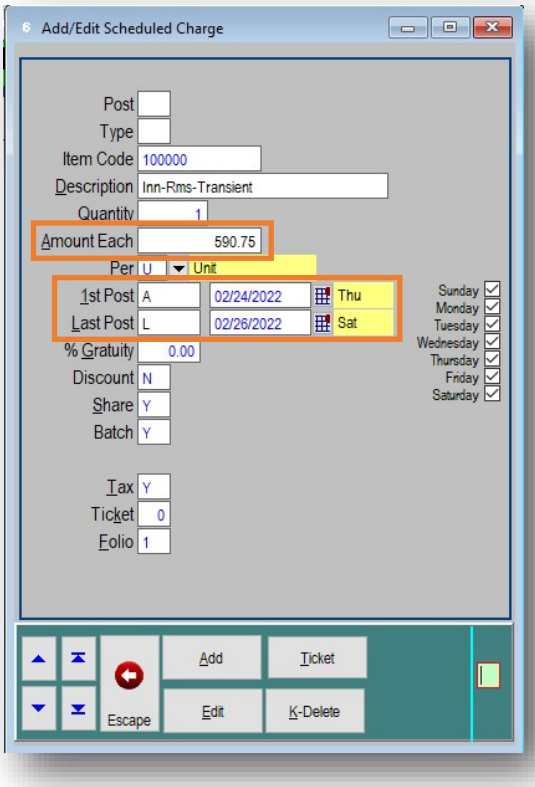
6. Click **A** on the keyboard or Click **Add Extra Charges.**



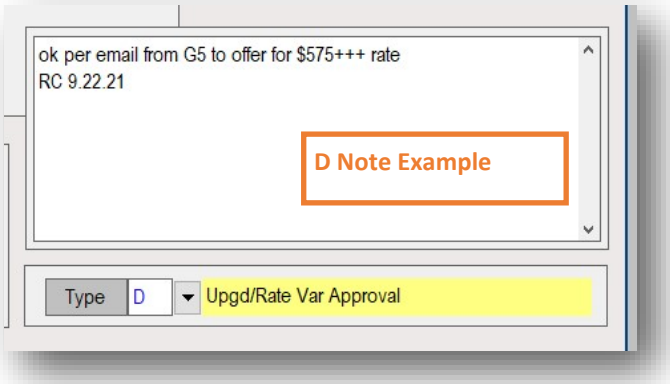
7. Press **Enter** on the keyboard **twice** to bypass Values and Entering a Code.
8. Select either **Inn-Rms-Transient** or **Lodge-Rms-Transient** or **Casa Transient** from the list of options (use page up and page down to view the different codes, The Lodge codes are on the 2nd page).

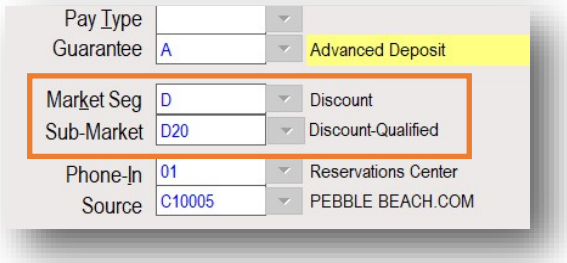
Negotiated Rates 2/2

9. In the **amount each** field, type in the **dollar value before taxes and fees** from either the negotiation sheet, from the digital binder for military rates, or the rate determined by a manager if outside of those two situations.
10. In the **1st Post** and **Last Post** fields - you may manually adjust the date range or input A (Arrival), L (Last), or a number that corresponds to the 1st, 2nd, 3rd night, etc."
11. Click **Page Down** on the keyboard to confirm your entries.
12. The agent should create a **D note** to explain the reason behind the adjusted rate and who it was approved by. Supervisor should review to make sure it is accurate.



- Either **D** and **D20** for **discount qualified** if the guest got approval for a different than rack rate.
- Or **D** and **D10** for **discount published** for a rate that was advertised as a promotion.





12. Make sure the **Market Seg** and **Sub Market** codes match the reason.



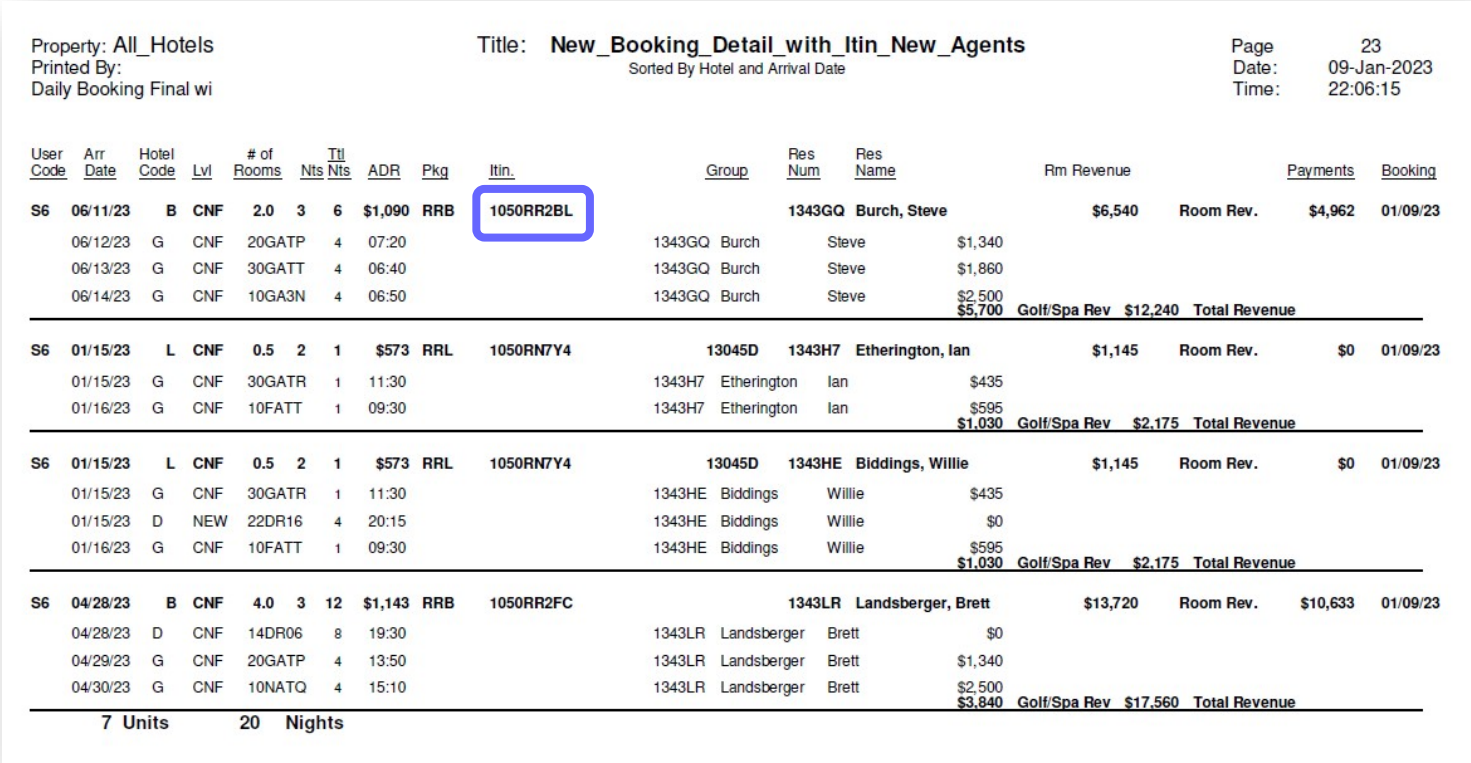
13. The **Secretary field** should have a code that matches the adjusted rate and reason.

New Booking Sheets

New Booking Sheets list out all of the new room reservations from the previous day, organized by agent. An automated report runs nightly and sends an email through outlook to the Agent and copies their supervisor.

Agents should be reviewing their bookings from the previous day to mitigate errors. Supervisors should review the new booking sheets from each agent on their team throughout the week and provide feedback on any mistakes that need to be corrected.

Example of New Booking Sheet:



Property: All_Hotels
Printed By:
Daily Booking Final wi

Title: **New_Booking_Detail_with_Itin_New_Agents**
Sorted By Hotel and Arrival Date

Page 23
Date: 09-Jan-2023
Time: 22:06:15

User Code	Arr Date	Hotel Code	Lvl	# of Rooms	Nts	Ttl Nts	ADR	Pkg	Itin.	Group	Res Num	Res Name	Rm Revenue		Payments	Booking
S6	**06/11/23**	**B**	**CNF**	**2.0**	**3**	**6**	**$1,090**	**RRB**	**1050RR2BL**		**1343GQ**	**Burch, Steve**	**$6,540**	**Room Rev.**	**$4,962**	**01/09/23**
	06/12/23	G	CNF	20GATP	4	07:20				1343GQ Burch Steve			$1,340			
	06/13/23	G	CNF	30GATT	4	06:40				1343GQ Burch Steve			$1,860			
	06/14/23	G	CNF	10GA3N	4	06:50				1343GQ Burch Steve			$2,500			
													$5,700	**Golf/Spa Rev $12,240**	**Total Revenue**	
S6	**01/15/23**	**L**	**CNF**	**0.5**	**2**	**1**	**$573**	**RRL**	**1050RN7Y4**	**13045D**	**1343H7**	**Etherington, Ian**	**$1,145**	**Room Rev.**	**$0**	**01/09/23**
	01/15/23	G	CNF	30GATR	1	11:30				1343H7 Etherington Ian			$435			
	01/16/23	G	CNF	10FATT	1	09:30				1343H7 Etherington Ian			$595			
													$1,030	**Golf/Spa Rev $2,175**	**Total Revenue**	
S6	**01/15/23**	**L**	**CNF**	**0.5**	**2**	**1**	**$573**	**RRL**	**1050RN7Y4**	**13045D**	**1343HE**	**Biddings, Willie**	**$1,145**	**Room Rev.**	**$0**	**01/09/23**
	01/15/23	G	CNF	30GATR	1	11:30				1343HE Biddings Willie			$435			
	01/15/23	D	NEW	22DR16	4	20:15				1343HE Biddings Willie			$0			
	01/16/23	G	CNF	10FATT	1	09:30				1343HE Biddings Willie			$595			
													$1,030	**Golf/Spa Rev $2,175**	**Total Revenue**	
S6	**04/28/23**	**B**	**CNF**	**4.0**	**3**	**12**	**$1,143**	**RRB**	**1050RR2FC**		**1343LR**	**Landsberger, Brett**	**$13,720**	**Room Rev.**	**$10,633**	**01/09/23**
	04/28/23	D	CNF	14DR06	8	19:30				1343LR Landsberger Brett			$0			
	04/29/23	G	CNF	20GATP	4	13:50				1343LR Landsberger Brett			$1,340			
	04/30/23	G	CNF	10NATQ	4	15:10				1343LR Landsberger Brett			$2,500			
													$3,840	**Golf/Spa Rev $17,560**	**Total Revenue**	

7 Units 20 Nights

1. Copy the **itinerary number** from the report
2. Navigate to **SMS** and paste it into Itinerary Lookup
3. Double click the booking to open it in the booking center
4. **Review** the booking according to the New Booking Checklist or Change/Revise Checklist
5. Navigate to **Revinate** and search for a lead
6. Paste the **itinerary number** into the search
7. Click the pencil to open the lead
8. **Review** the Lead according to the New Booking Checklist or Charge/Revise Checklist

If you notice any trends or patterns in the errors, please bring this up in a KRA.

1. Start by checking that the agent understands the concept or what is being asked of them
2. Review the topic in the KRA - *"How is it going with leaving a detailed R note?"*
3. Check to see if the agent has improved over the next few new booking reports
4. Acknowledge the growth or continue to address the opportunity as appropriate

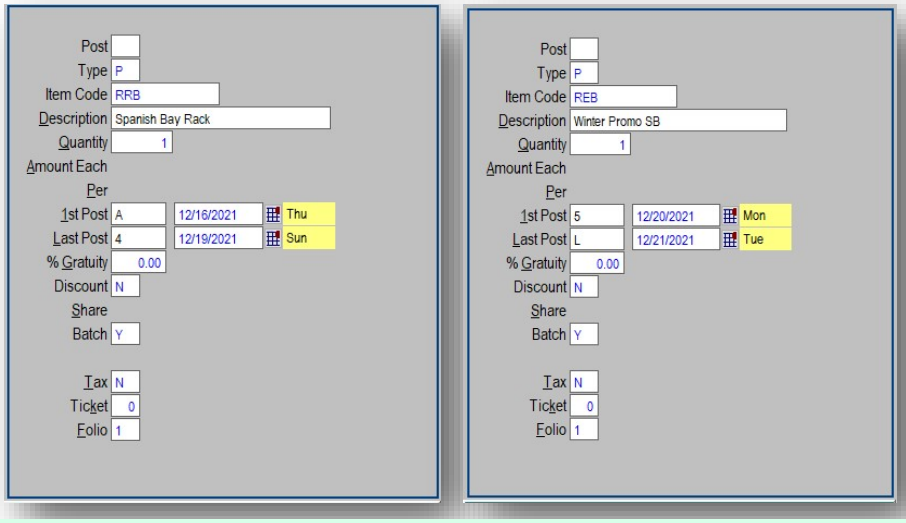
Special Bill | Different Package Codes

1. Set **SPBILL** as rate code in the package field
2. Since both rack and promo rates are built into the system, you shouldn't need to add in any specific amounts.
3. Click **/** on the keyboard or Click **Special Billing**
4. Click **A** on the keyboard or Click **Add Extra Charges**
5. Click **R** on the keyboard or Click **Rates**
6. Enter the **rate code** for the first rate
7. Select the proper **dates** for that rate. Ensure the package or promo rate aligns to the appropriate dates. Set rack rates for any dates the promo or package cannot apply .
8. **Repeat** steps 4 -7 to add the second rate into special billing
9. As a Result, all nights should be covered by either rack or promo rate.
   Below is an **example** of special bill after splitting between winter rates and rack rate during the same stay:

Sq	Pst	Typ	Code	Desc	Qy	Amt	Per	1st Post	Last Post	% Grats	Dsc	Shr	Bch	Brk	Tax	Tkt	Fol
1		**P**	**REB**	**Winter Promo SB**	**1**			**12/20/2021**	**12/21/2021**	**0.00**	**N**	**Y**	**Y**		**N**	**0**	**1**
2		P	RRB	Spanish Bay Rack	1			12/16/2021	12/19/2021	0.00	N	Y	Y		N	0	1

10. Make sure your **market** and **sub-market** codes are D and D10 for discount published for a rate that was advertised as a promotion.

(To the right): **Example** of adding the extra charge in special bill for a Winter Promotion split with Rack rate during one consecutive stay:



Common Package Codes:

- RRB | Spanish Bay Rack Rate
- RRL | Lodge Rack Rate
- RRP| Casa Rack Rate
- REB | Spanish Bay Winter Rate
- REL | Lodge Winter Rate
- WSB31 | Spanish Bay Stay & Play 1 golfer package
- WSB32 | Spanish Bay Stay & Play 2 golfer package
- PWB31 | Spanish Bay Stay & Play Past Guest 1 golfer package
- PWB32 | Spanish Bay Stay & Play Past Guest 2 golfer package
- WSL31 | Lodge Stay & Play 1 golfer package
- WSL32 | Lodge Stay & Play 2 golfer package
- PWL31 | Lodge Stay & Play Past Guest 1 golfer package
- PWL32 | Lodge Stay & Play Past Guest 2 golfer package

Understand a Folio (1/3)

Columns of a Folio

Date = date the payment or charge took place

User = SMS initials of who took payment or charged guest

Unit = The room type or specific room where payment or charge occurred

Trn# = Transaction number

Folio = The number or letter folio it is on

Code = Type of transaction (Payment with credit card, transferring funds, charged with POS)

Description = More details of the charge or payment

Charge = What we have charged them during their stay

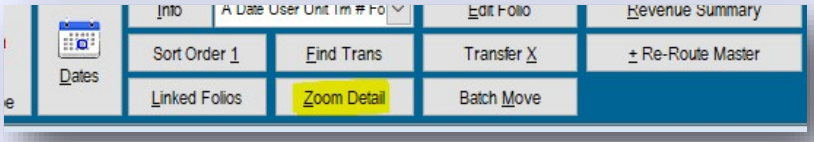
Payments = What the Guest has already paid towards the trip

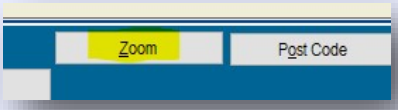
At the end of the stay, the Charges and Payments columns should be balanced out.

Transaction Detail

Date	User	Unit	Trn #	Folio	Code	Description	Charge	Payments
05/12/22	BX	BRF7	25R3H0	1	970PPA	XXXX1003	0.00	9,272.72
05/13/22	CF	BRF7	25R68X	1	970PPA	XXXX1003	0.00	11,265.22
07/13/22	DS	BRO7	26C1IQ	1	970PPA	XXXX1003	0.00	1,992.50
05/01/23	PM	B2506	28L6W9	1	XFD	CNF1363QQ-Meryash, Micha	5,083.29	0.00
05/01/23	PM	B2506	28L6WA	1	XFD	CNF12Z7RT-Grasso, Tony	4,020.60	0.00
05/01/23	PM	B2506	28L6WD	1	XFD	CNF12Z6J4-Karmzack, Jack	3,655.32	0.00
05/01/23	PM	B2506	28L6WF	1	XFD	CNF1363QP-Rayman, Dale	5,083.29	0.00
05/02/23	AZ	B2506	28L8CQ	1	XFD	CNF1363UK-Spelman, Rober	3,655.32	0.00

NOTE: To see a charge in more detail, you can click **Zoom Detail** then **Zoom**.





⇒ This will show you the charges in a receipt format.

10/15/23	--	B1502	2A17QL	1	020TCA	CA Tourism Assessment
10/15/23	--	B1502	2A17QM	1	000TIP	Service Charge-ROOMS
10/15/23	--	B1502	2A17QN	1	020TID	Mntry County Tourism Tax
10/16/23	SY	B1502	2A184S	1	820POS	SBC Tennis Pro S#-85666
10/16/23	SY	B1502	2A1858	1	820POS	SBC Tennis Pro S#-85667
10/16/23	IF	B1502	2A19JB	1	130POS	Traps Lounge #-6107543
10/17/23	IF	B1502	2A22B8	1	128POS	Lobby Lounge #-8707487
10/17/23	DK	B1502	2A22GD	1	000VLD	Laundry & Dry Cleaning
10/17/23	IF	B1502	2A22LZ	1	130POS	Traps Lounge #-6107559
10/18/23	RZ	B1502	2A24ID	1	411POS	PB Shop @ SBay #/2412RH
10/16/23	--	B1502	2A20PW	G	100CPR	UHNW Symp 2023
10/16/23	--	B1502	2A20PW	G	020TOT	Occupancy Tax
10/16/23	--	B1502	2A20PW	G	020TCA	CA Tourism Assessment

Revenue Center: PB Shop @ S Bay Opened by: RUTH RHODES

Sq	SubC	Qty	Description	Server	Spa Pkg Amt	Amount
1	1	1	PB020 HAT M	RUTH RHODES	0.00	49.50
2	1	1	PB020 SHIRT M	RUTH RHODES	0.00	145.00
3	1	1	Sales Tax	RUTH RHODES	0.00	15.07
4	1	1	Charge on A 1394R8	RUTH RHODES	0.00	-209.57
5						

Understand a Folio (2/3)

Folio numbers & letters:

- **Folios 1-9:** Charges and payments the guest can see and are used to organize a guests stay as needed.
- **Folio B:** Blind Folio. Charges and payments the guest cannot see.

  ⇒ Authorizations

Folio	Code	Description	Charge	Payments
B	100PPA	XXXX3007	4,000.00	4,000.00
B	100PPA	XXXX3007	2,300.00	2,300.00

  ⇒ Voids

Folio	Code	Description	Charge	Payments
1	970PPV	XXXX1111	0.00	3,854.62
B	970PPV	XXXX1111	0.00	3,722.94
B	970PPV	XXXX1111	0.00	-3,722.94

- **Folio C:** Corporate Folio. These are charges the guest cannot see. This is often used with 3rd party bookings, or when a primary covering all charges and doesn't want their guest to see charges.

Folio	Code	Description	Charge	Payments
C	128POS	Lobby Lounge #-8610061	164.52	0.00
C	100000	Inn-Rms-Transient	1,200.00	0.00
C	020TOT	Occupancy Tax	126.00	0.00
C	020TCA	CA Tourism Assessment	2.34	0.00
C	000TIP	Service Charge-ROOMS	32.00	0.00
C	020TID	Mntry County Tourism Tax	7.00	0.00
C	320POS	Spyglass Hill P#/2414KS	1,860.00	0.00
C	320POS	Spyglass Hill P#/2414LO	210.00	0.00
C	237POS	SH Course Cart#-9326501	60.98	0.00

- **Folio G:** Group Folio. What gets covered by the company hosting the group, i.e. charges billed to a Master Account

Folio	Code	Description	Charge	Payments
G	100CPR	UHNW Symp 2023	845.00	0.00
G	020TOT	Occupancy Tax	88.73	0.00
G	020TCA	CA Tourism Assessment	1.65	0.00
G	000TIP	Service Charge-ROOMS	32.00	0.00
G	020TID	Mntry County Tourism Tax	7.00	0.00
G	100CPR	UHNW Symp 2023	845.00	0.00
G	020TOT	Occupancy Tax	88.73	0.00
G	020TCA	CA Tourism Assessment	1.65	0.00
G	000TIP	Service Charge-ROOMS	32.00	0.00
G	020TID	Mntry County Tourism Tax	7.00	0.00
G	GRMXFC	C/L12X817-2023 PWM Sympo	0.00	1,948.76

- **Folio P:** Package Folio. These are charges related to packages.

Folio	Code	Description	Charge	Payments
P	100CPR	UHNW Symp 2023	-845.00	0.00
P	100020	BRO7 : Inn-Rms-Group B	845.00	0.00
P	100CPR	UHNW Symp 2023	-845.00	0.00
P	100020	BRO7 : Inn-Rms-Group B	845.00	0.00

Understand a Folio (3/3)

Examples of different charges and payments:

1. This is the initial **deposit** and **additional deposits** as the guest added rooms.
   ⇒ The reason we know these are deposits, is the date is before arrival, it's the first line item(s) on this folio, and the amount is in the payments column.

Date	User	Unit	Trn #	Folio	Code	Description	Charge	Payments
05/12/22	BX	BRF7	25R3H0	1	970PPA	XXXX1003	0.00	9,272.72
05/13/22	CF	BRF7	25R68X	1	970PPA	XXXX1003	0.00	11,265.22
07/13/22	DS	BRO7	26C1IQ	1	970PPA	XXXX1003	0.00	1,992.50

2. This is what a **room RTSA** would look like.

Description	Charge	Payments
Inn-Rms-Transient	1,500.00	0.00
Occupancy Tax	157.50	0.00
CA Tourism Assessment	2.93	0.00
Service Charge-ROOMS	32.00	0.00
Mntry County Tourism Tax	2.00	0.00

⇒ The room rate is broken down into its different parts Room, Taxes, Service (Gratuity), and Assessments.
⇒ They are in the Charge column to be reconciled with a Payment at checkout

3. Here are charges from Spyglass Hill **Pro Shop**.

Description	Charge	Payments
Spyglass Grill#-7769783	156.23	0.00
Spyglass Hill P#/22C77B	3,900.00	0.00
SH Course Cart#-9321780	119.04	0.00
SH Course Cart#-9321781	68.02	0.00
SH Course Cart#-9321782	61.98	0.00
SH Course Cart#-9321792	123.69	0.00
SH Course Cart#-9321793	81.00	0.00
SB Links Pro Sh#/22C8MA	2,033.61	0.00
SB Course Cart#-9604556	51.01	0.00

⇒ Charges from other Pro Shops and Restaurants will look similar but with the name of that establishment instead.

4. This is what it would look like when **transferring funds** from and **CL** to a **room**.

Code	Description	Charge	Payments
GRMXFC	C/L12X817-2023 PWM Sympo	0.00	1,948.76

Code	Description	Charge	Payments
XFC	C/L12M514-UHNW Symp 2023	0.00	86,821.00

5. This is what it would look like when **transferring funds** from and **room** to a **room**.

Code	Description	Charge	Payments
XFD	CNF1363QQ-Meryash, Micha	5,083.29	0.00
XFD	CNF12Z7RT-Grasso, Tony	4,020.60	0.00

Understand General Availability (F7,G) 1/4

Main Screen of General Availability (F7, G); description of displayed categories.

- **OBHOLD:** For each date and unit type, the number of units that users without overbooking clearances are permitted to overbook by.
- **OOO:** Out Of Order Rooms. When a room is scheduled Out Of Order for at least one night, it will be included in this count.
- **NET:** The Inventory minus any **OOO.**
- **RESERV:** Individual (non-group) reservations.
- **PICKUP:** The number of reservations made with a **Group** code. This will ONLY count reservations attached to groups that have been formally defined with a Group Master Tile. Any reservations that have a Link code in the group field with no group definition will not be part of this tally.
- **$OLD:** (**Sold**) The total of rooms for which actual reservations exist, either for non-group or group-**Pickup** reservations. (no **Blocks**)
- **VACANT:** This is the availability when only actual **Sold** reservations are taken into account. This is the **Inventory** minus **Sold** (which includes **Reserved** and **Pickups**) minus any **OOO**. This does NOT reflect group **Blocks** that exceed the **Pickup**.
- **BOOKED:** The total number of rooms committed, including individual **Reservations** and group **Blocks.**
- **AVAIL:** The best-case availability, which is the **Inventory** minus the **OOO** minus the **Booked.**

Date	OBHOLD	OOO	NET	RESERV	PICKUP	$OLD	VACANT	BOOKED	AVAIL	Day
12/05/2023	0	27	468	78	251	329	139	331	137	Tue
12/06/2023	0	24	471	53	340	393	78	395	76	Wed
12/07/2023	0	19	476	76	215	291	185	291	185	Thu
12/08/2023	0	19	476	109	281	390	86	391	85	Fri
12/09/2023	0	19	476	147	278	425	51	427	49	Sat
12/10/2023	0	24	471	137	210	347	124	351	120	Sun
12/11/2023	0	24	471	114	301	415	56	418	53	Mon
12/12/2023	0	19	476	67	335	402	74	405	71	Tue
12/13/2023	0	18	477	65	169	234	243	234	243	Wed
12/14/2023	0	18	477	88	145	233	244	233	244	Thu
12/15/2023	0	18	477	99	180	279	198	279	198	Fri
12/16/2023	0	18	477	86	196	282	195	283	194	Sat
12/17/2023	0	141	354	61	76	137	217	137	217	Sun
12/18/2023	0	210	285	88	25	113	172	115	170	Mon
12/19/2023	0	149	346	92	25	117	229	119	227	Tue
12/20/2023	0	21	474	84	28	112	362	112	362	Wed

Understand General Availability (F7,G) 2/4



Description of displayed button functionality. Most display information per room type, unless filter view is changed.

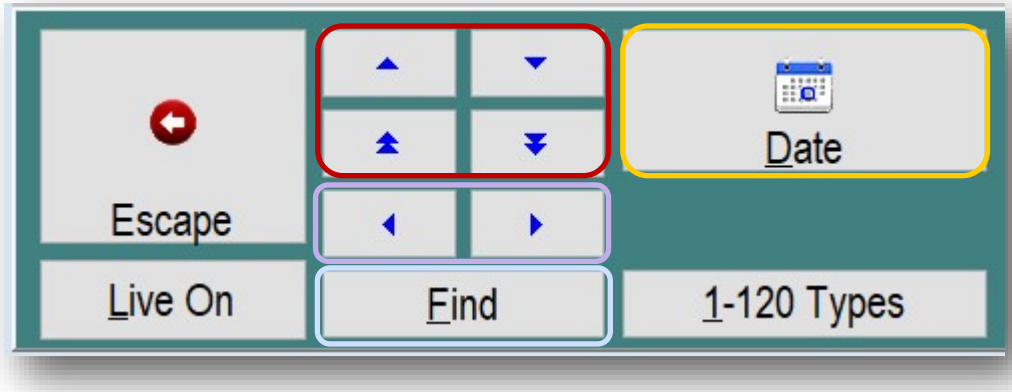
- **OBHOLD:** Displays currently defined over/under booking limits
- **NOTES**: Displays restriction notes and view obstructions
- **WEEK DAYS:** Filter view by week days, weekends, or both
- **INVENTORY:** Total rooms in inventory
- **OOO:** Total rooms that are out of order
- **NET:** Number of rooms available to sell (after minus OOO)
- **$ SOLD:** Number of actual reservations, including non-group and group pickups, but not including excess group block
- **BOOKED:** Number reserved including group blocks
- **AVAILABLE:** Number of rooms available after deducting all reservations and group blocks
- **RESERVED:** Number of rooms reserved by non-group members
- **VACANT:** Number of rooms that have not been $Sold
- **SUMMARY**: Displays relationship between %Sold/Vacant and Booked/Available
- **TOTALS**: Displays a series of totals; Main Screen of General Availability (F7, G)
- **EXPAND**: Displays series of totals including group commitment
- **ADJUSTED**: Displays series of totals including multi - group adjustments
- **ZOOM**: Displays series of totals for one room type, property, or room category
- **QUERY:** Displays list of groups and wholesalers for selected date
- **GROUP:** Display group block, booked, pick up, available to pickup, or zoom to group block management screen
- **CONSOLIDATE**: Display totals at property level, unit type level, or detail level
- **MULTPROP**: Display totals of each room type at selected properties

NOTE: Room category in general availability means an arbitrary category A - P; Different room types are assigned ‘categories’

Understand General Availability (F7,G) 3/4

Navigating General Availability

- **Find:** This button will allow you to narrow down applicable data according to a specific room type.
- **Date**: You can use this calendar to select a start date for the data.
- **Right and Left arrows:** When you are looking at data for multiple rooms, these arrows allow you to navigate through all the rooms categories.
- **Up and Down arrows:** These allow you to cycle through dates either one day at a time or one page of dates at a time. Double arrows move up or down one full page of dates. Single arrow moves up or down one date at a time.



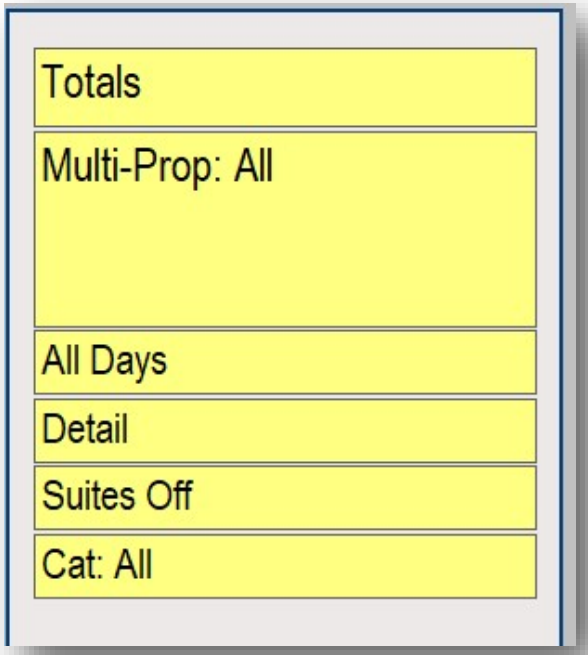
Navigate through rooms

Navigate through dates

Select a starting date

Set **ZOOM** to a specific room type

This yellow box located on the right hand side of the General Availability screen, will show you the filters currently set for the information being displayed.



Understand General Availability (F7,G) 4/4

Availability Summary



To Access Availability Summary:

1. G—General Availability
2. S—Summary
3. If you want to narrow to a specific property, click ^ for MultProp and select your property

The **Availability Summary** screen breaks down room status, showing occupancy (rooms in use), vacancy (available rooms), and net rooms (total available, excluding those out of order). It helps manage bookings efficiently by providing a quick overview of room availability, excluding temporarily unavailable rooms.

Occupancy Percentage Calculation
Scenario: The Inn at Spanish Bay has 269 rooms total. On 12/17/23, 122 of those rooms were Out of Order so the NET number of rooms is 147

Booked Rooms (42)
of NET Rooms (147)

Occupancy = 42 ÷ 147
Occupancy = .2857
Occupancy % = **28.57%**

The calculation below will help in understanding why we don't use Booked percentage as a representation for Occupancy.

Booked Percentage Calculation
Scenario: The Inn at Spanish Bay has 269 rooms total. On 12/17/23, 122 of those rooms were Out of Order

Booked Rooms (42)
of Available Rooms (105)
+ # OOO (122)
Total # Rooms at The Inn at Spanish Bay (269)

Booked = 42 ÷ 269
Booked = .1561
Booked % = **15.61%**

Date	NET	$OLD	%SLD	VACANT	%VAC	BOOKED	%BKD	AVAIL	%AVL	Day
12/16/2023	269	69	25.65	200	74.35	69	25.65	200	74.35	Sat
12/17/2023	147	42	15.61	105	39.03	42	15.61	105	39.03	Sun
12/18/2023	79	42	15.61	37	13.75	42	15.61	37	13.75	Mon
12/19/2023	138	39	14.50	99	36.80	39	14.50	99	36.80	Tue

Tape Chart (F8) Utilization 1/2

The Tape Chart is a view of each individual pre-blocked reservation. Reservations only pre-blocks certain room / request configurations. The Front Desk is in charge of pre-blocking all of the rooms (or setting the house) before guest arrival.

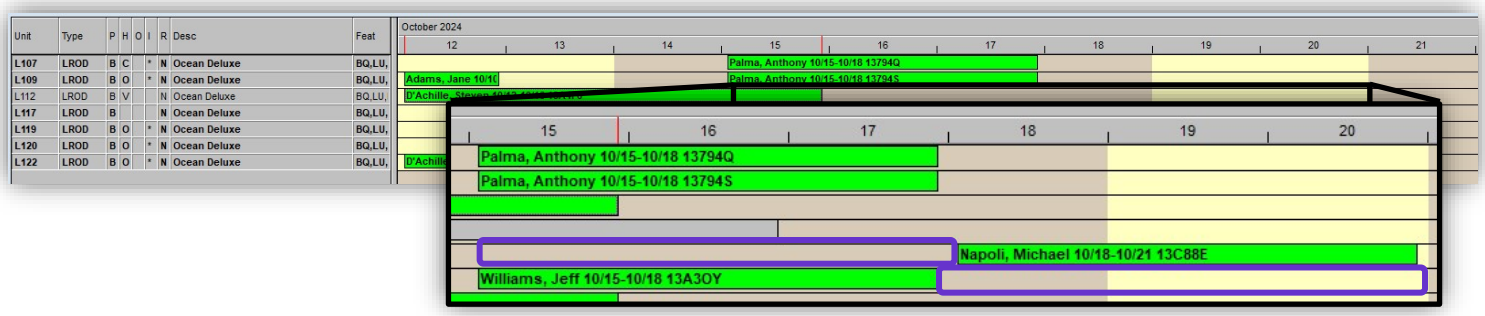
Accessing the Tape Chart

1. Press the **F8** key or Select the icon 
2. Enter the **dates, property, type**, and any applicable **room features** to filter the view
3. To view all rooms at all properties, click cancel in the filter window

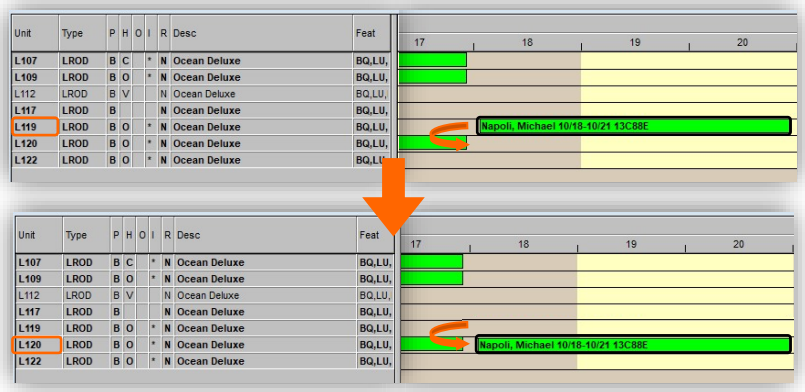
Common Use Scenarios

Room Type with specific bedding request (Do not move a Group Reservation rooms)

1. Go into the Tape Chart, set the date for **3 days prior to arrival**, and view if a different leisure reservation can be moved to accommodate the new reservation.
   ⇒ If we cannot move the room, the agent should call the guest back and offer a different room type/room move/solution/etc.
2. On the Tape Chart we can view that the **room type is available** for those nights but not any one specific room number.



3. Write down the R# of the room(s) you want to move in case you loose track of it (them)
4. **Move** the 'Napoli, Michael' reservation from room L119 to L120. This move should only be done if we can maintain the requests of the 'moved' reservation.
   ⇒ To **move** this reservation, click and drag the green bar from its existing line, to the line of the new room number.



   ⇒ Enter the **reason** for the move, making sure to notate the R# we are accommodating



Tape Chart (F8) Utilization 2/2

Common Use Scenarios Cont.

Pre-blocking a Suite

1. Go into the Tape Chart and view if a different **leisure reservation** can be moved to accommodate the new reservation.

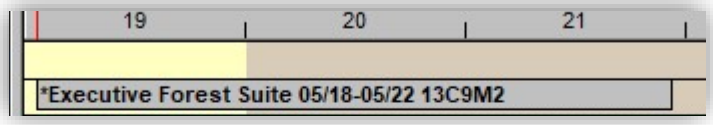
   Steps to Assist:

   ⇒ Follow process from previous page

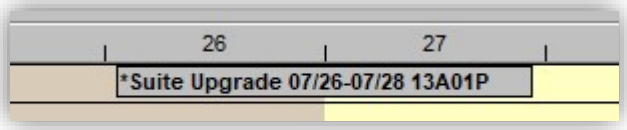
2. If the Tape Chart shows a suite booked by **Group Reservations**, it might be able to be moved to accommodate a leisure guest.

   Leisure Reservations should never move or edit a group room reservation.
   Check with either the Group Golf Coordinator (if group is not assigned) or the Group Rooms and Golf Coordinator (If the group is assigned) to see if the move can be made. If able, the applicable Coordinator will take action on that room move.

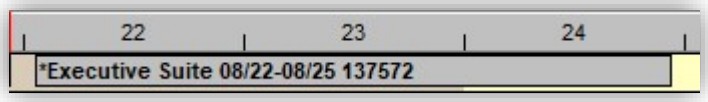
   - If the suite is booked by **Group Reservations**, it will be notated with:
     - *Name of the suite—can only move if moving to same type of suite



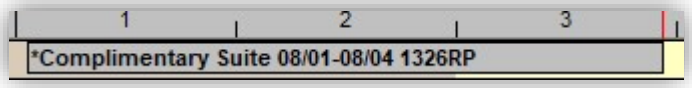
     - *Suite Upgrade—can move, it just needs to be any suite as an upgrade



     - *Executive Suite—can move, it just needs to be any exec. suite and not a specific one



     - *Complimentary Suite—might be able to move



   Steps to assist:

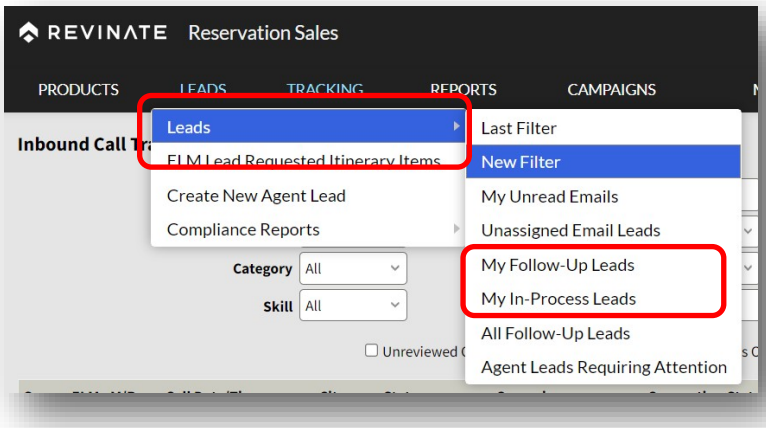
   1. Check to see if the room is marked movable
      ⇒ If marked non-moveable, it cannot be moved
   2. If the room is named to the group attendee
      ⇒ Check the change log and see what the room was named before
      ⇒ Use the screenshots above and general availability as a guide to determine if groups might be able to move the room for the leisure guest
   3. Check in with groups for assistance, please do not move the room
   4. If the room cannot be moved, the agent should call the guest back and offer a different room type

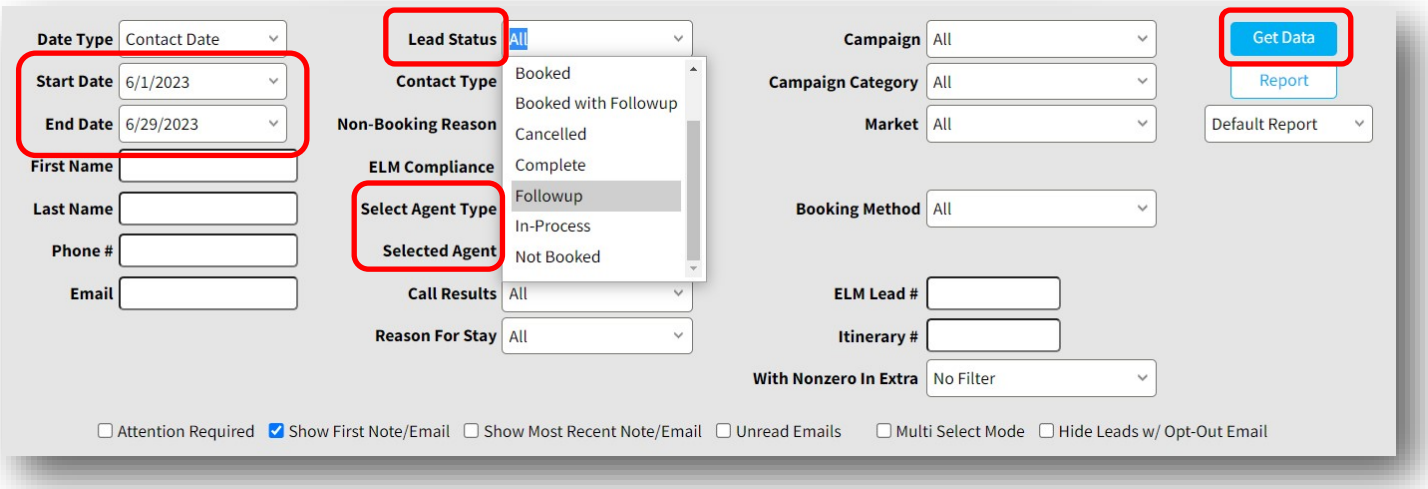
Follow Up/In Process Leads

Follow Up: These are leads that have been assigned to an agent and they **have not** reached out the guest yet. This also happens if the agent forgets to change a new lead that they created from "Follow up" to the appropriate lead status.
In Process: These are leads that have been assigned to an agent and they **have** reached out to the guest and haven't booked.

RUN REPORT FOR FOLLOW UP / IN PROCESS LEADS

1. Click **Reservation Sales** > **My Start Page**
2. Click **Leads** > **Hover over Leads** > Click **My Follow Leads** or **My In-Process Leads**
3. Click **Multi Select Mode**
4. Under **Selected Agent** > Select the **agents on your team**





WORKING WITH YOUR AGENT:

Make sure that there are a manageable number of **In Process** leads and that any **Follow Up** leads are taken care of today. A reasonable number of **In Process** leads for an **agent is 15 or less**. Some agents may be able to handle more or less than this. This is where you will be using coaching and building rapport with the staff to know what is manageable for each specific agent.

1. Check all **In Process leads**, check to see when the last communication was and if there is a time schedule to reconnect with the guest. If there has been no communication and there is no agreed upon time for the agent to call back, this lead status should be Not Booked.
2. If there are a **any Follow Up leads**, check in with your agent and ask how they are doing managing their leads. Seek understanding when asking then guide them toward a solution to make sure leads are process appropriately.
3. Be sure to also check **any Follow Up** leads that have a **past arrival date** and have the agent mark the lead as **Not Booked**.

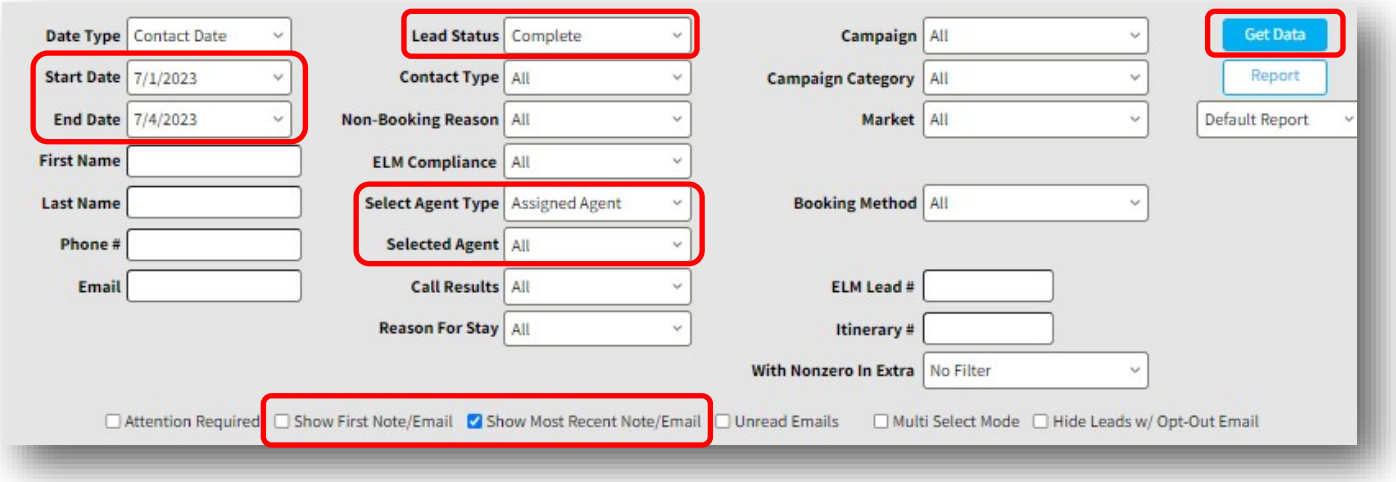
Complete leads

Complete: This lead status is used to indicate that the current lead should be merged with a separate lead, or a lead that needs to be deleted. Typically, the agent will leave a note saying "Please merge this lead with ELM# 10613155003" with the number being different for each lead.

ELM: Enhanced Lead Management

RUN REPORT FOR COMPLETE LEADS

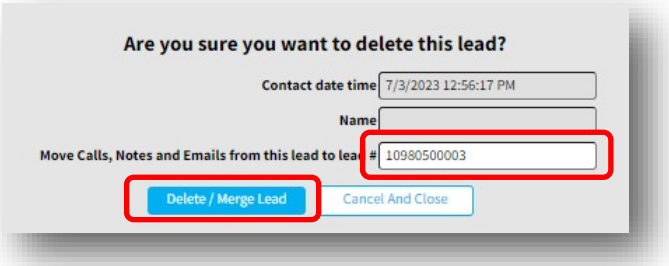
1. Click **Reservation Sales** > **My Start Page**
2. Click **Leads** > **Hover over Leads** > Click **New Filter**
3. Set the **Start Date** and **End Date** for the duration you want the data. This will often be for one month or one year.
4. **Lead Status** should be set to **Complete**
5. **Selected Agent Type** should be **Last Follow Up Agent.**
6. **Selected Agent** should be an **agent** on your team or left as **All** if you would like to see the whole department.
7. All other fields should be **All**
8. Check the box for **Show Most Recent Note/Email**
9. Uncheck the box for Show **First Note/Email**
10. Click **Get Data**



MERGING COMPLETE LEADS

The 'most recent Note/Email" in Revinate should show a note from the agent that asks to merge the complete lead with a previously existing lead and lists the ELM number.

1. **Copy** that **ELM number**
2. Click the **trash can** icon to merge the lead
3. On the next screen, **paste** the **ELM number** that you got from the Navis note into the text field
4. Click **Delete/Merge** lead

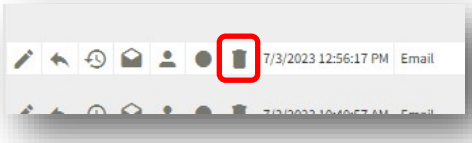


5. Verify that the leads were merged by viewing the new lead and seeing the calls and notes moved over.

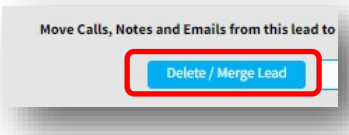
DELETING COMPLETE LEADS

The 'most recent Note/Email" in Revinate should show a note from the agent that asks to delete the lead or say its not needed.

1. Click the **pencil** to make sure we need to delete the lead.
2. Click the **trash can** icon to delete the lead



3. Click **Delete/Merge** lead



Auto Completes

Auto-Completes: If a lead's status is in follow up and has four days of inactivity, the lead will fall into auto-complete. This means that a lead was assigned to an agent and they have not followed up or attempted to reach the guest.

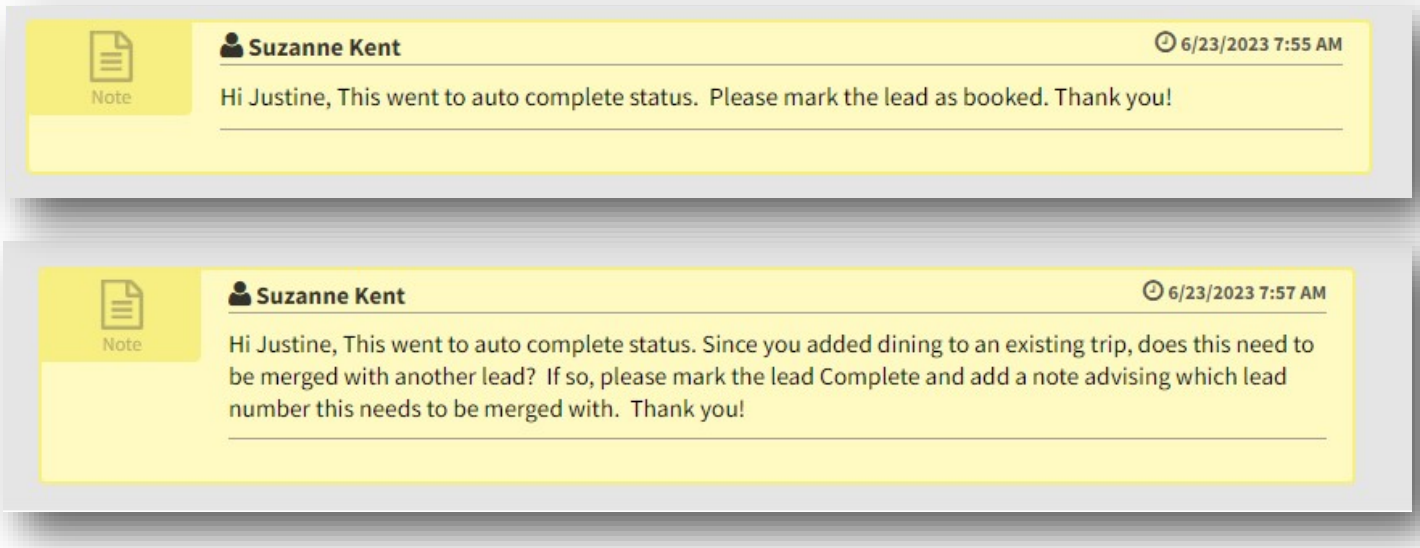
RUN REPORT FOR AUTO COMPLETE LEADS

1. Click **Reservation Sales** > **My Start Page**
2. Click **Leads** > **Hover over Leads** > Click **New Filter**
3. Set the **Start Date** and **End Date** for the duration you want the data. This will often be for one month or one year.
4. **Lead Status** should be set to **Auto_Complete.**
5. **Selected Agent Type** should be **Assigned Agent.**
6. **Selected Agent** should be an **agent** on your team or left as **All** if you would like to see the whole department.
7. All other fields should be **All** or as shown below.
8. Click **Get Data**

ADDRESSING AUTO COMPLETE LEADS:

1. Look at each lead to gain more information and address the ones that are assigned to agents on your team.
2. **Star** the lead
3. Set a **reminder** for today around the current time
4. Set the **leads status** to In Process
5. Leave a note in Navis for the agent asking them to address the lead:

"Hi (Agent Name) This lead fell into Auto_Complete. Please follow up with the guest and adjust the lead status accordingly."

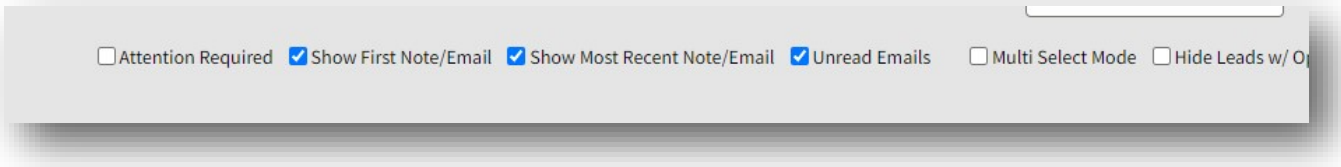


Unread Emails

Unread Emails: When a guest has responded to an email in Revinate and the Agent has yet to read and take action on the email.

RUN REPORT FOR LEADS WITH UNREAD EMAILS:

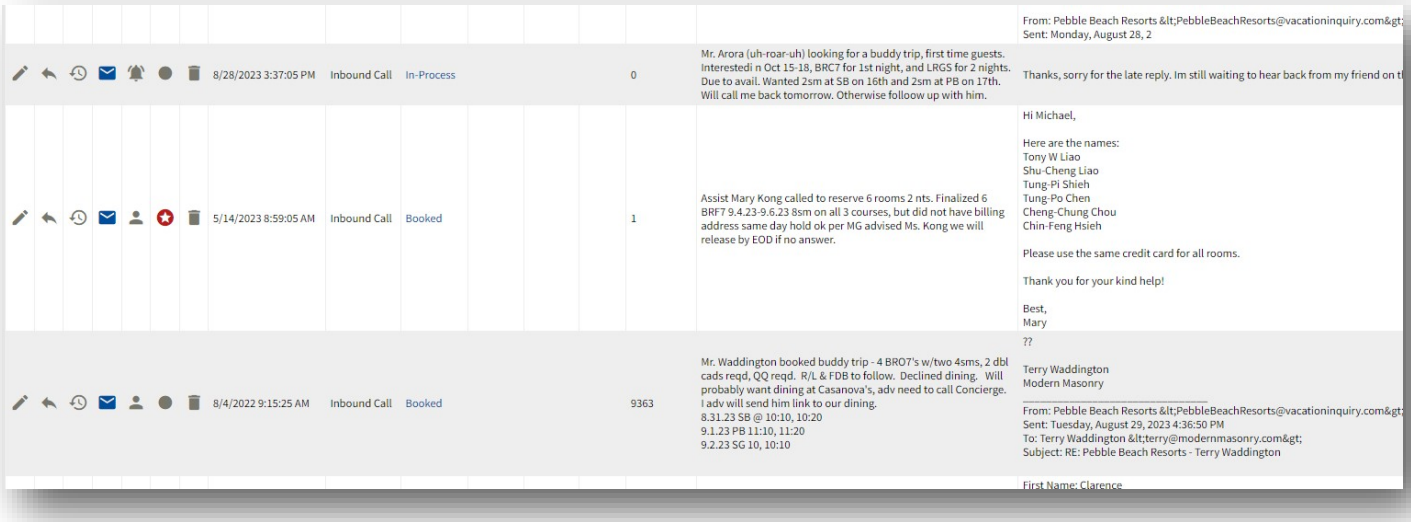
1. Click **Reservation Sales** > **My Start Page**
2. Click **Leads** > **Hover over Leads** > Click **My Unread Emails**
3. Click **Multi Select Mode**
4. Under **Selected Agent** > Select the **agents on your team**



WORKING WITH YOUR AGENT:

1. Check in with your agent (either email, chat, over the phone or in person) if the message has been unread for more than a day (if its from yesterday).
2. Have your agent follow up with the guest appropriately.
3. If your agent is out for an extended period of time or on a Leave of Absence we want to check for Unread Emails and assist the guest on behalf of the agent.

Example of what the report might look like with the first note made by the agent and the most recent unread guest response.



Call Compliance

Agent Responsibility:
Agents should check their call compliance weekly. Agents will be able to fix many of the situations that arise from non compliant calls or leads. Agents will reach out to a supervisor to fix any incorrect call dispositions or leads that need to be marked booked for another agent.

Supervisor Responsibility:
Supervisors will check in with their agents to make sure they are checking and fixing their call compliance. Supervisors will also assist with incorrect call dispositions and marking leads booked for another agent.

Adjusting a call disposition:

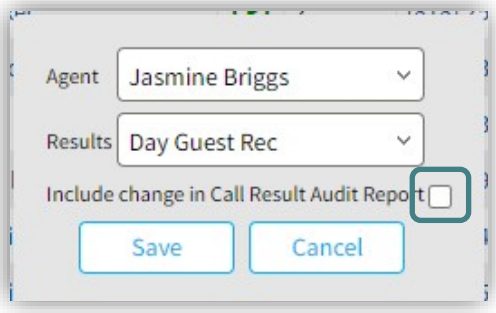
1. Access the **Call Compliance** report: In Revinate > Click Reservations Sales > Click Call Compliance > set dates to current month
2. Click the blue number pertaining to the agent and the category you are assisting with
3. Click the **call result** in blue
4. Select the appropriate **call disposition**
5. **Check** or **Uncheck** the 'Include Change in Call Result' box accordingly
6. Click **Save**

Alternate way to adjust a call disposition:

1. Access **inbound** or **outbound tracking** depending on the call you are locating
2. Change the search results for the **Agent, date,** and **call disposition** you are searching for
3. Click the **call result** in blue
4. Select the appropriate **call disposition**
5. **Check** or **Uncheck** the 'Include Change in Call Result' box accordingly
6. Click **Save**

'Include Change in Call Result Report' box:

If the **agent** brought this change to your attention, **uncheck** 'Include change in Call Result Audit Report'. This will ensure that the adjustment is <u>not included</u> in the Agent Incentive.



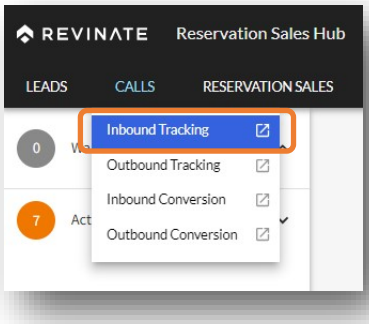
If the **supervisor** sees the incorrect call disposition during call auditing, leave it **checked** so that it <u>will be included</u> in the Agent Incentive.

Audit Robo Calls (1/2)

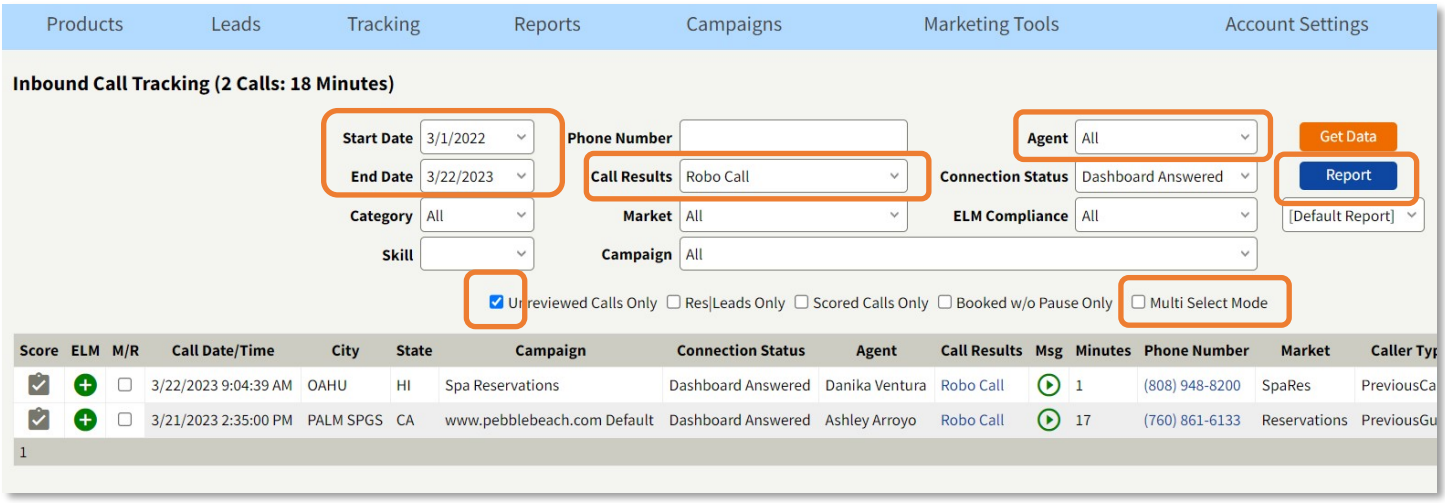
Robo Call: This is when we get a call that is a robot and is not an actual caller who needs our assistance. This may also include when a fax machine is trying to call one of our numbers and doesn't connect properly. This does not include Google Assistant who may call and book dining on behalf of a guest.

IMPORTANT: Do not block the 7500 number as that is our local line transfer and is also used to dispatch our 8888 line. This will prevent those calls from coming through

1. Navigate to **Revinate Hub** > Click **Calls** > Click **Inbound Tracking**
   his will give you a list of inbound calls with criteria you can change to search for specific types of calls



2. Change **Start Date** to **1 year in the past** > Change **End Date** to **Todays Date**
3. Change **Call Results** to **Robo Call**
4. Check the box for **Unreviewed Calls Only**
   This will make sure to only bring up calls that have not been blocked or adjusted accordingly

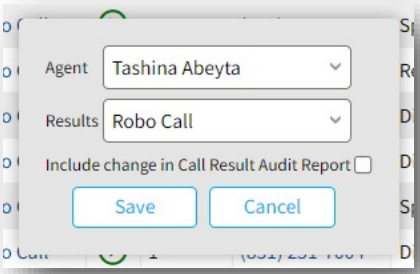


   Example: If this is a call where the guest got disconnected then the call result would be Misdialed/Disconnect. If the guest was helped fully and it was for Spa then it would be Spa Desk. The above screenshot shows a Spa Call to Ashley Arroyo that is 17mins long. This is most likely not a Robo Call but indeed a Spa Desk call.

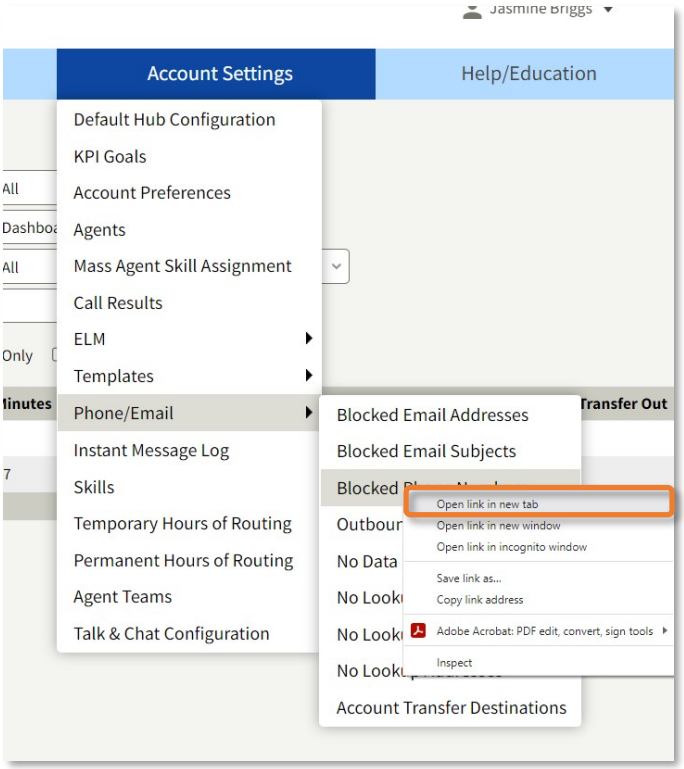
5. You only need to check the Robo Calls from the **Agents on your team** > Click **Multi Select Mode** > Select only **your Agents**
6. **Listen** to each call that had not been review yet. To do this, click the green play button.
7. If this is **NOT a Robo Call**, **adjust** the **call disposition** appropriately.

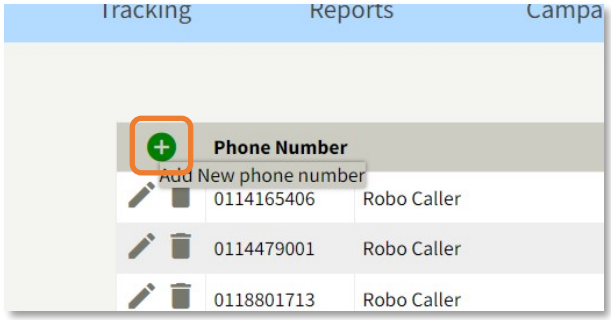
Audit Robo Calls (2/2)

8. **To adjust the call result:** click the **result (blue text)** that you want to change. A small box will pop up > Click the **results drop down** > Select from the list the **accurate call result** > **Uncheck** the box Include change in Call Result Audit Report > Click **Save**



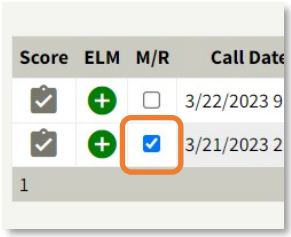
9. If the call is a **Robo Call**, it will need to be **blocked**.
   To block a Robo Call: Hover over **Account Settings** > Hover over **Phone/Email** > **Right click Blocked Phone Numbers** > Select **Open link in new tab**
10. Click the **green plus** to add a new number to the list of blocked numbers.
11. **Copy** the **phone number** from the Inbound Tracking report > **Paste** number into **Phone Number**
12. For description please use either **Robo Caller** or **Fax** so we can maintain consistency with our current list.
13. Click **Save**.







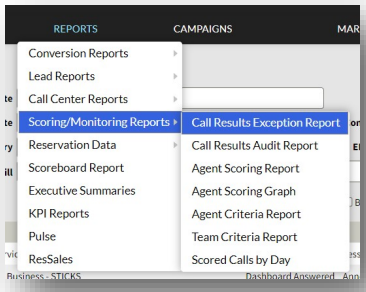
14. If you made a mistake you can click the pencil next to the number you want to edit or the trash can to delete it from the list.
15. Once you have reviewed a call please **check the box M/R** to indicate is has been reviewed and adjusted or processed appropriately.



Call Exception Report

Call Exception Report: This report displays call results based on both individual usage and team averages. There are a variety of ways to sort this data. However, the report was created to help identify overuse or incorrect use of "Non-Lead Call Results" since this misuse greatly affects call conversion accuracy and marketing reporting.
All data points within columns are hyperlinks that will take you to inbound call tracking so that you can further audit calls and, if needed, correct erroneous call results. This audit is currently done each Thursday.

1. Click **Reports** > **Scoring/Monitoring Reports** > **Call Exception Report** > Set the dates for one week prior to day (the previous **Thursday through Wednesday**) > Set Agent to **Primary Agents** > Click **Get Data**

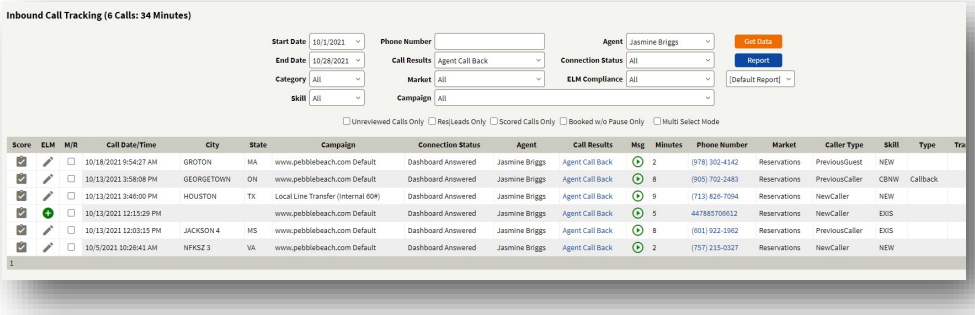


    - The report will generate with the list of primary agents and highlight any call disposition categories that need to be audited.
    - The percentages that in orange are outside the average.

⇒ The most common categories to audit are: **24hr PB, Day Guest Golf,** and **General Inquiry**. If these categories are not highlighted then check the other golf categories or any category that is abnormally different for that agent.

Agent	Answered	Res|Lead Calls	Res|Lead Rate	Conv%	24 Hour PB Golf	6 Mo. SB/DM Golf	90 Day SG Golf	Agent Call Back	Checking on Waitlist	Chg/Rev Existing Res
Jasmine Briggs	169	49	29.0 %	59.2 %	0.0 %	1.2 %	1.8 %	3.6 %	0.0 %	16.6 %
Total	**11,106**	**2,895**	**26.1 %**	**65.1 %**	**2.2 %**	**1.0 %**	**0.9 %**	**1.2 %**	**0.1 %**	**14.6 %**

2. **Click into any of the percentages** that are marked in orange to investigate as to why they are not within average range.
    - Once you click into a percentage, you will see a list of calls with that call disposition.



⇒ This will take training and institutional knowledge to work this report and to know what the call disposition should be.

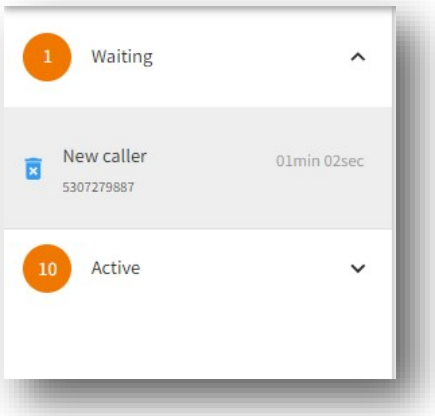
3. **Listen to the call**, you many need to only listen to the beginning and end of the recording.
4. **Open the lead** if there is one attached to **read the notes** from the specific call.
5. You can also **open the reservation** if you need **further information**.
6. Once you have **gathered enough information you can determine if the call disposition was accurate or not**.
7. If you need to change the disposition:
    a. **Click the Call Results** in blue for the specific call and choose the appropriate disposition.
    b. Make sure the **Include in Audit report** is checked so the adjustment is accounted for in the Agent Incentive.
8. After going through this process, if there are **still highlighted categories** for your team of agents, **send an email to _ResMOD** to advise.

Dismiss a Call

When a call is coming through Revinate and putting each Agent into **RONA** [Roll Over Next Agent | Roll Over No Answer] even though they are in fact answering the call, we need to manually end the call in Revinate.
We may also need to discard a call if an Agent has disconnected but in Revinate the call is still ongoing.

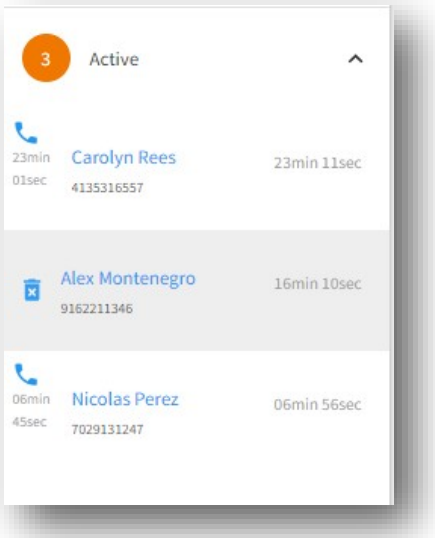
RONA Call

1. Instruct the Agents that might receive that call to go into Project status, this will prevent the call from continuing to throw Agents into RONA
2. Obtain the phone number that is throwing the Agents into RONA. Usually Agents enter this phone number into chat.
3. Click Waiting to expand the list of calls still in the queue
4. Click the phone number that is causing issues
5. Press Ctrl + K on your keyboard until a trash can icon appears.
6. Click the trash can icon to discard the call



Ongoing Call

1. The Agent has disconnected from the guest but Revinate still thinks they are in a call.
2. Click Active to expand the list of Ongoing Calls
3. Click the Agent that is having trouble ending their call
4. Press Ctrl + K on your keyboard until a trash can icon appears.
5. Click the trash can icon to discard the call



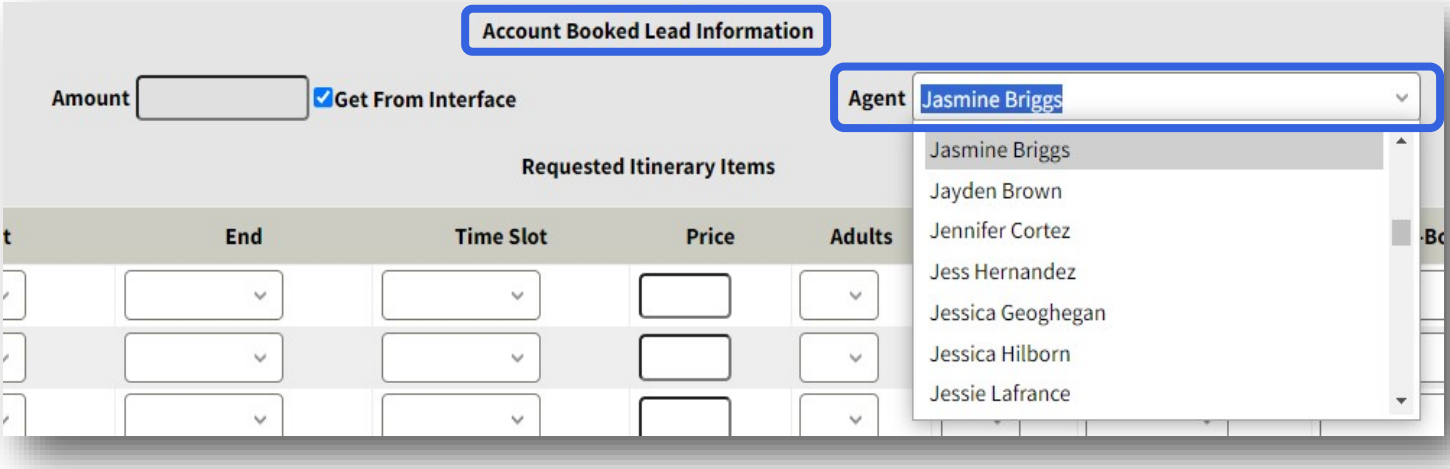
Give Agent Revenue Credit

Revenue for Reservation Sales Agents is tracked through Revinate. When an agent marks a lead as 'Booked', it will list them as the Agent to receive credit for the booking.

Agents may book reservations that have been planned by another Agent, in these cases we ask the booking Agent to leave the lead 'In Process' and have a Supervisor marked it 'Booked' for the original planning Agent.

1. Open the lead in Revinate > Click Leads > Click Search/Create Lead
2. Type in the itinerary number (Or ELM Lead #) into the Search field > Click Search
3. Change the Lead Status from In-Process to Booked
4. The Lead will change and display Account Booked Lead Information below the Lead Status and Itinerary #
5. Change the Agent to the Agent that should receive revenue credit

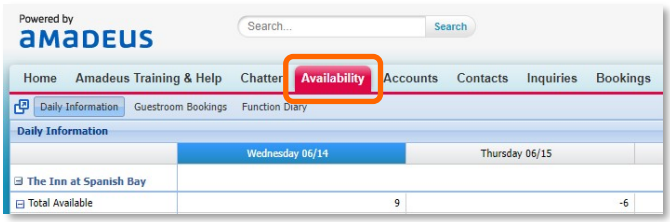
   Note: Credit for E-Desk leads should be given to the individual Agent who worked the lead, but the Assigned Agent should remain set to the team (Travel Desk or ResLeads)

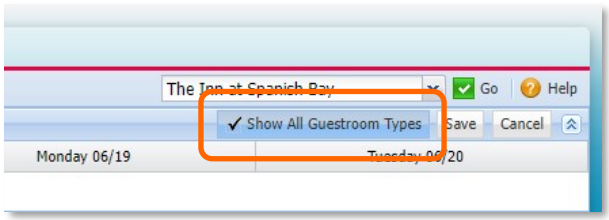


Check Suite Availability Amadeus

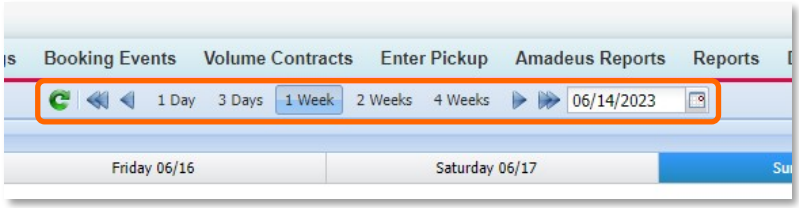
Amadeus: This is a website through salesforce that is used by group sales to track their reservations. As supervisors we would check this software to determine if our agents can reserve suits at the Inn at Spanish Bay.

Log in to Amadeus > Select Availability tab > Select Show All Guestroom Types box

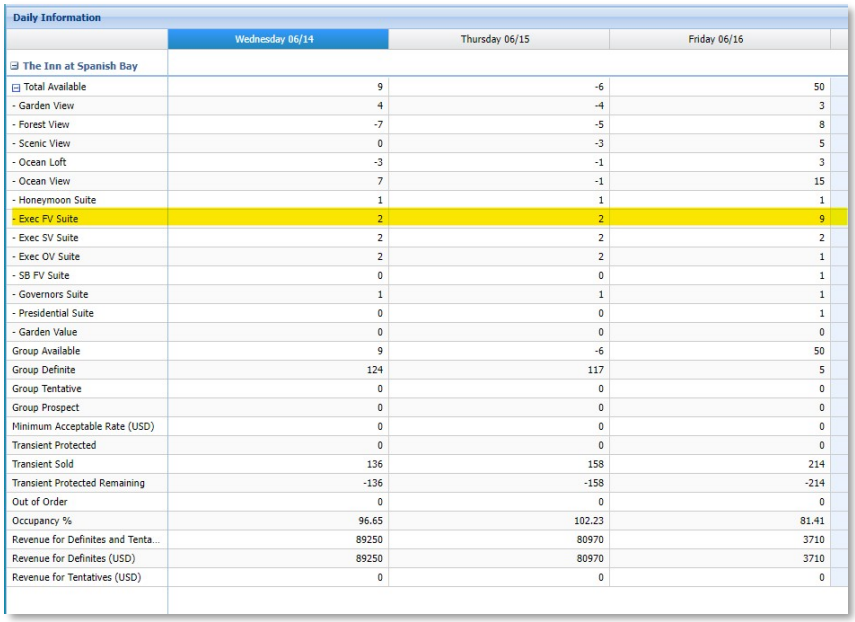




1. Use the arrows in the date field to select the desired date of arrival or type in the date at mm/dd/yyyy



2. Review results; looking at how many of the requested room(s) are available for the requested dates.
   EXAMPLE: There are (2) BSF5's available for 6.14.23 (2) available for 6.15.23 and (9) available for 6.16.23.



Daily Information

	Wednesday 06/14	Thursday 06/15	Friday 06/16
The Inn at Spanish Bay			
Total Available	9	-6	50
- Garden View	4	-4	3
- Forest View	-7	-5	8
- Scenic View	0	-3	5
- Ocean Loft	-3	-1	3
- Ocean View	7	-1	15
- Honeymoon Suite	1	1	1
- Exec FV Suite	2	2	9
- Exec SV Suite	2	2	2
- Exec OV Suite	2	2	1
- SB FV Suite	0	0	1
- Governors Suite	1	1	1
- Presidential Suite	0	0	1
- Garden Value	0	0	0
Group Available	9	-6	50
Group Definite	124	117	5
Group Tentative	0	0	0
Group Prospect	0	0	0
Minimum Acceptable Rate (USD)	0	0	0
Transient Protected	0	0	0
Transient Sold	136	158	214
Transient Protected Remaining	-136	-158	-214
Out of Order	0	0	0
Occupancy %	96.65	102.23	81.41
Revenue for Definites and Tenta...	89250	80970	3710
Revenue for Definites (USD)	89250	80970	3710
Revenue for Tentatives (USD)	0	0	0

3. Advise the agent of applicable room availability.
4. Log out.

BSF5 = Forest Executive **BSF1** = Presidential Suite **BSO5** = Honeymoon Suite

BSC5 = Scenic Executive **BSF2** = Spanish Bay Suite

BSO4 = Ocean Executive **BSF3** = Governor's Suite

Build a KRA 1/6

KRA stands for Key Result Areas. KRAs are bi-weekly one on one meetings between agent and supervisor. It is intended to allow time for supervisors to provide feedback and agents to ask questions.
Overall we are looking for progress with each agent.

KRA Template:

1. Use the **template** located:
   \\falcon\DEPT SHARES\RES\RESORT RESERVTIONS\MANAGEMENT\SUPERVISORS\KRAs
2. Utilize these **reports and resources** to build a KRA
   a. Agent Ranking - Report from Managers
   b. Inbound Conversion Report - Revinate
   c. Agent Handle Time - Revinate
   d. Call Scoring Rubric - Revinte & Z Drive
3. One KRA should focus on the **Agent Ranking**, the other KRA that month should focus on the other **metrics pulled from Revinate and call scoring**.
4. All KRAs should include current **goals** that the agent is working towards and progress status of each goal.

Agent Ranking:

The Agent Ranking is sent by managers each month to the room sales team.

1. **Input** the **data** from the Agent Ranking into the excel sheet '**Agent Ranking Coaching Template**'
   ⇒ This sheet has conditional formatting such that the box will color code according to the section you input the data
2. Take a **snippit** of the data and **paste** it into the KRA document.
   ⇒ This will help you interpret the data and use it to coach your agent
   ⇒ It will also allow them to see it in a visual format
3. Click **Clear Data** to clear out the sheet and use it to build your next agent's KRA
4. You can include any **Year to Date Agent Data** to more easily see trends throughout the year

Example of Agent Ranking

November 2023 - Agent Ranking

Total Booked Revenue	Booked Revenue Score	Average Daily Rate	ADR Score	Inbound Calls	Outbound calls	Total Calls	Uptime	Calls Per Hour	Calls Per Hour Score	Wrap Up Time Average	in seconds	Wrap Up Time Score	Project Time (Total Hours for Month)	in seconds	Project Time Score	Available %	Available % Score	Non-Compliant Call %	Non-Compliant Call Score	Call Accuracy	Call Accuracy Score	Total Points Earned	Ranking
$832,416	30	$1,516	10	378	70	448	143	3.13	4	1:42	102	10	5:40	340	10	84%	8	0%	5	0%	5	82	1
$640,934	20	$1,349	4	438	60	498	161	3.09	4	2:06	126	10	5:43	343	10	90%	10	2%	5	0%	5	68	2
$516,669	15	$1,566	10	353	31	384	143	2.69	2	1:42	102	10	3:02	182	10	87%	10	2%	5	2%	5	67	3
$622,548	20	$1,384	6	385	79	464	173	2.68	2	2:48	168	8	6:14	374	10	88%	10	2%	5	1%	5	66	4
$526,514	15	$1,346	4	448	5	453	153	2.96	2	1:36	96	10	3:42	222	10	90%	10	1%	5	0%	5	61	5
$422,445	10	$1,441	8	438	20	458	139	3.29	4	1:54	114	10	7:32	452	8	88%	10	0%	5	0%	5	60	6
$306,125	5	$1,380	6	563	27	590	163	3.62	6	1:54	114	10	3:26	206	10	86%	8	0%	5	0%	5	55	7
$508,930	15	$1,231	0	317	55	372	137	2.72	2	2:48	168	8	2:20	140	10	90%	10	3%	4	0%	5	54	8
$385,797	5	$1,343	4	418	33	451	160	2.82	2	1:18	78	10	6:17	377	10	86%	8	2%	5	1%	5	49	9
$412,764	10	$1,353	6	352	17	369	141	2.62	2	3:12	192	6	7:01	421	8	83%	8	3%	4	1%	5	49	9
$400,809	10	$1,199	0	330	41	371	136	2.73	2	2:36	156	8	6:26	386	10	86%	8	1%	5	0%	5	48	11
$368,249	5	$1,350	6	264	44	308	112	2.75	2	3:42	222	4	6:57	417	10	84%	8	1%	5	0%	5	45	12
$403,504	10	$1,291	2	355	38	393	158	2.49	2	3:48	228	4	6:12	372	10	84%	8	6%	3	2%	5	44	13
$153,424	0	$1,330	4	320	2	322	134	2.40	2	1:48	108	10	5:26	326	10	84%	8	4%	4	3%	4	42	14
$291,388	0	$1,373	6	263	5	268	127	2.11	2	4:24	264	2	4:03	243	10	82%	8	7%	2	0%	5	35	15
$186,936	0	$1,348	4	168	52	220	92	2.39	2	6:30	390	0	6:56	416	10	79%	6	6%	3	1%	5	30	16
$436,216		$1,363		362	36.2	398	142	2.78		2:44	164			326		86%		3%		1%			

Build a KRA 2/6

Example of Agent Ranking Coaching Template:

Total Points Earned	65		Ranking	5	

Total Booked Revenue	Criteria	Points
	1 mil+	40
	900K	35
	800K	30
	700K	25
$600,000	600K	20
	500K	15
	400K	10
	300K	5
	Under 300K	0

Project Time (Total Hours for Month)	Criteria	Points
7:00	Under 7:00	10
	7:01-9:00	8
	9:01-11:00	6
	11:01-13:00	4
	13:01-15:00	2
	over 15:00	0

Average Daily Rate	Criteria	Points
	$1450+	10
$1,445	$1400 - $1449	8
	$1350 - $1399	6
	$1300 - $1349	4
	$1250 - $1299	2
	Under $1250	0

Available %	Criteria	Points
	91% - 87%	10
	86% - 82%	8
78%	81% - 77%	6
	76% - 72%	4
	71% - 62%	2

Calls Per Hour	Criteria	Points
	4.00 - 4.59	10
3.99	3.66-3.99 or 4.6-5.09	8
	3.40-3.65 or 5.1-5.59	6
	3.00-3.39 or 5.6-5.99	4
	< 3 or > 6	2

Non-Compliant Call %	Criteria	Points
	0% - 2%	5
3%	3% - 4%	4
	5% - 6%	3
	7% - 8%	2
	> 8%	1

Wrap Up Time Average	Criteria	Points
	Under 2:30	10
2:30	2:30 - 3:00	8
	3:01 - 3:30	6
	3:31 - 4:00	4
	4:01 - 4:30	2
	4:31+	0

Call Accuracy	Criteria	Points
	0% - 2%	5
	3% - 4%	4
	5% - 6%	3
	7% - 8%	2
9%	> 8%	1

Example of Year to Date Data:

June 22 - April 23

AGENT 1	Rev	ADR	Calls	Wrap	Proj	Avail	Compliance	Accuracy	Points	Rank
June	$430,971	$1,263	3.34	4:54	8:38	76%	1%	3%	43	19
July	$232,903	$1,189	3.81	4:42	6:15	82%	1%	0%	32	19
August	$419,648	$1,410	3.89	3:12	10:02	84%	2%	1%	56	14
September	$494,622	$1,302	3.26	3:18	12:37	81%	0%	1%	52	12
October	$333,257	$1,199	3.14	2:42	7:41	84%	10%	0%	42	13
November	$457,595	$1,201	3.27	2:42	7:43	83%	8%	2%	51	7
December	$336,465	$1,266	3.11	3:48	8:58	80%	4%	1%	44	12
January	$515,498	$1,286	2.94	3:36	7:42	81%	10%	1%	51	10
February	$489,430	$1,311	3.13	4:06	11:36	79%	9%	1%	46	12
Total/Avg	$3,710,389	$1,270	3.321111	3:40	9:01	81%	5%	1%		

AGENT 2	Rev	ADR	Calls	Wrap	Proj	Avail	Compliance	Accuracy	Points	Rank
June	$420,101	$1,386	5.1	2:48	7:00	90%	7%	5%	63	6
July	$498,735	$1,343	5.53	2:42	5:35	88%	2%	0%	68	4
August	$508,885	$1,302	4.31	3:00	9:20	90%	1%	0%	69	5
September	$391,196	$1,213	3.91	2:48	9:59	88%	2%	1%	51	13
October	$439,099	$1,311	3.25	2:36	7:21	88%	2%	0%	60	4
November	$525,475	$1,415	3.24	3:00	7:52	87%	8%	0%	62	4
December	$551,828	$1,291	3.57	3:12	8:50	86%	6%	1%	57	7
January	$508,578	$1,298	3.66	3:54	12:06	86%	4%	1%	54	9
February	$510,443	$1,419	3.49	4:12	7:46	87%	2%	1%	59	8
Total/Avg	$4,354,340	$1,331	4.006667	3:08	8:25	88%	4%	1%		

AGENT 3	Rev	ADR	Calls	Wrap	Proj	Avail	Compliance	Accuracy	Points	Rank
June	$425,229	$1,306	4.1	4:24	8:22	86%	1%	0%	54	14
July	$438,148	$1,174	4.21	4:24	9:02	85%	2%	0%	48	18
August	$321,990	$1,375	3.61	5:00	6:46	86%	1%	0%	45	19
September	$334,545	$1,216	3.43	4:54	6:59	87%	3%	0%	42	15
October	$245,761	$1,192	2.87	3:48	8:07	86%	0%	0%	33	15
November	$230,483	$1,283	2.59	4:12	4:32	85%	14%	1%	36	12
December	$301,608	$1,127	2.79	4:24	8:18	86%	14%	1%	39	14

The Agent Ranking Coach Template and the Year to Date Data Template can be found here:
\\falcon\DEPT SHARES\RES\RESORT RESERVTIONS\MANAGEMENT\SUPERVISORS\KRAs

Metric Goals:

Total Booked Revenue - Above 700K

⇒ This is subject to the highest revenue achieved, if the highest revenue was 500K than that would be considered good metrics for that month

Average Daily Rate - $1400 and above

Calls Per Hour - Between 3.5 and 4.5 calls

⇒ This is subject to call volume, with less calls overall, the average to achieve will also be less

Average Wrap Up Time - Under 3:00 minutes

Project Time - Under 9 hours

Available % - Above 82%

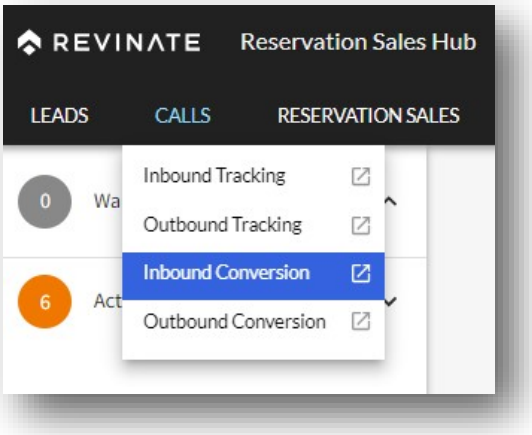
Non-Compliant Call % - Below 4%

Call Accuracy - Below 4%

Build a KRA 3/6

Inbound Conversion:

Inbound Conversion is a report run through Revinate that



1. Navigate to **Revinate**
2. Click **Calls**
3. Click **Inbound Conversion**
4. Set the **Start Date** to the beginning of the current month
5. Leave the **End Date** as todays date
6. Click **Get Data** to refresh report
7. Click the top of the **Booked Revenue** column to organize the report by highest to lowest revenue
8. Take **three separate snippets** of the report:
    - One of the categories on the top row
    - One of the row pertaining to the agent's KRA that you are building
    - And one of the totals on the last row
9. **Paste** these into the KRA

Example of Inbound Conversion Report:

Agent	Answered	Booked Revenue	Inbound Call Booked Revenue	Res|Lead Calls	Res|Lead Rate	Rev / Answered	Rev / Res|Lead	Rev / Booked	Conv%	Booked
Annique Geary	134	$278,952.32	$234,842.32	67	50.0 %	$1,752.55	$3,505.11	$6,021.60	58.2 %	39
Debbie Linsao-Sherman	95	$203,944.60	$153,474.60	40	42.1 %	$1,615.52	$3,836.87	$8,077.61	47.5 %	19
Dolores Amir	120	$195,545.72	$173,155.72	48	40.0 %	$1,442.96	$3,607.41	$6,659.84	54.2 %	26
Michael Saavedra	63	$192,715.10	$164,215.10	26	41.3 %	$2,606.59	$6,315.97	$10,263.44	61.5 %	16
Kylie Turnbull	124	$170,305.00	$155,065.00	50	40.3 %	$1,250.52	$3,101.30	$9,121.47	34.0 %	17
Carolyn Rees	145	$165,213.18	$155,203.18	43	29.7 %	$1,070.37	$3,609.38	$7,390.63	48.8 %	21
Kelley Minton	18	$165,014.00	$5,085.50	7	38.9 %	$282.53	$726.50	$2,542.75	28.6 %	2
Brandi Lasater	141	$159,734.11	$117,484.11	42	29.8 %	$833.22	$2,797.24	$4,351.26	64.3 %	27
Alex Montenegro	72	$152,652.39	$14,855.00	37	51.4 %	$206.32	$401.49	$781.84	51.4 %	19
Kandace Masangkay-Anderson	135	$141,225.00	$95,645.00	53	39.3 %	$708.48	$1,804.62	$3,085.32	58.5 %	31
Oliver Nodora	133	$136,225.00	$136,225.00	61	45.9 %	$1,024.25	$2,233.20	$5,239.42	42.6 %	26
Rik Olsen	81	$126,123.30	$109,438.30	27	33.3 %	$1,351.09	$4,053.27	$5,759.91	70.4 %	19
Chris Drennen	98	$122,270.00	$96,965.00	41	41.8 %	$989.44	$2,365.00	$4,215.87	56.1 %	23
Total	**6,129**	**$3,413,001.37**	**$2,395,294.33**	**989**	**16.1 %**	**$390.81**	**$2,421.94**	**$4,246.98**	**57.0 %**	**564**

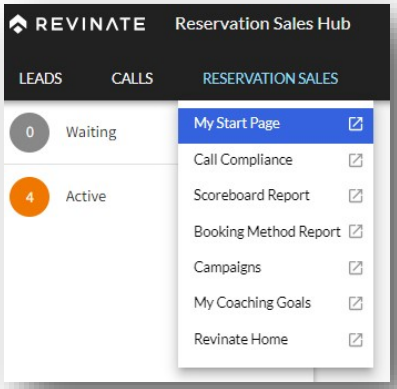
Answered - Number of calls answered through Revinate
Booked Revenue - The overall revenue that agent has made for the set dates
Inbound Call Booked Revenue - The amount of revenue for inbound calls only (excluding outbound calls)
Res|Lead Rate - The percentage of total answered calls that were lead calls (Booked, Not Booked, Hot Lead)
Rev/Booked - The amount of revenue per call with the 'Booked' call disposition
Booked - The amount of calls with the 'Booked' call disposition

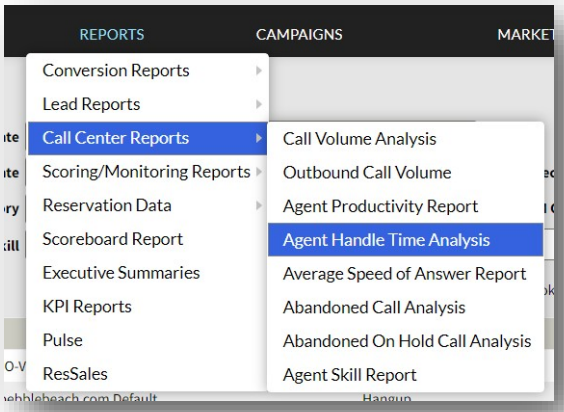
Build a KRA 4/6

Agent Handle Time:

Agent Handle Time is a combination of the average time an agents spends on the phone with guests and the average time an agents spends in wrap up after the call cleaning up their reservation.
The report will show the data in both seconds and minutes, we only use **the minutes portion** for coaching.

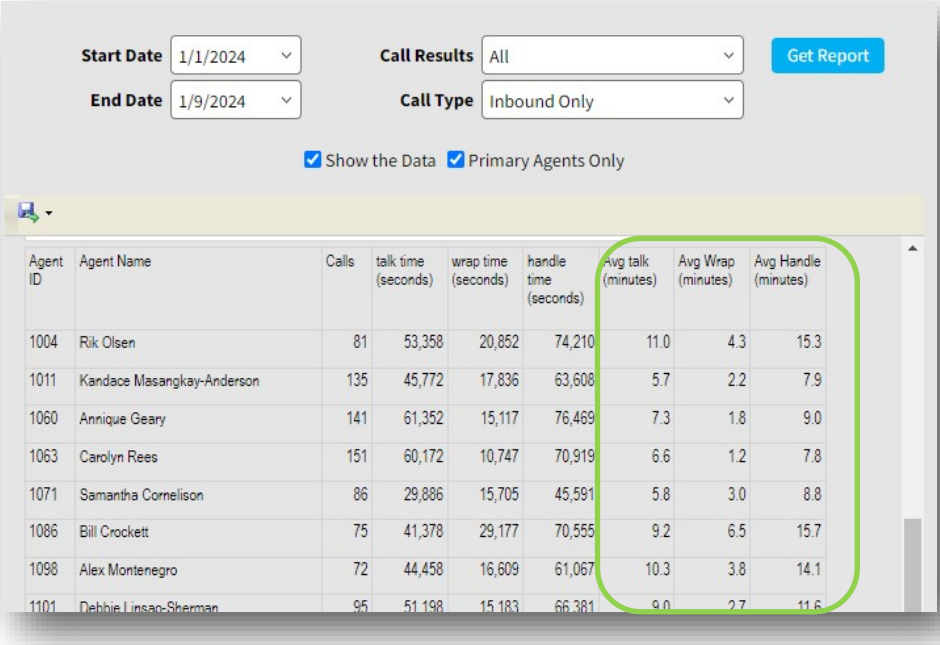
1. Navigate to **Revinate**
2. Click **Reservation Sales**
3. Click **My Start Page**
4. Click **Reports**
5. Hover over **Call Center Reports**
6. Click **Agent Handle Time Analysis**





7. **Start Date** should be the beginning of the current month
8. **End Date** should be todays date
9. Check the box for **Show the Data** and for **Primary Agents Only**
10. Click **Get Report**
11. Scroll down to view the results
12. Take **three snippits**:
    a. One of the top row categories
    b. One of the agents data you are building the KRA for
    c. One of the bottom row totals
13. **Paste** these into the KRA

Example of Agent Handle Time Report:



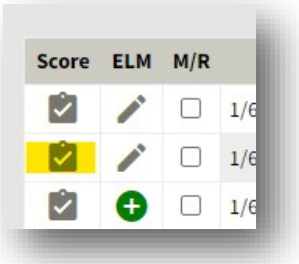
Agent ID	Agent Name	Calls	talk time (seconds)	wrap time (seconds)	handle time (seconds)	Avg talk (minutes)	Avg Wrap (minutes)	Avg Handle (minutes)
1004	Rik Olsen	81	53,358	20,852	74,210	11.0	4.3	15.3
1011	Kandace Masangkay-Anderson	135	45,772	17,836	63,608	5.7	2.2	7.9
1060	Annique Geary	141	61,352	15,117	76,469	7.3	1.8	9.0
1063	Carolyn Rees	151	60,172	10,747	70,919	6.6	1.2	7.8
1071	Samantha Cornelison	86	29,886	15,705	45,591	5.8	3.0	8.8
1086	Bill Crockett	75	41,378	29,177	70,555	9.2	6.5	15.7
1098	Alex Montenegro	72	44,458	16,609	61,067	10.3	3.8	14.1
1101	Debbie Linsao-Sherman	95	51,198	15,183	66,381	9.0	2.7	11.6

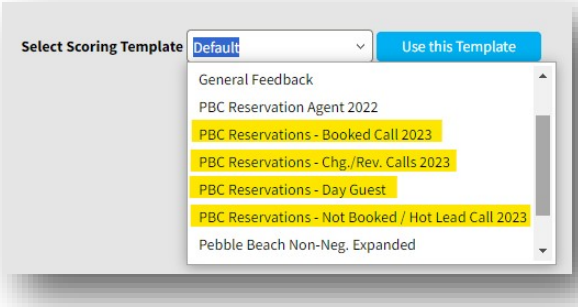
Build a KRA 5/6

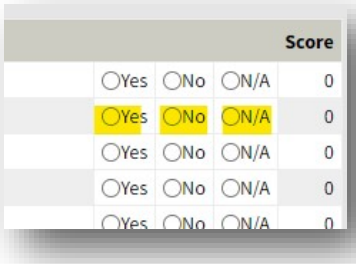
Call Scoring Rubric:

The call scoring rubric should be utilized within Revinate but a copy can be found in the Digital Binder.
Call scoring is an all or nothing for each row of the rubric.
Supervisors score 3 calls for each agent a month making sure to score a combination of (1) Booked, (1) Not Booked / Hot Lead, and (1) Change Revise call disposition.

1. Navigate to **Revinate**
2. Click **Calls**
3. Click **Inbound Tracking**
4. **Start Date** should be the beginning of the current month
5. **End Date** should be todays date
6. Change **Call Result** to the call disposition where you want to score a call
7. Select the **Agent** on your team whose call you want to score
8. Click **Get Data**
9. Click the **clipboard icon** in the Score column for the call that you want to score
10. Select the **Scoring Template** that is appropriate for the call you want to score
11. Click the **appropriate radio button** for each criteria - Use NA for when the criteria does not apply

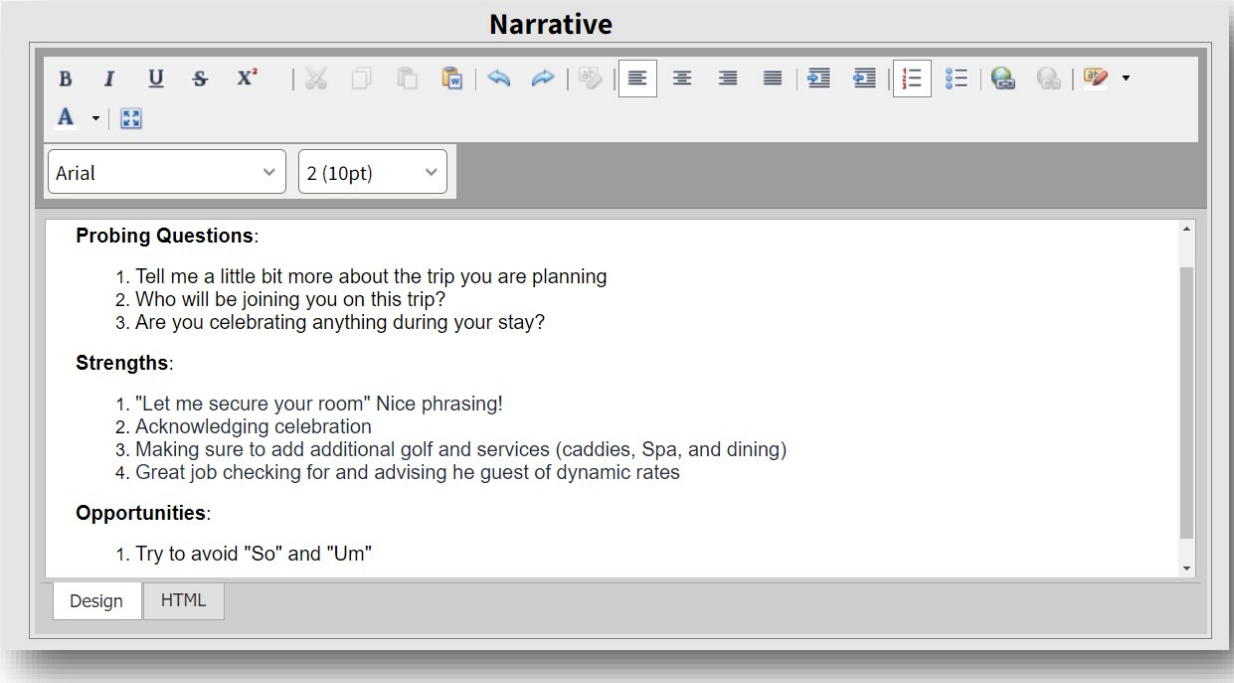






12. Provide **narrative feedback** in the Narrative section calling out the probing questions that the agent used, what strengths they had during the call, and any opportunities they have to work on.
13. Once the call scoring is completed, Click **Update**
14. **Email** the scored call to the agent and yourself
15. Input the **score** and **narrative feedback** into the **KRA**

Example of Narrative Feedback:



Build a KRA 6/6

Example of Agent Ranking KRA

Date of KRA

Agent Name
KRA COACHING PLAN

RESERVATION SALES AGENT

Agent Ranking:

Total Points Earned	44			Ranking	13	
Total Booked Revenue	**Criteria**	**Points**		**Project Time (Total Hours for Month)**	**Criteria**	**Points**
	1 mil+	40		8:12	Under 12:00	10
	900K	35			12:01 - 14:00	8
	800K	30			14:01 - 18:00	6
	700K	25			18:01 - 24:00	4
	600K	20			24:01 - 30:00	2
	500K	15			Over 30:00	0
$415,580	400K	10				
	300K	5				
	Under 300K	0				
Average Daily Rate	**Criteria**	**Points**		**Available %**	**Criteria**	**Points**
	$1300+	10			91% - 87%	10
$1,288	$1250-$1299	8		86%	86% - 82%	8
	$1200-$1249	6			81% - 77%	6
	$1150-$1199	4			76% - 72%	4
	$1100-$1149	2			71% - 62%	2
	Under $1100	0				
Calls Per Hour	**Criteria**	**Points**		**Non-Compliant Call %**	**Criteria**	**Points**
	4.75 or 5.5	10			0% - 2%	5
	4.5 - 4.74 or 5.6 - 6	8			3% - 4%	4
	4.25 - 4.49 or 6 - 6.5	6			5% - 6%	3
	4 - 4.24 or 6.6 - 7	4			7% - 8%	2
2.98	<4 or >7	2		24%	>8%	1
Wrap Up Time Average	**Criteria**	**Points**		**Call Accuracy**	**Criteria**	**Points**
	Under 2:30	10		1%	0% - 2%	5
	2:30 - 3:00	8			3% - 4%	4
	3:01 - 3:30	6			5% - 6%	3
	3:31 - 4:00	4			7% - 8%	2
	4:01 - 4:30	2			>8%	1
6:24	4:31+	0				

Year to Date:

	Rev	ADR	Calls	Wrap	Proj	Avail	Compliance	Accuracy	Points	Rank
June	$425,229	$1,306	4.1	4:24	8:22	86%	1%	0%	54	14
July	$438,148	$1,174	4.21	4:24	9:02	85%	2%	0%	48	18
August	$321,990	$1,375	3.61	5:00	6:46	86%	1%	0%	45	19
September	$334,545	$1,216	3.43	4:54	6:59	87%	3%	0%	42	15
October	$245,761	$1,192	2.87	3:48	8:07	86%	0%	0%	33	15
November	$230,483	$1,283	2.59	4:12	4:32	85%	14%	1%	36	12
December	$301,608	$1,127	2.79	4:24	8:18	86%	14%	1%	39	14
January	$425,839	$1,345	2.95	5:48	7:53	86%	15%	2%	46	14
February	$415,580	$1,288	2.98	6:24	8:12	86%	24%	1%	44	13
Total/Avg	$3,139,183	$1,256	3.281111	4:48	7:34	86%	8%	1%		

Goals:

- **New** – Make sure to close out calls with:
  - Offering to assist with anything else
  - Thank you for calling Pebble Beach Resorts, have a great day
- **New** – Reduce average wrap up time to 3.30
  - What do you feel like is utilizing the larger wrap up time?
- **Goal Met!** – Streamline answers with guest to reduce confusion and increase call efficiency.
  - This has improved!
- **Continued** – Improve lead not booked/hot lead creation parameters; offer to follow up with the guest, set a reminder for that follow up, and detail said follow up in your Navis notes.
- **Continued** –
  - Call Compliance was very high and all from not getting an email– 24%
  - Improve Call Compliance by asking for that email. There are a couple different ways you can ask for the email depending on the flow of the call.
    - Future promos
    - Send a quote
    - Send contact details for when they are ready to book or if they have questions

Example of Call Scoring KRA:

Date of KRA

Agent Name
KRA COACHING PLAN

RESERVATION SALES AGENT

Inbound Conversion:

Agent	Answered	Booked Revenue	Inbound Call Booked Revenue	Rev/Lead Calls	Rev/Lead Rate	Rev / Answered	Rev / Rev/Lead	Rev / Booked	Conv%	Booked
	140	$286,847.32	$241,957.32	70	50.0%	$1,728.27	$3,456.53	$6,048.93	57.1%	40
Total	6,240	$3,767,270.37	$2,644,332.33	1,014	16.3%	$423.80	$2,608.02	$4,583.24	56.9%	577

Agent Handle Time:

Agent ID	Agent Name	Calls	talk time (seconds)	wrap time (seconds)	handle time (seconds)	Avg talk (minutes)	Avg Wrap (minutes)	Avg Handle (minutes)
1004		90	58,050	22,941	80,991	10.8	4.2	15.0
	Total	2,290	1,058,766	377,118	1,435,884	7.7	2.7	10.5

Call Scoring:

Summary of Debora's scored calls: Avoid DRAG at the beginning of the call, don't forgot to offer to call the guest back, and remember those probing questions to understand what the guest is looking for and what their trip entails.

Booked Call 94%
Caller: Liz Rohrman
Probing Questions:
1. When were you looking at coming out? (DRAG)
2. Will it be golf for just him?
3. Did you have a chance to look at the website for rooms?
4. Would you be interested in a room with an Ocean View?

Strengths:
1. "Let me secure your room" Nice phrasing!
2. Acknowledging celebration
3. Making sure to add additional golf and services (caddies, Spa, and dining)
4. Great job checking for and advising he guest of dynamic rates

Opportunities:
1. Great probing questions; try to ask them before you quote avail, good job circling back to these questions.
2. Try to avoid "So" and "Um"

Goals:

- **Continued** – Improve Call Compliance by asking for that email. There are a couple different ways you can ask for the email depending on the flow of the call.
  - Future promos
  - Send a quote
  - Send contact details for when they are ready to book or if they have questions
- **Continued** - With cancelations calls, make sure to offer to change dates first (even if guest is outside 14cxl) to try and keep those room nights on the books.
- **New** – Make sure to offer that follow up call, this will increase successful lead management and increase chances for booked revenue.

Agent Ranking & Incentive

The Agent Ranking and the Incentive Results are sent by managers each month to the reservations sales agents.

- **The Agent Ranking** is a list of each individual based off of their overall revenue, accuracy, and efficiency. Each category that the agent is responsible for fits within a certain range and will correlate to a certain number of points.
- **The Incentive Results** are the payout based off of the ranking and the number of hours worked, it includes both the individual incentive that the reservations sales agents receive and the team incentive that the EDesk, Supervisors, and the coordinators receive. To be eligible for the incentive you need to work at least 112 hours that month.

November 2023 - Agent Ranking

Total Booked Revenue	Booked Revenue Score	Average Daily Rate	ADR Score	Inbound Calls	Outbound calls	Total Calls	Uptime	Calls Per Hour	Calls Per Hour Score	Wrap Up Time Average	In seconds	Wrap Up Time Score	Project Time (Total Hours for Month)	In seconds	Project Time Score	Available %	Available % Score	Non-Compliant Call %	Non-Compliant Call Score	Call Accuracy	Call Accuracy Score	Total Points Earned	Ranking
$832,416	30	$1,516	10	378	70	448	143	3.13	4	1:42	102	10	5:40	340	10	84%	8	0%	5	0%	5	82	1
$640,934	20	$1,349	4	438	60	498	161	3.09	4	2:06	126	10	5:43	343	10	90%	10	2%	5	0%	5	68	2
$516,669	15	$1,566	10	353	31	384	143	2.69	2	1:42	102	10	3:02	182	10	87%	10	2%	5	2%	5	67	3
$622,548	20	$1,384	6	385	79	464	173	2.68	2	2:48	168	8	6:14	374	10	88%	10	2%	5	1%	5	66	4
$526,514	15	$1,346	4	448	5	453	153	2.96	2	1:36	96	10	3:42	222	10	90%	10	1%	5	0%	5	61	5
$422,445	10	$1,441	8	438	20	458	139	3.29	4	1:54	114	10	7:32	452	8	88%	10	0%	5	0%	5	60	6
$306,125	5	$1,380	6	563	27	590	163	3.62	6	1:54	114	10	3:26	206	10	86%	8	0%	5	0%	5	55	7
$508,930	15	$1,231	0	317	55	372	137	2.72	2	2:48	168	8	2:20	140	10	90%	10	3%	4	0%	5	54	8
$385,797	5	$1,343	4	418	33	451	160	2.82	2	1:18	78	10	6:17	377	10	86%	8	2%	5	1%	5	49	9
$412,764	10	$1,353	6	352	17	369	141	2.62	2	3:12	192	6	7:01	421	8	83%	8	3%	4	1%	5	49	9
$400,809	10	$1,199	0	330	41	371	136	2.73	2	2:36	156	8	6:26	386	10	86%	8	1%	5	0%	5	48	11
$368,249	5	$1,350	6	264	44	308	112	2.75	2	3:42	222	4	6:57	417	10	84%	8	1%	5	0%	5	45	12
$403,504	10	$1,291	2	355	38	393	158	2.49	2	3:48	228	4	6:12	372	10	84%	8	6%	3	2%	5	44	13
$153,424	0	$1,330	4	320	2	322	134	2.40	2	1:48	108	10	5:26	326	10	84%	8	4%	4	3%	4	42	14
$291,388	0	$1,373	6	263	5	268	127	2.11	2	4:24	264	2	4:03	243	10	82%	8	7%	2	0%	5	35	15
$186,936	0	$1,348	4	168	52	220	92	2.39	2	6:30	390	0	6:56	416	10	79%	6	6%	3	1%	5	30	16
$436,216		$1,363		362	36.2	398	142	2.78		2:44	164			326		86%		3%		1%			

Categories:

Total Booked Revenue - The overall (including inbound and outbound) revenue that an agent made within the current month. This is tracked through Revinate where the lead is marked booked and the Agent listed under 'Account Booked Lead Information' will be the agent to get revenue credit.

Average Daily Rate - The average nightly rate before tax of the rooms the agent sold for the month. This is a report through R&R.

Calls Per Hour - The average # of calls an agent handled (Inbound and Outbound) per hour while logged into Revinate. This is tracked through Revinate - the number of calls the agent took that month divided by the total hours uptime they have in Revinate.

Wrap Up Time Average - The average time and agent spends in wrap up after a call. This is tracked through Revinate.

Project Time - The total time the agent spent in project for the month. This is tracked through Revinate.

Available % - The percentage of time that an agent is available to take calls. This includes being in ready, in a call, or in wrap up from a call. This is tracked through Revinate.

Non-Compliant Call % - The percentage of unfixed calls and leads per call compliance. This is tracked in Revinate.

Call Accuracy - The percentage of call dispositions that needed to be adjusted during call auditing. This is tracked in Revinate.

KRA Data Analysis & Feedback

Utilize the checklist below as a guideline to coach and provide feedback for the Agents

Metrics / Data	• Make sure the Agent understands what the metrics / data mean • Make sure the Agent knows how their actions affect each metric / data point • Goals should be clear and measurable • Goals should have an achievable timeframe
Check in with Agent	• What is your favorite part of the job so far? • What is your least favorite part? • What have you worked on this past week? • What has been challenging to handle or difficult to understand? • How can we provide more support for you in your role? • How do you feel you are progressing with _____? • What do you want to work on or get better at?
Daily Booking Report	• Look for patterns and frequency of errors • Is the Agent starting with high category rooms? What room types are the booking? • Is the Agent booking full itineraries? – Room+Golf+Dining • Check accuracy of Lead Forms and Call Dispositions • Does the agent have professional and timely Revinate correspondences
Action Center/ Lead Mgmt.	• 15 or fewer In-Process Leads (This can very depending on the Agent) • All In-Process Leads have Email Reminders • No Unread Email Replies 2+ days out • No Autocomplete Leads • Any Call Compliance issues have been fixed
Call Scores	• Does the Agent display accurate Resort Knowledge? • Do they have good Call Control? - Not letting the guest completely derail the call flow • Call flow from guest's perspective - Is the Agent able to transition from describing the room to asking for the sale? • Attempts to overcome objections - Offer solutions like alternate dates or room categories • Call closing – Are there missed opportunities to close the sale or offer follow up call?
Handle Time Analysis	• Wrap up and Talk Time relative to the average ◊ If Wrap Up time is high - Are they struggling with anything? ◊ Wrap Up can be lower if booking accuracy is high ◊ High/low talk time can lead to high/low revenue per call - Agent may not be spending enough time with the guest: (1) not asking probing questions (2) not offering solutions (3) not offering follow up call
Productivity Analysis	• Time spent in Project - should be lower than 7hrs for the month • Ideal ratio of available to unavailable = 80% /20%
Inbound Conversion	• Revinate Conversion = Booked Leads / Res Lead Calls - Ideally 50%-60% • Res Lead Rate = Answered Calls / Res Lead Calls - Ideally 35% • If agent is below 35%: ◊ Check talk time - Agent may not be spending enough time with the guest not asking probing questions, not offering other solutions, and not moving the call to at least 'hot lead' or 'not booked' ◊ Agent selected the incorrect call result: General Inquiry or Day Guest Golf • Revenue per booked call – ideally $3500+ • If agent is below $3500 ◊ They may be only offering lower category rooms ◊ They may not be adding additional golf and dining to create full itineraries
Monthly Agent Ranking	• Agent Ranking Coaching - Use this tool to visually provide feedback on agents metrics • Year to Date - Look for growth over time or areas that are starting to fall and need more focus

Build Daily Report(s) for Senior Leadership (1/11)

Daily Report(s): There are four(4) reports that are built/updated daily. **Daily Report, Reservations Call Statistics**, **Res Call and Room Nights**, and **Dining Calls Removed**.

In these reports:
New = new booking/reservation
Net=number of room nights
ASA= Average Speed to Answer or Answer Speed
R&G= Room and Golf

Example of Completed Daily Report:

From Revinate Reports

From SMS

Formula

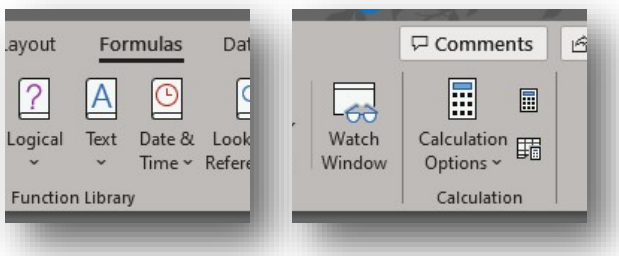
From Dining Calls Removed

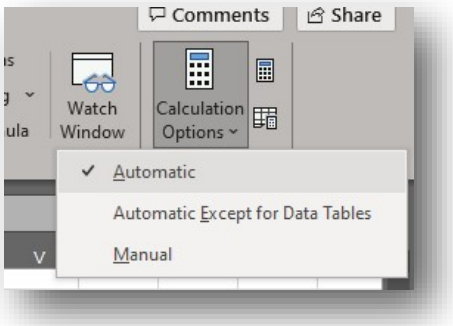
From TX Report

From Res Calls vs Rm Nts

Formula Troubleshooting for any spreadsheets

If formulas are not auto calculating > Click **Formula** tab on top of spreadsheet > Click **Calculation Options** > Make sure that **Automatic** is checked

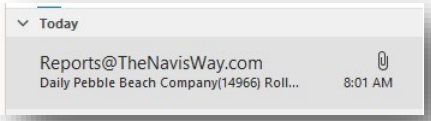


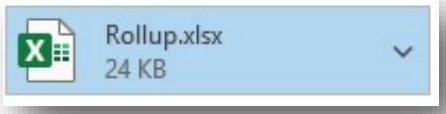


Build Daily Report(s) for Senior Leadership (2/11)

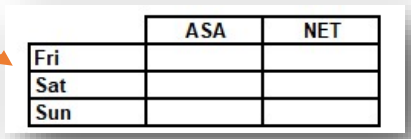
Starting the Template

1. Find the **Navis Roll Up** report in your Outlook Email. Double Click to open the document.



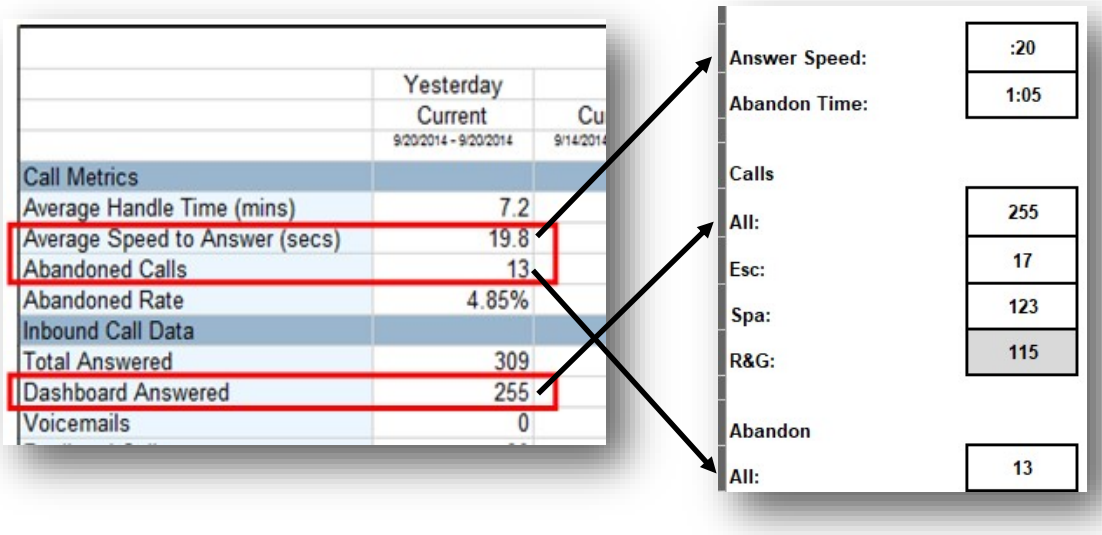


2. Click Enable Editing at the top of the document.
3. Save the **Navis Roll Up** report in L:\RESORT RESERVATIONS\MANAGEMENT\DAILY CALL STATS\Resort Reservations\NAVIS Rollup Reports in the current year and month folder, as **Rollup—mm.dd.yy** (yesterdays date).
4. Save the **Navis Roll up** report again but in the folder L:\RESORT RESERVATIONS\MANAGEMENT\DAILY CALL STATS\Daily Report in the current year and month folder, as **mm.dd.yy** (yesterdays date)
   This is now your **Daily Report.**
5. Click View > Page Break Preview > Move the line to include all the data on one page > Click Normal to return to normal view
6. In the **Daily Report,** delete all data including and below "Non-Lead Call Results".
7. Navigate to the L Drive L:\RESORT RESERVATIONS\MANAGEMENT\DAILY CALL STATS\Daily Report.
8. Click **Navis Daily Report Add Ons Template.**
9. Select and copy the content in the document. On Mondays, this template should include the percentages from the weekend.



	ASA	NET
Fri		
Sat		
Sun		

10. Paste it into the **Daily Report** and save it.
11. Enter the **Average Speed to Answer** from The Navis Roll Up Report into your **Daily Report** in Answer Speed.
12. Enter **Abandoned Calls** from The Navis Roll Up Report into your **Daily Report** in Abandon All box.
13. Enter **Dashboard Answered** from The Navis Roll Up Report into your **Daily Report** in Calls All box.



	Yesterday Current 9/20/2014 - 9/20/2014	Cu 9/14/2014
Call Metrics		
Average Handle Time (mins)	7.2	
Average Speed to Answer (secs)	19.8	
Abandoned Calls	13	
Abandoned Rate	4.85%	
Inbound Call Data		
Total Answered	309	
Dashboard Answered	255	
Voicemails	0	

Build Daily Report(s) for Senior Leadership (3/11)

SMS Report (4.H.U. 01. R)

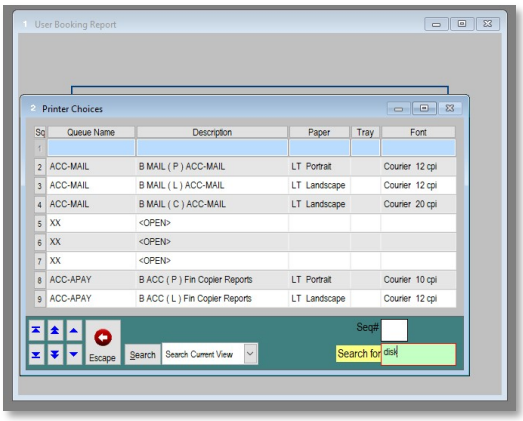
1. Navigate to **SMS.**
2. From the main menu, press **R** for **Reports** or click Reports.
3. Press **R** for **Reports** Menu or click Reports Menu.
4. Double Click **Statistics** > Double Click **Booking Reports** > Double Click **User Booking Report >** Double Click **User Booking Report (The hot keys are 4.H.U. 01)**
5. **Click** the **star** to save this as a favorite. [Going forward you will be able to access it from the main menu > Click My Favorite Reports > Select the Report you want to run].



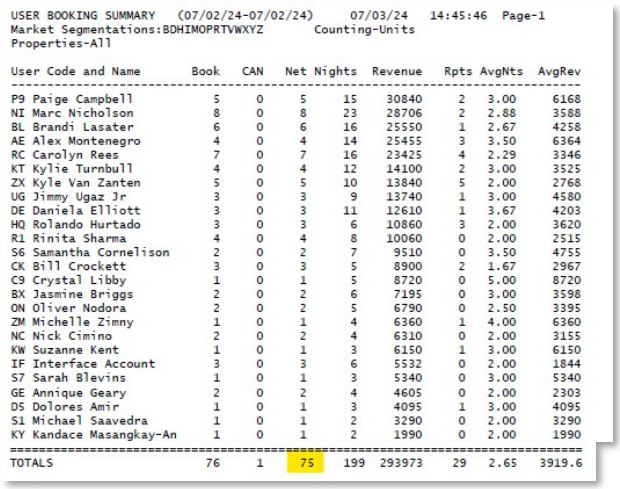
Sq	Menu Key	Report Title	Desc
1	4HU	User Booking Report	Reservations Daily Booking Report



6. Click **Run (The hot key is R)**
7. This will open up a window saying Printer Choices > Click **enter** > In the Search box type disk > press enter > Type **01** into seq# to select Disk File.
   This will allow you to view the document on your computer.



8. Take a **snippet** of the beginning portion that shows Agents and their bookings from yesterday. Paste that into the Daily Report.
9. Scroll to the last page.
10. Take a **second snippet** of the totals at the end of the report. We are looking for the net room nights total, add that number into the Net field on the Daily Report.
11. Highlight the **Net** bookings, paste it under the previous snippet of names.



```
USER BOOKING SUMMARY   (07/02/24-07/02/24)     07/03/24   14:45:46  Page-1
Market Segmentations:BDHIMOPRTVWXYZ       Counting-Units
Properties-All

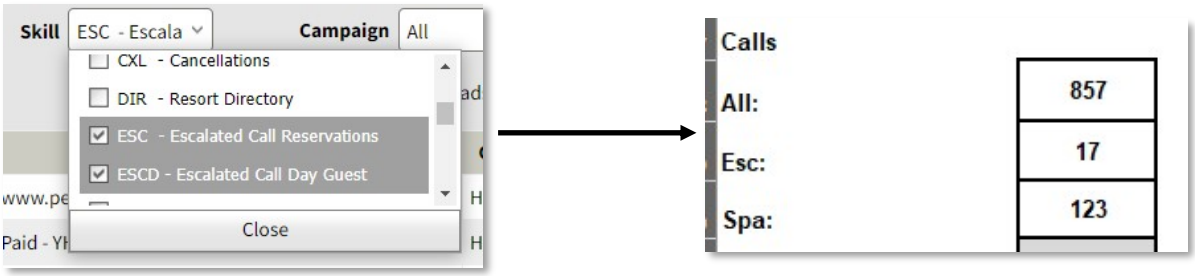
User Code and Name       Book   CAN   Net Nights  Revenue   Rpts AvgNts  AvgRev
-------------------------------------------------------------------------------
P9 Paige Campbell           5     0     5     15    30840     2   3.00    6168
NI Marc Nicholson           8     0     8     23    28706     2   2.88    3588
BL Brandi Lasater           6     0     6     16    25550     1   2.67    4258
AE Alex Montenegro          4     0     4     14    25455     3   3.50    6364
RC Carolyn Rees             7     0     7     16    23425     4   2.29    3346
KT Kylie Turnbull           4     0     4     12    14100     2   3.00    3525
ZX Kyle Van Zanten          5     0     5     10    13840     5   2.00    2768
UG Jimmy Ugaz Jr            3     0     3      9    13740     1   3.00    4580
DE Daniela Elliott          3     0     3     11    12610     1   3.67    4203
HQ Rolando Hurtado          3     0     3      6    10860     3   2.00    3620
R1 Rinita Sharma            4     0     4      8    10060     0   2.00    2515
S6 Samantha Cornelison      2     0     2      7     9510     0   3.50    4755
CK Bill Crockett            3     0     3      5     8900     2   1.67    2967
C9 Crystal Libby            1     0     1      5     8720     0   5.00    8720
BX Jasmine Briggs           2     0     2      6     7195     0   3.00    3598
ON Oliver Nodora            2     0     2      5     6790     0   2.50    3395
ZM Michelle Zimny           1     0     1      4     6360     1   4.00    6360
NC Nick Cimino              2     0     2      4     6310     0   2.00    3155
KW Suzanne Kent             1     0     1      3     6150     1   3.00    6150
IF Interface Account        3     0     3      6     5532     0   2.00    1844
S7 Sarah Blevins            1     0     1      3     5340     0   3.00    5340
GE Annique Geary            2     0     2      4     4605     0   2.00    2303
D5 Dolores Amir             1     0     1      3     4095     1   3.00    4095
S1 Michael Saavedra         1     0     1      2     3290     0   2.00    3290
KY Kandace Masangkay-An     1     0     1      2     1990     0   2.00    1990
===============================================================================
TOTALS                     76     1    75    199   293973    29   2.65  3919.6
```

If you need to run the reports manually click here for the full steps.

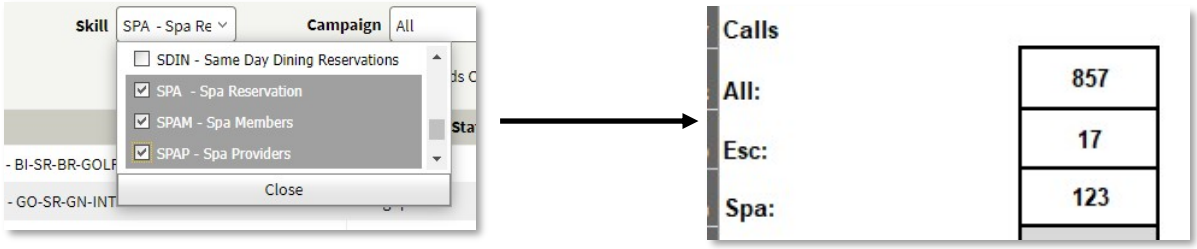
Build Daily Report(s) for Senior Leadership (4/11)

Revinate Reports

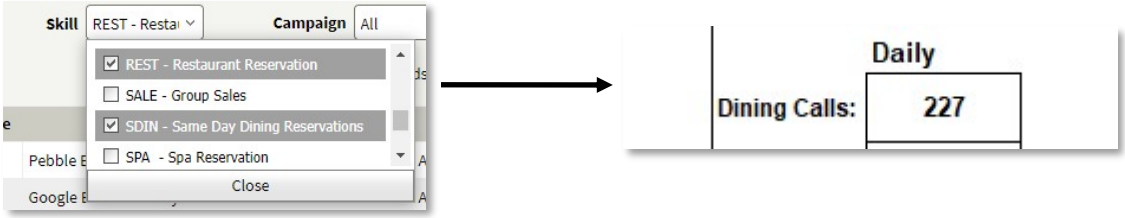
1. Navigate to **Revinate.**
2. Run a report for **Inbound Tracking** > set the date to yesterday > choose multiselect mode
   Check and Uncheck All for Skill and/or Connection Status to make sure you only have those specific ones chosen.
3. Obtain the number of **Answered Esc Calls** > Change connections status to **Dashboard Answered** > Under Skill check ESC, ESCD > Get Data > Record that number into the **Daily Report.**
4. Obtain the number of **Abandoned Esc Calls** > Change connection status to first three **Abandoned** types > > Get Data > Record that number into the **Daily Report.**



5. Obtain the number of **Abandoned Spa Calls** > Change connection status to first three Abandoned types > select CBSP—Call Back Spa, CBSM—Call Back Spa Members, SPA—Spa Reservation, SPAM—Spa Members, and SPAP—Spa Providers, TSPA—Transfer Spa > Record the number of abandoned calls into the **Daily Report.**
6. Obtain the number or **Answered Spa Calls** > Change connection status to Dashboard Answered > Get Data > Record that number into the **Daily Report.**



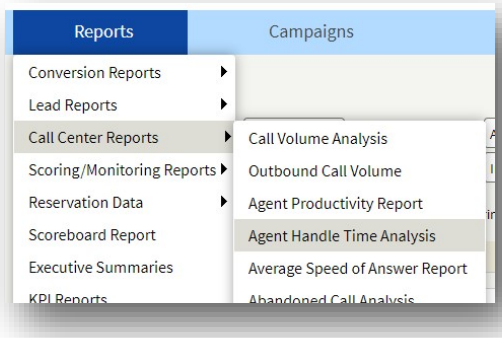
7. Obtain number of **Answered Dining Calls** by > Under Skill check CBRS—Call Back Restaurant, REST—Restaurant Reservations, SDIN—Same Day Dining Reservations and TDIN—Transfer Dinning > Get Data > Record that number into the **Daily Report.**



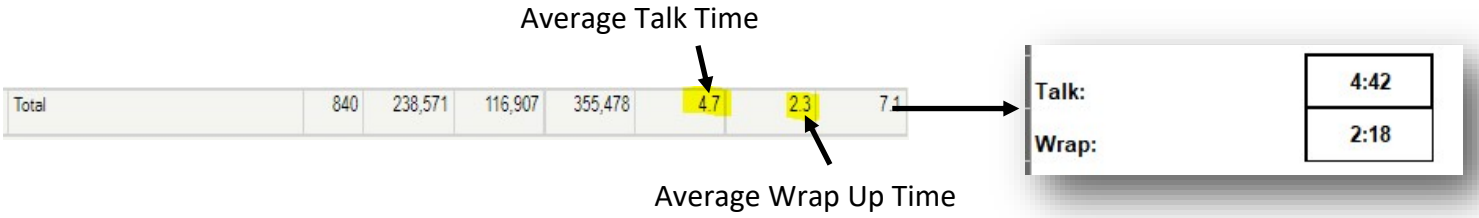
Build Daily Report(s) for Senior Leadership (5/11)

Revinate Reports Cont.

1. Obtain **Talk** and **Wrap time** > Click Reports > Click Call Center Reports > Click **Agent Handle Time Analysis** Report > Set **start and end** date to yesterday > Click **Show the Data.**

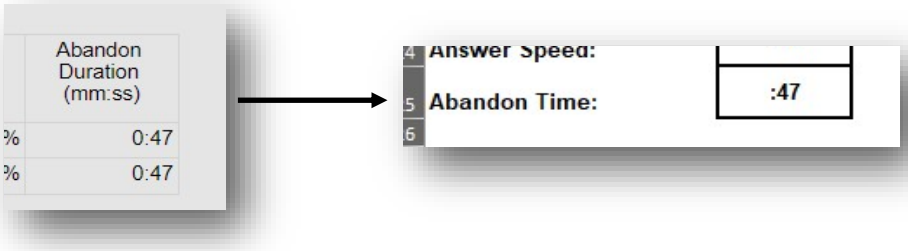


2. Record the total **average talk** and **wrap time** in the **Daily Report**.



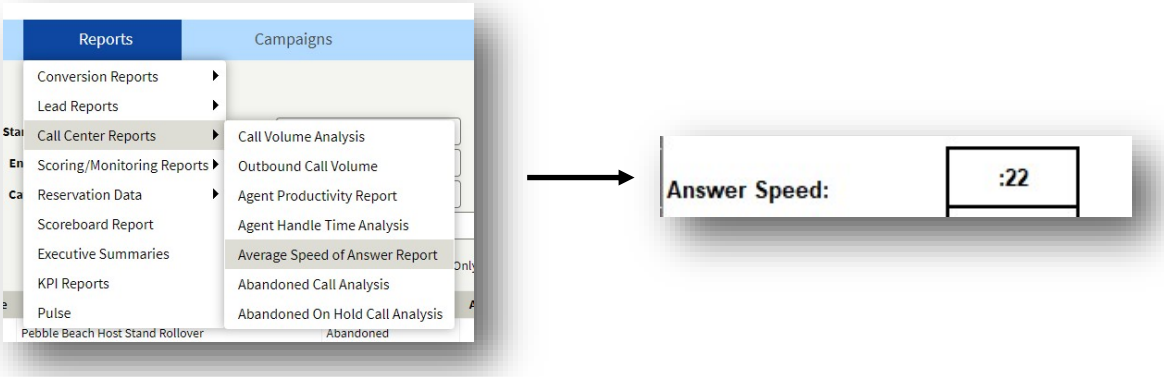
3. Make sure to do the math to convert to minutes and seconds. **EXAMPLE**: 4.7 = 4:42 (7*6 = 42)

4. Obtain **Abandon Time** > Click Reports > Click Call Center Reports > Click **Average Speed of Answer** > Click **multi select >** Check **show data** > Click Get Data.



5. Scroll to the bottom of the page > Record **Abandon Time** into **Daily Report.**

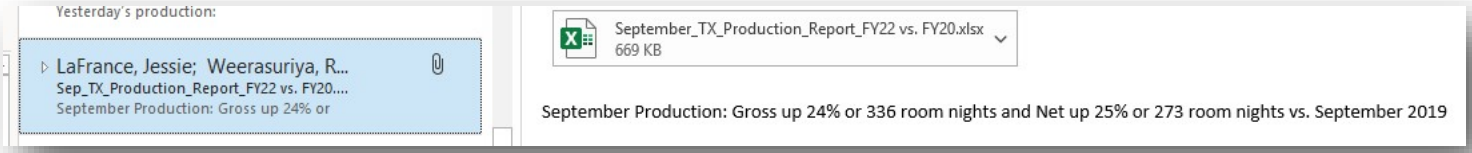
6. Obtain **Answer Speed** without dining calls > Under Skill uncheck CBRS—Call Back Restaurant, REST—Restaurant Reservations, SDIN—Same Day Dining Reservations and TDIN—Transfer Dining Calls > Click Get Data > Record **Answer Speed** into **Daily Report.**



Build Daily Report(s) for Senior Leadership (6/11)

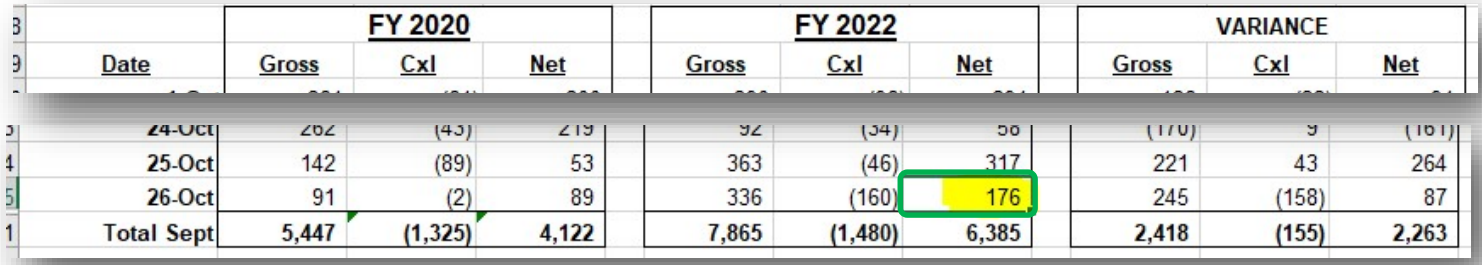
TX Reports

1. Navigate to **Outlook**, find and open the **TX Report** from yesterday that revenue management sends out.

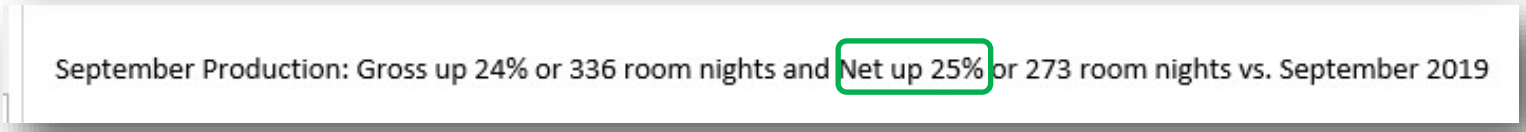


2. Obtain the **Net room nights** for yesterday from the attached spreadsheet.

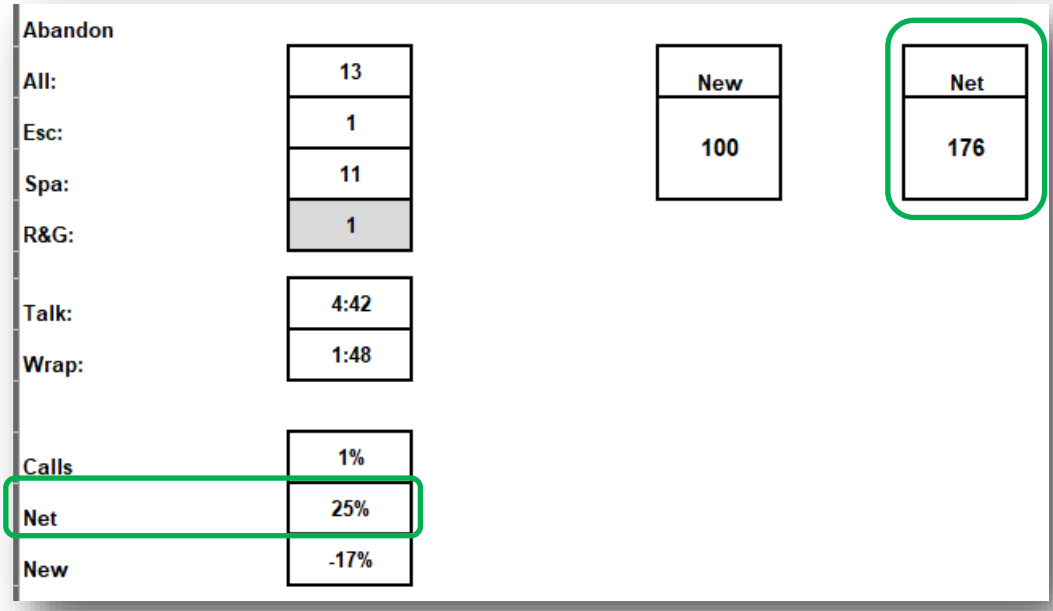
3. Obtain the **percentage of Net up/down** from the body of the email.



	FY 2020			FY 2022			VARIANCE		
Date	Gross	Cxl	Net	Gross	Cxl	Net	Gross	Cxl	Net
24-Oct	262	(43)	219	92	(34)	58	(170)	9	(161)
25-Oct	142	(89)	53	363	(46)	317	221	43	264
26-Oct	91	(2)	89	336	(160)	176	245	(158)	87
Total Sept	5,447	(1,325)	4,122	7,865	(1,480)	6,385	2,418	(155)	2,263



4. Fill in the **Daily Report** for **Net** room nights and **Net percentage.**



Build Daily Report(s) for Senior Leadership (7/11)

Fill in Reports

Now you can use your **Daily Report** to fill in 3 other reports. You will also collect information from these reports after filling in the new data.

Dining Calls Removed

1. Open **Dining Calls Removed** document and fill in from the Daily Report > Time to answer w/o dining > Calls answered w/o Spa and Dining (R&G only), Net room nights, and New reservations.

Time to Answer

	Date	Calls Ans.	MTD
	------ 2023 ------		
Sun	1-Oct	0:28	0:28
Mon	2-Oct	0:24	0:26
Tue	3-Oct	0:24	0:25
Wed	4-Oct	0:29	0:26
Thu	5-Oct	0:28	0:26
Fri	6-Oct	0:31	0:27
Sat	7-Oct	0:33	0:28
Sun	8-Oct	0:42	0:29
Mon	9-Oct	0:30	0:29
Tue	10-Oct	0:24	0:29
Wed	11-Oct	0:27	0:29
Thu	12-Oct	1:05	0:32
Fri	13-Oct	0:50	0:33
Sat	14-Oct	0:26	0:32
Sun	15-Oct	0:22	0:32
Mon	16-Oct	0:25	0:31
Tue	17-Oct	0:30	0:31
Wed	18-Oct	0:22	0:31
Thu	19-Oct	0:20	0:30
Fri	20-Oct		0:30
Sat	21-Oct		0:30
Sun	22-Oct		0:30
Mon	23-Oct		0:30
Tue	24-Oct		0:30
Wed	25-Oct		0:30
Thu	26-Oct		0:30
Fri	27-Oct		0:30
Sat	28-Oct		0:30
Sun	29-Oct		0:30
Mon	30-Oct		0:30
Tue	31-Oct		0:30

In Navis - remove Rest and SDIN skills

Calls Answered

	Date	Calls Ans.	MTD
	------ 2023 ------		
Sun	1-Oct	242	242
Mon	2-Oct	490	732
Tue	3-Oct	508	1240
Wed	4-Oct	487	1727
Thu	5-Oct	494	2221
Fri	6-Oct	471	2692
Sat	7-Oct	285	2977
Sun	8-Oct	221	3198
Mon	9-Oct	394	3592
Tue	10-Oct	432	4024
Wed	11-Oct	432	4456
Thu	12-Oct	417	4873
Fri	13-Oct	444	5317
Sat	14-Oct	243	5560
Sun	15-Oct	222	5782
Mon	16-Oct	511	6293
Tue	17-Oct	473	6766
Wed	18-Oct	490	7256
Thu	19-Oct	422	7678
Fri	20-Oct		7678
Sat	21-Oct		7678
Sun	22-Oct		7678
Mon	23-Oct		7678
Tue	24-Oct		7678
Wed	25-Oct		7678
Thu	26-Oct		7678
Fri	27-Oct		7678
Sat	28-Oct		7678
Sun	29-Oct		7678
Mon	30-Oct		7678
Tue	31-Oct		7678

Total calls answered minus Spa, Rest and SDIN

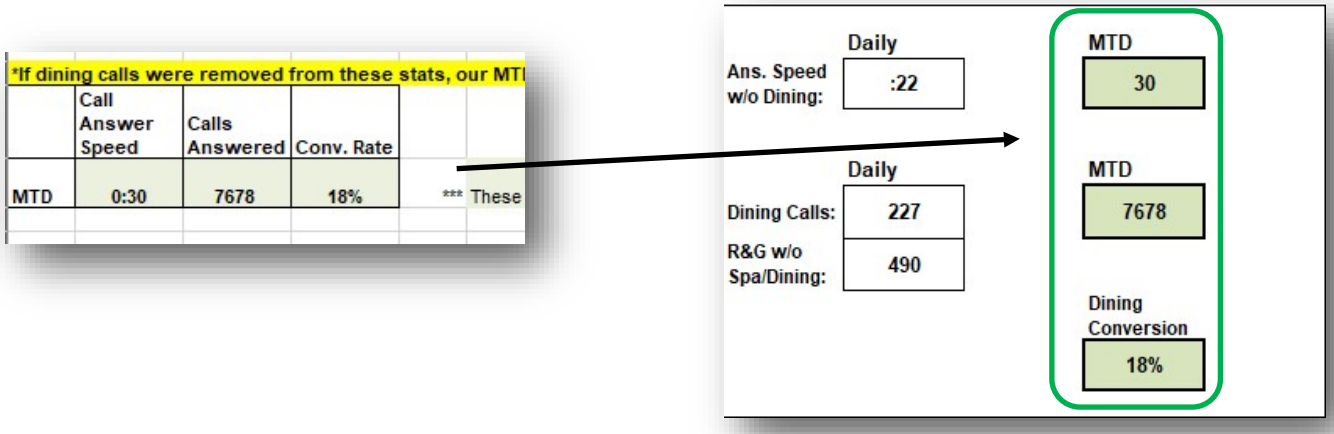
Net Room Nights (New Method)

	Date	Net Rm Nts	MTD
	------ 2023 ------		
Sun	1-Oct	83	83
Mon	2-Oct	120	203
Tue	3-Oct	273	476
Wed	4-Oct	86	562
Thu	5-Oct	175	737
Fri	6-Oct	204	941
Sat	7-Oct	151	1,092
Sun	8-Oct	96	1,188
Mon	9-Oct	121	1,309
Tue	10-Oct	89	1,398
Wed	11-Oct	202	1,600
Thu	12-Oct	206	1,806
Fri	13-Oct	170	1,976
Sat	14-Oct	124	2,100
Sun	15-Oct	68	2,168
Mon	16-Oct	250	2,418
Tue	17-Oct	341	2,759
Wed	18-Oct	247	3,006
Thu	19-Oct	237	3,243
Fri	20-Oct		3,243
Sat	21-Oct		3,243
Sun	22-Oct		3,243
Mon	23-Oct		3,243
Tue	24-Oct		3,243
Wed	25-Oct		3,243
Thu	26-Oct		3,243
Fri	27-Oct		3,243
Sat	28-Oct		3,243
Sun	29-Oct		3,243
Mon	30-Oct		3,243
Tue	31-Oct		3,243

New Reservations (not room nights)

	Date	New Res	MTD
	------ 2023 ------		
Sun	1-Oct	31	31
Mon	2-Oct	68	99
Tue	3-Oct	95	194
Wed	4-Oct	84	278
Thu	5-Oct	71	349
Fri	6-Oct	84	433
Sat	7-Oct	55	488
Sun	8-Oct	34	522
Mon	9-Oct	70	592
Tue	10-Oct	62	654
Wed	11-Oct	75	729
Thu	12-Oct	92	821
Fri	13-Oct	65	886
Sat	14-Oct	52	938
Sun	15-Oct	33	971
Mon	16-Oct	100	1071
Tue	17-Oct	120	1191
Wed	18-Oct	100	1291
Thu	19-Oct	104	1395
Fri	20-Oct		1395
Sat	21-Oct		1395
Sun	22-Oct		1395
Mon	23-Oct		1395
Tue	24-Oct		1395
Wed	25-Oct		1395
Thu	26-Oct		1395
Fri	27-Oct		1395
Sat	28-Oct		1395
Sun	29-Oct		1395
Mon	30-Oct		1395
Tue	31-Oct		1395

2. Fill into the **Daily Report** from the Dining Calls Removed document > the MTD Answer speed, total calls, and conversion rate.

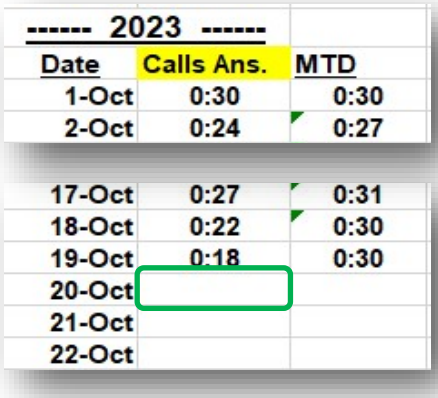


3. Click **Ctrl + Home** > Save and close the **Dining Calls Removed document**.

Build Daily Report(s) for Senior Leadership (8/11)

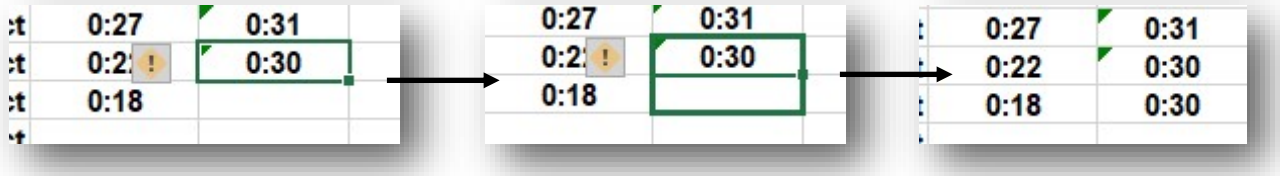
Res Calls and Rm Nts

1. Open **Res Calls and Rm Nts** for the current month. Located >L:\RESORT RESERVATIONS\MANAGEMENT\DAILY CALL STATS\Resort Reservations\Calls VS Room Nights\Call Stats (In the current year).
2. From the **Daily Report**, pull the **Answer Speed** and enter it into yesterdays date.



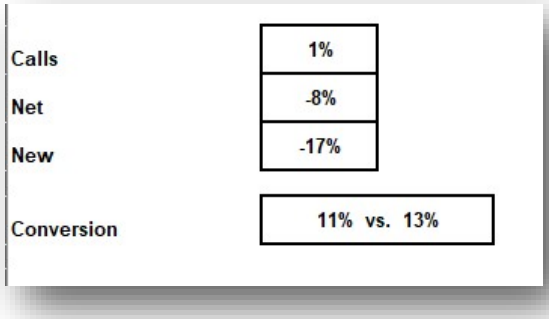
------ 2023 ------		
Date	Calls Ans.	MTD
1-Oct	0:30	0:30
2-Oct	0:24	0:27
17-Oct	0:27	0:31
18-Oct	0:22	0:30
19-Oct	0:18	0:30
20-Oct		
21-Oct		
22-Oct		

3. Copy the equation (format) for the MTD column from the above lines by clicking the square when the plus sign is visible, clicking and dragging down.
   Until the 3rd of the month, leave all formulas in column H.



0:27	0:31	
0:2	0:30	
0:18		

4. Do the same for **Total Calls Answered, Net Room Nights,** and **New Reservations**.
5. Add in the **MTD** for **Answer Speed** w/out dining, total **MTD calls**, and **dining conversion** at the bottom of the Res Calls vs Rm Nts.
6. Pull from the **Res Calls vs Rm Nts** document the variance **percentage** of **Calls**, **Net** (verify), and **New** from to the **Daily Report.**
7. Pull from the **Res Calls vs Rm Nts** document into the **Daily Report** the [This year] **MTD Conversion** rate vs [Last Year] MTD Conversion rate into Conversion.



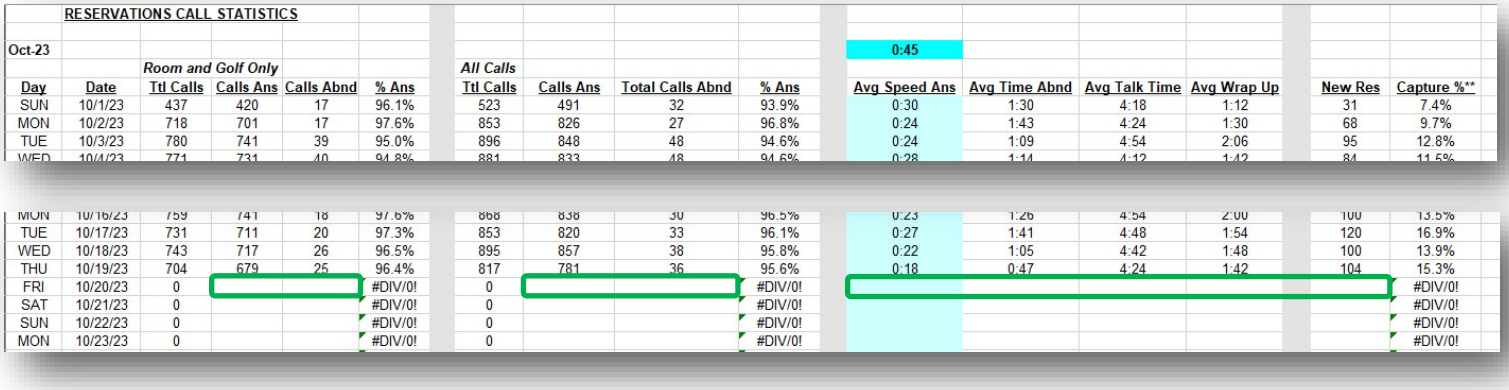
Calls	1%
Net	-8%
New	-17%
Conversion	11% vs. 13%

8. **DOUBLE CHECK THAT ALL NUMBERS ENTERED ARE ACCURATE.**
9. Click **Ctrl + Home** > Save and close **Res Calls vs Rm Nts.**

Build Daily Report(s) for Senior Leadership (9/11)

Reservation Call Statistics

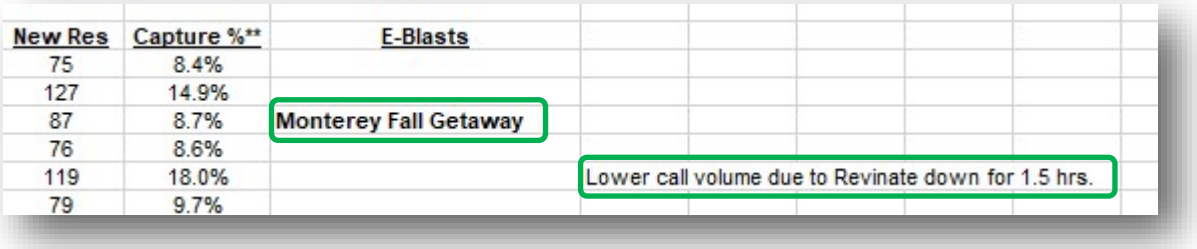
1. Open the **Reservations Call Statistics** for the current month. Located > L:\RESORT RESERVATIONS\MANAGEMENT\DAILY CALL STATS\Resort Reservations.
2. Use **Daily Report** to fill in **Calls Answered** and **Calls Abandoned** for Room and Golf and for All Calls.
3. Use **Daily Report** to fill in **Average Answer Speed**, **Average Time Abandoned**, **Average Talk Time**, **Average Wrap Up** and **New** Reservations.



RESERVATIONS CALL STATISTICS

Oct-23										0:45					
		Room and Golf Only				All Calls									
Day	Date	Ttl Calls	Calls Ans	Calls Abnd	% Ans	Ttl Calls	Calls Ans	Total Calls Abnd	% Ans	Avg Speed Ans	Avg Time Abnd	Avg Talk Time	Avg Wrap Up	New Res	Capture %**
SUN	10/1/23	437	420	17	96.1%	523	491	32	93.9%	0:30	1:30	4:18	1:12	31	7.4%
MON	10/2/23	718	701	17	97.6%	853	826	27	96.8%	0:24	1:43	4:24	1:30	68	9.7%
TUE	10/3/23	780	741	39	95.0%	896	848	48	94.6%	0:24	1:09	4:54	2:06	95	12.8%
WED	10/4/23	771	731	40	94.8%	881	833	48	94.6%	0:28	1:14	4:12	1:42	84	11.5%
MON	10/16/23	759	741	18	97.6%	868	838	30	96.5%	0:23	1:26	4:54	2:00	100	13.5%
TUE	10/17/23	731	711	20	97.3%	853	820	33	96.1%	0:27	1:41	4:48	1:54	120	16.9%
WED	10/18/23	743	717	26	96.5%	895	857	38	95.8%	0:22	1:05	4:42	1:48	100	13.9%
THU	10/19/23	704	679	25	96.4%	817	781	36	95.6%	0:18	0:47	4:24	1:42	104	15.3%
FRI	10/20/23	0			#DIV/0!	0			#DIV/0!						#DIV/0!
SAT	10/21/23	0			#DIV/0!	0			#DIV/0!						#DIV/0!
SUN	10/22/23	0			#DIV/0!	0			#DIV/0!						#DIV/0!
MON	10/23/23	0			#DIV/0!	0			#DIV/0!						#DIV/0!

4. Add any notes that would explain a large change in call volume/answer speed. You can also add any promotions/packages/e-blasts that were released.

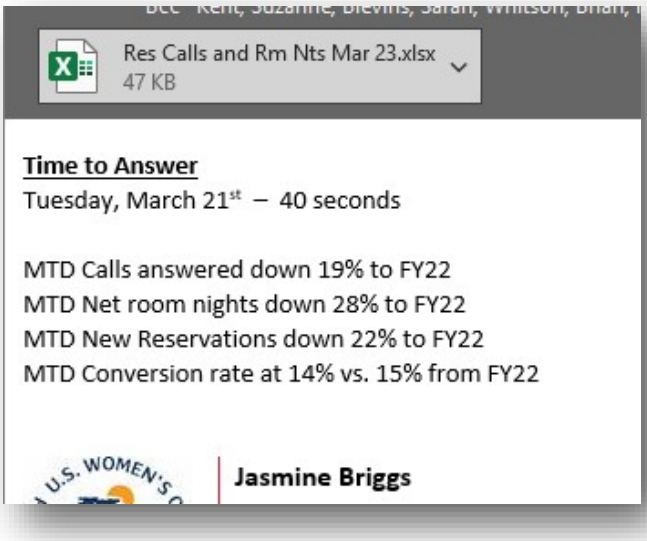


New Res	Capture %**	E-Blasts	
75	8.4%		
127	14.9%		
87	8.7%	Monterey Fall Getaway	
76	8.6%		
119	18.0%		Lower call volume due to Revinate down for 1.5 hrs.
79	9.7%		

Build Daily Report(s) for Senior Leadership (10/11)

Finalize Daily Report

1. Draft email Reservation Calls and Room Nights Current Month vs Last Year and send to senior staff.
2. **Subject the Email:**
   Reservations Calls and Room Nights Current Month vs. Last Year
3. **Body of the Email**: (Use the example as a Template)
4. **Attach** the **Res Calls vs Rm Nts** [current month and current year] document



5. Open the document from the email and double check all the numbers
6. **Address the Email:**
   To: Daily Reports

   Create a **Contact Group** called **Daily Reports** and include a list of specific senior staff. Obtain this list from a member of the Reservations management team. Include _ResMOD and current supervisors in this contact group.

7. Click **Send.**
8. Save and Print the **Daily Report** in color and file it in the file cabinet for the current month and year.

Build Daily Report(s) for Senior Leadership (11/11)

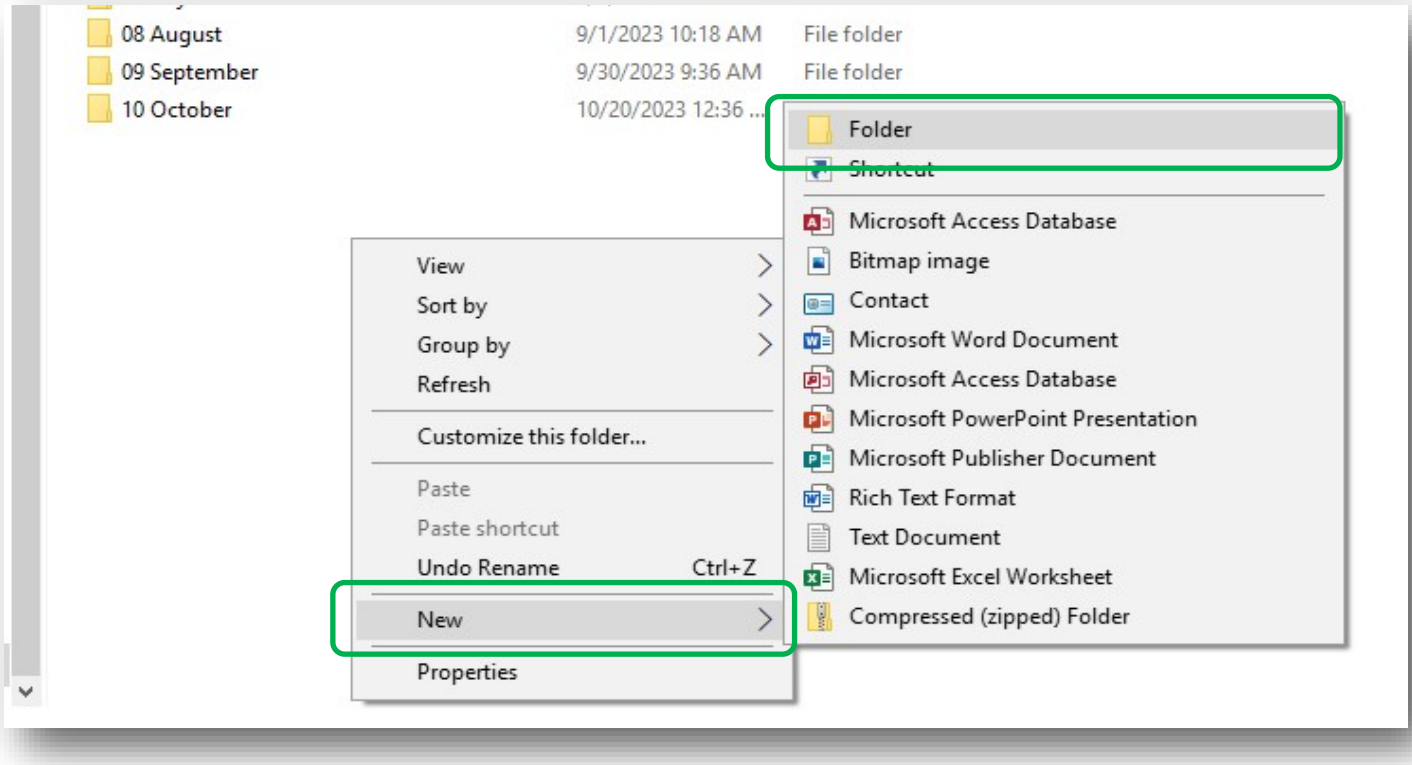
Running SMS Report Manually

1. Navigate to **SMS.**
2. From the main menu, press **R** for **Reports** or click Reports.
3. Press **R** for **Reports** Menu or click Reports Menu.
4. Select **Statistics** > **Booking Reports** > **User Booking Report (The hot keys are 4.H.U).**
5. [NORMALLY AUTOMATED] Run this report **Ad Hoc.**
6. [NORMALLY AUTOMATED] Select for **yesterdays date** for beginning and end.
7. [NORMALLY AUTOMATED] Select **Revenue** > **Units** > **No** > **Remove** the letters **A C E S** from the string > enter > **No** > **enter.**
8. This will open up a window saying Generating report > Click **enter** > Search for disk > Type **01** into seq# to select Disk File. This will allow you to view the document on your computer as a PDF.
9. Take a **snippet** of the beginning portion that shows Agents and their bookings from yesterday. Paste that into the Daily Report.
10. Scroll to the last page of the PDF.
11. Take a **second snippet** of the totals at the end of the report. We are looking for the net room nights total, add that number into the Net field on the Daily Report.
12. Highlight the **Net** bookings, paste it under the previous snippet of names.

Prep New Month: Daily Reports (1/6)

Create New Folders for our Reports

1. Navigate to Z: RES\RESORT RESERVATIONS\MANAGEMENT\DAILY CALL STATS\Daily Report\2023 (Current Year)
2. Create a new folder for the **Daily Report** for next month and title it the number of the month followed by the name of the month. **Example**: 11 November

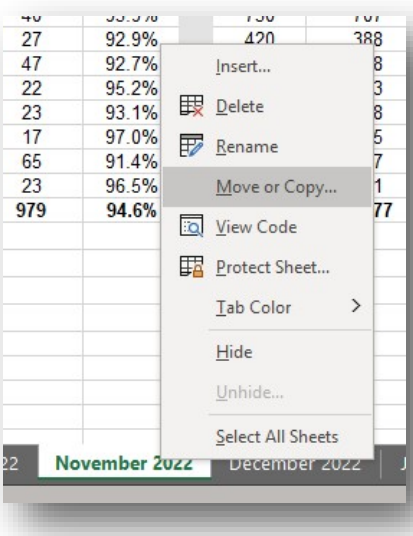


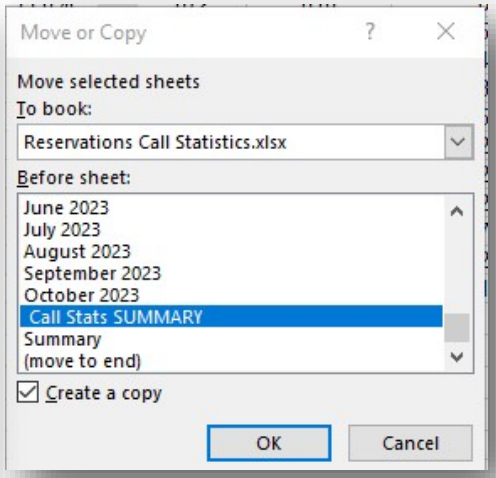
3. Navigate to Z: \RES\RESORT RESERVATIONS\MANAGEMENT\DAILY CALL STATS\Resort Reservations\NAVIS Rollup Reports\2023 (Current Year)
4. Create a new folder for the **Navis Rollup Reports** for the next month and title it the number of the month followed by the name of the month. **Example**: 11 November

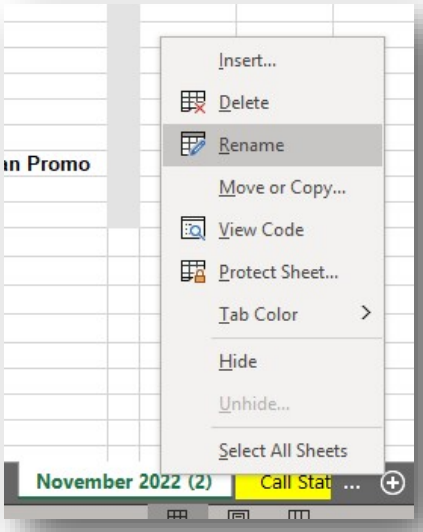
Prep New Month: Daily Reports (2/6)

Reservation Call Statistics

1. Open **Reservation Call Statistics** from the previous year for the month that you are going to create
2. **Right Click** the tab > Select **Move or Copy**
3. Select Before Sheet: **Call Stats SUMMARY**
4. Check the **Create a copy box**
5. Click **OK**
6. **Rename** Sheet to current year



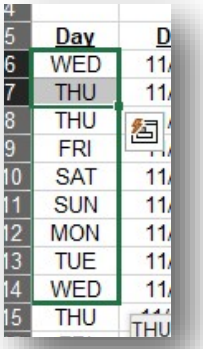


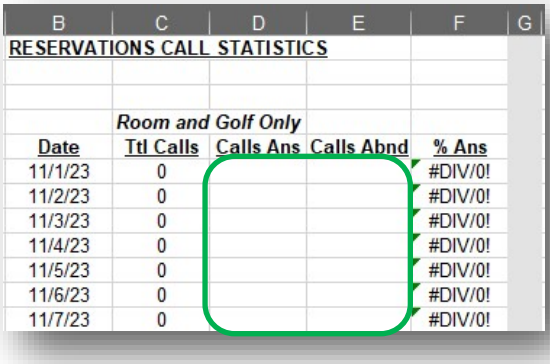


7. In cell **A3,** type in the **date** of the first day of the month you are creating. **Example**: 11/1/23

   This will auto-populate the dates in column **B.**
8. In column **A** under Day, type in the first two **days of the week** that match the beginning of the month
9. **Copy the format** by selecting the first two days, clicking, and dragging down to the rest of that column

   The rest of the days of the week will auto-populate for the other sections





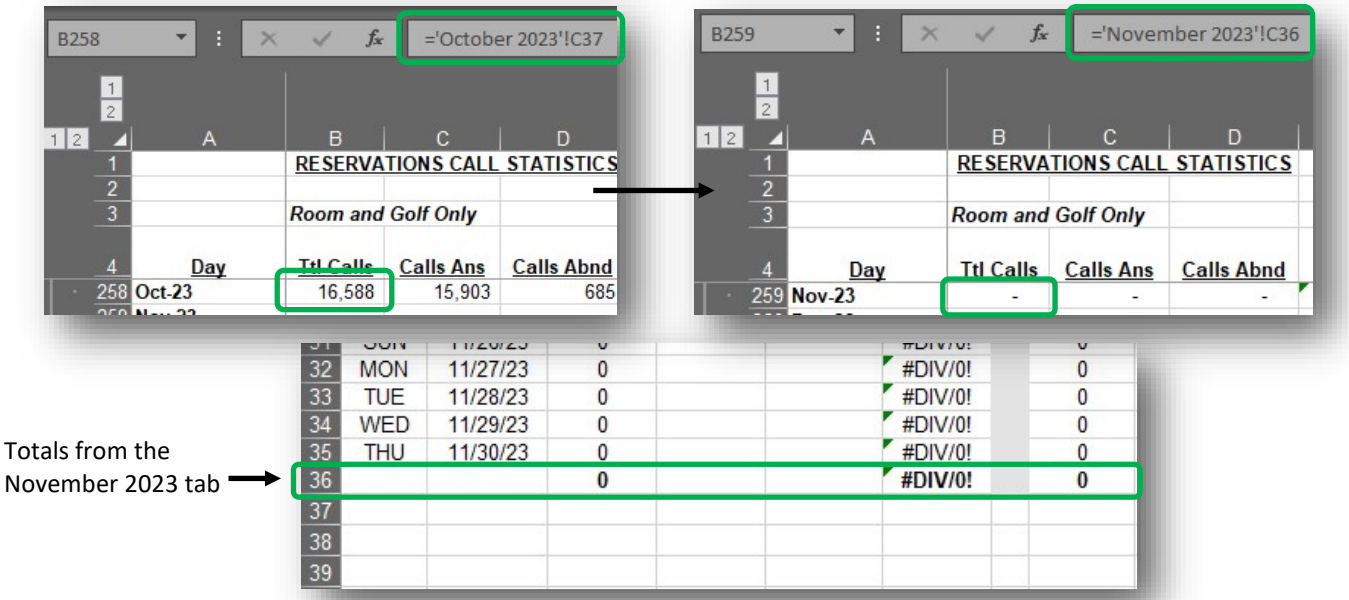
10. **Clear out** the data from Columns D-E, I-J, M-P, and R. **Do not clear** the last row that includes the formulas, this contains the totals for each column.
11. **Clear out** any data in the E-Blast and Notes columns
12. Click **Ctrl + Home** to navigate back to the very top of the sheet
13. **Save** the document and close it

Prep New Month: Daily Reports (3/6)

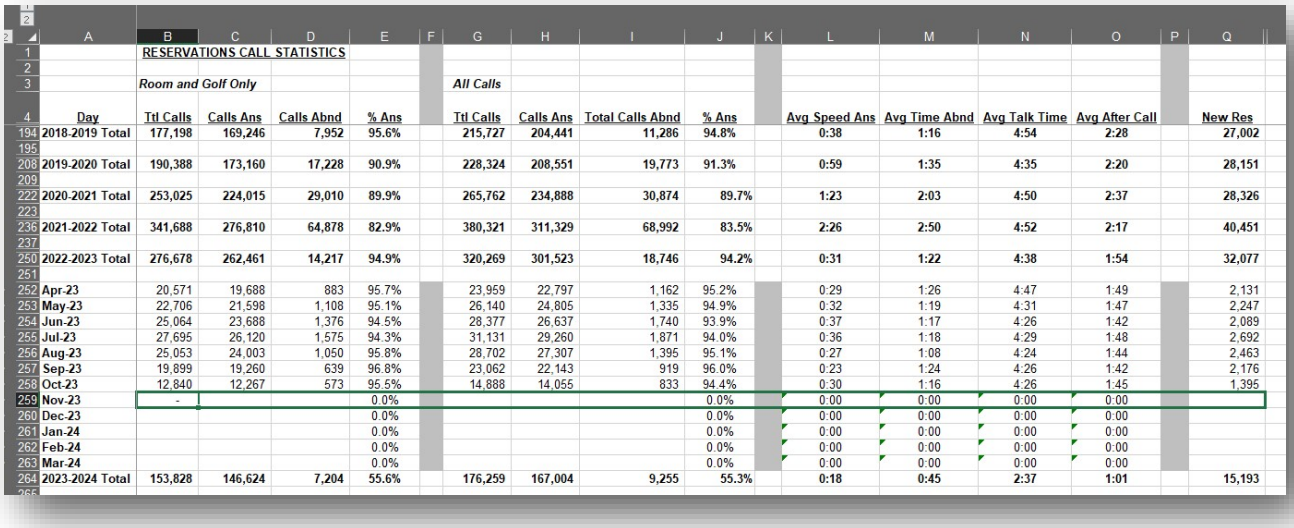
Reservation Call Statistics - Call Stats Summary Tab

Use previous month's formula as an example to create the new month's formula. This formula will pull totals from new months sheet.

1. Click on the **previous month's total calls cell** > the formula will appear towards the top in the formula bar > **Copy the formula**
2. Click on the **new month's total calls cell** > Paste the **formula** > in the formula bar **change the month and the number** at the end of the formula > **Copy the formula** to the rest of the cells up to and including column Q



3. **Re-format** Column **F**, **K**, and **P** to be grey > **Highlight** the **row above** > Click **format painter** > Click **newly made row**



RESERVATIONS CALL STATISTICS

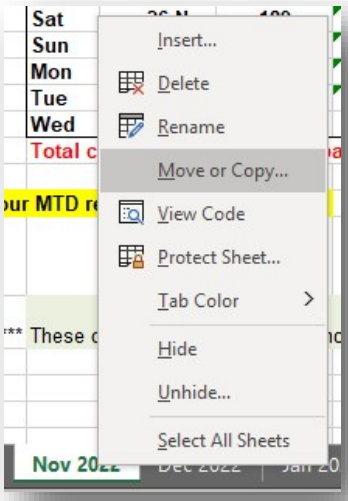
	Day	Ttl Calls	Calls Ans	Calls Abnd	% Ans	Ttl Calls	Calls Ans	Total Calls Abnd	% Ans	Avg Speed Ans	Avg Time Abnd	Avg Talk Time	Avg After Call	New Res
		Room and Golf Only				All Calls								
194	2018-2019 Total	177,198	169,246	7,952	95.6%	215,727	204,441	11,286	94.8%	0:38	1:16	4:54	2:28	27,002
208	2019-2020 Total	190,388	173,160	17,228	90.9%	228,324	208,551	19,773	91.3%	0:59	1:35	4:35	2:20	28,151
222	2020-2021 Total	253,025	224,015	29,010	89.9%	265,762	234,888	30,874	89.7%	1:23	2:03	4:50	2:37	28,326
236	2021-2022 Total	341,688	276,810	64,878	82.9%	380,321	311,329	68,992	83.5%	2:26	2:50	4:52	2:17	40,451
250	2022-2023 Total	276,678	262,461	14,217	94.9%	320,269	301,523	18,746	94.2%	0:31	1:22	4:38	1:54	32,077
252	Apr-23	20,571	19,688	883	95.7%	23,959	22,797	1,162	95.2%	0:29	1:26	4:47	1:49	2,131
253	May-23	22,706	21,598	1,108	95.1%	26,140	24,805	1,335	94.9%	0:32	1:19	4:31	1:47	2,247
254	Jun-23	25,064	23,688	1,376	94.5%	28,377	26,637	1,740	93.9%	0:37	1:17	4:26	1:42	2,089
255	Jul-23	27,695	26,120	1,575	94.3%	31,131	29,260	1,871	94.0%	0:36	1:18	4:29	1:48	2,692
256	Aug-23	25,053	24,003	1,050	95.8%	28,702	27,307	1,395	95.1%	0:27	1:08	4:24	1:44	2,463
257	Sep-23	19,899	19,260	639	96.8%	23,062	22,143	919	96.0%	0:23	1:24	4:26	1:42	2,176
258	Oct-23	12,840	12,267	573	95.5%	14,888	14,055	833	94.4%	0:30	1:16	4:26	1:45	1,395
259	Nov-23	-			0.0%				0.0%	0:00	0:00	0:00	0:00	
260	Dec-23				0.0%				0.0%	0:00	0:00	0:00	0:00	
261	Jan-24				0.0%				0.0%	0:00	0:00	0:00	0:00	
262	Feb-24				0.0%				0.0%	0:00	0:00	0:00	0:00	
263	Mar-24				0.0%				0.0%	0:00	0:00	0:00	0:00	
264	2023-2024 Total	153,828	146,624	7,204	55.6%	176,259	167,004	9,255	55.3%	0:18	0:45	2:37	1:01	15,193

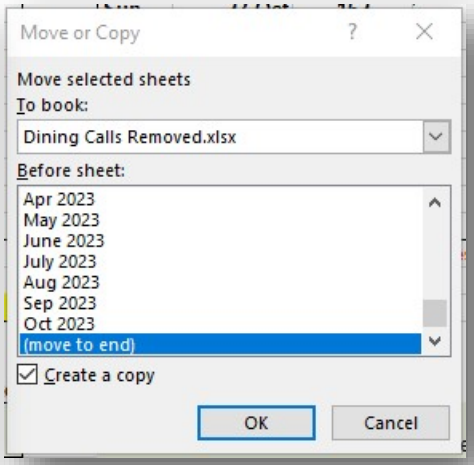
4. Click back to the current month > click **Ctrl + Home** to navigate back to the very top of the sheet > **Save** the document and **close** it

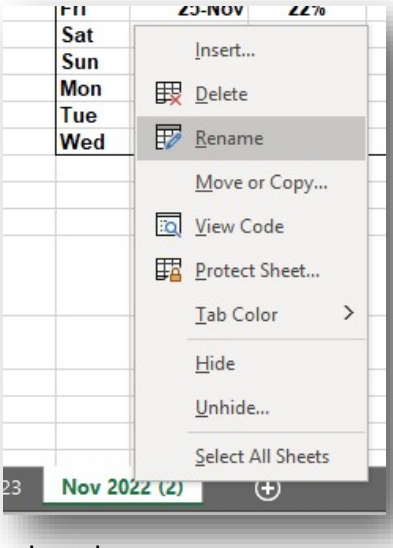
Prep New Month: Daily Reports (4/6)

Dining Calls Removed

1. Open **Dining Calls Removed** document and go to **last years** tab of the **month** you are building
2. **Right click** on the tab > select **Move or Copy** > scroll down and select **move to end** > check the **Create a copy box >** click **OK**
3. **Rename** this new tab to the current year

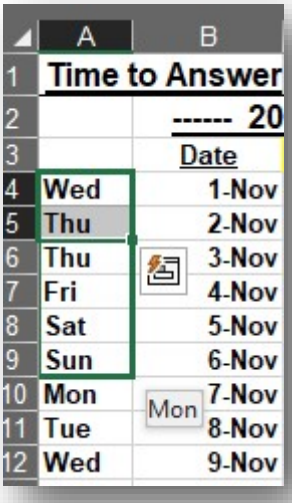




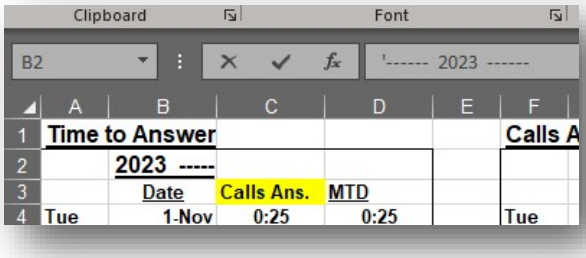


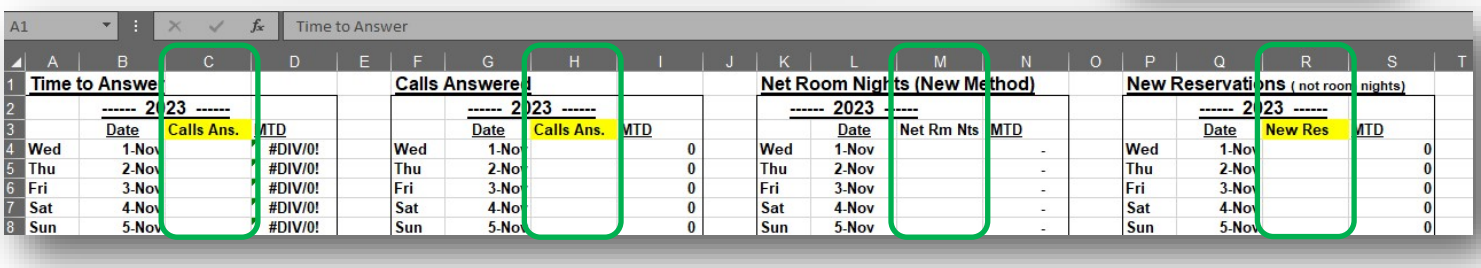
4. Update the **year** in cell **B2**. It will auto-populate the rest of the years in the tab
5. Type in the first two **days of the week** that match the beginning of the month in column A.
6. **Copy the format** by selecting the first two days, clicking, and dragging down to the rest of that column

   The rest of the days of the week will auto-populate for the other sections.



7. **Clear out** the data for columns **C, H, M,** and **R**
8. Click **Ctrl + Home** to navigate back to the very top of the sheet.
9. **Save** and close the document





Prep New Month: Daily Reports (5/6)

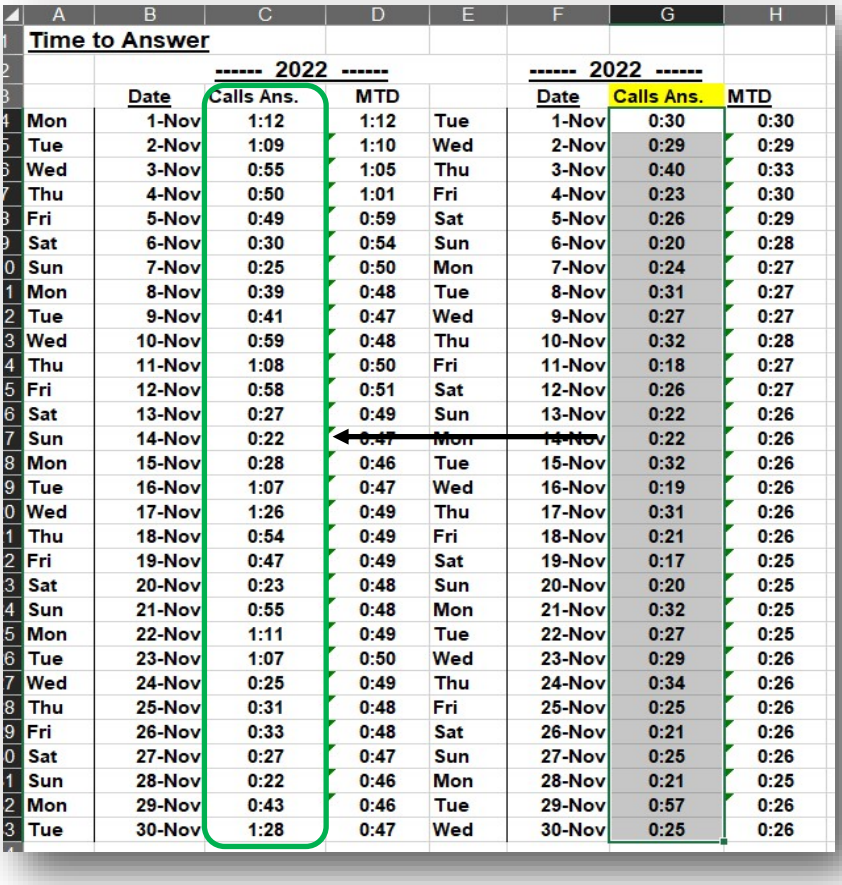
Res Calls and Room Nights

1. Open **Res Calls and Room Nights** of the **previous year** for the **month** you are working on.
2. Click **File** > **Save As**
3. Save the file into the **current year folder** and **rename the file** as the current year
4. **Email Reservations** management team to obtain the production goal for next month
5. Change the **year** in cell **B2** to **last year**
6. Change the **year** in cell **F2** to the **current year**
7. The rest of the years will auto-populate in the other sections
8. Update the days of the week for **Time to Answer** column **A** and column **E**

   The rest of the days of the week will auto-populate.
9. For all sections except Conversion Rate, **move data** from column **G** to **C**

   You are moving last years data to the left and clearing out the data for this year.

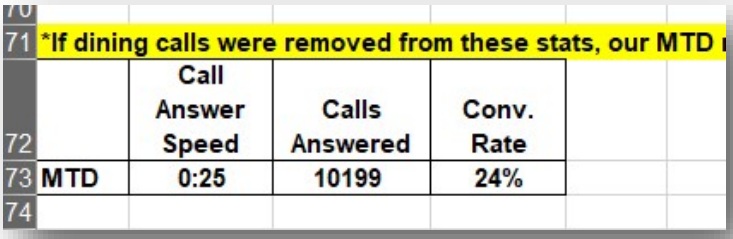
   Don't remove any data from the **Conversion Rate** section, this is all formulas.
10. **Check MTD** to make sure it matches before deleting data in column G.
11. Leave all formulas in H column.



	A	B	C	D	E	F	G	H
1	Time to Answer							
2			------ 2022 ------			------ 2022 ------		
3		Date	Calls Ans.	MTD		Date	Calls Ans.	MTD
4	Mon	1-Nov	1:12	1:12	Tue	1-Nov	0:30	0:30
5	Tue	2-Nov	1:09	1:10	Wed	2-Nov	0:29	0:29
6	Wed	3-Nov	0:55	1:05	Thu	3-Nov	0:40	0:33
7	Thu	4-Nov	0:50	1:01	Fri	4-Nov	0:23	0:30
8	Fri	5-Nov	0:49	0:59	Sat	5-Nov	0:26	0:29
9	Sat	6-Nov	0:30	0:54	Sun	6-Nov	0:20	0:28
10	Sun	7-Nov	0:25	0:50	Mon	7-Nov	0:24	0:27
11	Mon	8-Nov	0:39	0:48	Tue	8-Nov	0:31	0:27
12	Tue	9-Nov	0:41	0:47	Wed	9-Nov	0:27	0:27
13	Wed	10-Nov	0:59	0:48	Thu	10-Nov	0:32	0:28
14	Thu	11-Nov	1:08	0:50	Fri	11-Nov	0:18	0:27
15	Fri	12-Nov	0:58	0:51	Sat	12-Nov	0:26	0:27
16	Sat	13-Nov	0:27	0:49	Sun	13-Nov	0:22	0:26
17	Sun	14-Nov	0:22	0:47	Mon	14-Nov	0:22	0:26
18	Mon	15-Nov	0:28	0:46	Tue	15-Nov	0:32	0:26
19	Tue	16-Nov	1:07	0:47	Wed	16-Nov	0:19	0:26
20	Wed	17-Nov	1:26	0:49	Thu	17-Nov	0:31	0:26
21	Thu	18-Nov	0:54	0:49	Fri	18-Nov	0:21	0:26
22	Fri	19-Nov	0:47	0:49	Sat	19-Nov	0:17	0:25
23	Sat	20-Nov	0:23	0:48	Sun	20-Nov	0:20	0:25
24	Sun	21-Nov	0:55	0:48	Mon	21-Nov	0:32	0:25
25	Mon	22-Nov	1:11	0:49	Tue	22-Nov	0:27	0:25
26	Tue	23-Nov	1:07	0:50	Wed	23-Nov	0:29	0:26
27	Wed	24-Nov	0:25	0:49	Thu	24-Nov	0:34	0:26
28	Thu	25-Nov	0:31	0:48	Fri	25-Nov	0:25	0:26
29	Fri	26-Nov	0:33	0:48	Sat	26-Nov	0:21	0:26
30	Sat	27-Nov	0:27	0:47	Sun	27-Nov	0:25	0:26
31	Sun	28-Nov	0:22	0:46	Mon	28-Nov	0:21	0:25
32	Mon	29-Nov	0:43	0:46	Tue	29-Nov	0:57	0:26
33	Tue	30-Nov	1:28	0:47	Wed	30-Nov	0:25	0:26

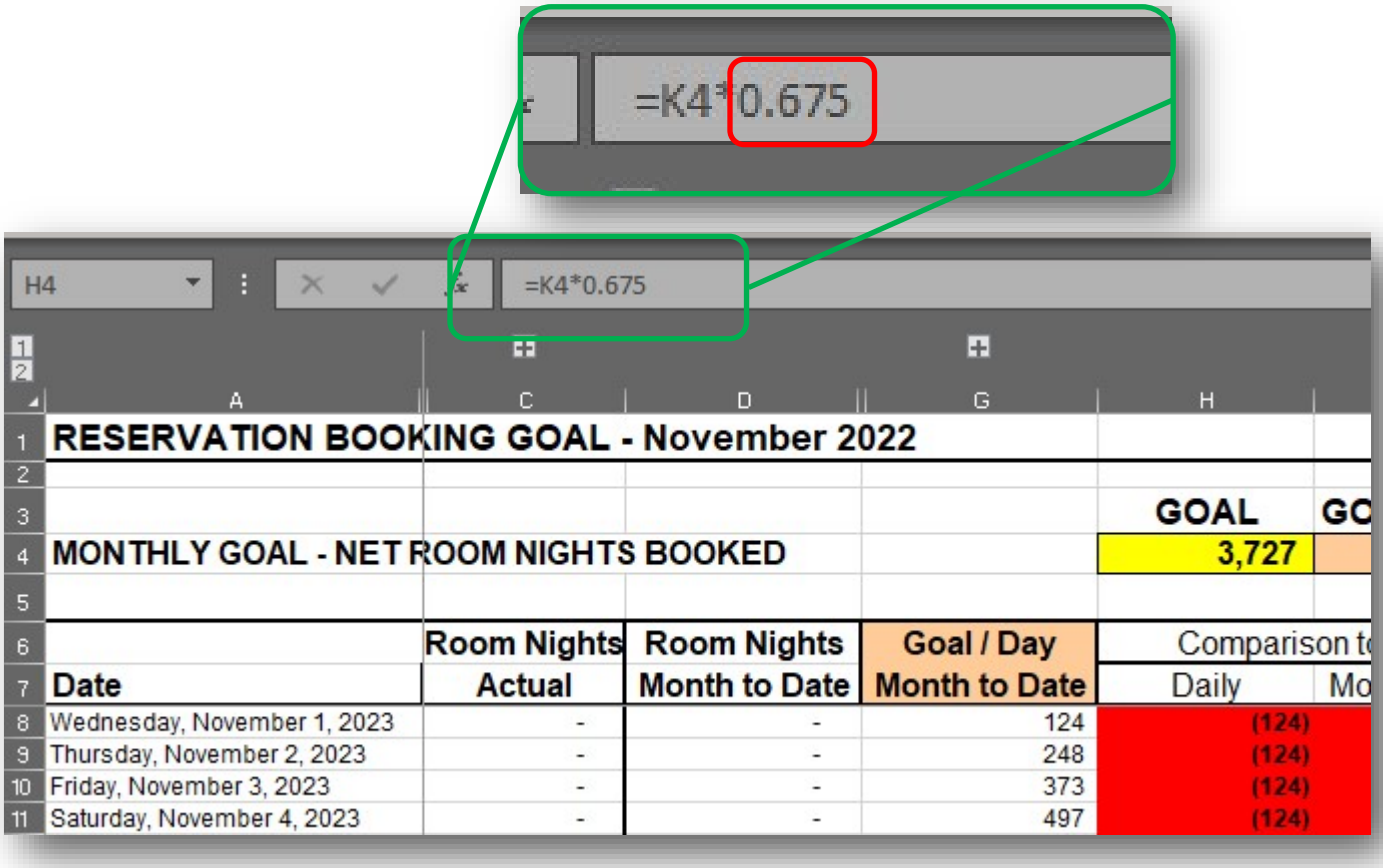
Prep New Month: Daily Reports (6/6)

12. **Clear out** the **dining data** at the end of the sheet.



71	*If dining calls were removed from these stats, our MTD			
72		Call Answer Speed	Calls Answered	Conv. Rate
73	MTD	0:25	10199	24%
74				

13. **Rename both** tabs to current year
14. Click on **Goal** tab. This is the information for next month's room night goal for the team.
15. **Update** date and year in cell **A1** & **A8**
16. **Click** and **drag down** to format the rest of the column.
17. Cell **H4** has a formula that must match our room night goal. We need to modify the number in red with trial and error until it matches.



	A	C	D	G	H
1	RESERVATION BOOKING GOAL - November 2022				
2					
3					GOAL
4	MONTHLY GOAL - NET ROOM NIGHTS BOOKED				3,727
5					
6		Room Nights	Room Nights	Goal / Day	Comparison t
7	Date	Actual	Month to Date	Month to Date	Daily
8	Wednesday, November 1, 2023	-	-	124	(124)
9	Thursday, November 2, 2023	-	-	248	(124)
10	Friday, November 3, 2023	-	-	373	(124)
11	Saturday, November 4, 2023	-	-	497	(124)

18. Click **Ctrl + Home** to navigate back to the very top of the sheet.
19. **Save** and **close** the document.

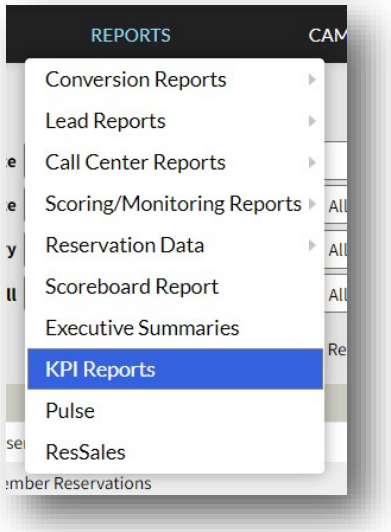
KPI Report

Pulled from Reviante Knowledge Base

The KPI (Key Performance Indicator) Report enables the Reservations Manager to set team and individual goals for the month. The goal of this report is to provide key metrics that show you that status of the team enabling the Leadership Team to provide strategic feedback to meet monthly goals.

The KPI Report is organized by each supervisor's team of agents.
This report should be used to see your team as a whole and their progress in the current month.

To access these reports:
1. Click **Reports**
2. **KPI Reports**
3. Select **your team's** report for the current month





This comprehensive report includes metrics and goals for:
- Performance Overview
- Inbound Conversion
- Outbound Revenue
- Call Scoring
- Call Accuracy
- Call Compliance
- Agent Productivity

City Ledger Report 1/2

A **City Ledger Report** is run to view the funds that guest still have on file that are set to expire soon.

Keyboard Shortcuts
R
R
S

Run Report in SMS

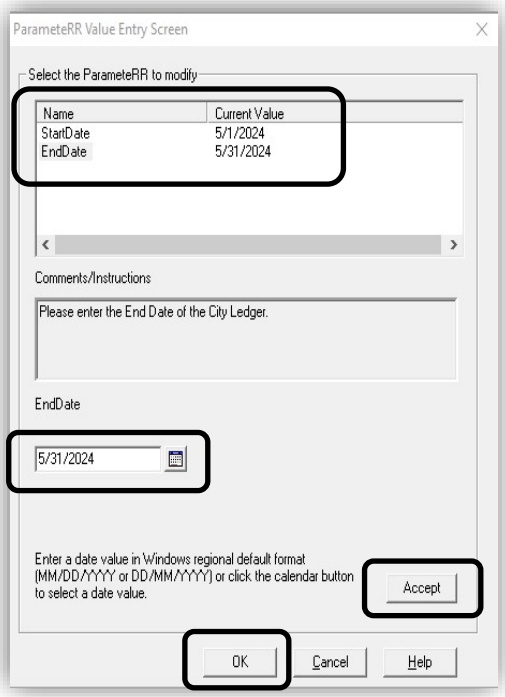
1. From the Home Screen of SMS, Click **Reports**
2. Click **Reports Menu**
3. Click **Scan** or press **S** on your **keyboard,**
4. Press **Tab** to move to search field
5. Search for **Res City Ledger**
6. Click **Res City Ledger Balance by Create Date** or **Res City Ledger Balance By Date**

Sq	Title	Active	Menu Key	Legacy Category1
1	**RES City Ledger Balance by Create Date**	This report is based off creation date		
2	RES City Ledger Balance By Date	This report is based off expiration date		

7. Search for **PDF**

Sq	Queue Name	Description	Paper	Tray	Font
1	**PDFPRINTER**	**PDFPRINTER**	**LT Landscape**		**Courier 12 cpi**

8. Select **PDFPRINTER**
9. Click **Enter** for 1 copy
10. Set **Start Date** > Click **Accept**
11. Set **End Date** > Click **Accept**
12. Click **OK** to run report
13. **Save** PDF on desktop

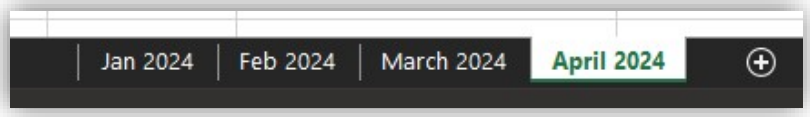


14. **Convert** from PDF to Excel using Online PDF Conversion [ilovepdf.com]

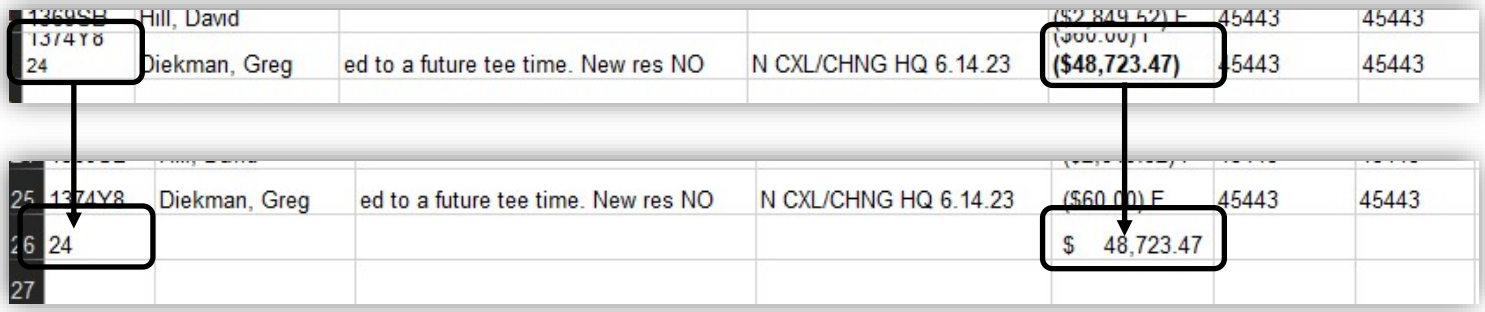
City Ledger Report 2/2

Format Spreadsheet

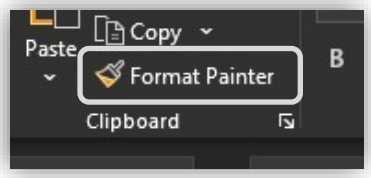
1. Open the City Ledger [current year] spreadsheet
   Located: RES\RESORT RESERVATIONS\MANAGEMENT\SUPERVISORS\City Ledgers
2. Create new sheet and name it Month Year of the report you ran
   Example: May 2024



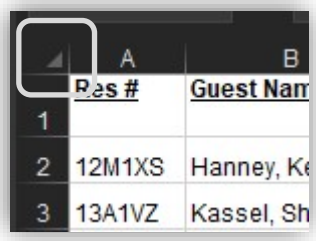
3. Copy and Paste data from the converted excel sheet into the newly created sheet



4. Separate totals from last row
5. Use the format painter tool to format the new sheet
   - Highlight the first row of data from a previous sheet - Try not to select a row with color already
   - Click format painter



   - On the new sheet, Click the arrow at the top left corner of the sheet - This will copy the formatting to all of the data in the sheet



6. Copy header row from a previous sheet and paste it over the header row in the new sheet

City Ledger Audit 1/3

Once the City Ledger Report has been created and formatted into the **City Ledger Spreadsheet**, you can start working on this audit. We will ask our agents to provide an opportunity (extension or deadline) for these guests to use their funds before they are set to expire.

Things to Note:

- This audit should be worked every day with a total of 5-8 hours per week, as schedule permits.
- It will take time to research many of these City Ledgers to understand what happened to the funds. To research you may need to look at City Ledger folios, Reservations and their folios, Guest Tiles, and Revinate notes.
- We do not take action on City Ledgers created by our pro shops. These City Ledgers are typically labeled as "Rain-check"
- City Ledgers from other departments will most likely not have any notes, you can check the folio to see where the funds came from. We do not take any action on these City Ledgers.
- If a guest has multiple City Ledgers, check with the Reservations Manager about combining the accounts. Clarify if all funds are available to use, or if one of the accounts needs to be marked for forfeiture
- If you are unsure if we should be providing an extension on a City Ledger, check with the Reservations Manager.
- For past expired City Ledgers, we are communicating a 6-month extension for the guest to call back and make a reservation within 18 months. If the guest does not use these funds after this final extension we are forfeiting the funds.

Opening a City Ledger

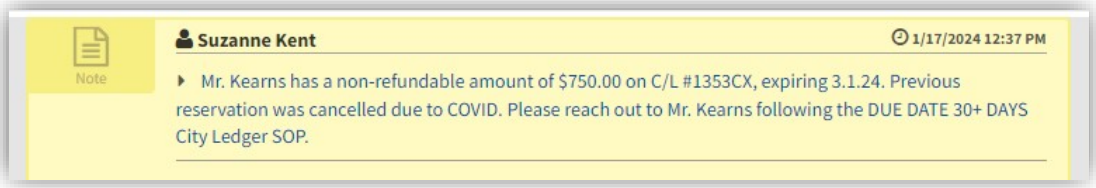
1. Copy City Ledger #
2. Open Work-slate type “r” and paste City Ledger #
3. Click ‘Page Down’ to search
4. Look at the City Ledger to determine the next action
    - ♦ If the City Ledger contains funds from an exception to policy canceled reservation
        - ⇒ This should be **assigned** to an **Agent** to reach out to the guest
    - ♦ If the City ledger contains funds that are less than $5 or a previous exception has already been made from working this audit and the guest still has not used the funds
        - ⇒ These will be **forfeited**
    - ♦ If the City Ledger contains funds from **golf prepayment**
        - ⇒ This needs to be **checked and monitored**

Assigning a City Ledger

1. Start by assigning to the Agent that originally **booked** the reservation
2. If that Agent no longer works here:
    - Assign it to the Agent who **cancelled** the reservation
3. If that Agent no longer works here:
    - **Pick an Agent** using the weekly schedules as a checklist starting at the top and working your way down.
    - Try to keep the assignments evenly distributed among the Agents.

City Ledger Audit 2/3

4. Create **a new lead** in Revinate:
    - Input the guest's information
        - ⇒ First / Last name, Phone #, and email
    - Fill in the campaign as "Reservation Cancellation - 14 Days"
    - Assign the lead to the Agent
    - Star the lead to set it as an Attention Lead
    - Set a reminder for today within the next hour
    - Leave a note with the details of the CL and instructions for the Agent
        - ⇒ Use the applicable template from the **City ledger Lead Notes** word document, adjust wording accordingly
        - ⇒ **Located**: \\falcon\DEPT SHARES\RES\RESORT RESERVATIONS\MANAGEMENT\SUPERVISORS\City Ledgers



5. Fill in the **City Ledger Spreadsheet**:
    - Who the lead is assigned to
    - The date it was assigned
    - The lead #
    - Notate any unusual scenarios in the Notes column
    - Color the row **yellow**

Monitor / Maintain Spreadsheet

After the Agent has advised the guest of the 6 month extension, color the row **pink**
After the guest books the new reservation, color the row **green**
After the guest has completed their stay, color the row **dark grey** and hide the row

Forfeiting Funds

If the guest has **less than $5** on the City Ledger or if the guest has **not used the funds** after the provided extension, we are authorized to forfeit these funds

1. Set an **ADM Trace** on the City Ledger to **forfeit** the funds
2. Set the ADM Trace for tomorrow
3. Detail what is to be forfeited and why
4. In the City Ledger Spreadsheet, color the row **brown**

Prepaid Golf / Refundable:

Please forfeit $2.50 from C/L #12N6PA Robert Walker due to low dollar amount. Guest prepaid golf but not all funds were used. This amount is refundable.
KW 3.11.24

Unused funds / Non-refundable:

Please forfeit $2710.68 from C/L #12I5OX Bruce Crystal. Guest was given until 1.31.21 to make a new res or forfeit. We never heard from the guest.
KW 3.11.24

Forfeiting Funds Follow Up

1. Check back to make sure funds were forfeited and close City Ledger if accounting didn't close it
2. Once the funds are moved and the City Ledger is closed, color the row **dark grey** and hide the row

City Ledger Audit 3/3

Prepaid Golf

1. Check the City Ledger and the booking to ensure the notes and chargeback notes are accurate
2. Fix any little mistakes
3. Send bigger or reoccurring mistakes to the Agent to fix
4. In the City Ledger Spreadsheet, color the row **light blue**

Prepaid Golf Follow up

1. After the tee time has passed, check the City Ledger again
2. If there are still funds on the City Ledger, set an **ADM trace** for the guest to be **refunded**
3. In the City Ledger Spreadsheet, color the row brown
4. Once the refund has been processed and the City ledger is closed, in the City Ledger Spreadsheet color the row **dark grey** and hide the row

Color Key

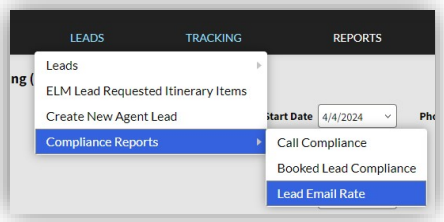
Need to submit ADM refund	Guest needs to be refunded and AMD trace needs to be set
Assigned	An Agent has been assigned to the lead and will reach out
ADM to Refund or Forfeit	Guest needs to be refunded (from prepayment) or is forfeiting (didn't use the funds)
Pending response from MG	Reached out to Res MOD for clarification / approval and awaiting response
Extended expiration date	Approval for extending the City Ledger funds for guest to call in, no advisement of forfeiting funds
Set to forfeit in 6 mo	Agent has reached out to the guest and advised 6 month extension to book 18 months out, funds forfeit if not used
Booked new reservation	Guest booked a new reservation and will be using City Ledger funds
Resolved/Complete	This City Ledger has been addressed and closed
Other Department	The City Ledger is being managed by another department
Prepaid Golf	Prepaid Golf and Prepaid Golf with funds that were not fully used

RTG Report

The RTG (Refuse to give) report in Revinate will show the percentage of leads marked RTG per agent.
Agents should only be using the RTG box on a lead when they have asked for the guests' email and the guest has declined to provide it.

Run Report

1. In Revinate, click Reservation Sales > My Start Page
2. Hover over Leads > Hover over Compliance Reports > Click Lead Email Rate



3. Set report for current month > Click Get Data

Interpreting Report

1. Look for a high number and percentage of leads with RTG checked
2. Click the blue number to view the list of leads with RTG checked
3. Listen to each call to verify if the agent asked for the email and the guest refused

ELMs	With Email	%	With DNA	%	With RTG	%
109	98	90 %	7	6 %	4	4 %
128	123	96 %			5	4 %
105	96	91 %	2	2 %	7	7 %
125	121	97 %	3	2 %	1	1 %
81	77	95 %	2	2 %	2	2 %
90	78	87 %	3	3 %	9	10 %
129	121	94 %	8	6 %		
121	114	94 %	3	2 %	4	3 %
136	114	84 %	18	13 %	4	3 %
133	113	85 %	15	11 %	5	4 %
148	130	88 %	11	7 %	7	5 %
75	69	92 %	3	4 %	3	4 %
125	117	94 %	7	6 %	1	1 %
83	80	96 %	3	4 %		
89	82	92 %	7	8 %		
95	84	88 %	10	11 %	1	1 %
96	91	95 %	2	2 %	3	3 %

Note:

- A guest hanging up before the agent asks for the email does not count as the guest refusing to give an email; we should check the DNA (Did not ask) box
- Checking the RTG box to fix call compliance is not a valid option.

Work Station Planning

What is my full phone number?

IF EXTENSION BEGINS WITH:	THE PREFIX IS:
59xx, 61xx, 64xx, 66xx, 86xx, 65xx	622
84xx, 85xx	625
79xx	644
55xx, 57xx, 74xx	647
78xx	648
27xx. 70xx, 76xx	649
26xx	658

Phones with Forwarded Numbers
To undo the forward, you must release that extension from both phones.

Release an Extension from a Phone:
- Dial 113#
- 1234
- Enter the extension you want to release

Connect An Extension to a Phone:
- Dial 112#
- 1234
- Enter the extension you want to connect

Prepare the Work Station

Tech:
1 Analog or VoIP Phone
1 CPU
2 Monitors
1 Keyboard
1 Mouse
1 IDTECH
1 Set of Speakers

Cables:
1 CPU Power Cable
1 Phone Base Headset Cord
2 DisplayPort cables:
- 1 VGA if needed

2 Ethernet cables:
- 1 short: CPU ->phone
- 1 long : CPU -> wall port

Non-Tech:
Trash Can
Inbox Tray
Calculator
Pens
Post-Its

Move Stations

Agents will carry from their previous station:
- CPU (computer box)
- Office supplies
- Headphones
- Personal affects

At new station:
- Sanitize the area
- Edit their REVINATE phone number to that of their new station
- Take a test call with their head-set through REVINATE

Update
- Caller ID - IT?
- Division Phone List - Sara Grey
- Back9 Directory - HR

Monitor Connections

VGA



DVI



DisplayPort





Avaya Headset Adapters

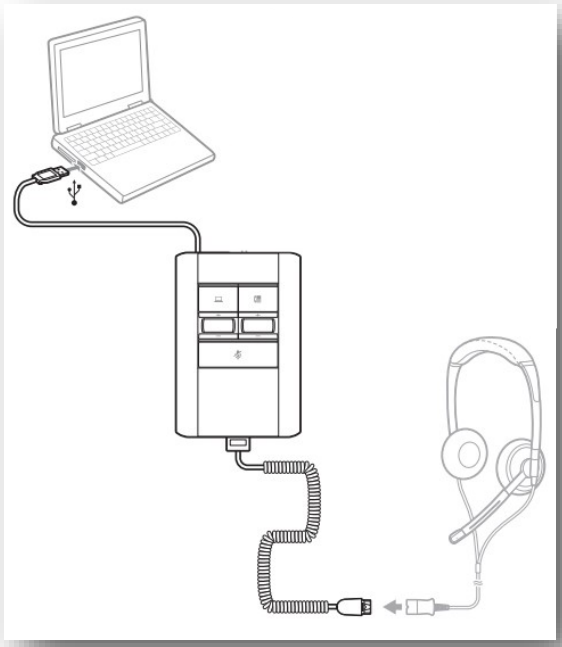
Type of Internet Connection	Adapter Product Code
1. Analog Phones	HIC-1 0606
2. VoIP Phones	HIS-0322 or HIS-0619

Soft Phone Set-Up

The soft phone is an internet based phone that can be used if the main phone line goes down but we still have power and internet.

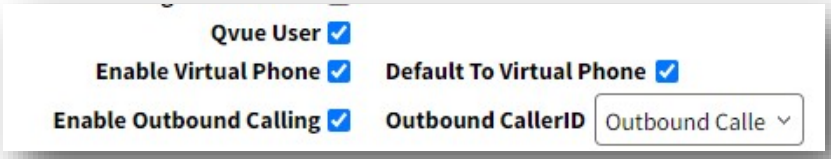
Set Up:

- Plug in the USB side to your computer and plug in the other side to your headset

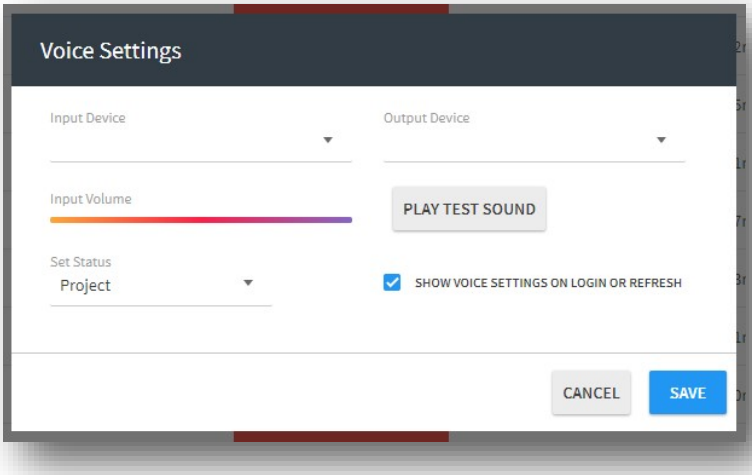


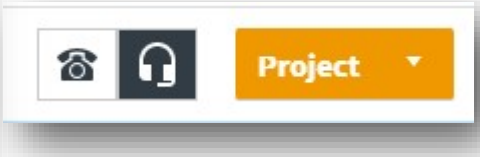
Log into Navis:

- **A Manager** will need to Enable Virtual Phone and select Default to Virtual Phone under Agent Setting in Navis.



- When you refresh your Navis, you will get a prompt to select your input and output device.
  - Do not change these setting and **just click Save**
  - You will now see an image of a headset that lets you know the Virtual Phone is enabled.

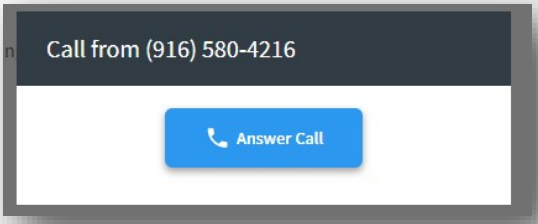




Soft Phone Operation

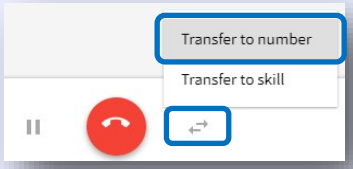
ANSWER AN INCOMING CALL:

1. The Lead form will pop
2. Click back to the NAVIS/REVINATE HUB
3. Click **Answer Call** in Navis

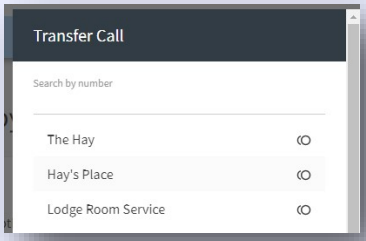


TRANSFER A CALL TO ANOTHER DEPARTMENT:

- Click **transfer (double arrows)** icon and select **transfer to number**

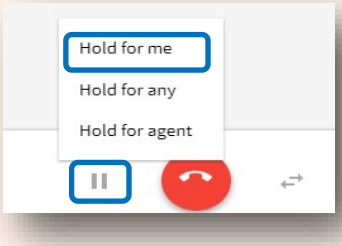


- Select the **department** you need to transfer to

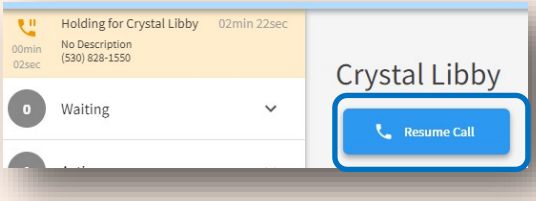


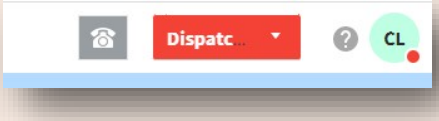
PLACE A CALL ON HOLD:

- Click **hold (pause)** icon and select **hold for me**



- To bring the guest back on the line, click **Resume Call**





NOTE: This will give the guest hold music but when you resume the call, it will ring back to the guest as if they called back.

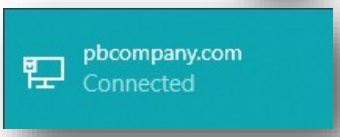
Tech Troubleshooting 1/2

Check to see if the problem is solved before moving to the next numbered step

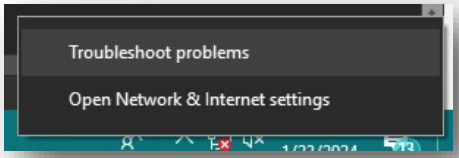
No internet access | Onsite:

This represents a connected internet status and this represents a non-connected internet status

The computer should be connected to the Pebble Beach network. Single click on the internet status icon and you should see 'pbcompany.com - Connected' when everything is working.



To fix non-connected internet status:



1. Right click **internet status icon** > Click **Troubleshoot problems** > Allow the troubleshooter to run and **follow any instructions** you can to fix the connection error.
2. **Restart** the computer
3. Fully **shut down** the computer and **turn it back on**
4. **Unplug** and **re-plug** in the **ethernet cable** at both ends (computer and wall)
5. Reach out to **Manager / IT** for further assistance

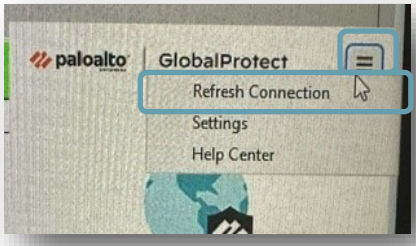
No internet access | Work from home:

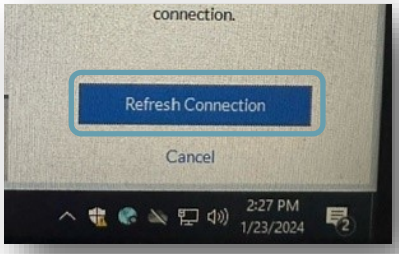
Work from home agents use Global Protect to allow them to connect to Pebble Beach's Network without being onsite. We need to factor this in when we are troubleshooting for a work from home agent.

The Global Protect icon with a successful connection looks like and when the connection has failed

To fix non-connected internet status:

1. **Refresh** Global Protect > Click Global Protect icon > Click **menu** button (top right of Global Protect popup) > Click **Refresh Connection**





2. Make sure Global Protect is connected to par.pbcompany.com
3. **Restart** the computer
4. Fully **shut down** the computer and **turn it back on**
5. Check the **modem/router** and **reset** the device
6. Right click **internet status icon** > Click **Troubleshoot problems** > Allow the troubleshooter to run and **follow any instructions** you can to fix the connection error.
7. **Unplug** and **re-plug** in the **ethernet cable** at both ends (computer and wall)
8. Reach out to **Manager / IT** for further assistance

Tech Troubleshooting 2/2

Check to see if the problem is solved before moving to the next numbered step

No access to the Z-Drive:

1. **Restart** the computer
2. Fully **shut down** the computer and **turn it back on**
3. Reach out to **Manager / IT** for further assistance

Credit card reader (IDTech) isn't taking input keys or is frozen:

1. **Unplug** and **re-plug** in the **IDTech**
2. **Restart** the computer
3. **Check** to see if other **agents** are having the **same issue** > Reach out to **Manager / IT** for further assistance

Keyboard or mouse not responding:

1. **Unplug** and **re-plug** in the device
2. **Restart** the computer
3. If wireless - check the **batteries**
4. **Replace** device

Computer running slow or freezing:

1. **Restart** the computer
2. Fully **shut down** the computer and **turn it back on**
3. **Check** to see if other **agents** are having the **same issue** > Reach out to **Manager / IT** for further assistance

Red screen or an error causing a crash for SMS:

1. If SMS is frozen from the error and wont close > **Ctrl + Alt + Delete** > Click **Task Manager** > Click **Vhl (32 bit)** > Click **End task** > **Re-open SMS**
2. If SMS crashes > **Re-open SMS**
3. **Restart** the computer
4. Take a **screenshot** or **snippet** of the **error** > **Check** to see if other **agents** are having the **same issue** > Reach out to **Manager / IT** for further assistance

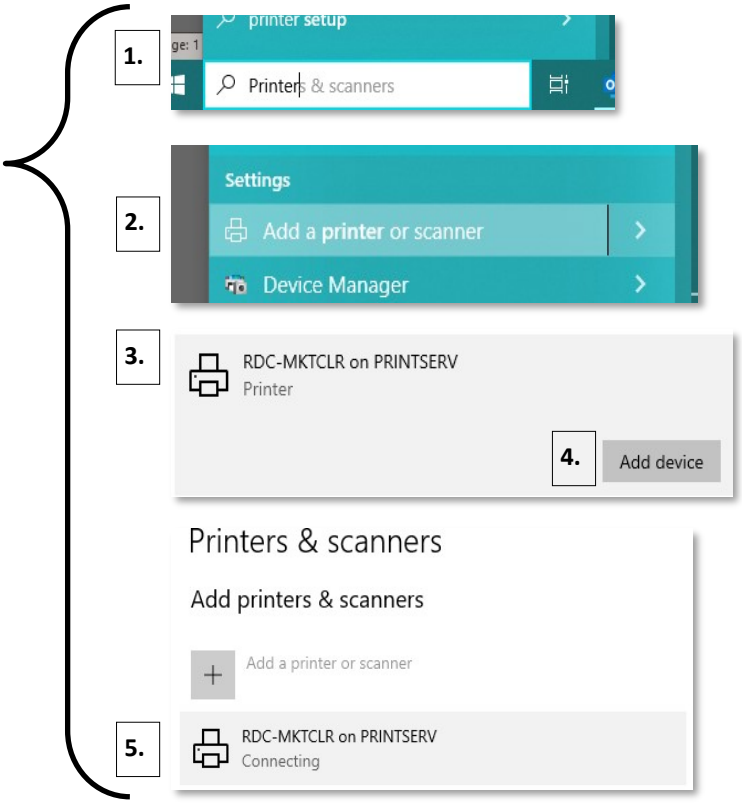
A program (SMS, Revinate, Excel, etc) is frozen, running slow, or not loading properly:

1. If a program is frozen from the error and wont close > **Ctrl + Alt + Delete** > Click **Task Manager** > Click the **name of the program** (SMS = Vhl (32 bit)) > Click **End task** > **Re-open** the **program**
2. **Restart** the program
3. **Restart** the computer
4. Take a **screenshot** or **snippet** of the **error** > **Check** to see if other **agents** are having the **same issue** > Reach out to **Manager / IT** for further assistance

Printer Setup

<u>Add the color printer for use</u>

1. In the windows search bar type “printer”
2. Click “Add a printer or scanner”
3. Search & Click on “RDC-MKTCLR on PRINT-SERV”
4. Click Add device
5. Windows will add the printer
   Once complete you will be able to print to it



<u>Setup an Employee in the printer/copier</u>

1. At either printer, press Send
2. Press Address Book
3. Press Add / Edit Address Book
4. In the Address Book section, press Add / Edit again
5. Press Add
6. Make sure Contact is selected
7. Press Next
8. On the Name tab under the Name section Press Change
9. Type in the Employee’s name
10. On the Email tab Press Change
11. Type in the Employee’s email
12. Press Save
13. It will ask ‘Do you want to add address to one touch key’; Press No
14. Press the physical Home button to return to the printer’s main screen

<u>Email a Scan</u>

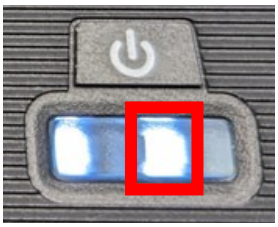
1. At either printer, place the document either in the top loading tray (face up) or open the top of the printer and place onto the glass surface (face down)
2. Press Send
3. Select the email address of who you want to receive the scan
4. Press Start
   In a few moments, the intended recipient will receive the emailed scan

<u>Make a Copy</u>

1. At either printer, place the document either in the top loading tray (face up) or open the top of the printer and place onto the glass surface (face down)
2. Press Copy

Wireless Headset | Call Shadowing

1. Remove the host headset from its base and turn it on.
2. Turn the guest headset on and place it into the host base. The light on the base will begin to flash then remain solid.



3. When the guest headset begins to flash, remove it from the base.
4. The power button on the guest headset should go solid, indicating that it is now on and paired.
5. Mute the guest headset before making/receiving calls; press the middle button on the headset.

NOTE:

- Turning off either headset or returning either headset to its base will cancel the pairing
- When the agent mutes the call on the desk phone, both the host and their guest will be muted
- When the agent places the caller on hold, the caller will not be able to hear either the host nor their shadow

Group Reservations Coordinator

Resort Reservations

2024 Training Binder









C9|BX 5.28.23

Role Overview

The **Group Rooms & Golf Coordinator** is responsible for planning and implementing resort stays and tee times for large groups.

You will be assigned groups who have been booked by the **Pebble Beach Sales Department**.

Each group will have a designated "**Planner**" with whom you will be communicating to execute the details specified in the group contract.

Essential Duties

- ◊ DEVELOP RELATIONSHIPS WITH CLIENTS
- ◊ ENTER ROOM AND GOLF RESERVATIONS INTO OUR HOTEL MANAGEMENT PROGRAM
- ◊ MANAGE SPECIAL REQUESTS, BOOKING CHANGES, CONTRACT ADDENDUMS, AND ROOM BLOCKS
- ◊ MAINTAIN RECORDS OF EACH GROUP
- ◊ RUN REPORTS TO BE UTILIZED BY MANAGEMENT AND OTHER DEPARTMENTS
- ◊ CROSS-SELL ROOMS AND PROPERTIES
- ◊ ATTEND PRE-CONFERENCE MEETINGS AND SITE VISITS
- ◊ SHARE INFORMATION AND UPDATES WITH OTHER DEPARTMENTS ASSIGNED TO YOUR GROUPS

Group Reservations Manager

- OVERSIGHT OF OFFICIAL DOCUMENTS
- APPROVAL OF OVERSELLS AND EXCEPTIONS
- GUIDANCE THROUGHOUT THE PROGRAM PREPARATION PROCESS
- EMPLOYEE PROGRESS CHECK-INS (KRA MEETINGS)
- SCHEDULING

PEBBLE BEACH RESORTS



Coordinating Departments

Below is an outline of the **major departments (pink)** as well as the **coordinating departments (blue)** who work together create a successful group program from beginning to end.

National Sales Managers

The National Sales Managers (NSM) are first to contact each group. They develop the program and negotiate the group's contract.

Once signed, they distribute the contract to all departments involved for fulfillment.

Conference Services Managers

Once the contract is signed, the Conference Services Managers oversee the implementation of the program.

They are now responsible for editing and distributing the resume.

- Accounting
- Audio Visual
- Transportation
- Banquets
- Special Services
- Group Retail
- Floral
- Pro Shops

Group Reservations

The Group Reservations Department is responsible for creating and coordinating all reservations in accordance to the group's contract.

- Group Reservations Manager
- Group Golf Coordinator
- Group Rooms & Golf Coordinator
- Group Spa Coordinator
- VIP Coordinator

GRES Glossary

CONTRACT	The document created by the National Sales Managers that details the agreed upon program signed by both the group and Pebble Beach Company
CONCESSIONS	Concessions are the additional benefits that groups receive per their contract at no additional charge.
PROGRAM	The event and all of it's components (billing, activities, requirements) that has been planned for a large group visiting Pebble Beach Resorts
PLANNER	The point person(s) within a group who is tasked with planning their event with Pebble Beach Company
RESUME	The actualization of the contract. This consists of a breakdown of the group's program and responsibilities for each department involved.
BLOCK	The allotment of rooms that has been held from inventory for a group to occupy per their contract
PICK UP	A picked up room is a room that the group has utilized from their block and turned into a Reservation.
PEAK NIGHTS	The main nights of a group's contract; the nights in which they have the largest number of rooms in their room block
PRE/POST NIGHTS	Additional nights on either end of a group's contracted program. Attendees may reserve Pre/Post Nights at the group rate to a max of three nights pre or post their program dates. Beyond 3 nights, guests pay rack rate.
RACK RATE	The standard public rate of a room or activity. If a group wants to stay at Pebble Bach Resorts beyond three days pre or post their group's date range, they will pay rack rate for the additional nights.
OBLIGATION	The room and golf for which a group is contractually obligated to pay. A group is permitted to add or reduce rooms and/or golf at any point, but if they reduce more than what is permitted per their contract, they may still be obligated to pay for said rooms or tee times.
CUMULATIVE VS. NIGHTLY	The guidelines of room reductions permitted prior to a group's cut-off date. Cumulative reductions are based on the total number of room nights within the group's room block Nightly reductions are based upon the total number of room nights per individual night
RUN OF HOUSE (ROH)	The group will pay one flat nightly rate per room across multiple room categories
TIERED RATES	The group will pay a different nightly rates for each contracted room category
STAFF ROOMS	Lower category rooms sold at reduced rates, typically assigned to the group's onsite staff
THE MASTER ACCOUNT	The financial account belonging to the group. Charges billed to The Master Account will be paid for by the group.
IPO	"Individual Pays Own" is a billing scenario in which attendees of a group program will pay for their own rooms and/or golf
STIPEND/ CREDIT	An allowance for attendees that will be charged to The Master Account
BLOCK TO ACTUAL	The finalized block for which a group is obligated. This is a progress report that we send to groups to explain how many rooms they have utilized (picked up) out of their block thus far. The "block" is what was agreed upon on the contract; the "actual" is this document explaining the current block/ obligation.
DELEGATE LIST	A report that lists all attendees and their dates of stay; a Rooming List
ALLOWABLE REDUCTION %	Per a group's contract, they can reduce their block up to a certain percentage (typically 10%) prior to their cutoff date without being financially responsible for those dropped rooms
TRAVELLED	The group's stay has already been completed. "That group has travelled."

Programs & Resources

Amadeus is customer management system developed by Salesforce. Pebble Beach Resorts uses this program to manage our large group reservations, document contacts, track due dates, and make certain room block changes.

SMS Host is a hospitality management system. While Amadeus is used to manage the large groups as customers, SMS is where the hotel and golf reservations are created and managed.

Passkey is an event management program that groups can use to reserve their rooms online rather than reserving through their company or organization's "Planner." This is an option typically reserved for groups who want each of their attendees to pay for their room stays independently.

Sertifi is program that we use to securely collect confidential information, such as credit card numbers, electronically.

The Pebble Beach Company has a **Network Server** on which various departments can store documents, reports, and historical documentation.

Resort Reservations utilizes:

- **The O Drive**—This drive holds documents saved by Group Reservations, Conference Services, and the National Sales Managers
- **The L Drive**—This drive holds documents saved by Resort Reservations which includes procedural resources

Digital Binder for GRES

The **Digital Binder** is an excel spreadsheet used by the Reservations Department that allows us easy access to many data-based documents that we need to reference every day.

Since the entire department uses this document, not everything will apply to Group Reservations. **Below is an outline of the primary documents that Group Reservations will use regularly.**

The "**RATES**" links will take you to a concise list of rates for things like:

- Rack Room Rates
- Golf Greens Fees
- Caddie Fees
- Rental Club Fees
- Cart Fees

The "**HOTELS/ROOMS**" links will take you to:

- Property Maps
- Room Feature Spreadsheets that include:
  - ◊ Square Footage
  - ◊ Bedding Types
  - ◊ Which rooms connect
  - ◊ ADA rooms

The "**GROUP RESERVATIONS ONLY**" links will take you to:

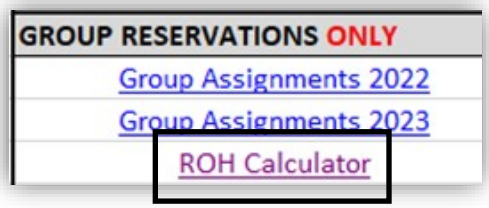
- Group Assignments
- ROH Rates
- Group Rates
- ROH Calculator



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Run of House (ROH) Calculator

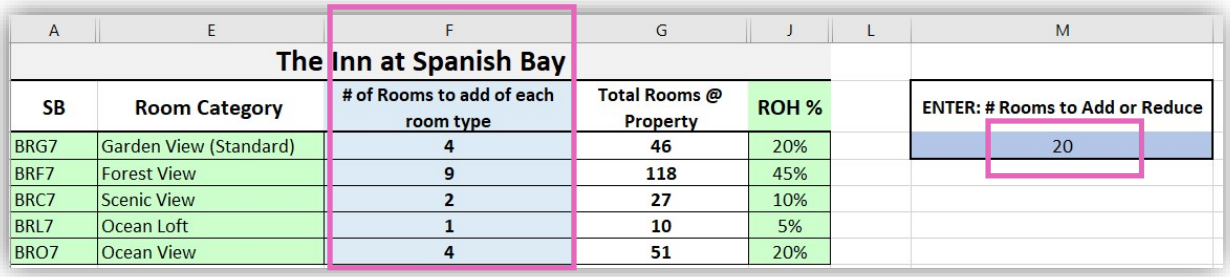
Within the Digital Binder is a very useful tool that will help Group Rooms & Golf Coordinators maintain our Run of House percentages when making edits to room reservations for our groups.



MODIFY ROH Calculator

Whenever you need to add or reduce rooms while maintaining ROH, access this tool.

- Type the number of rooms you need to add or subtract into the box in the M Column
- You will instantly see the F column update
- This will tell you how many of each room category you must subtract



A	E	F	G	J	L	M
	The Inn at Spanish Bay					
SB	Room Category	# of Rooms to add of each room type	Total Rooms @ Property	ROH %		ENTER: # Rooms to Add or Reduce
BRG7	Garden View (Standard)	4	46	20%		20
BRF7	Forest View	9	118	45%		
BRC7	Scenic View	2	27	10%		
BRL7	Ocean Loft	1	10	5%		
BRO7	Ocean View	4	51	20%		

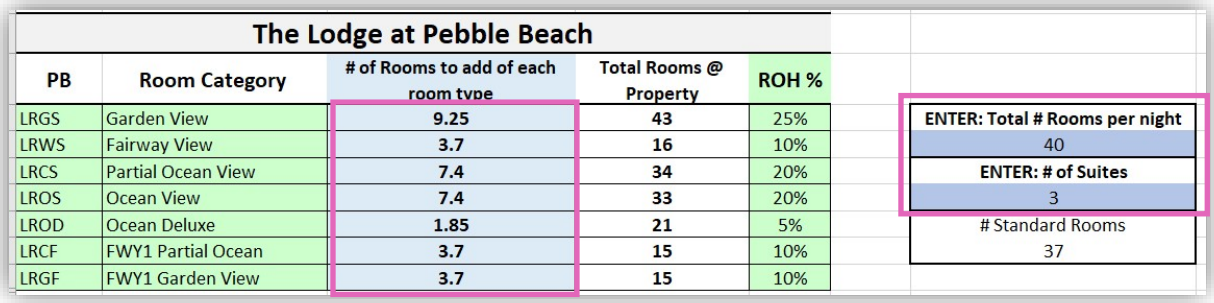
In the example above, this agent needed to add 20 rooms to their block. The ROH Calculator determined that, to maintain ROH, the must add:

- 4 Garden Views
- 9 Forest Views
- 2 Scenic Views
- 1 Ocean Loft
- 4 Ocean View

TOTAL ROH Calculator

Sometimes, after several edits have been made to a block, we find that we have drifted away from our ROH %.. To check ourselves, you can access the Total ROH Calculator and plug in the total block numbers for you group to see if we need to make adjustments.

Plug in the total number of rooms per night AND suites per night. This calculator will then generate the appropriate allotment of rooms per category per ROH %.



The Lodge at Pebble Beach						
PB	Room Category	# of Rooms to add of each room type	Total Rooms @ Property	ROH %		
LRGS	Garden View	9.25	43	25%		ENTER: Total # Rooms per night
LRWS	Fairway View	3.7	16	10%		40
LRCS	Partial Ocean View	7.4	34	20%		ENTER: # of Suites
LROS	Ocean View	7.4	33	20%		3
LROD	Ocean Deluxe	1.85	21	5%		# Standard Rooms
LRCF	FWY1 Partial Ocean	3.7	15	10%		37
LRGF	FWY1 Garden View	3.7	15	10%		

First Contact Checklist

Complete the following tasks within 1 week of being assigned a new group's Turnover File:

1.) LOCATE THE GROUP FOLDER IN THE O DRIVE AND REVIEW

- Contract—Review block/rate structure, commission, cut-off date, allowable reduction
- Allotment Report—Verify that allotment matches the contracted block
- Golf Confirmation—Compare to the contract and notate the ratio of rooms to golfers
- Turnover Packet—Look for relevant notes of past year's program

2.) COMPLETE THE GROUP INFORMATION SHEET WITH INFORMATION FROM

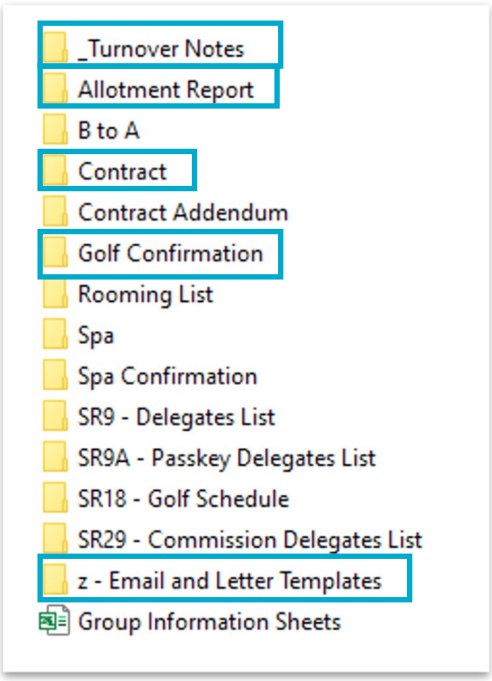
- Turnover Packet / Amadeus Booking
- Contract

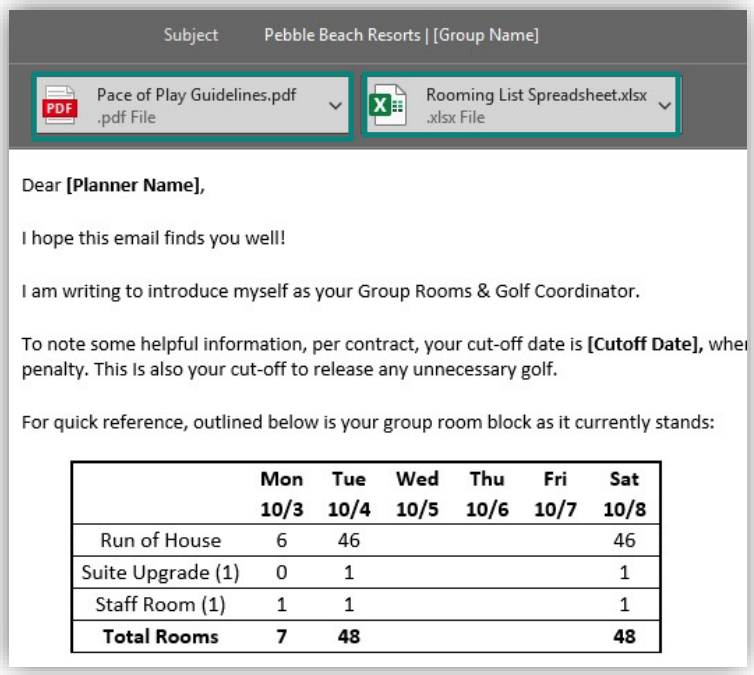
3.) SET UP OUTLOOK

- Create Calendar Events for 1 week prior to the Cutoff Date
- Create Calendar Events for the Cutoff Date
- Create an Outlook Folder to store emails for the group

4.) EMAIL THE GROUP'S PLANNER

- Use the GRES Introduction Email Template
- The Pace of Play Guidelines and Rooming List Spreadsheet will be pre-attached
- Manually attach the Golf Confirmation
- Copy/Paste the group's Block from the contract
- Edit the subject line, greeting, cut-off date/cut-off percentage, and signature





	Mon 10/3	Tue 10/4	Wed 10/5	Thu 10/6	Fri 10/7	Sat 10/8
Run of House	6	46				46
Suite Upgrade (1)	0	1				1
Staff Room (1)	1	1				1
Total Rooms	**7**	**48**				**48**

Revision Checklist

1. Run an Allotment Report
   - Verify that no changes have been made since your previous edit
   - Determine if your desired edit will require you to expand the block

2. If you will be editing the block, verify F7 General Availability and F7 Availability Notes
   - If inside 14 days, check both property and room category availability

   Planner Change
   a. Edit the Block in SMS Host, Amadeus, or Passkey
   b. Edit Dates, Room Categories, or names en mass via Reservations Zoom
   c. Change Dates, Room Category, or Cancel an individual Reservation Tile
   d. Enter or Import a Rooming List or Rename Individual Reservation Tiles

   Group Attendee Change
   a. Have Pre/Post Night Rates approved by Group Reservations Manager
   b. Send the guest an Letter of Authorization via Sertifi
   c. Edit the Block in SMS Host, Amadeus, or Passkey
   d. Change Dates or Room Category , or Cancel an individual Reservation Tile
   e. Whose a Guest Tile with contact information and credit card from the LOA
   f. Adjust the charge on the Reservation Tile
      - Addition/Upsell: Charge the Guest's CC for the difference in room nights
      - Reduction/Downsell: Set ADM Trace to refund the guest
      - Set GBC Trace if guest is obligated to reduced charge/nights
   g. Update Deposit #1 in Special Billing
   h. Send a GEMAIL

   Passkey Change
   a. Ensure that the Passkey Change is correctly reflected on the Reservation Tile
   b. If Upsell, charge the guest's credit card for the difference in the room rate
   c. If Downsell:
      - Pre-cutoff—set ADM Trace for refund
      - Post-cutoff—Set GBC Trace
   d. Update Deposit #1 in Special Billing
   e. Send a GEMAIL

   Overflow Booking
   a. Create an Overflow Booking in Amadeus
   b. Set the Reservations Template
   c. Create Billing Profile
   d. Pick Up rooms
   e. Duplicate Reservations
   f. Rename Reservation Tiles

   Adjust Golf
   a. Change the Golf Block or Adjust/Enter Pairings in the Tee Sheets
   b. Run and save a Golf Exhibit to the Group's Folder
   c. Edit and save a new Golf Confirmation to the Group's Folder
   d. If post-cutoff, leave Tee Sheet Note for Resell and track on Golf Info Sheet

3. Run and save an Allotment Report to the Group's Folder

4. Run and save a Delegates List to the Group's Folder

5. If the Block has changed:
   - *And* it is pre-cutoff, Generate Contract Addendum
   - *And* the group has maxed their allowable attrition or it is post-cutoff, have the Golf Coordinator Generate a Block to Actual, then update the Group 2 Notes
   - Have Letter approved by the Group Reservations Manager and save to the Group Folder

6. Email the Planner the Block to Pickup Change Email Template and attach (as needed):
   - Contract Addendum or Block to Actual
   - Delegates List
   - Golf Confirmation

Finalization Checklist

6-2 MONTHS PRIOR TO ARRIVAL

1. Attend the Site Visit:

1 WEEK PRIOR TO CUTOFF DATE

Email the Planner:

1. Advise them that their cutoff date is coming up so they can make remaining room block and/or golf changes without penalty
2. Include a synopsis of their Pickup (if applicable) and overall block numbers
3. Attach Golf Confirmation

CUTOFF DATE

Email the Planner:

1. Generate and attach a Block to Actual summary
2. Ask for a Rooming List with any VIPs and bedding requests
3. Ask for a Pairing List, Golf Billing, Tournament Services, Caddies, and Club Rentals—Notate on the Golf Information Sheet
4. Enter your Group Notes (“2 Notes”) in Group Management Tile

RECEIPT OF ROOMING LIST

1. Pick Up Rooms
2. Input Room Requests/ Feature Requests
3. Email a Delegates List to the Planner

RECEIPT OF RESUME

(30-15 days prior to arrival)

1. Edit the Resume
2. Send the Resume update to the Conference Services Manager
3. Ensure that all tasks are completed on your Group Information Sheet
4. Work through the Final Checklist on your Golf Information Sheet

1 DAY PRIOR TO ARRIVAL

1. If the contract lists a Travel Agency, run the Commission Delegates List
2. Verify that the TAG receives commission on appropriate rooms

ARRIVAL

1. Attend the Pre-Conference Meeting

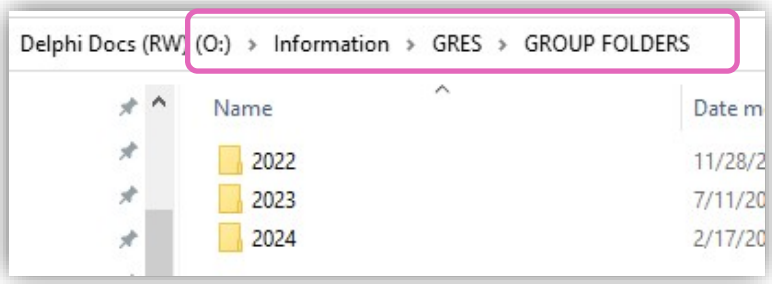
POST EVENT

1. For billing questions Post-Event, Contact the Group Billing Coordinator

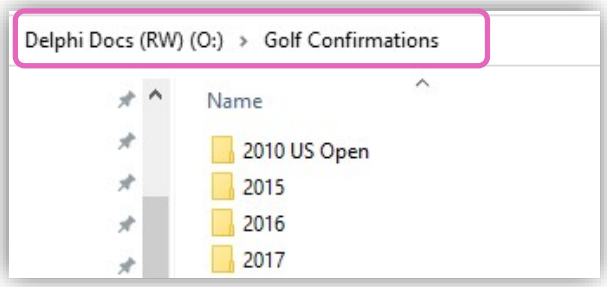
O Drive File Locations

The O Drive is used by the National Sales Managers, Conference Services, and Group Reservations. Group Reservations uses the O Drive to store important files about each group including updates when groups make changes.

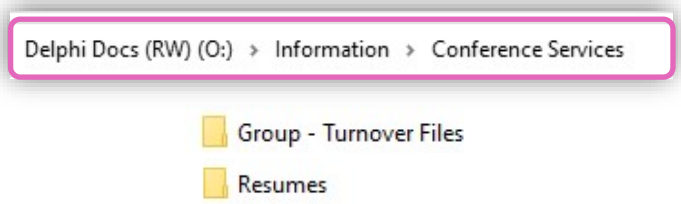
Group Reservations creates a folder for that group in the O Drive as soon as a contract goes definite. We use this folder to store their contract information and track all changes and updates.



Group Golf Coordinator will reserve golf and generate a Golf Confirmation (a.k.a. Golf Exhibit) while contracts are still tentative. Once the contract is definite, the most up to date version of the Golf Confirmation is placed into the Group Folder for the Group Rooms & Golf Coordinator.



Conference Services also uses the O Drive to store information. This will include the Group Turnover Files and Resumes.



National Sales Managers each have a folder in the O Drive where they store, among other things, the full contracts for each Group.



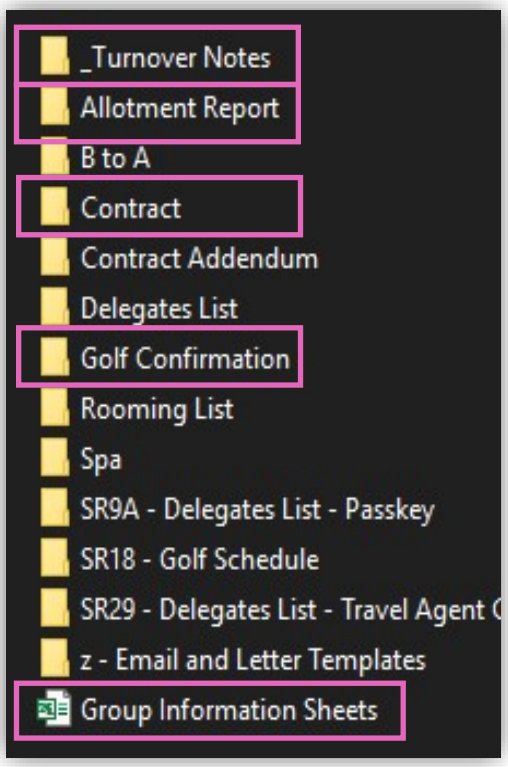
Select the **NSM's personal folder** to access the contracts for their groups.

Group Turnover

Once a contract "goes definite" - meaning it is signed by the group—the **National Sales Manager** will pass along the contract to all departments involved. This transition is known as the "**Turnover**," and the information we receive from is referred to as the "**Turnover File**."

The Turnover File (a.k.a. **Group Folder**) will have several documents about your group, but will also have several empty folders that the Group Rooms & Golf Coordinator will fill as they manage their group.

The following documents will be loaded into the Group Folder at the Turnover:



- **Turnover Notes:** This folder contains the "Booking Recap," a snapshot of the Amadeus booking, and notes from previous years to improve future programs.
- **Allotment Report:** The current rooms held for the group ("pickup"). It should match the contract's block at Turnover.
- **Contract:** the agreed program details between the group and National Sales Managers.
- **Golf Confirmation:** The current golf tee time schedule in SMS.
- **Group Information Sheets:** The Group Information Sheets, in an Excel document, track progress and key group details. The Group Reservations Manager fills in important areas before handing over to the coordinator, including unique contract agreements and staff rate codes.

Review the Group Folder
- Turnover Notes
- Contract
- Allotment Report
- Golf Confirmation

Fill Out the Group Information Sheet
Find Info in the:
- Contract
- Amadeus Booking

Introduce Yourself
Email the Planner:
- Current Block & Cut-Off
- Pace of Play Guidelines
- Rooming List

Contracts

GROUP ROOM BLOCK

	Wednesday 7/12/2023	Thursday 7/13/2023	Friday 7/14/2023
Run of House	33	33	10

Block Structure?
Suites?
Staff Rooms?

Check-in time is 4:00 p.m. and check-out time is 12:00 Noon

GROUP ROOM RATES

ROH or Tiered Rates?
Commissionable?

Confirmed rates for **Bank of America TMT Golf Outing** during **July 12 - 15, 2023** are:

Room	Group Rates
Run of House	$1,110.00

These above rates are:

- For single or double occupancy per room night.
- European Plan (EP).
- Non-commissionable.
- Exclusive of a **$25.00** per night service charge, a **10.50%** per night county occupancy tax, and a **0.195%** per night California Tourism Assessment. In addition, the county charges **$2.00** per occupied room night for the County Tourism Assessment.
- Service charges and taxes are subject to change.

RESERVATION PROCEDURE

Rooming List?
Passkey?

A final rooming list, with names and addresses of attendees, type of accommodations requested, and exact arrival and departure dates, is required by **May 26, 2023**. After this date, guestrooms and group rates will be confirmed on a space available basis.

SCHEDULE FOR GROUP ROOM BLOCK ADJUSTMENTS

Nightly or Cumulative Reduction?
Cutoff Date / Percentage?

If you require additional guestrooms, they will be confirmed on a space available basis and added to your contracted nightly group room block.

Between the date this contract is signed and May 26, 2023, you may reduce up to 10% of the nightly Group Room Block without being assessed a cancellation fee. You will be assessed a cancellation fee for all rooms cancelled in excess of 10% of the nightly Group Room Block. This fee will be equal to the group room rate multiplied by the number of rooms cancelled for each night.

After May 26, 2023, you will be assessed a cancellation fee for all reductions to the Group Room Block. This cancellation fee will equal the group room rate multiplied by the number of rooms cancelled for each night.

This cancellation fee will be reduced if rooms are resold. These rooms must be the last rooms sold in order for the hotel to achieve 100% occupancy. Due to day-to-day variations in hotel occupancy, room block obligations are figured on a per night basis, rather than cumulatively over the group's meeting dates.

Run of House

The term "**Run of House**" can refer to either the Room Category Allotment or the Room Rates on a group's contract.

Run of House Block (a.k.a. the Allotment of Rooms)

The number of rooms in each room category is based off of Run of House Percentages.

*Casa Palmero does not have a ROH Allotment because typically the entire property is bought out.

If the contract states "100 Run of House Rooms" at The Inn at Spanish Bay, we would block 20 Garden Views, 45 Forest Views, 10 Scenic View's, etc.

The Inn at Spanish Bay

Room Category	ROH %
Garden View	20%
Forest View	45%
Scenic View	10%
Ocean Loft	5%
Ocean View	20%

The Lodge at Pebble Beach

Room Category	ROH %
Garden View	25%
Fairway View	10%
Partial Ocean View	20%
Ocean View	20%
Ocean Deluxe	5%
Fairway 1 Partial Ocean	10%
Fairway 1 Garden View	10%

Run of House Rates

The group will pay one rate across the board for all rooms, regardless of category. Run of House Rates are generally on the low side since we will be allotting them a significant percentage of lower category rooms.

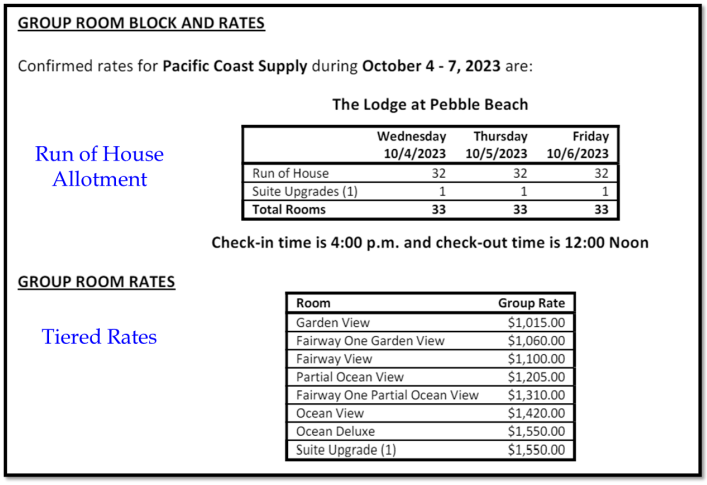
It is possible for a group with a Run of House Block to have either a ROH Rate Structure or a Tiered Rate Structure. If a group has a Tiered Block, they will always have Tiered Rates.

ROH Block
The allotment of rooms is based on ROH percentages

Tiered Block
The group chooses how many of each room category they want to block

ROH Rates
The group pays one rate across the board for all rooms, regardless of category

Tiered Rates
The group pays a specific rate for each individual room category



GROUP ROOM BLOCK AND RATES

Confirmed rates for **Pacific Coast Supply** during **October 4 - 7, 2023** are:

Run of House Allotment

The Lodge at Pebble Beach

	Wednesday 10/4/2023	Thursday 10/5/2023	Friday 10/6/2023
Run of House	32	32	32
Suite Upgrades (1)	1	1	1
Total Rooms	**33**	**33**	**33**

Check-in time is 4:00 p.m. and check-out time is 12:00 Noon

GROUP ROOM RATES

Tiered Rates

Room	Group Rate
Garden View	$1,015.00
Fairway One Garden View	$1,060.00
Fairway View	$1,100.00
Partial Ocean View	$1,205.00
Fairway One Partial Ocean View	$1,310.00
Ocean View	$1,420.00
Ocean Deluxe	$1,550.00
Suite Upgrade (1)	$1,550.00

Block vs. Obligation

Block: The rooms that are set aside from inventory for the group to occupy

Obligation: The rooms that the group is contractually obligated to pay for, regardless of what is currently blocked.

If a group adheres to their contract, the Block and Obligation will be identical.

There are two things a group can do which will result in them being obligated to pay for more rooms than we have blocked:

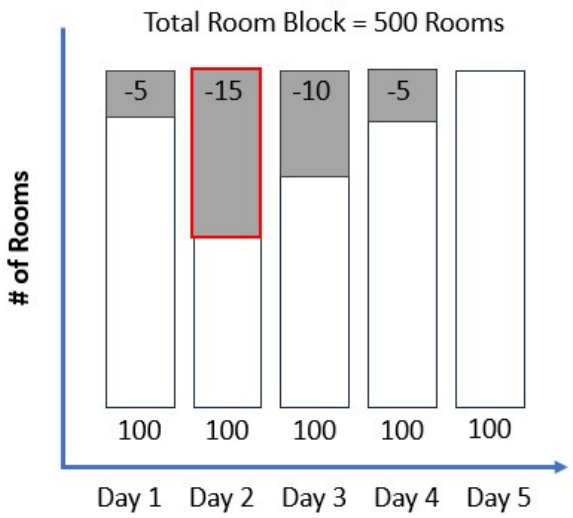
1. The group reduced their number of rooms beyond the allowable reduction percentage as stipulated in their contract. *(Typically 10%)*
2. The group reduced their number of rooms after the Cutoff Date *(Typically 45 days prior to arrival)*

**Exception*: If we sell out (reach 100% occupancy), we forgive these penalties.*

Allowable Reduction Clause: Nightly vs. Cumulative

- The benefit to a Cumulative Reduction clause is that it is more forgiving when you make reductions in that it is more difficult to reach the reduction max.
- The negative to a Cumulative Reduction clause is that, if you do reach the max, it is much less likely that Pebble Beach Resorts will reach 100% occupancy on all trip nights and be able to forgive the penalty.

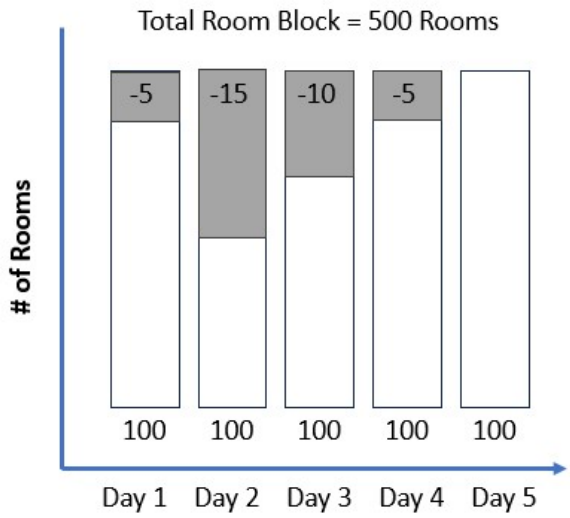
Nightly Reduction



Day 2 **exceeds** the 10% Nightly Allowable Reduction. The group will be **obligated** to pay for 5 rooms on Day 2 despite those rooms not being occupied.

Exception: If we reach 100% occupancy <u>on the night you exceeded allowable reduction</u>, we will waive the penalty.

Cumulative Reduction



Cumulative reduction is 35 rooms which is 7% of the total 500 Room Block. This **does not exceed** the 10% Cumulative Allowable Reduction.

Exception: If we reach 100% occupancy <u>over all of your trip dates</u>, we will waive the penalty.

Contract Variations (1/2)

Run of House Block vs. Tiered Block

ROH Block:

	Monday 3/28/16	Tuesday 3/29/16	Wednesday 3/30/16
Run of House	25	190	190
Suites (10)	0	10	10
Total Rooms	**25**	**200**	**200**

ROH Rates:

Room	Group Rate
Run of House	$375.00
Suites (10)	$825.00

Tiered Block:

	Thu 05/06	Fri 05/07
Spa Room	12	12
Courtyard Suite	2	2
Palmero Suite	1	1
Total Rooms	**15**	**15**

Tiered Rates:

Room	Rate
Spa Room	$965.00
Courtyard Suite	$1,350.00
Palmero Suite	$2,750.00

Suite Upgrades vs. ROH Suites vs. Tiered Suites

Suite Upgrade Block

	Wednesday 10/4/2023	Thursday 10/5/2023	Friday 10/6/2023
Run of House	32	32	32
Suite Upgrades (1)	1	1	1
Total Rooms	**33**	**33**	**33**

ROH Suites Block

	Monday 3/28/16	Tuesday 3/29/16	Wednesday 3/30/16
Run of House	25	190	190
Suites (10)	0	10	10
Total Rooms	**25**	**200**	**200**

Tiered Suites Block

	Tue 9/22	Wed 9/23	Thu 9/24	Fri 9/25	Sat 9/26
Staff Rooms (4)	2	3	4	4	4
Run of House	0	0	46	46	46
Sloat Suite	0	1	2	2	2
Colton Suite	0	0	1	1	1
Monterey Suite	0	0	1	1	1
Steinbeck Suite	0	0	1	1	1
Total Rooms	2	4	55	55	55

Run of House Block with Tiered Rates

ROH Block

	Wednesday 10/4/2023	Thursday 10/5/2023	Friday 10/6/2023
Run of House	32	32	32
Suite Upgrades (1)	1	1	1
Total Rooms	**33**	**33**	**33**

Tiered Rates Blocked at ROH %:

Room	Group Rate
Garden View	$1,015.00
Fairway One Garden View	$1,060.00
Fairway View	$1,100.00
Partial Ocean View	$1,205.00
Fairway One Partial Ocean View	$1,310.00
Ocean View	$1,420.00
Ocean Deluxe	$1,550.00
Suite Upgrade (1)	$1,550.00

Multiple Property Contract / Staff Rooms

The Inn at Spanish Bay

Room	Group Rate
Run of House	$1,090.00
Staff Rooms (5)	$515.00

The Lodge at Pebble Beach

Room	Group Rate
Garden View	$1,245.00
Fairway View	$1,245.00
Partial Ocean View	$1,245.00
Ocean View	$1,245.00
Ocean Deluxe	$1,245.00
Staff Room (1)	$670.00

Contract Variations (2/2)

Commissionable

10% Commission (Standard)

These above rates are:

- For single or double occupancy per room night.
- European Plan (EP).
- Commissionable at **10.00%** payable to **Barefield and Associates**. Commissionable payment will be based on the number of "occupied" guestrooms and paid when the group's master account is paid in full.
- Exclusive of a **$28.00** per night service charge, a **10.50%** per night county occupancy tax, and a **0.195%** per night California Tourism Assessment. In addition, the county charges **$2.00** per occupied room night for the County Tourism Assessment.
- Service charges and taxes are subject to change.

5% Commission

All group rates excluding staff room are commissionable at **5.00%** to **MFactor** as official Agent of Record (IATA#05701592) and Planner. Commissionable payment will be based on the total/cumulative number of "occupied" guestrooms and paid to **MFactor** within fourteen (14) days after the group's master account is paid in full. Even if the planner should change, **MFactor** will remain Agent of record and no additional commissions will be paid by hotel.

Rooming List vs. Passkey

Rooming List

RESERVATION PROCEDURE

A final rooming list, with names and addresses of attendees, type of accommodations requested, and exact arrival and departure dates, is required by **April 14, 2023**. After this date, guestrooms and group rates will be confirmed on a space available basis.

Passkey

RESERVATION PROCEDURE

Reservations will be made through a secured online site designed and customized specifically for your group's program. We will work directly with you in coordinating and setting up a link to this online booking system. Once complete, you will provide this link to your guests to start the booking process. This website will allow your guests to confirm, cancel, or adjust their room reservations online. The website will be open to your guests up until three (3) days prior to the group's first arrival night. Any changes after that will need to be made directly with the hotel.

Nightly vs. Cumulative Reduction

Nightly

SCHEDULE FOR GROUP ROOM BLOCK ADJUSTMENTS

After **April 14, 2023,** you will be assessed a cancellation fee for all reductions to the Group Room Block. This cancellation fee will equal the group room rate multiplied by the number of rooms cancelled for each night.

This cancellation fee will be reduced if rooms are resold. These rooms must be the last rooms sold in order for the hotel to achieve 100% occupancy. Due to day-to-day variations in hotel occupancy, room block obligations are figured on a per night basis, rather than cumulatively over the group's meeting dates.
cancelled for each night.

Cumulative

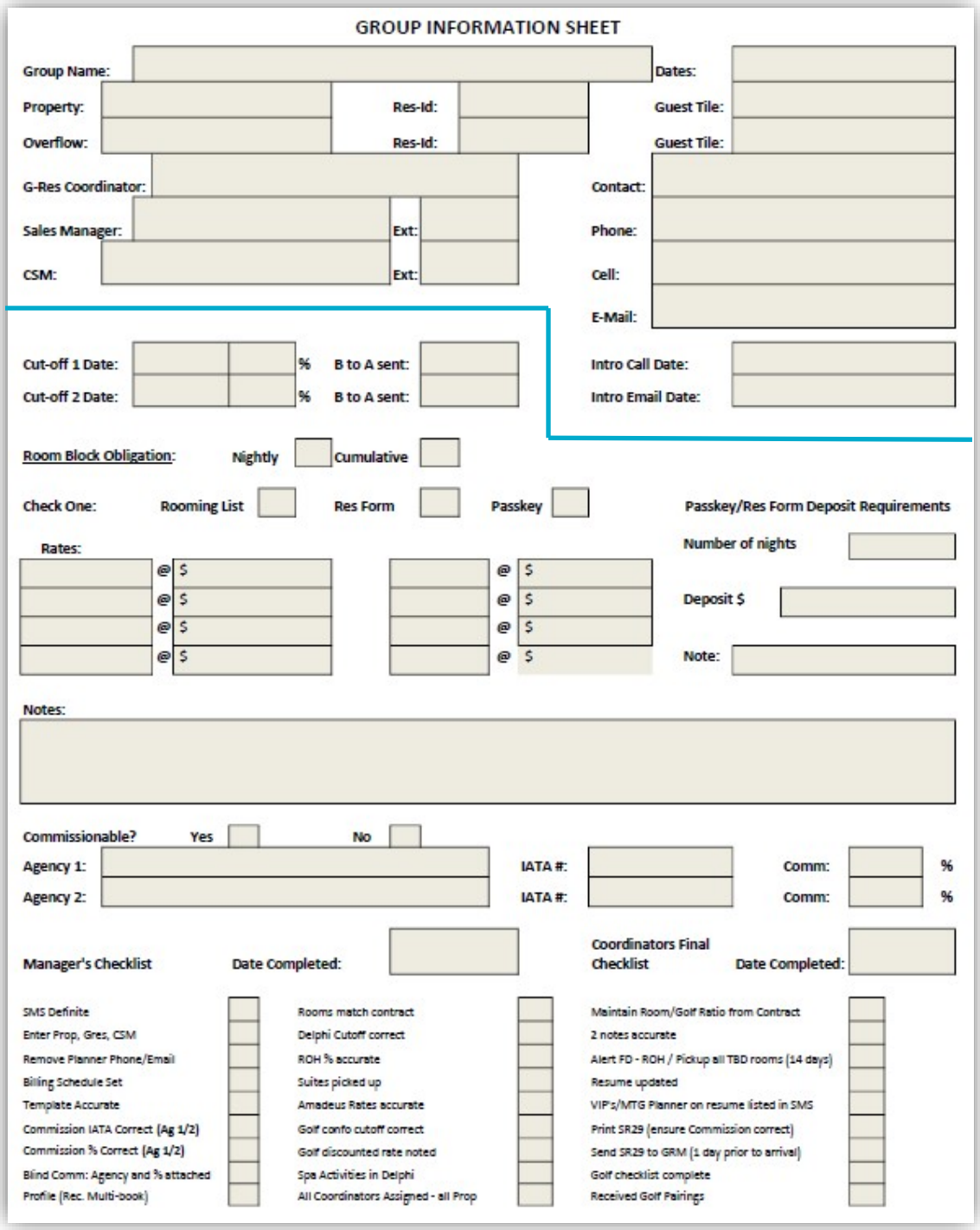
After **January 17, 2023**, you will be assessed a cancellation fee for all reductions to the Group Room Block. This cancellation fee will equal the group room rate multiplied by the number of rooms cancelled for each night.

This cancellation fee will be reduced if rooms are resold. These rooms must be the last rooms sold in order for the hotel to achieve 100% occupancy. Room block obligations will be figured on a cumulative basis over the group's meeting dates to include: **March 3 - 8, 2023**. Total Group Room Block is **277** rooms.

Group Information Sheet

The **Group Information Sheet** is a snapshot of important details about the group that the Group Rooms & Golf Coordinator will fill out upon receipt of the Turnover File.

- Everything **above the blue line** can be found within the **Amadeus Booking**
- Everything **below the blue line** must be found on the **Contract**



GROUP INFORMATION SHEET

Group Name: | Dates:

Property: | Res-Id: | Guest Tile:

Overflow: | Res-Id: | Guest Tile:

G-Res Coordinator: | Contact:

Sales Manager: | Ext: | Phone:

CSM: | Ext: | Cell:

E-Mail:

Cut-off 1 Date: % | B to A sent: | Intro Call Date:

Cut-off 2 Date: % | B to A sent: | Intro Email Date:

Room Block Obligation: Nightly | Cumulative

Check One: Rooming List | Res Form | Passkey | Passkey/Res Form Deposit Requirements

Rates: | Number of nights | Deposit $ | Note:

Notes:

Commissionable? Yes | No

Agency 1: | IATA #: | Comm: %

Agency 2: | IATA #: | Comm: %

Manager's Checklist | Date Completed: | Coordinators Final Checklist | Date Completed:

SMS Definite
Enter Prop, Gres, CSM
Remove Planner Phone/Email
Billing Schedule Set
Template Accurate
Commission IATA Correct (Ag 1/2)
Commission % Correct (Ag 1/2)
Blind Comm: Agency and % attached
Profile (Rec. Multi-book)

Rooms match contract
Delphi Cutoff correct
ROH % accurate
Suites picked up
Amadeus Rates accurate
Golf confo cutoff correct
Golf discounted rate noted
Spa Activities in Delphi
All Coordinators Assigned - all Prop

Maintain Room/Golf Ratio from Contract
2 notes accurate
Alert FD - ROH / Pickup all TBD rooms (14 days)
Resume updated
VIP's/MTG Planner on resume listed in SMS
Print SR29 (ensure Commission correct)
Send SR29 to GRM (1 day prior to arrival)
Golf checklist complete
Received Golf Pairings

Amadeus Booking

- *Group Name*
- *Dates of Stay*
- *Property*
- *Res ID*
- *G-res Coordinator*
- *Sales Manager*
- *CSM*

CONTRACT

Heading within Contract:

Reservation Procedure
- Rooming List vs. Res-Form vs. Passkey

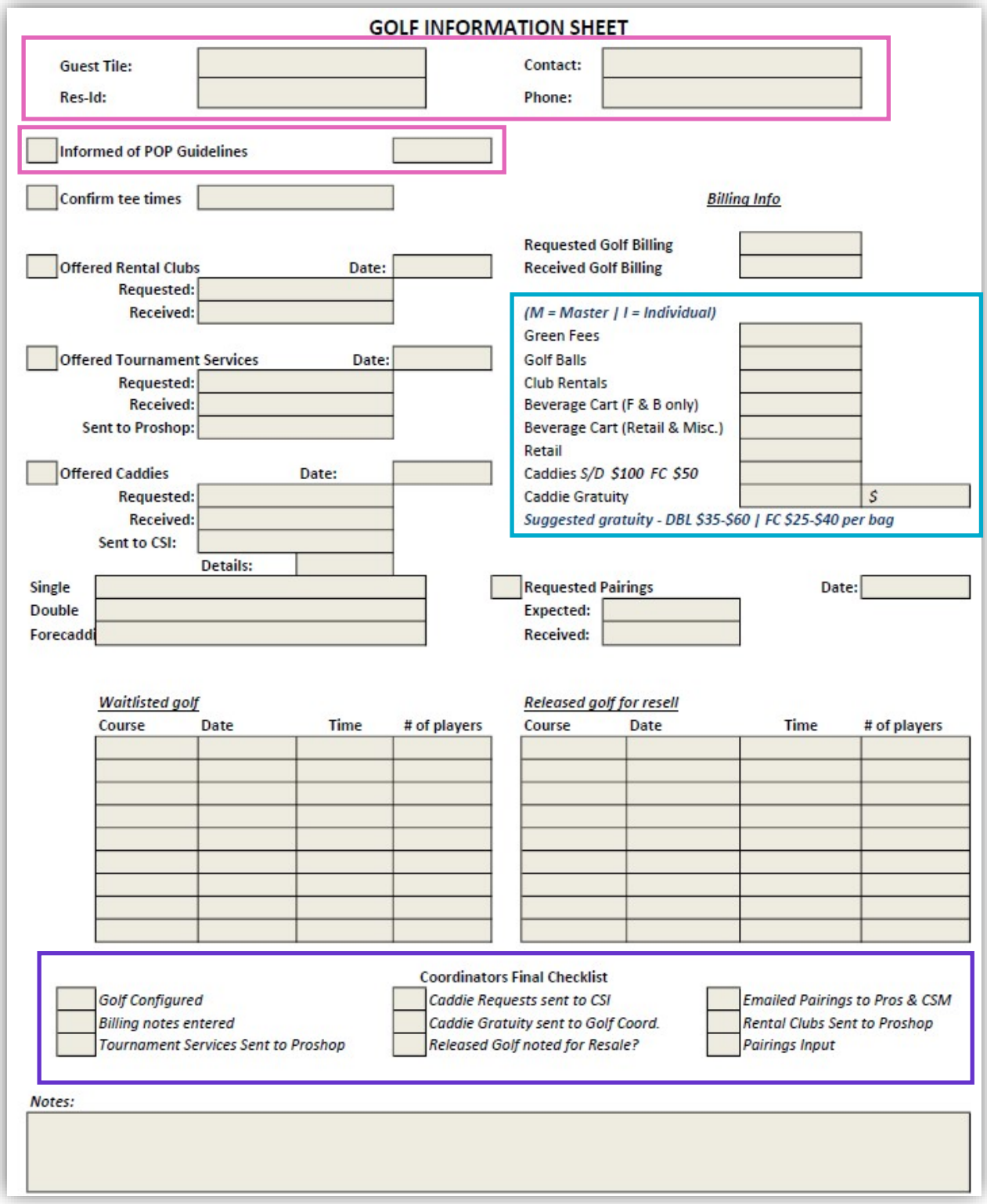
Group Room Block Rates
- Rates
- Are Rooms Commis-sionable

Schedule for Group Room Block Adjustments
- Cutoff Date
- Allowable Reduction Percentage
- Nightly vs. Cumulative

Golf Information Sheet

The **Golf Information Sheet** is for the Room & Golf Coordinator to fill out as a way of tracking tasks related to Group Golf.

- As soon as you receive the Turnover File, you can fill the **basic group details at the top**.
- When you send the planner your introduction email, check off and date the **POP guidelines**
- You will need to obtain the **golf billing details** from the Planner and forward that to the CSM
- Receipt of the Resume is your queue to begin working through the "**Final Checklist**"



GOLF INFORMATION SHEET

Guest Tile: | Contact:
Res-Id: | Phone:

☐ Informed of POP Guidelines

☐ Confirm tee times

☐ Offered Rental Clubs Date:
Requested:
Received:

☐ Offered Tournament Services Date:
Requested:
Received:
Sent to Proshop:

☐ Offered Caddies Date:
Requested:
Received:
Sent to CSI:
Details:

Single
Double
Forecaddi

Billing Info

Requested Golf Billing
Received Golf Billing

(M = Master | I = Individual)
Green Fees
Golf Balls
Club Rentals
Beverage Cart (F & B only)
Beverage Cart (Retail & Misc.)
Retail
Caddies *S/D $100 FC $50*
Caddie Gratuity $
Suggested gratuity - DBL $35-$60 | FC $25-$40 per bag

☐ Requested Pairings Date:
Expected:
Received:

Waitlisted golf

Course	Date	Time	# of players

Released golf for resell

Course	Date	Time	# of players

Coordinators Final Checklist

☐ *Golf Configured*
☐ *Billing notes entered*
☐ *Tournament Services Sent to Proshop*
☐ *Caddie Requests sent to CSI*
☐ *Caddie Gratuity sent to Golf Coord.*
☐ *Released Golf noted for Resale?*
☐ *Emailed Pairings to Pros & CSM*
☐ *Rental Clubs Sent to Proshop*
☐ *Pairings Input*

Notes:

Delegates Lists

Delegates List (SR9)

Code	Group Name			Arrival	Departure			
12X6UF	2023 AT&T - MPF Players - The Lodge			1/18/2023	2/7/2023			
Res No	**Name**	**Unit**	**Type**	**Arrival**	**Depart**	**Pkg**	**Rate**	**Special Service**
13460B	Bale, Gareth	L119	LROD	01/30/23	02/05/23	L2X6UF	$1,715.00	
1339S6	Buchmueller, Ross	L361	LRCS	01/31/23	02/06/23	L2X6UF	$1,335.00	
133301	Burns, Maurice	L143	LROS	02/01/23	02/06/23	L2X6UF	$1,575.00	
1336P7	Burns, Maurice #2	L165	LROS	02/01/23	02/06/23	L2X6UF	$1,575.00	
1338DL	Desmond, Dermot	L117	LROD	01/29/23	02/05/23	L2X6UF	$1,715.00	

Send this report once you are within 14 days of your group's arrival.
We do not send this version prior to 14 days because it lists the Room Categories.

Delegates List (SR9 NR) - This is the standard format for Rooming List Groups

Code	Group Name			Arrival	Departure			
12X6UF	2023 AT&T - MPF Players - The Lodge			1/18/2023	2/7/2023			
Res No	**Name**	**Arrival**	**Depart**	**Pkg**	**Rate**	**Special Service**		
12X6UF	2023 AT&T - MPF Players -	01/18/23	02/16/23		$0.00			
13460B	Bale, Gareth	01/30/23	02/05/23	L2X6UF	$1,715.00			
1339S6	Buchmueller, Ross	01/31/23	02/06/23	L2X6UF	$1,335.00			
133301	Burns, Maurice	02/01/23	02/06/23	L2X6UF	$1,575.00			

Run this report any time you make a change to a picked up room. You send this report to the Planner as **evidence of your room modifications.**

Passkey Delegates List (SR9A)

Code	Group Name			Arrival	Departure			
12Z6GE	Oppenheimer & Co. Inc. Spanish Bay			5/17/2023	5/21/2023			
Res No	**Name**	**Unit**	**Type**	**Booked Dt**	**Who?**	**Last_Edit**	**Who?**	**Pkg**	**DailyRate**	**Share**
1359AM	Davidson, Mark	BRL7		3/31/2023	PK	4/12/2023	LE	B2Z6GE	$730.00	
1359O2	Mckechnie, Mark	BRG7		4/3/2023	PK	4/12/2023	LE	B2Z6GE	$730.00	
1359AV	Orton, David	BRC7		3/31/2023	PK	4/12/2023	LE	B2Z6GE	$730.00	
1357LA	Hyland, John	BRF7		3/24/2023	PK	4/3/2023	LE	B2Z6GE	$730.00	

Run this report weekly to see which attendees have **booked or modified rooms through Passkey**.
If the "Who?" column says "PK," it means that the most recent action was taken via Passkey.

Commission Delegates List (SR29)

Res#	Name	Arrival	Depart	AvgRate	Rm Rev	Unit	Agnt1	Comm1	Agnt2	Comm2
13685Y	Amster, Tom	5/18/2023	5/21/2023	$1,160.00	$3,480.00	PRX5	03633884	10.00%		0.00%
	Commission Due:							**$348.00**		**$0.00**
131013	Battle, BreAnn	5/16/2023	5/18/2023	$1,160.00	$2,320.00	PRX5	03633884	10.00%		0.00%
	Commission Due:							**$232.00**		**$0.00**
13685W	Farahi, John	5/18/2023	5/21/2023	$1,160.00	$3,480.00	PDX4	03633884	10.00%		0.00%
	Commission Due:							**$348.00**		**$0.00**
131012	Orlowsky, Jeff	5/16/2023	5/18/2023	$1,160.00	$2,320.00	PDX4	03633884	10.00%		0.00%
	Commission Due:							**$232.00**		**$0.00**
13685V	Silverton, Michael	5/18/2023	5/21/2023	$1,160.00	$3,480.00	PDX4	03633884	10.00%		0.00%

This report allows you to see which rooms have **Travel Agency commissions** applied. It differentiates between Agency #1 (standard) and Agency #2 (Blind commission.) You can also verify that the commission percentage is correct per the contract. 1 day prior to arrival, you must verify that commission is not applied to Staff Rooms. To do so, run the standard SR9 report which will tell you which rooms have the Staff indicator "T" in the Special Services column

Understanding Room Blocks

Room Block (From Contract / B to A / Contract Addendum)

Property	Rate	Room Type	Sun 1/8/23	Mon 1/9/23	Tue 1/10/23	Wed 1/11/23	Thu 1/12/23	Total
The Lodge at Pebble Beach	$ 850.00	Run of House	0	0	74	74	74	**222**
	$ 850.00	Upgraded Suites (2)	0	0	2	2	2	**6**
	$ 400.00	Staff Rooms (2)	1	2	2	2	2	**9**
		Booking Total	**1**	**2**	**78**	**78**	**78**	**237**

ONLY BREAKS DOWN BLOCK

BREAKS DOWN BLOCK FOR ENTIRE PROPERTY

Allotment Report

Unit Type	Mon 09/25/23 Cur Blk	Mon 09/25/23 Cur PkUp	Tue 09/26/23 Cur Blk	Tue 09/26/23 Cur PkUp	Wed 09/27/23 Cur Blk	Wed 09/27/23 Cur PkUp	Thu 09/28/23 Cur Blk	Thu 09/28/23 Cur PkUp	Fri 09/29/23 Cur Blk	Fri 09/29/23 Cur PkUp	Sat 09/30/23 Cur Blk	Sat 09/30/23 Cur PkUp	Sun 10/01/23 Cur Blk	Sun 10/01/23 Cur PkUp	Mon 10/02/23 Cur Blk	Mon 10/02/23 Cur PkUp	Total Cur Blk	Total Cur PkUp
LROS	4	0	8	0	8	0	2	0	0	0	0	0	0	0	0	0	22	0
LRCS	4	0	8	0	8	0	2	0	0	0	0	0	0	0	0	0	22	0
LRGS	5	0	10	0	10	0	2	0	0	0	0	0	0	0	0	0	27	0
LRWS	2	0	4	0	4	0	1	0	0	0	0	0	0	0	0	0	11	0
LRCF	2	0	4	0	4	0	1	0	0	0	0	0	0	0	0	0	11	0
LRGF	2	0	4	0	4	0	1	0	0	0	0	0	0	0	0	0	11	0
LROD	1	0	2	0	2	0	1	0	0	0	0	0	0	0	0	0	6	0
TOTALS	20	0	40	0	40	0	10	0	0	0	0	0	0	0	0	0	110	0

Room Block (SMS)

Date	Day	Seg	BRO7 Block	BRO7 Pickup	BRL7 Block	BRL7 Pickup	BRC7 Block	BRC7 Pickup	BRG7 Block	BRG7 Pickup	BRF7 Block	BRF7 Pickup	BSF5 Block	BSF5 Pickup	BSC5 Block	BSC5 Picku
05/03/23	Wed		2	2	0	0	2	1	4	4	2	2	0	0	0	0
05/04/23	Thu		19	19	5	4	11	11	24	20	39	37	4	4	1	1
05/05/23	Fri		42	37	11	10	21	11	46	46	92	92	5	5	1	1
05/06/23	Sat		42	37	11	10	21	10	46	46	92	91	5	5	1	1

BREAKS DOWN BOTH BLOCK & PICKUP

BREAKS DOWN BLOCK PER ROOM CATEGORY

Room Block Detail (From Amadeus)

Partial Ocean View

Group Available	16	12	-1	-4
Agreed	4	8	8	2
Forecasted	4	8	8	2
Blocked	4	8	8	2
Picked Up				
Rate (USD)	535.00/535.00	535.00/535.00	535.00/535.00	535.00/535.00
Pickup Rate (USD)				

Room Block Detail (From Passkey)

Fairway One Partial Ocean View — View Sub-Blocks

Attendee Types: Attendee		Sun 10/16	Mon 10/17	Tue 10/18	Wed 10/19	Thu 10/20	Fri 10/21	Sat 10/22	Sun 10/23	Mon 10/24
Nightly Rate(Rate Display)	USD	1055.00	1055.00	1055.00	1055.00	1055.00	1055.00	1055.00	1055.00	1055.00
Current Block(original)		0	0	2	16	16	2	0	0	0
Pickup (Delegate)		0	0	0	16	16	1	0	0	0
Available		0	0	2	0	0	1	0	0	0

Resumes

Brandon Ferch	**Levi Breck**	**Isabelle Decocco**
Senior Conference Services Manager	National Sales Manager	Group Room & Golf Coordinator

ROOM BLOCK AS OF:

The Inn at Spanish Bay

DAY:	TUES	WED	THU	FRI	SAT	SUN	MON
DATE:	3/21	3/22	3/23	3/24	3/25	3/26	3/27
ROOM BLOCK:	3	15	96	96	96	33	1
OBLIGATION:	3	15	96	96	96	33	1
ROOM OBLIGATION:	Reduction from above obligations are subject to charge.						

EXPECTED ATTENDANCE: 175 guests

ROOMING RATES:

Inn at Spanish Bay
Garden View - $533.90
Scenic View - $624.24
Ocean View - $714.58

The above rates are single or double occupancy plus 10.5% room tax and a 0.195% per night California Tourism Assessment. In addition, the county charges $2.00 per occupied room night for the County Tourism Assessment. Our current service charge is $32.00 per room night. Taxes and service charges are subject to change.

The two sections of the Resume that the Group Rooms & Golf Coordinator must ensure are correct are:

1. The Room Block summary
2. The Group's Billing Details

COMMISSION: Non-commissionable.

AUTHORIZED SIGNATURES:

Ms. Michelle Knox Ms. Tina Kempken
Mr. Sterling Tanner
*Note all authorized signers are staying off property.

GUEST ROOM BILLING:

MASTER ACCOUNT INCLUDES:

C BEVERAGE CARTS (food, non-alcoholic beverage and beer sold on carts and grill on 4/18 only, Liquor and Wine is the individual expense)
E CADDIE SERVICES (caddie fees only)
G GOLF FEES (scheduled green fees at PBGL on 4/18 and SGGC on 4/19 only)
L RESTAURANT LUNCHES (food, non-alcoholic beverage and beer at pre-scheduled reservations on 4/18 only, Liquor and wine is the individual expense)

INDIVIDUAL'S BILL INCLUDES:

A RETAIL (gift shops, markets, golf, spa and tennis boutiques)
B RESTAURANT BREAKFASTS (all resort food and beverage outlets)
C BEVERAGE CARTS (food, beverage, tobacco, and misc. sold on carts and grills)
D RESTAURANT DINNERS (all resort food and beverage outlets)
E CADDIE SERVICES (caddie fees and gratuity)
F SHIPPING
G GOLF FEES (scheduled green fees and club rental)
H HONOR BARS
I RESTAURANT MISC. (cigars, corkage fees, and restaurant retail items)
J BUSINESS CENTER
K BANQUET CHARGES (banquet food and beverage, décor, floral, and meeting AV)
L RESTAURANT LUNCHES (all resort food and beverage outlets)
M IN-ROOM MOVIES/VIDEO GAMES
N RECREATION (tennis court fees, horseback riding, bicycle and kayak rental)
O LOUNGES (food, beverage, cigars)
P PERSONAL (laundry, dry cleaning, babysitting, etc.)
Q TELEPHONE (local and long distance charges from individual guest rooms)
R ROOMS (including tax and service charge)
S SPA/FITNESS SERVICES (manicures, facials, hair services, body treatments, personal trainer, etc.)
T TRANSPORTATION (group and/or individual airport transfers, shuttles, sedan, or limousine service)
U GOLF/TENNIS/SPA RETAIL (golf and tennis equipment/spa products)
W GOLF ACADEMY
X AV (equipment used in individual guest rooms)

SPECIAL BILLING:

All charges to the Master Account for the following guests:
Mr. Steve Young – all nights

Edit the Resume



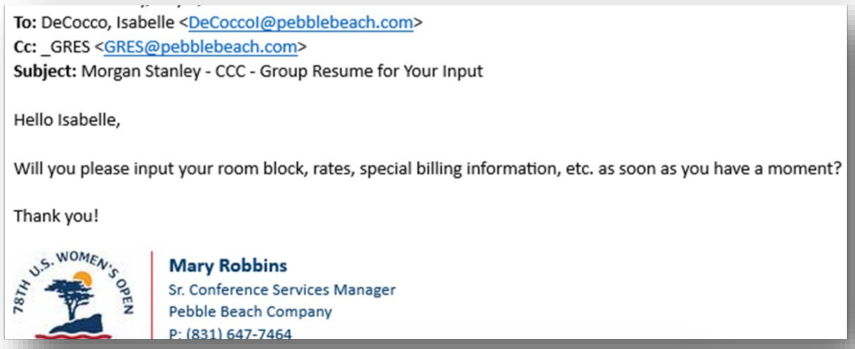
Once a group is within 30-15 days prior to arrival, Conference Services will email the Group Rooms & Golf Coordinator to input the final billing and block.

The Coordinator should edit:

- The Room Block
- All Group Billing Sections

Email the edited Word Document back to the CSM so they can add it to the official Resume.

Include the current Golf Confirmation as well as any other pertinent information for final distribution.



To: DeCocco, Isabelle <DeCoccoI@pebblebeach.com>
Cc: _GRES <GRES@pebblebeach.com>
Subject: Morgan Stanley - CCC - Group Resume for Your Input

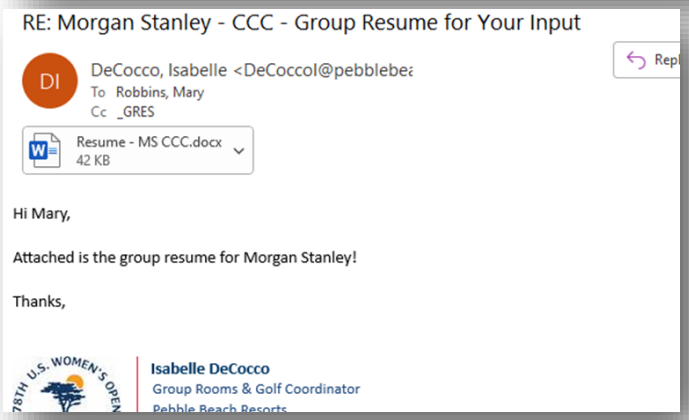
Hello Isabelle,

Will you please input your room block, rates, special billing information, etc. as soon as you have a moment?

Thank you!

78TH U.S. WOMEN'S OPEN

Mary Robbins
Sr. Conference Services Manager
Pebble Beach Company
P: (831) 647-7464



RE: Morgan Stanley - CCC - Group Resume for Your Input

DI DeCocco, Isabelle <DeCoccoI@pebblebea
To Robbins, Mary
Cc _GRES

Resume - MS CCC.docx
42 KB

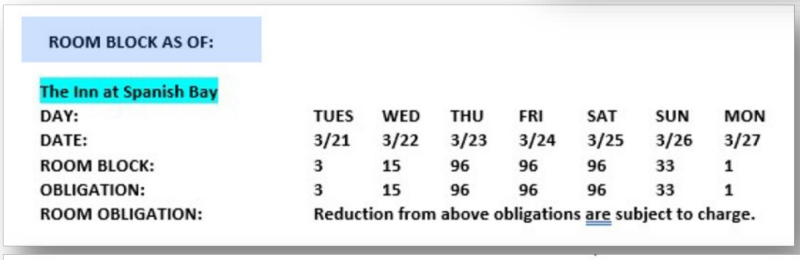
Hi Mary,

Attached is the group resume for Morgan Stanley!

Thanks,

78TH U.S. WOMEN'S OPEN

Isabelle DeCocco
Group Rooms & Golf Coordinator
Pebble Beach Resorts

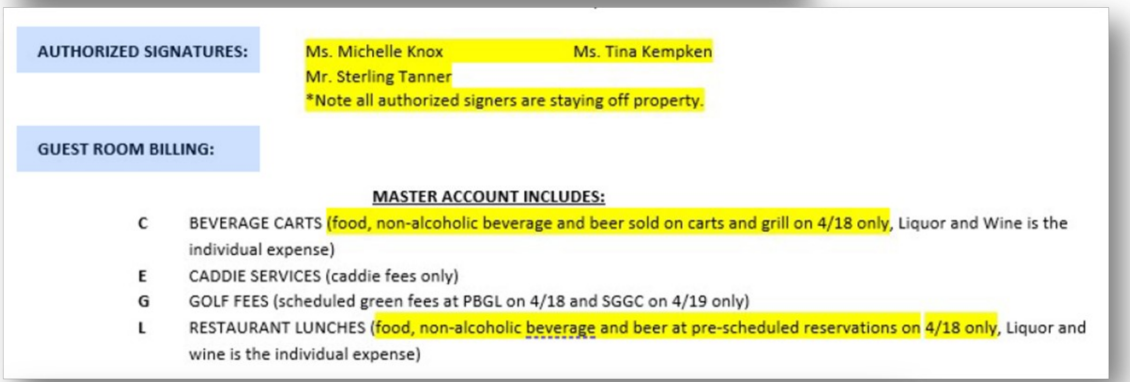


ROOM BLOCK AS OF:

The Inn at Spanish Bay

DAY:	TUES	WED	THU	FRI	SAT	SUN	MON
DATE:	3/21	3/22	3/23	3/24	3/25	3/26	3/27
ROOM BLOCK:	3	15	96	96	96	33	1
OBLIGATION:	3	15	96	96	96	33	1

ROOM OBLIGATION: Reduction from above obligations are subject to charge.

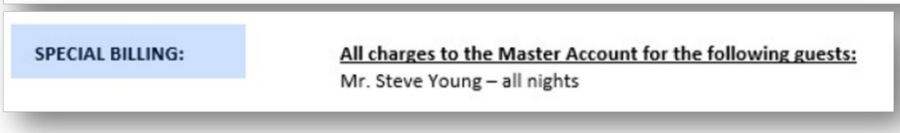


AUTHORIZED SIGNATURES: Ms. Michelle Knox Ms. Tina Kempken
Mr. Sterling Tanner
*Note all authorized signers are staying off property.

GUEST ROOM BILLING:

MASTER ACCOUNT INCLUDES:

C BEVERAGE CARTS (food, non-alcoholic beverage and beer sold on carts and grill on 4/18 only, Liquor and Wine is the individual expense)
E CADDIE SERVICES (caddie fees only)
G GOLF FEES (scheduled green fees at PBGL on 4/18 and SGGC on 4/19 only)
L RESTAURANT LUNCHES (food, non-alcoholic beverage and beer at pre-scheduled reservations on 4/18 only, Liquor and wine is the individual expense)



SPECIAL BILLING: **All charges to the Master Account for the following guests:**
Mr. Steve Young – all nights

Site Visits & Pre-Conferences



There are two in-person meetings that **Group Rooms & Golf Coordinators** are **required to attend** for each of their assigned Groups:
Site Visits and Pre-Conference Meetings.

Both of these meetings are opportunities for you, and other departments involved in the group's Program, to meet the Planner in person, provide updates, and answer questions.

The **Conference Services Manager** will send you email invitations to both of these meetings via Outlook. If you are not able to attend a meeting, you must make arrangements for a colleague to attend in your stead.

SITE VISITS

This meeting can occur six to two months prior to the Group's arrival date.

This is an introductory meeting so the Planner can become familiar with the properties and the Pebble Beach employees with whom they will be working.

Planners will stay at the resort to attend these meetings. The VIP team is responsible for booking Site Visit rooms.

- You will receive an invitation from the CSM which you must accept so it will be placed on your Outlook Calendar

- Prior to this meeting, review the room and golf availability around and throughout their program dates prior to the meeting in the event that the planner asks about additions

- Bring with you:
  - ◊ The Turnover Folder
  - ◊ Your business card

- At this meeting:
  - ◊ Introduce yourself to the planner
  - ◊ Listen to requests, answer questions
  - ◊ Request any necessary information from the Planner to finalize their Group's booking details

PRE-CONFERENCE MEETINGS

This meeting occurs on the Groups arrival date or one day prior to arrival.

Each department involved in the group's program will introduce themselves and present details to the Planner about the program.

- You will receive an invitation from the CSM which you must accept so it will be placed on your Outlook Calendar

- Assemble a packet for the Planner that includes:
  - ◊ The current Block to Actual
  - ◊ The Delegates List
  - ◊ The Golf Confirmation
  - ◊ Your business card

- Make enough copies of the Block to Actual for:
  - ◊ The Sales Manager
  - ◊ The Conference Services Manager
  - ◊ The Billing Coordinator
  - ◊ The Front Desk Manager
  - ◊ The Golf Representative

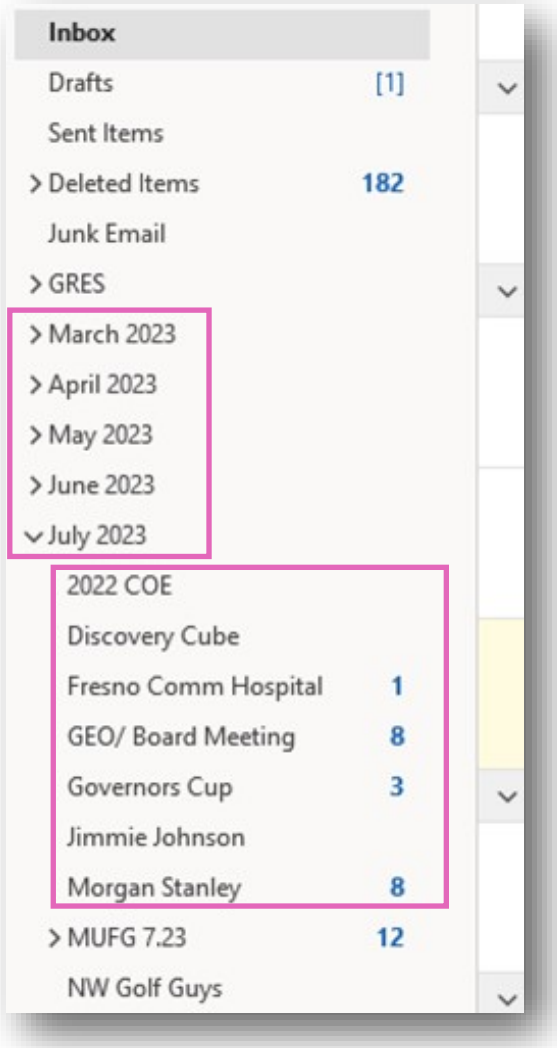
- At the meeting, place this packet where the Planner is going to sit

- When it is your turn to speak:
  - ◊ Tell the Planner what is in the packet
  - ◊ Welcome them
  - ◊ Advise that the Front Desk will assist them 24/7 now that they have arrived
  - ◊ Advise that the Pro Shop will handle day-of-play golf changes

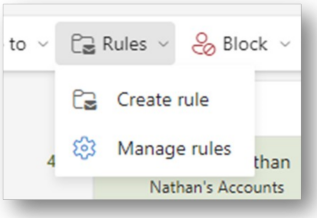
Outlook Organization

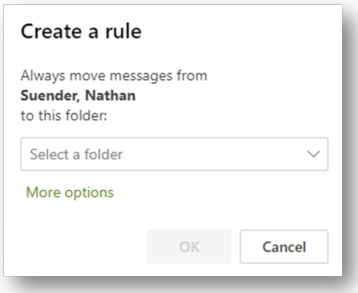
Outlook Folders:
To stay organized, it is recommended to create folders for each month of the year, then create a sub-folder for each group labeled with the name and Res ID:
"**Discovery Cube 12375P**"

It is also good practice to indicate which groups are Passkey by labeling them as such:
"**Discovery Cube 12375P PK**"



Outlook Rules:
GRES Coordinators are on many distribution lists, so it can be helpful to create rules to automatically sort recurring emails into specific folders.

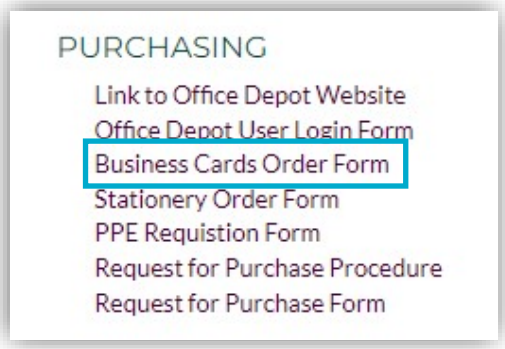




Business Card Orders

Once a Group Rooms & Golf Coordinator has completed their 90 day probation period, they may place an order for their business cards.

The Group Reservations Coordinator will place all business card orders through the Back Nine.
Once the order is approved by the Purchasing Manager, delivery will take approximately one week.

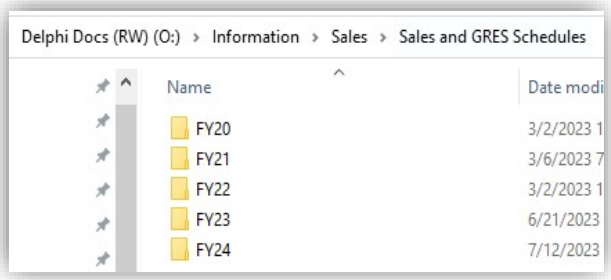


Time Off Requests

All time off requests should be directed to the Group Reservations Manager. Coordinators must wait until the request is approved before entering the time into Kronos.

On a weekly basis, the Sales Administrative Director will email an up-to-date **Sales & Group Reservations Staff Schedule** to the Sales and Group Reservations teams. This allows everyone to see who is available in the office in the event that the departments need to contact each other about their assigned groups.

This calendar is stored in the O Drive:

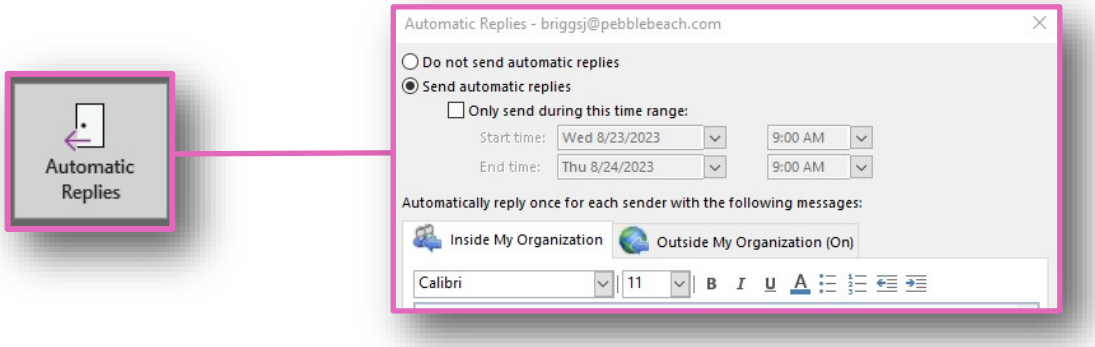


	Mon 7/17	Tue 7/18	Wed 7/19	
ADAM BARNETT	8:00a - 4:30p	8:00a - 4:30p	8:00a - 4:30p	8:0
EILEEN QUINA	8:00a - 4:30p	8:00a - 4:30p	8:00a - 4:30p	8:0
GILLIAN FUTRYK	8:00a - 4:30p	8:00a - 4:30p	8:00a - 4:30p	8:0
DANIEL BURTON	VACATION	VACATION	VACATION	V
LAUREL LOUIE	8:30a - 5:00p	8:30a - 5:00p	8:30a - 5:00p	8:3
BRIGITTE LERMEN	7:30a - 4:00p	7:30a - 4:00p	7:30a - 4:00p	7:3
MADELINE SHEEN	8:00a - 4:30p	8:00a - 4:30p	8:00a - 4:30p	8:0
JESSICA CAMPBELL	8:30a - 5:00p	8:30a - 5:00p	8:00a - 12:00p	8:3
ISABELLE DECOCCO	8:00a - 4:30p	8:00a - 4:30p	8:00a - 4:30p	8:0
JOSELYNE SEN	9:00a - 5:30p	9:00a - 5:30p	9:00a - 5:30p	9:0
ANGIE BIRKETT	VACATION	VACATION	VACATION	V
VITA HOPE			LOA	
JOE CHUNNIC	8:30a - 5:00p	8:30a - 5:00p	8:30a - 5:00p	8:3

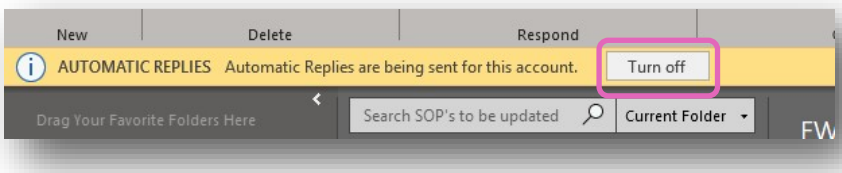
Out of Office Messages

All Rooms & Golf Coordinators must set Out of Office Messages in Outlook for post-work hours, weekends, and vacation days.

Click "File" > **Automatic Replies** > click radio button **Send automatic replies**



When you return to the office, click **Turn Off** on the main page of Outlook to turn off the out of office message.



Out of Office – Friday – Sunday

I am currently out of the office.
For immediate assistance, please contact the Front Desk or Pro Shop Directly at 831.647.7500.

Out of Office – Monday – Thursday

I am currently out of the office. My hours are Monday - Friday ~ 8:00 - 4:30 PM.
For immediate assistance, please contact the Gres@pebblebeach.com email and the team will be able to assist you shortly.

Special Event Group Management

Group Rooms and Golf Coordinators are all responsible for taking on the various groups who attend our Pebble Beach Company Special Events. **AT&T Pro-Am** or the **Concours d'Elegance,**

Roles:

- The "NSM" role is the Group Reservations Manager
- The "Planner" role is the Special Events Sales Team

Blocks:

- Special Events picks up all rooms immediately as "Shell Bookings" labeled as "*TBA"
- As the Group Rooms & Golf Coordinators receive the Rooming Lists, they update the *TBA bookings to the guest's names
- Special Events manages the shell bookings, so if the "block" needs to be expanded or reduced, the coordinator must inform Special Events

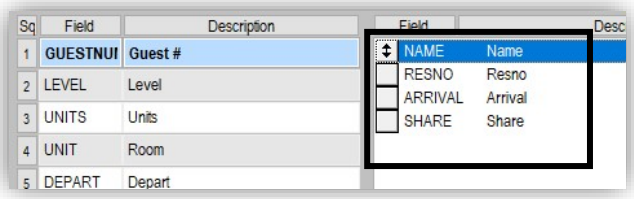
Inventory Management:

- To manage inventory, the Group Reservations Manager creates a TBA Report
- Any time the Delegate's List changes, coordinators must calculate how many rooms are still unoccupied (*TBA) and input the TBA data into the TBA Report
- The TBA Reports are utilized by the Special Events Sales Team to manage inventory.
- Group Reservations uses the TBA Reports to:
    - Easily see if Reservations can oversell on dates that the groups will not be utilizing all of their rooms
    - Easily see which groups have not yet sent their full Rooming Lists coordinators we can reach out to collect that information.

Special Event TBA Occupancy (1/2)

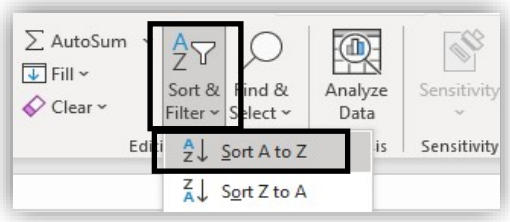
Export Your Data From SMS

1. Access the Group Management window for your Res ID
2. 3—Advanced Res Zoom
3. Export
4. Select the following columns in the exact order shown below:
    - Name
    - Resno
    - Arrival
    - Depart
5. OK to save your Excel File



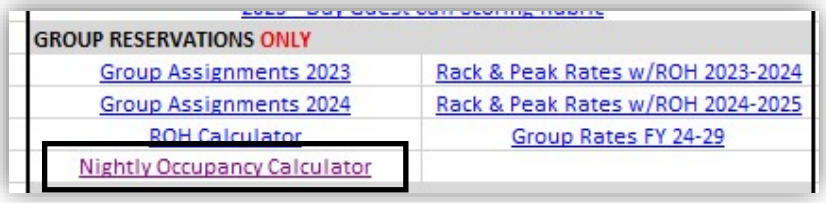
Sort Your Data

6. Open the saved file
7. Highlight the entire spreadsheet
8. Click Sort and Filter > Sort A to Z
9. Copy all rows with the name *TBA

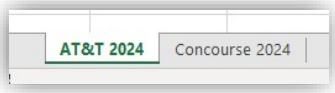


Input Your Data Into the Calculator

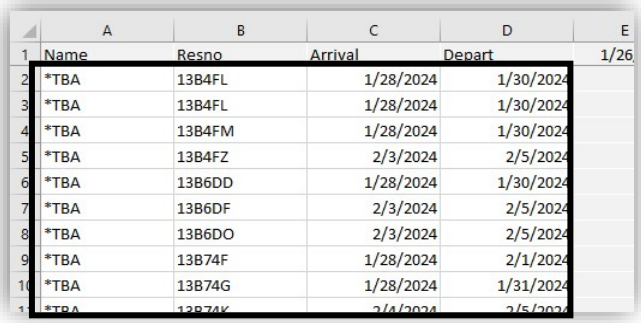
10. Open the Nightly Occupancy Calculator accessible within the Digital Binder



11. Click on the tab for either AT&T or Concours



12. Paste your data from your SMS Excel Export into the white fields of the Calculator



	A	B	C	D	E
1	Name	Resno	Arrival	Depart	1/26
2	*TBA	13B4FL	1/28/2024	1/30/2024	
3	*TBA	13B4FL	1/28/2024	1/30/2024	
4	*TBA	13B4FM	1/28/2024	1/30/2024	
5	*TBA	13B4FZ	2/3/2024	2/5/2024	
6	*TBA	13B6DD	1/28/2024	1/30/2024	
7	*TBA	13B6DF	2/3/2024	2/5/2024	
8	*TBA	13B6DO	2/3/2024	2/5/2024	
9	*TBA	13B74F	1/28/2024	2/1/2024	
10	*TBA	13B74G	1/28/2024	1/31/2024	
11	*TBA	13B74K	2/4/2024	2/5/2024	

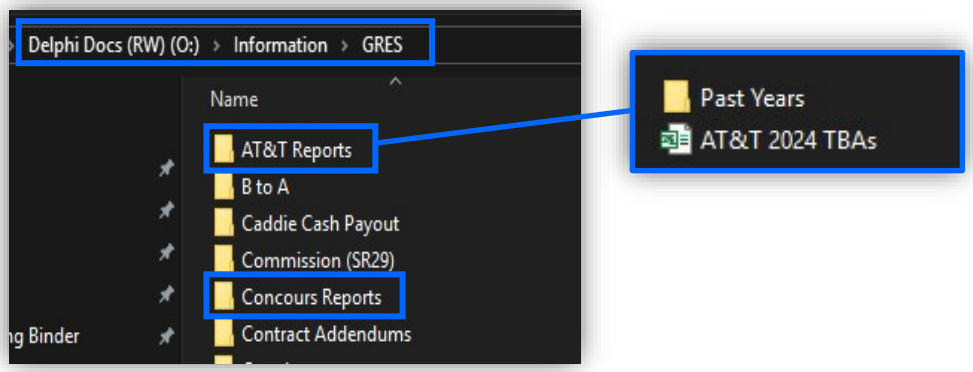
Special Event TBA Occupancy (2/2)

Your Nightly Occupancy Data will populate in Row 50

	A	B	C	D	E	F	G	H	I	J
1	Name	Resno	Arrival	Depart	1/26/2024	1/27/2024	1/28/2024	1/30/2024	1/31/2024	2/1/2024
48										
49										
50				Nightly Occupancy:	0	0	23	14	6	0
51										
52										

Update The TBA Report

13) Access the current AT&T or Concours TBA Report in the O Drive



14) Input your data from the Calculator into the "TBA's" row for your assigned group

		THU	FRI	SAT	SUN	MON	TUE	WED	THU	FRI	SAT	SUN	MON	TUE	WED	
	AT&T Rooms - Lodge	**1/25**	**1/26**	**1/27**	**1/28**	**1/29**	**1/30**	**1/31**	**2/1**	**2/2**	**2/3**	**2/4**	**2/5**	**2/6**	**2/7**	**TRN**
Lodge	**AT&T Lodge Rooms Inventory**					5	1	4	4	2	5	2				23
Gres	**Block**															0
	Released for Resell															0
	TBA's															0
Lodge	**Adobe Obligation**				23	23	23	23	23	23	23	20				181
Gres	**Block**				23	23	23	23	23	23	23	20				181
	Released for Resell				0	0	0	0	0	0	0	0				0
	TBA's				0	21	14	6	0	0	4	11				56

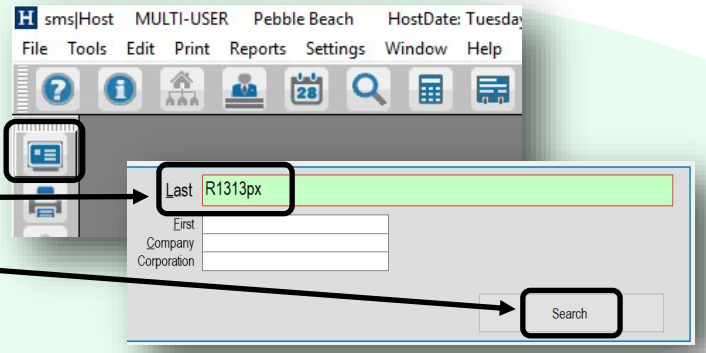
SMS Host | City Ledgers

SMS Host is the Hotel Management System through which the Reservations Department books Room, Golf, and Dining reservations. GRES will enter **SMS Host** to edit Group Reservations, Pick Up rooms, Run Reports, and more.

To begin in SMS,

1) Click the **Workslate** button
2) Type **R** followed by the **Group ID #**
3) Click **Search**

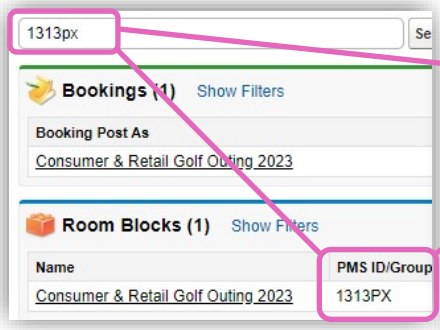
This will open the Group's City Ledger

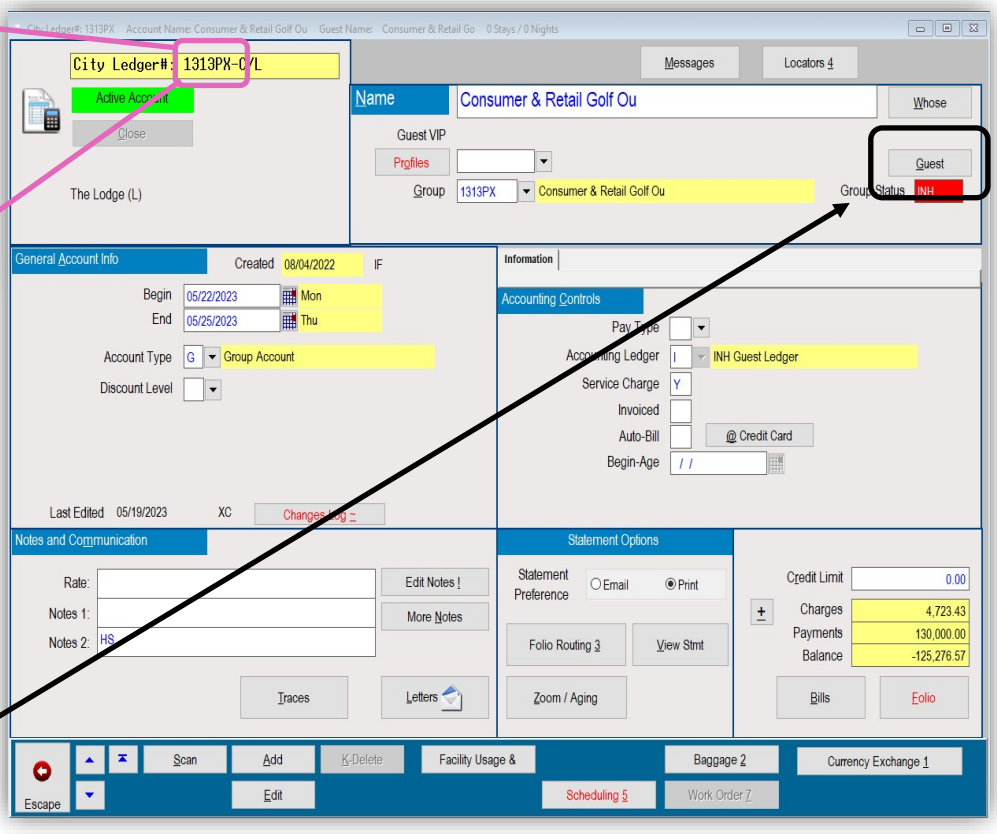


WHAT IS A CITY LEDGER?

A **City Ledger**, or "Master Account," is a house account that holds money from the Group. Anything that the Group is paying for throughout their stay will be "charged to the Master Account."

Amadeus Group ID # = SMS Host City Ledger #





The reason we look up the City Ledger is so we can easily access the Group's **Guest Tile.**

This Guest Tile can be thought of as the home page for each group.

Click **Escape** or hit the **Guest** button to open the Group Guest Tile

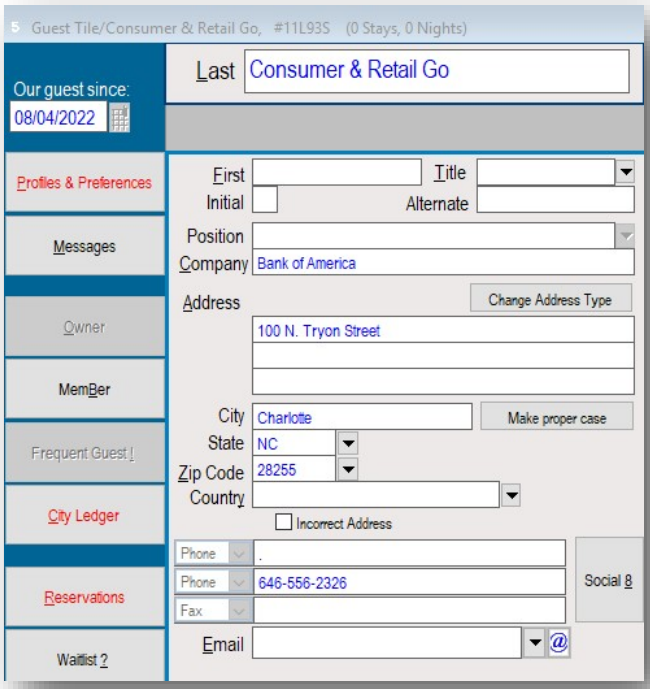
SMS Host | Guest Tiles

A **Guest Tile** is the hub of information about a Group.

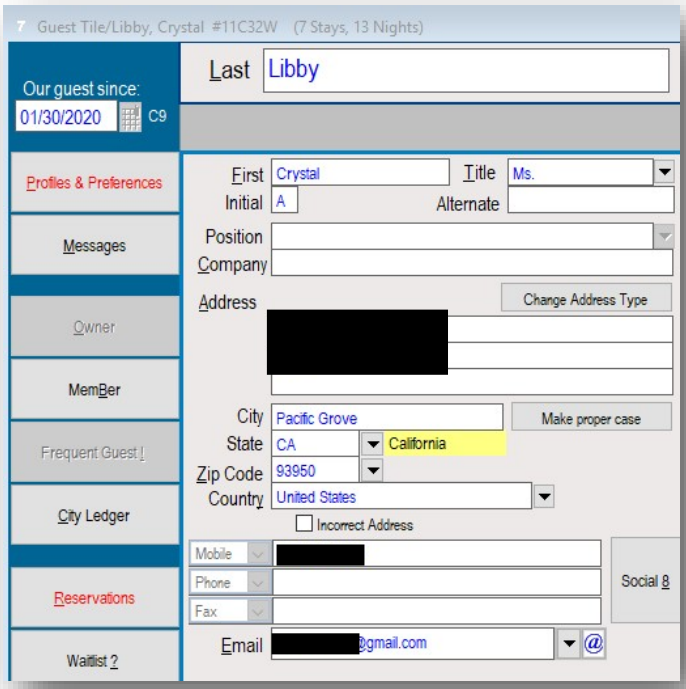
Every guest who visits Pebble Beach has their own Guest Tile, which is essentially an account for their family that holds contact information, reservation history, memberships, and more.

For Group Reservations, the Group itself gets a Guest Tile to manage their reservations, as opposed to the Guest Tile belonging to an individual person.

GROUP GUEST TILE

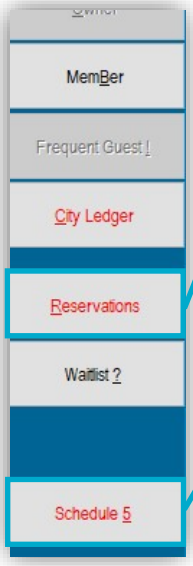


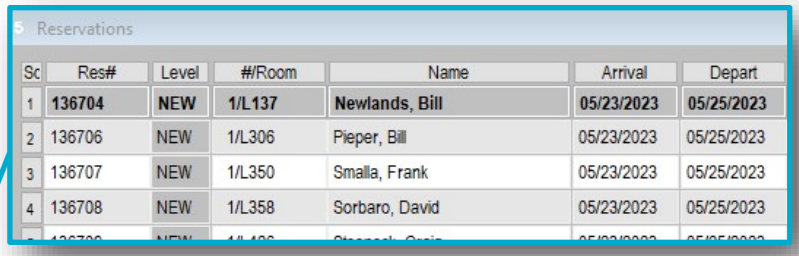
PERSONAL GUEST TILE

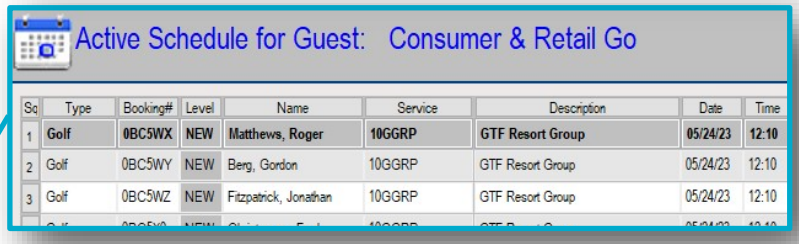


By creating one Guest Tile for the Group, we can easily control and edit all Room Reservations held by that group during their stay.

- Click "**Reservations**" to see a list of all Room Reservations
- Click "**Schedule**" to see a list of all Tee TImes







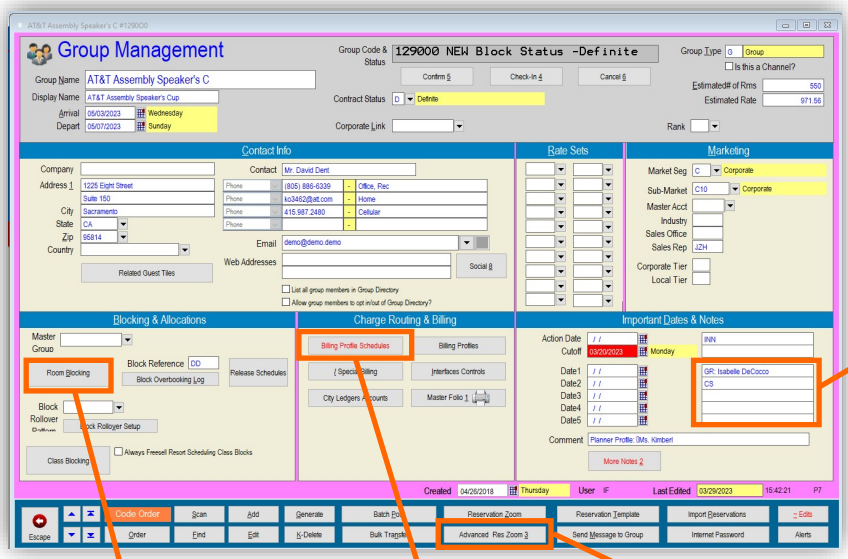
SMS Host | Group Management

The **Group Management Tile** is a page that will be set up prior to the Group Rooms & Golf Coordinator receiving the Turnover File.

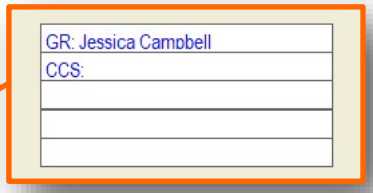
Access the Group Management Window from the Guest Tile



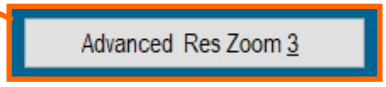
WHAT CAN WE DO IN THE GROUP MANAGEMENT

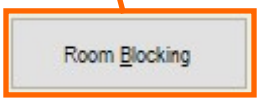


The Group Room & Golf Coordinator will edit this section upon receipt of the Turnover File so others can easily identify the assigned Group Rooms & Golf Coordinator and Conference Services Manager



Access Advanced Res Zoom
This opens a very user-friendly spreadsheet in which we can easily input Rooming Lists and edit room reservations

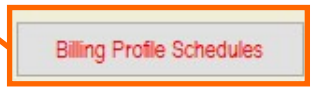




This button opens the **Group Blocking** window. This window is where you will make changes to a group's room block.

Reducing the room block will release rooms back into inventory. A group may only release rooms up to a certain percentage of their room block prior to their cut-off date.

If they exceed that percentage, they will still be responsible for paying for those released rooms unless we fully sell out that property.



This button opens the Group Billing window. Groups will have multiple biling scenarios—i.e. some charges to the master, some charges IPO.

Accounting inputs one "Billing Profile" for each of the group's billing scenarios as stated in the Resume.

There needs to be at least 1 Billing Profile inputted into this window which is initially entered by the Group Golf Coordinator right when we receive the Turnover File.

C9|BX 6.17.24

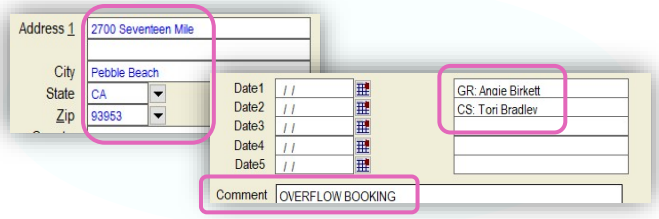
SMS Host | Reservations Template

Before you receive the Turnover File, the VIP Coordinators will create a Reservation Template within the Group Management Tile. The Reservations Template sets up default settings that will automatically apply to all rooms picked up by the Rooms & Golf Coordinators.

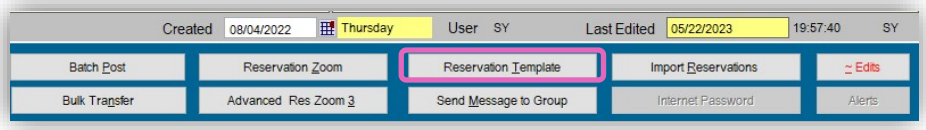
The only time a Rooms & Golf Coordinator will need to set up the template themselves is if they are creating an overflow booking for a group which generates a new Group Guest Tile.

SET UP A RESERVATIONS TEMPLATE FOR AN OVERFLOW BOOKING

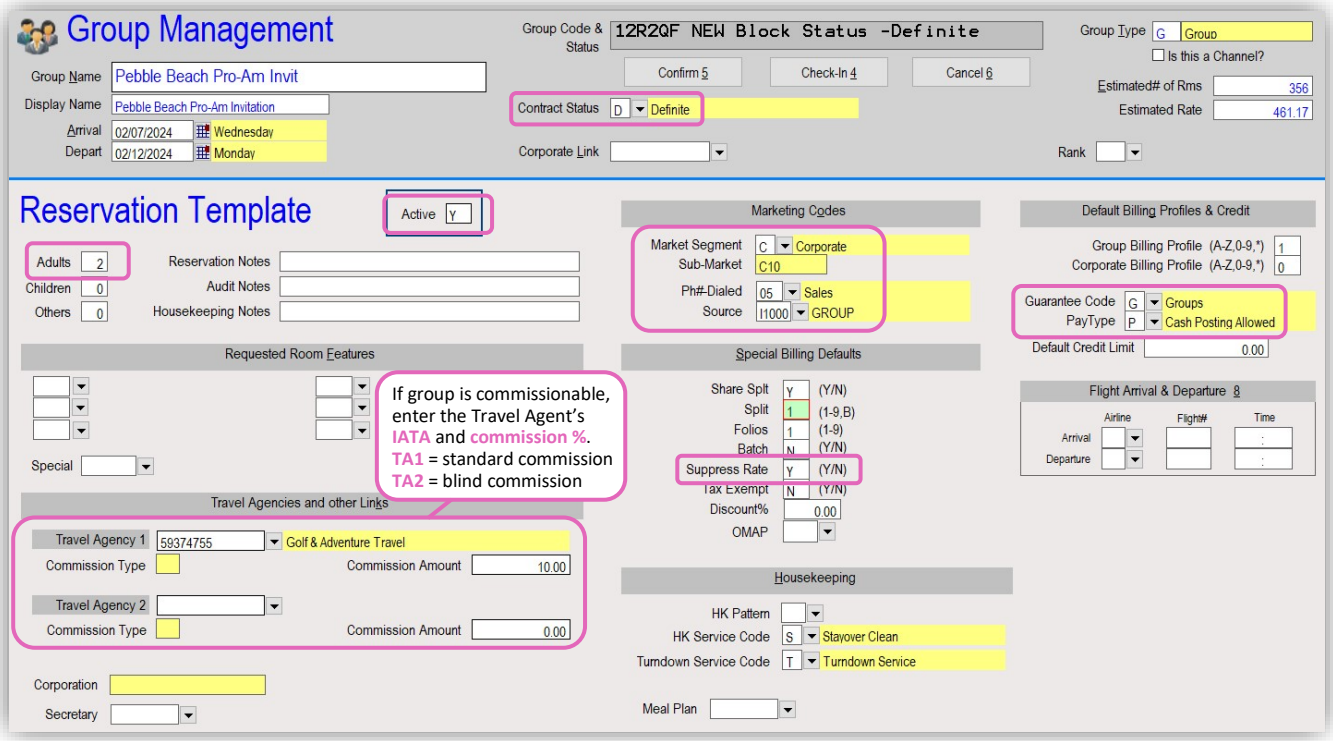
1. Notate the address of the primary booking (find address on the Amadeus Booking or SMS Guest Tile)
2. Create overflow booking in Amadeus, notate the Res ID (Rxxxxx) or Group Name (=xxxxx)
3. Look up the overflow booking in SMS via Workslate by Res ID (Rxxxxx) or by Group Name (=xxxxx)
3. Enter the Guest Tile and click G for Group
4. Edit the Group Management window:
    a. Input the group's address
    b. Type "OVERFLOW BOOKING" into the Comment field
    c. Add the GR and CS contacts



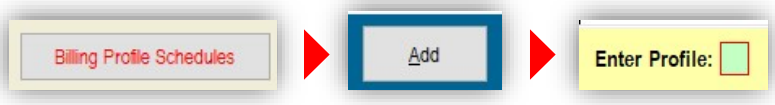
5. Click T for Reservation Template



6. Fill out each of the circled fields exactly as they appear below, then save



7. Escape to the Group Management Window to create a Billing Profile
    h. Click Billing Profile Schedules
    i. Click Add
    j. Type 1



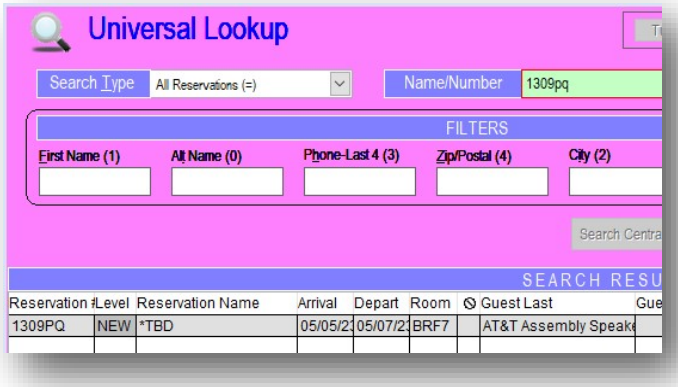
8. Now you can pick up rooms for your overflow booking

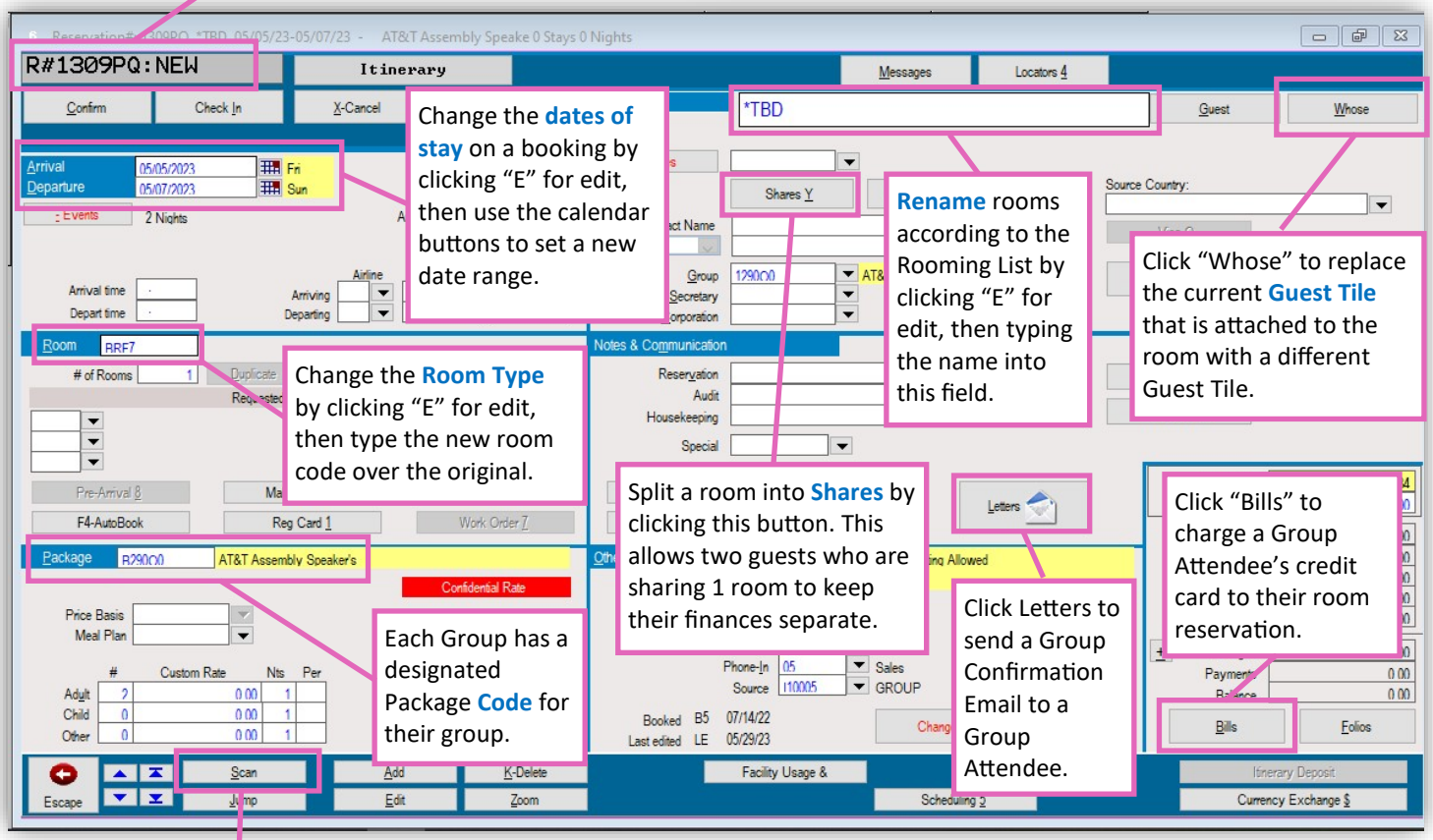
SMS Host | Reservation Tile

Room Reservation Tiles each have an ID# we refer to as the "**R number**"

You can look up R#s in **Universal Lookup** under the Search Type "All Reservations"

This R number will also appear next to each name on the **Delegates List**





Change the **dates of stay** on a booking by clicking "E" for edit, then use the calendar buttons to set a new date range.

Rename rooms according to the Rooming List by clicking "E" for edit, then typing the name into this field.

Click "Whose" to replace the current **Guest Tile** that is attached to the room with a different Guest Tile.

Change the **Room Type** by clicking "E" for edit, then type the new room code over the original.

Split a room into **Shares** by clicking this button. This allows two guests who are sharing 1 room to keep their finances separate.

Click Letters to send a Group Confirmation Email to a Group Attendee.

Click "Bills" to charge a Group Attendee's credit card to their room reservation.

Each Group has a designated Package **Code** for their group.

Scan + Link (Hotlinks S+L) is a common function used to quickly switch from one Reservation Tile to another.

All reservations on the Scan+Link list are connected together via the Group's **City Ledger #** (a.k.a. Res ID)

Similar to the Delegates List, you will see the **R Number** on each line.



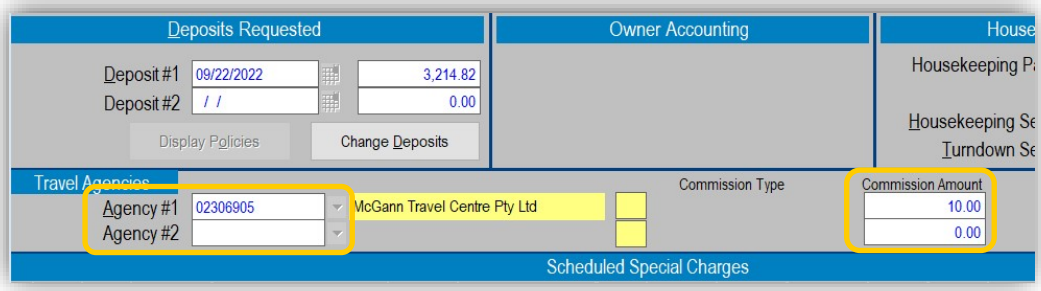
Sq	Res#	Level	#/Room	Name	Arrival	Depart
1	**1309PM**	**NEW**	**1/B1038**	***Luxury Suite**	**05/05/2023**	**05/07/2023**
2	1309PL	NEW	1/B3032	*Premium Suite	05/04/2023	05/07/2023
3	1309PC	NEW	1/B1016	*Suite Upgrade	05/04/2023	05/07/2023
4	1309PD	NEW	1/B1018	*Suite Upgrade	05/05/2023	05/07/2023
5	1309PN	NEW	1/B1044	*Suite Upgrade	05/04/2023	05/07/2023
6	1309PP	NEW	1/B1046	*Suite Upgrade	05/05/2023	05/07/2023
7	1309PH	NEW	1/B1546	*Suite Upgrade	05/05/2023	05/07/2023
8	1309PO	NEW	1/B2014	*Suite Upgrade	05/04/2023	05/07/2023
9	1309PG	NEW	1/B2016	*Suite Upgrade	05/04/2023	05/07/2023
10	1309PK	NEW	1/B3514	*Suite Upgrade	05/04/2023	05/07/2023
11	1309PQ	NEW	1/BRF7	*TBD	05/05/2023	05/07/2023
12	1290O0	C/L	1/B-CITY	AT&T Assembly Speaker's C	05/03/2023	05/07/2023
13						

SMS Host | Travel Agent Tiles

Pebble Beach Resorts will use **Travel Agencies** to provide our Sales Department with leads on group clients. If a lead successfully leads to a booking, we will give commission to the agency.

Group Rooms & Golf Coordinators are responsible for ensuring that the Travel Agencies are only attached to bookings for which they should receive credit. (For example, discounted Staff Rooms are not eligible for commission.) To audit this, coordinators will run an **SR29 Report**.

Travel Agent information for a booking can be seen in **Special Billing** in the "**Agency**" fields:

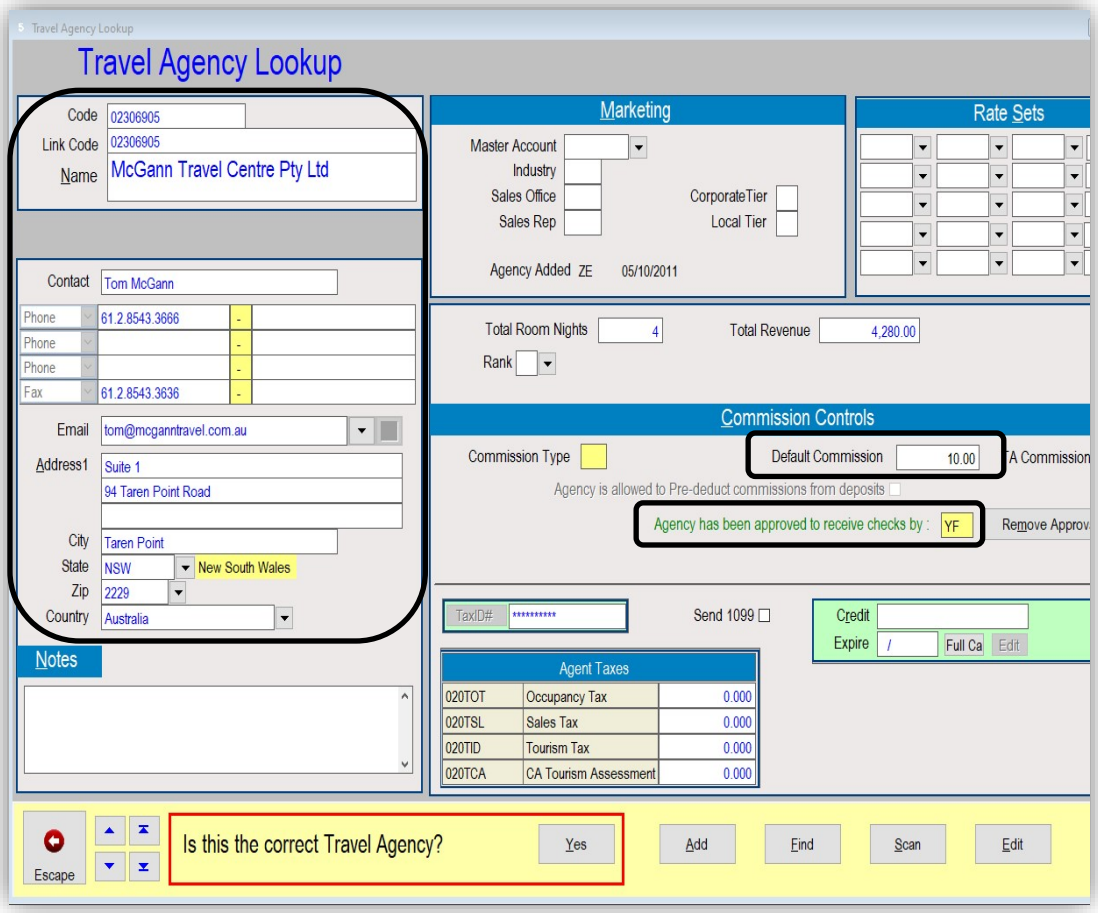


Travel Agency's are most commonly documented within **Agency #1.**

The standard room commission is 10%, but this can differ from contract to contract.

If an agency is documented in **Agency #2**, that means it is a "blind commission."

The commission will not appear on any bills/contract/folio. We hide this commission because the client does not necessarily know that we utilized a Travel Agency.



Travel Agent Tiles
(a.k.a. Tag Tiles)

This window contains the contact information for the headquarters of the Travel Agency.

It also states the commission percentage that the agency will receive.

In order to receive commission checks, there must be a "signature" under the commission that states by whom the commission has been approved. If there is no signature, the agency's application is likely pending with Pebble Beach.

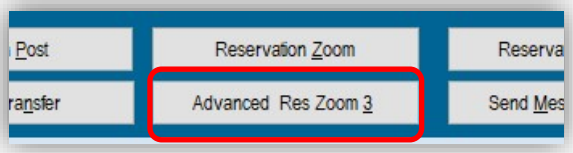
C9|BX 11.6.24

SMS Host | Advanced Zoom

The **Advanced Zoom** feature of **SMS Host** allows you to make mass room edits without the need to open individual room Reservation Tiles.

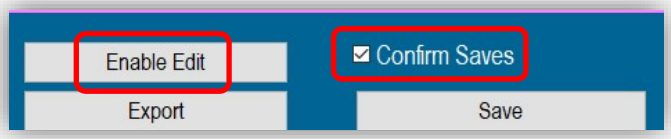
To Access Advanced Zoom:

1. Access the Group's **Guest Tile**
2. Select "**Group**" (G) to open "Group Management"
3. Select "**Advanced Res Zoom 3**" (3)

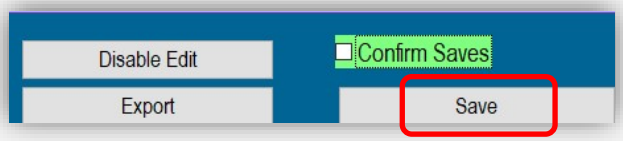


To allow for easy editing:

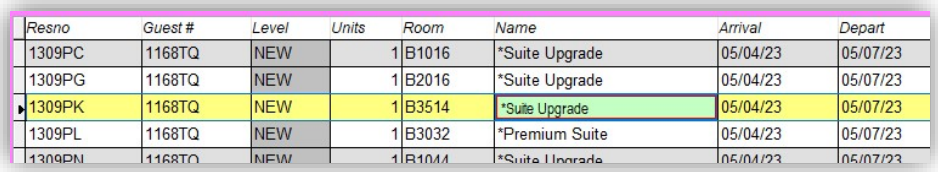
1. Click "**Enable Edit**"
2. Un-Check "**Confirm Saves**"



Once you complete your edits, hit "Save":

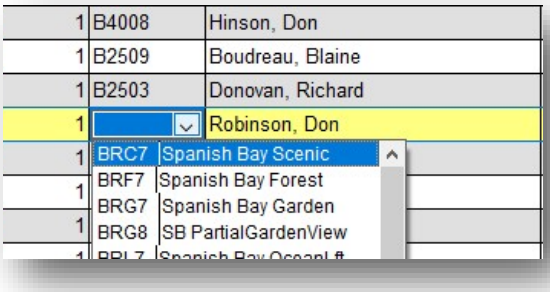


Enter a Rooming List: Last, First



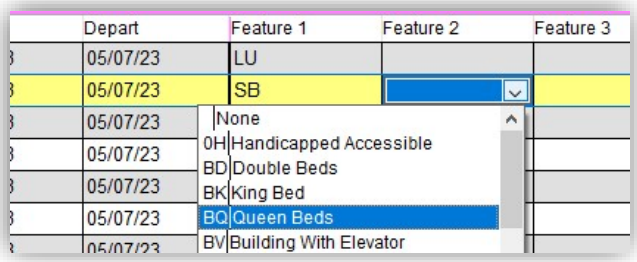
Resno	Guest #	Level	Units	Room	Name	Arrival	Depart
1309PC	1168TQ	NEW	1	B1016	*Suite Upgrade	05/04/23	05/07/23
1309PG	1168TQ	NEW	1	B2016	*Suite Upgrade	05/04/23	05/07/23
1309PK	1168TQ	NEW	1	B3514	*Suite Upgrade	05/04/23	05/07/23
1309PL	1168TQ	NEW	1	B3032	*Premium Suite	05/04/23	05/07/23

Change Room Types



1	B4008	Hinson, Don
1	B2509	Boudreau, Blaine
1	B2503	Donovan, Richard
1		Robinson, Don
1	BRC7	Spanish Bay Scenic
1	BRF7	Spanish Bay Forest
1	BRG7	Spanish Bay Garden
1	BRG8	SB PartialGardenView

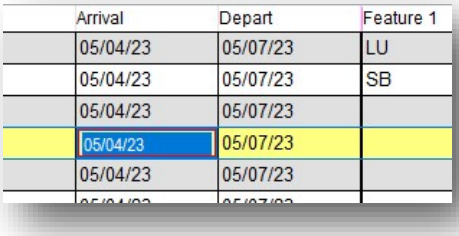
Enter Room Features



	Depart	Feature 1	Feature 2	Feature 3
	05/07/23	LU		
	05/07/23	SB		
	05/07/23			
	05/07/23			
	05/07/23			
	05/07/23			

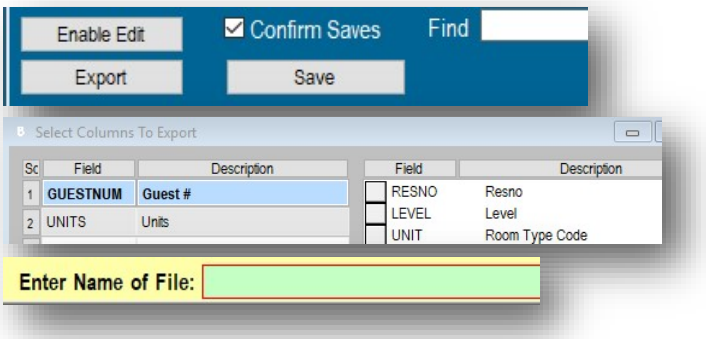
None
0H Handicapped Accessible
BD Double Beds
BK King Bed
BQ Queen Beds
BV Building With Elevator

Change Dates of Stay



	Arrival	Depart	Feature 1
	05/04/23	05/07/23	LU
	05/04/23	05/07/23	SB
	05/04/23	05/07/23	
	05/04/23	05/07/23	
	05/04/23	05/07/23	

Export Delegates List to Excel



C9|BX 11.20.23

SMS Host | General Availability (F7)

F7 is the Hot Key to access the "**General Availability**" feature of SMS. This feature allows you to check room availability at our Pebble Beach Properties over specified dates.

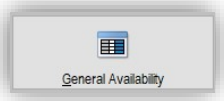
All groups have a "Block" of rooms available to them that we have preemptively pulled from inventory. As long as you stick within the room block, you never need to worry about checking availability. You only need to check availability if you are trying to book rooms that are outside of your group's Room Block.

When do I need to check availability in F7?

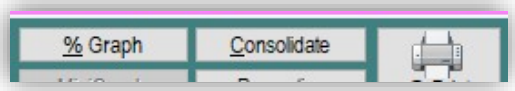
A room change is being made within a group's room block	**JUST DO IT**
A room change is being made that will exceed a group's room block	**CHECK F7**
An overflow booking is being created	**CHECK F7**

Check Availability by Property

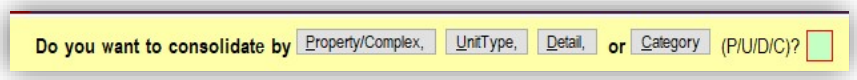
1. Click **F7** on your keyboard to open the **Availability Menu**
2. Click **G** on your keyboard to open "**General Availability**"



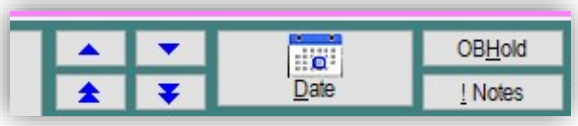
3. Click **C** to **Consolidate** your search



4. Click **P** to search availability by **Property**



5. Set your **calendar** to the **start date** you wish to search



NOTE:

Always check Availability Notes to see if additional restrictions apply to your dates.

If we're outside of 14 days, we only need to verify availability by Property.

If we're within 14 days, check both property and room type.

Check specific unit availability by Consolidating by Detail

You will see a chart that lists how many rooms are available at each property.

If we have enough available rooms at the property you wish to book, you can proceed with the room reservation

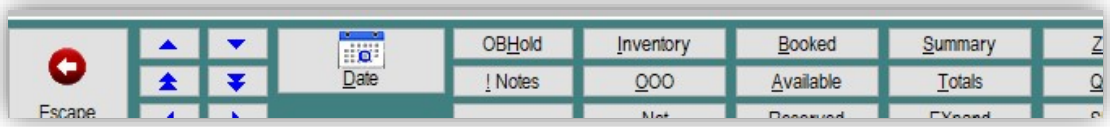
Date	L	B	P
03/21/2023	21	57	3
03/22/2023	20	62	5

SMS Host | Availability Notes (F7)

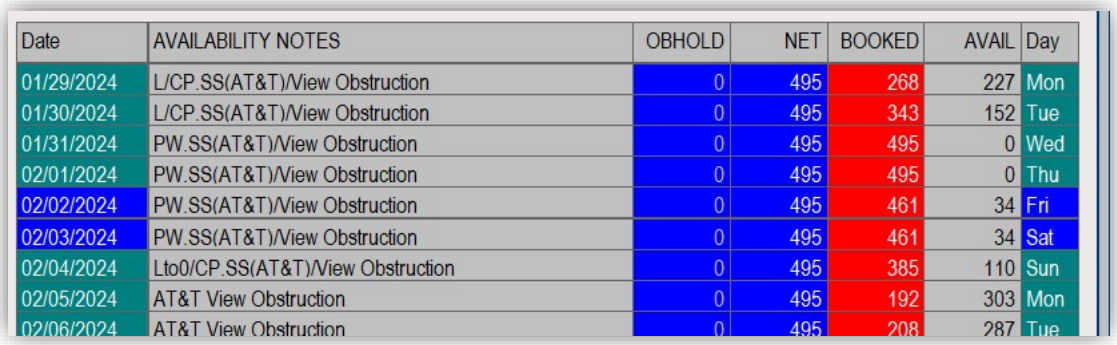
Whenever you check room availability, you must always look to see if there are any special notes on those dates. These notes could mean that—even though you see rooms available, they are being held and thus cannot be reserved.

Check Availability Notes

The Notes button will be available on any screen within the General Availability Window.



You will see Availability Notes written in codes that you can cross reference with the chart below.



Date	AVAILABILITY NOTES	OBHOLD	NET	BOOKED	AVAIL	Day
01/29/2024	L/CP.SS(AT&T)/View Obstruction	0	495	268	227	Mon
01/30/2024	L/CP.SS(AT&T)/View Obstruction	0	495	343	152	Tue
01/31/2024	PW.SS(AT&T)/View Obstruction	0	495	495	0	Wed
02/01/2024	PW.SS(AT&T)/View Obstruction	0	495	495	0	Thu
02/02/2024	PW.SS(AT&T)/View Obstruction	0	495	461	34	Fri
02/03/2024	PW.SS(AT&T)/View Obstruction	0	495	461	34	Sat
02/04/2024	Lto0/CP.SS(AT&T)/View Obstruction	0	495	385	110	Sun
02/05/2024	AT&T View Obstruction	0	495	192	303	Mon
02/06/2024	AT&T View Obstruction	0	495	208	287	Tue

B to 0	Inn—Do not sell rooms into the negative
L to 0	Lodge—Do not sell rooms into the negative
PW to 0	Do not sell rooms into the negative across all 3 properties *Example: The Lodge may be oversold as long as we have equal positive numbers at The Inn*
B.SS	Inn—No further rooms can be sold
L.SS	Lodge—No further rooms can be sold
PW.SS	No further rooms can be sold at any property
BOSS	Inn—Do not sell Ocean View rooms and up (Studio, Deluxe, Suites)
LOSS	Lodge—Do not sell Ocean View rooms and up (Studio, Deluxe, Suites)
View Obstruction	Ocean View rooms/suites may see construction related to PBC Events
(parentheses)	Words in parentheses will indicate the group are event that a note pertains to

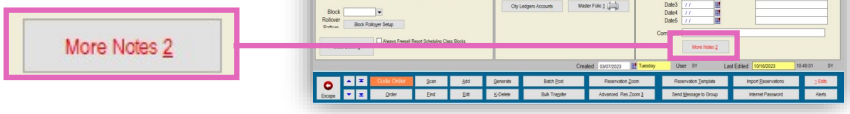
SMS Host | Group Notes (2 Notes)

Group Notes, also referred to as the "**2 Notes**," is where the Group Rooms & Golf Coordinator documents the group's nightly obligation for the Front Desk.

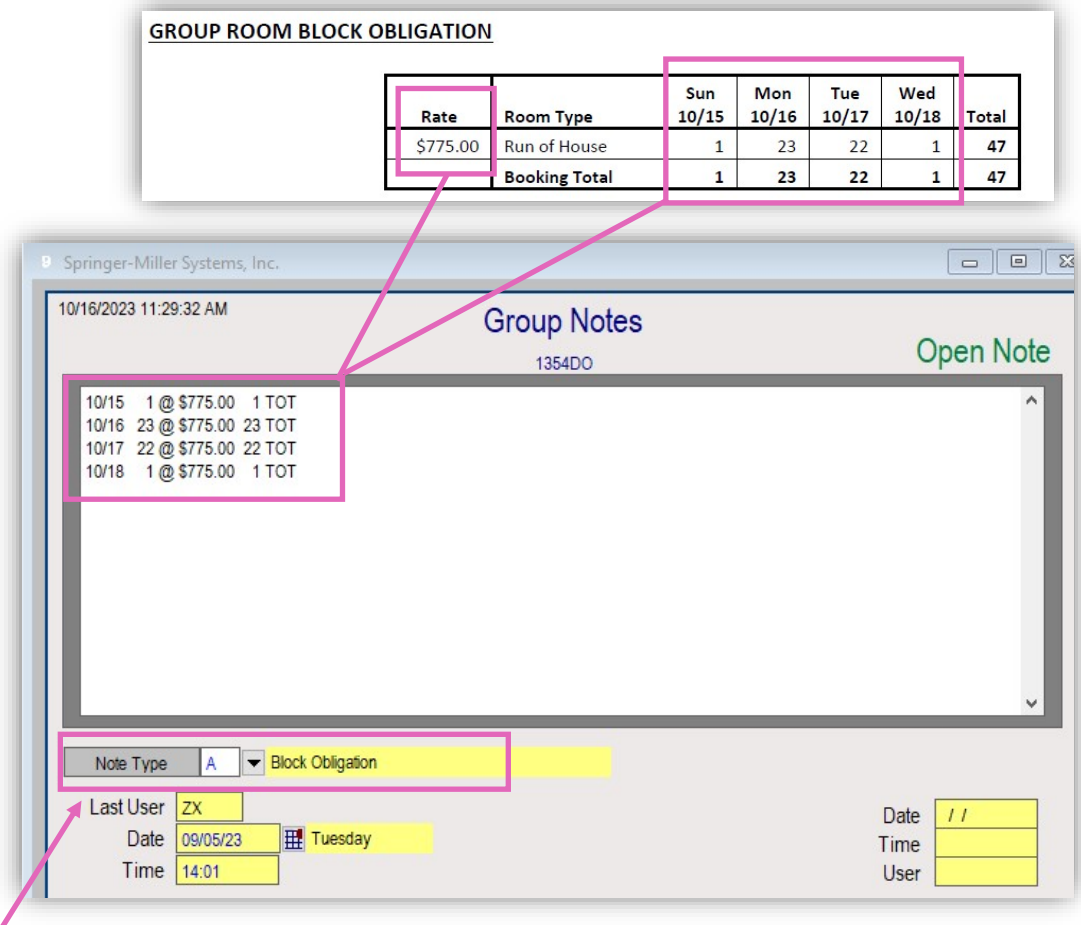
- This information should be entered as soon as the Block to Actual is set.
- If changes are made beyond that point, it is the responsibility of the Group Rooms & Golf Coordinator to keep these notes updated to the most recent data.

Where are the Group Notes?

1. Access the Group Management window in SMS
2. Click the "More Notes" button
   (or type "2" on your keyboard)



Input the current Block Obligation numbers into Group Notes:



Set Note Type to A for Block Obligation

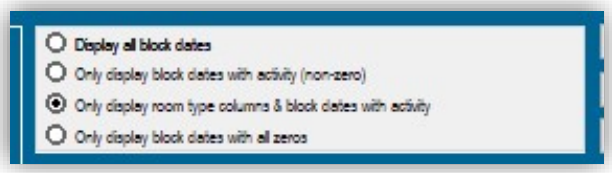
SMS Host | Edit A Room Block

Research:

1. Determine the contract structure
    - ROH—We must ensure to maintain the ROH% as we add rooms
    - Tiered Rates—The planner must request specific room categories to add
2. Check F7 General Availability and Notes
    - All rooms within the block are held from public inventory, but when increasing the block, we must ensure that we have a positive number of any room categories we add.
    - It can be ok to oversell a category if we are far enough from the arrival date and you are looking at a low tier category. Consult your manager for advice/approval.

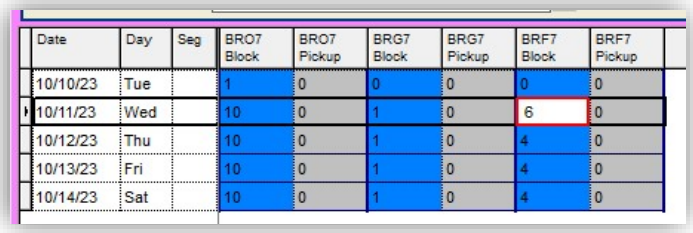
Edit the Block

1. Access the Group Management Window
2. Type B to open "Room Blocking"
3. Click the radio button that says "Only display room type columns & block dates with Activity"



A. Edit the number of rooms in the Room Block

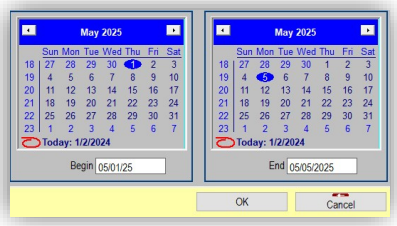
- Click E to Edit
- Type the new number of rooms you wish to block into the blue squares



Date	Day	Seg	BRO7 Block	BRO7 Pickup	BRG7 Block	BRG7 Pickup	BRF7 Block	BRF7 Pickup
10/10/23	Tue		1	0	0	0	0	0
10/11/23	Wed		10	0	1	0	6	0
10/12/23	Thu		10	0	1	0	4	0
10/13/23	Fri		10	0	1	0	4	0
10/14/23	Sat		10	0	1	0	4	0

B. Edit the Date Range of the Room Block

- Type "G to Generate Dates
- Set the new date range with the calendars and click OK to save



4. If you need to edit the rates, allow a few minutes for your changes to feed to Amadeus, then edit the rates in Amadeus

SMS Host | Pick Up Rooms (1/3)

As soon as the Planner provides you with their Rooming List, you should enter **SMS** and pick up rooms for each name on the list. "**Pick Up**" refers to the process of taking rooms from the group's block and creating reservations.

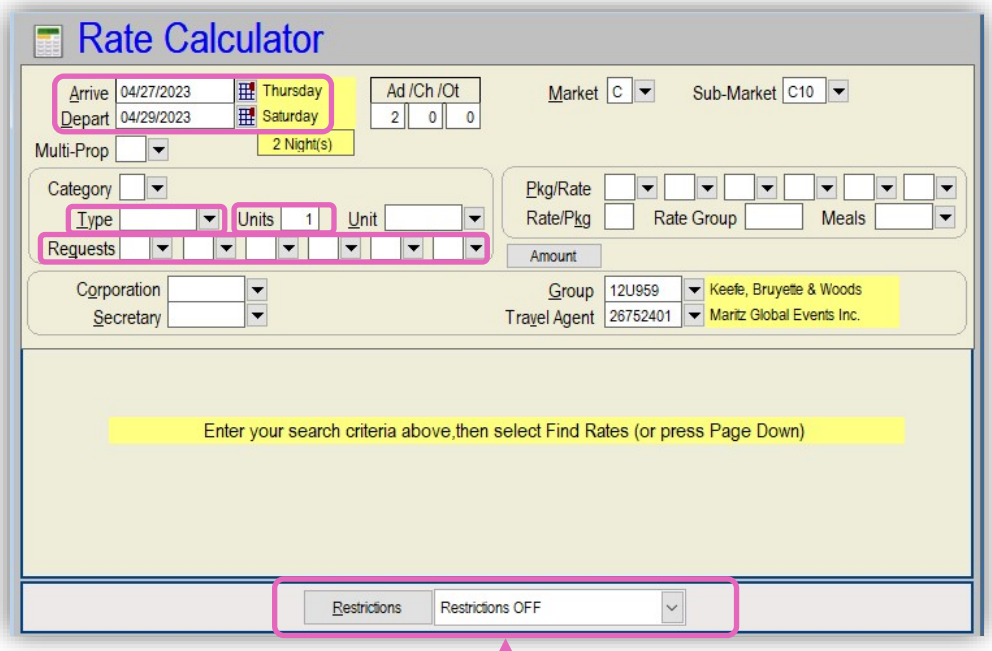
1. Run an **Allotment Report** in SMS to see how many of each room type your group has available to reserve per night

Unit Type	Mon 09/25/23 Cur Blk	Mon 09/25/23 Cur PkUp	Tue 09/26/23 Cur Blk	Tue 09/26/23 Cur PkUp	Wed 09/27/23 Cur Blk	Wed 09/27/23 Cur PkUp	Thu 09/28/23 Cur Blk	Thu 09/28/23 Cur PkUp	Fri 09/29/23 Cur Blk	Fri 09/29/23 Cur PkUp	Sat 09/30/23 Cur Blk	Sat 09/30/23 Cur PkUp	Sun 10/01/23 Cur Blk	Sun 10/01/23 Cur PkUp	Mon 10/02/23 Cur Blk	Mon 10/02/23 Cur PkUp	Total Cur Blk	Total Cur PkUp
LROS	4	0	8	0	8	0	2	0	0	0	0	0	0	0	0	0	22	0
LRCS	4	0	8	0	8	0	2	0	0	0	0	0	0	0	0	0	22	0
LRGS	5	0	10	0	10	0	2	0	0	0	0	0	0	0	0	0	27	0
LRWS	2	0	4	0	4	0	1	0	0	0	0	0	0	0	0	0	11	0
LRCF	2	0	4	0	4	0	1	0	0	0	0	0	0	0	0	0	11	0
LRGF	2	0	4	0	4	0	1	0	0	0	0	0	0	0	0	0	11	0
LROD	1	0	2	0	2	0	1	0	0	0	0	0	0	0	0	0	6	0
TOTALS	20	0	40	0	40	0	10	0	0	0	0	0	0	0	0	0	110	0

2. Open the group's **Guest Tile** and hit **F5** to run the **Rate Calculator**

3. Enter the following:

- **Arrival Date**
- **Departure Date**
- **Room Type**
- **Number of Units**
- **Room Features Requests (Optional)**



4. Change the **Restrictions** to "**OFF**" to run the search

5. You will see a rate code with the name of your group
Select your group's rate to create your Reservation Tiles

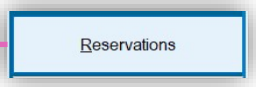
Sq	Rate Code	Description	Room Type	Vac	Avl	Grp	Unit Description	1st w/o t
1	L313PX	Consumer & Retail	LRGS	-3	-11	1	Lodge Garden	6200.0
2								

SMS Host | Pick Up Rooms (2/3)

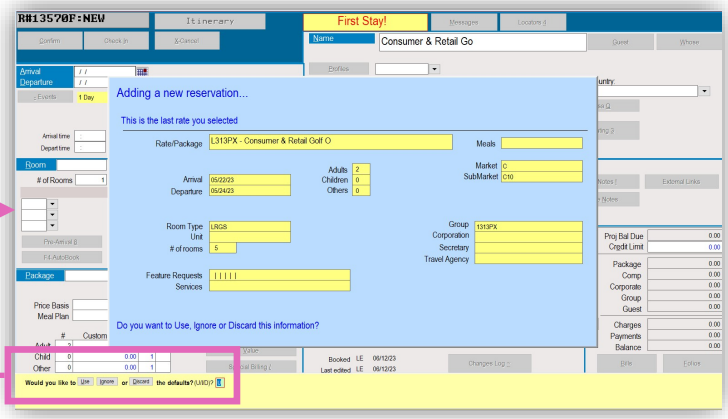
After you have "Picked Up" your rooms, they are connected to the group's City Ledger, but they are not yet associated with the Group Guest Tile.

ADD YOUR PICKED UP ROOMS TO THE GUEST TILE:

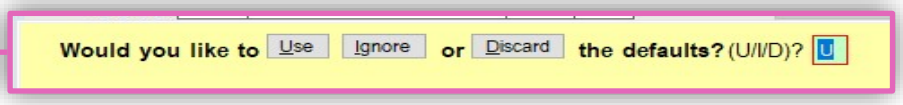
1. Access the **Guest Tile**
2. Click "**Reservations**" to open the list of picked up rooms.
3. If there are no picked up rooms you will see a blue window immediately.



4. If there are already picked up rooms you will see a list of all rooms
   - Type "**A**" for "**Add**"
   - Now, you will see a blue window open on top of the Reservations Tile window



5. At the bottom of this window, you are asked if you want to Use, Ignore, or Discard the Template of your Picked Up Rooms.
   - Type "**U**" for "**Use**"



6. Page Down to Save



Your rooms are now attached to your Guest Tile!

SMS Host | Pick Up Rooms (3/3)

CHANGE THE NAME OF EACH OF YOUR PICKED UP ROOMS TO "*TBA":

1. Access the first **Reservation Tile**
2. Click E for Edit
3. Type "***TBA**" into the Name field

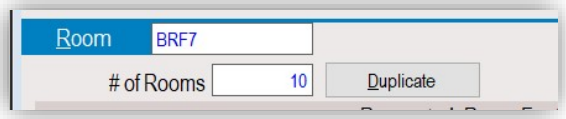
   The asterisk allows Revenue Management to easily locate and report on unassigned rooms



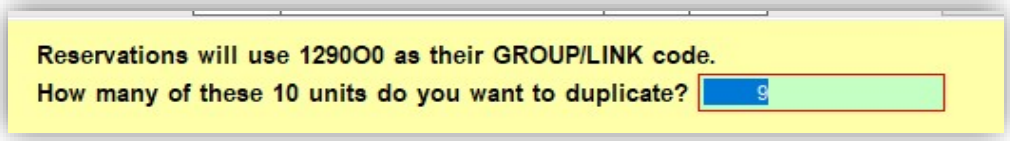
4. **Repeat** this process with each room
5. Once you receive the **Rooming List,** you will overwrite "*TBA" with the guest's name

DUPLICATE ALL ROOMS:

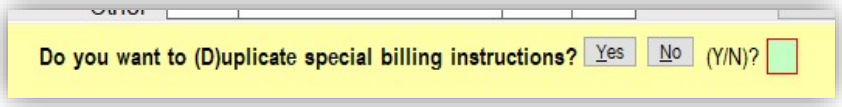
1. Click the **Duplicate** button



2. **Page Down** to confirm that you want to duplicate all rooms in the grouping



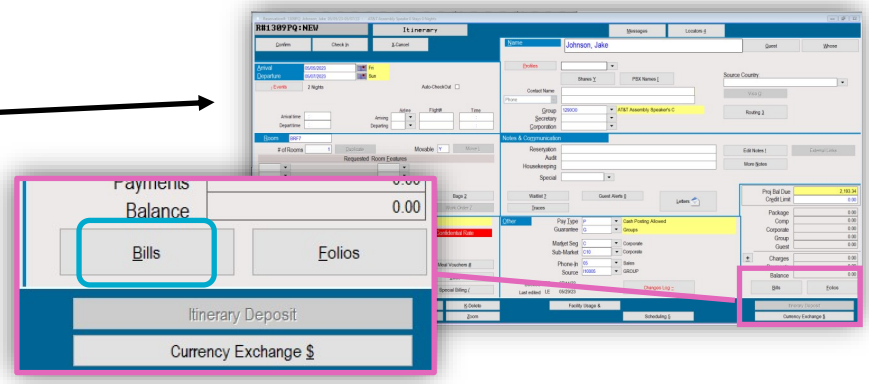
3. Type Y to confirm



SMS Host | Charge A Credit Card

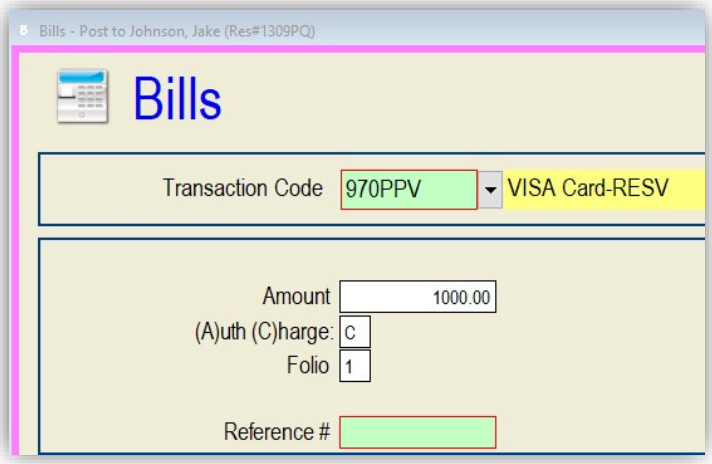
1.) Locate the **Reservation Tile**

2.) Click the **Bills** Button



3.) Input the following:

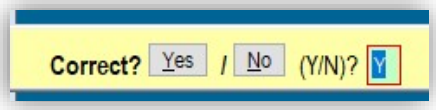
- Transaction Code
- Dollar Amount
- "C" to charge the card
- Keep the Folio as 1



WHAT IS MY TRANSACTION CODE?

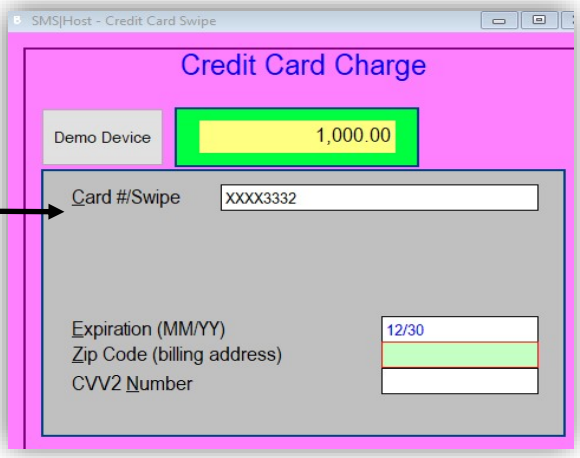
Dept. #	Post Payment	Credit Card Code
970	PP	Mastercard
		American express
		Visa
		diScover
		You got me a Gift Card!

4.) Press "**Enter**" on your keyboard



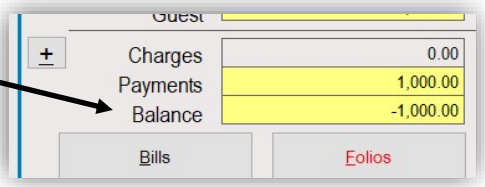
5.) Select "**Y**" to the following prompt

You will see the credit card number from the Guest Tile populate here



6) Hit **Page Down** to charge the card

7.) Click **Escape** twice to return to the Reservation and see the finalized charge

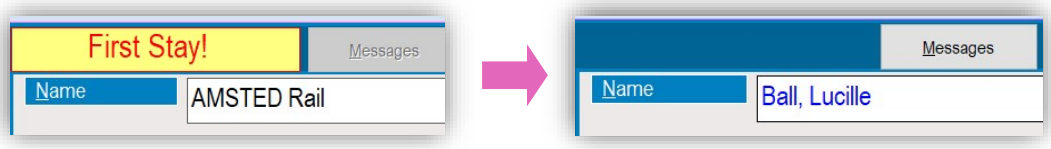


SMS Host | Enter A Rooming List (1/2)

Enter Rooming List on Individual Reservation Tiles

All rooms must be duplicated before you begin

1. Open any Reservation Tile belonging to your group
2. Click Edit
3. Type the name of your first guest in the format [LAST NAME, FIRST NAME]



4. Page Down to Save
5. Scan + Link to view the list of all reservation tiles

Sq	Res#	Level	#/Room	Name	Arrival	Depart	
1	**12C67W**	**C/L**	**1/B-CITY**	**AMSTED Rail**	**10/10/2023**	**10/15/2023**	
2	139405	NEW	1/BRO7	AMSTED Rail	10/11/2023	10/13/2023	
3	139406	NEW	1/BRO7	AMSTED Rail	10/11/2023	10/13/2023	
4	139407	NEW	1/BRO7	AMSTED Rail	10/11/2023	10/13/2023	
5	139408	NEW	1/BRO7	AMSTED Rail	10/11/2023	10/13/2023	
6	139409	NEW	1/BRO7	AMSTED Rail	10/11/2023	10/13/2023	
7	13940A	NEW	1/BRO7	AMSTED Rail	10/11/2023	10/13/2023	
8	13940B	NEW	1/BRO7	AMSTED Rail	10/11/2023	10/13/2023	
9	13940C	NEW	1/BRO7	AMSTED Rail	10/11/2023	10/13/2023	
10	13940D	NEW	1/BRO7	AMSTED Rail	10/11/2023	10/13/2023	
11	139404	NEW	1/BRO7	Ball, Lucille	10/11/2023	10/13/2023	

6. Select your next reservation tile and rename it to the next guest
7. Repeat until all rooms are named

SMS Host | Enter A Rooming List (2/2)

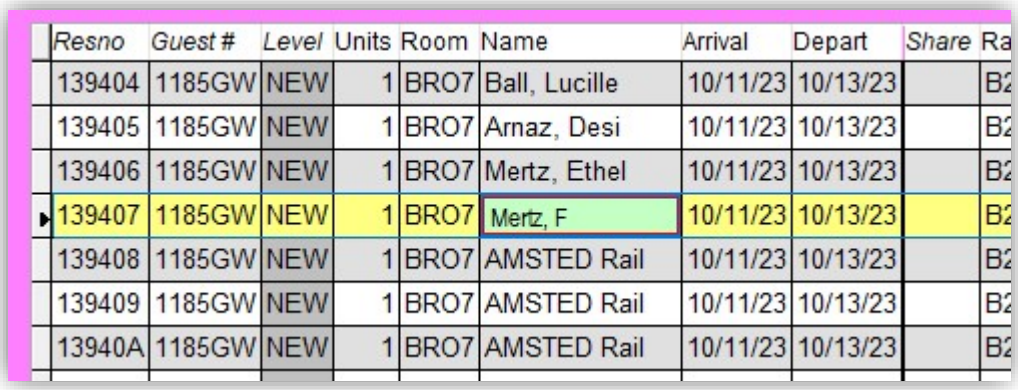
Enter Rooming List via Advanced Zoom

All rooms must be duplicated before you begin

1. Access the Group Management window and type 3 for Advanced Res Zoom
2. Click Enable Edit and Un-check Confirm Saves



3. Type the name of your guest into the Name field of the spreadsheet



Resno	Guest #	Level	Units	Room	Name	Arrival	Depart	Share	Ra
139404	1185GW	NEW	1	BRO7	Ball, Lucille	10/11/23	10/13/23		B2
139405	1185GW	NEW	1	BRO7	Arnaz, Desi	10/11/23	10/13/23		B2
139406	1185GW	NEW	1	BRO7	Mertz, Ethel	10/11/23	10/13/23		B2
139407	1185GW	NEW	1	BRO7	Mertz, F	10/11/23	10/13/23		B2
139408	1185GW	NEW	1	BRO7	AMSTED Rail	10/11/23	10/13/23		B2
139409	1185GW	NEW	1	BRO7	AMSTED Rail	10/11/23	10/13/23		B2
13940A	1185GW	NEW	1	BRO7	AMSTED Rail	10/11/23	10/13/23		B2

4. Hit the down arrow on your keyboard to move to the next line
5. Pause a moment to allow the system to refresh
6. Continue this pattern until all rooms are renamed according to the Rooming List
7. Once you are finished, click Disable Edit and re-check the Confirm Saves button

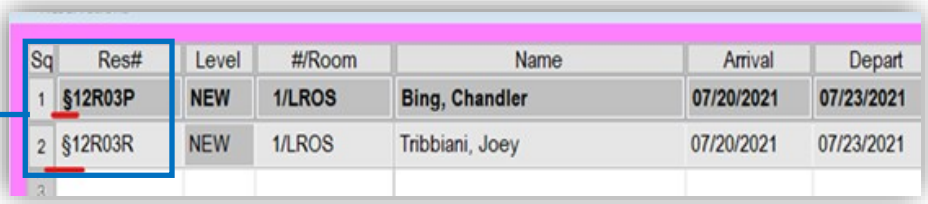


8. Run and send a Delegates List to the planner

SMS Host | Shares

A **Share** is a Reservation Tile that represents **a fraction of one room**. We split rooms into shares when two or more people will be staying in one room together, but want to keep their finances separate.

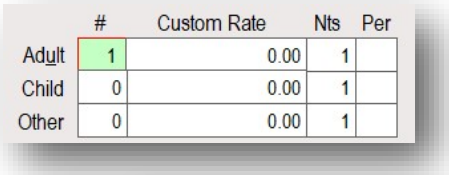
Shares can be identified by the symbol of **over-lapping** S's before the Reservation Number



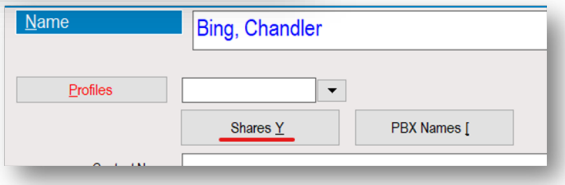
How to Split A Room Into Shares:

Note: If your Reservation Tile consists of multiple rooms, duplicate the rooms before sharing.

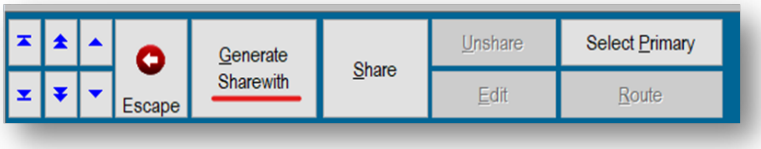
1.) Change the number of **Adults** to 1



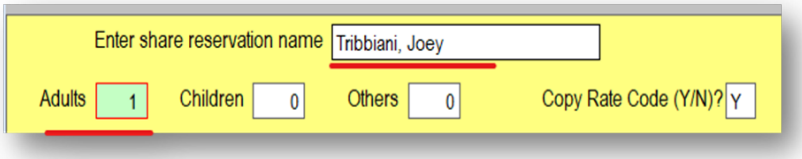
2.) Type "**Y**" to open the **Room Shares** window



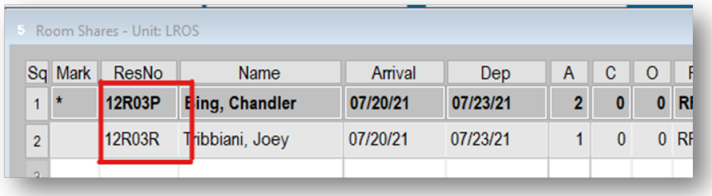
3.) Click the "**G**" to **Generate Sharewith**



4.) Enter the **name** of the guest **[Last, First]**
Tab to the next field
Change the **number of Adults** to **1**
Page Down to save



5.) The **Room Shares** window will open again and you will see that there are now two different Reservation Numbers.



6.) You can now click "**Whose**" to attach independent **Guest Tiles** to each Share

SMS Host | Whose A Guest Tile (1/2)

The term "**Whose**" refers to the process of **creating and attaching a Guest Tile to a room**.

⇒ The most common instance in which you will need to Whose a Guest Tile to a room will be when guests want to extend their stay with pre/post nights.

⇒ In these instances, we create and whose a Guest Tile so we can charge the group guest's credit card for the additional nights.

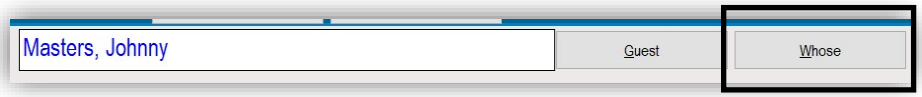
How to Whose A Guest Tile

Note: *In the case of Pre/Post Nights, whosing the Guest Tile is only one step of the process. Refer to the "*SMS |Pre/Post Nights*" SOP to ensure the process is completed in the correct order.*

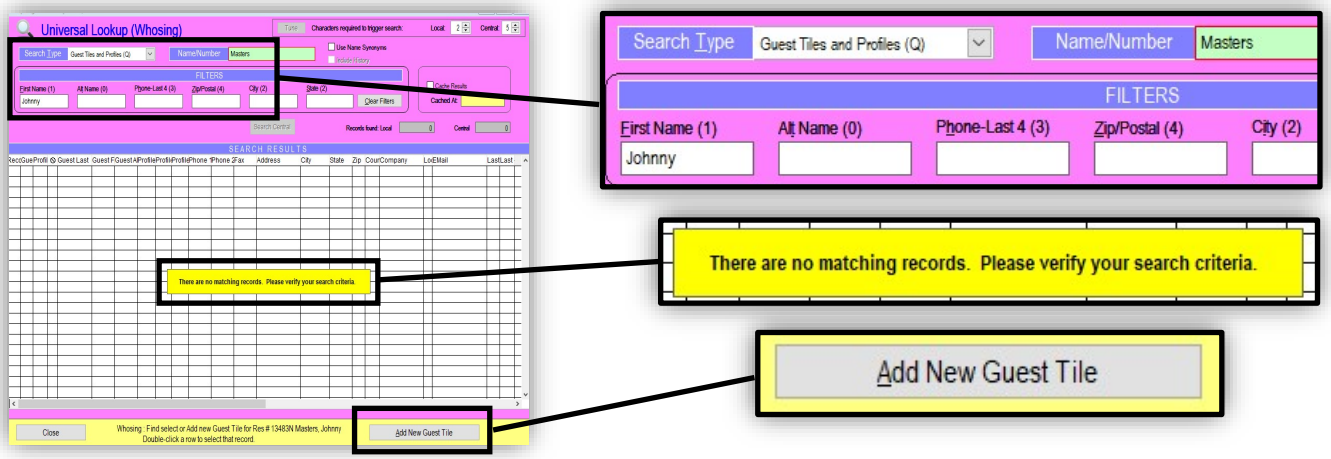
1. If the room is not Picked Up yet, **pick up** your guest's room first

2. Access the **Reservation Tile** of your guest

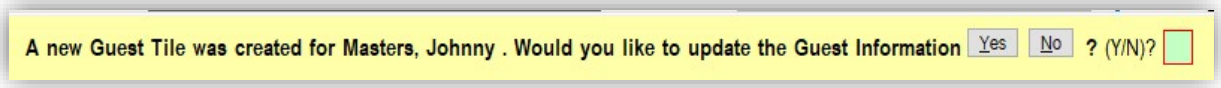
3. In the top right corner, click the **Whose** button



4. The **Universal Lookup** window will open—it will automatically display Guest Tile search results for the name on the current room.
   - If you see results matching the information on your Letter of Authorization, you can double click on that result to edit their existing Guest Tile
   - If you do not see matching search results, click **Add New Guest Tile**



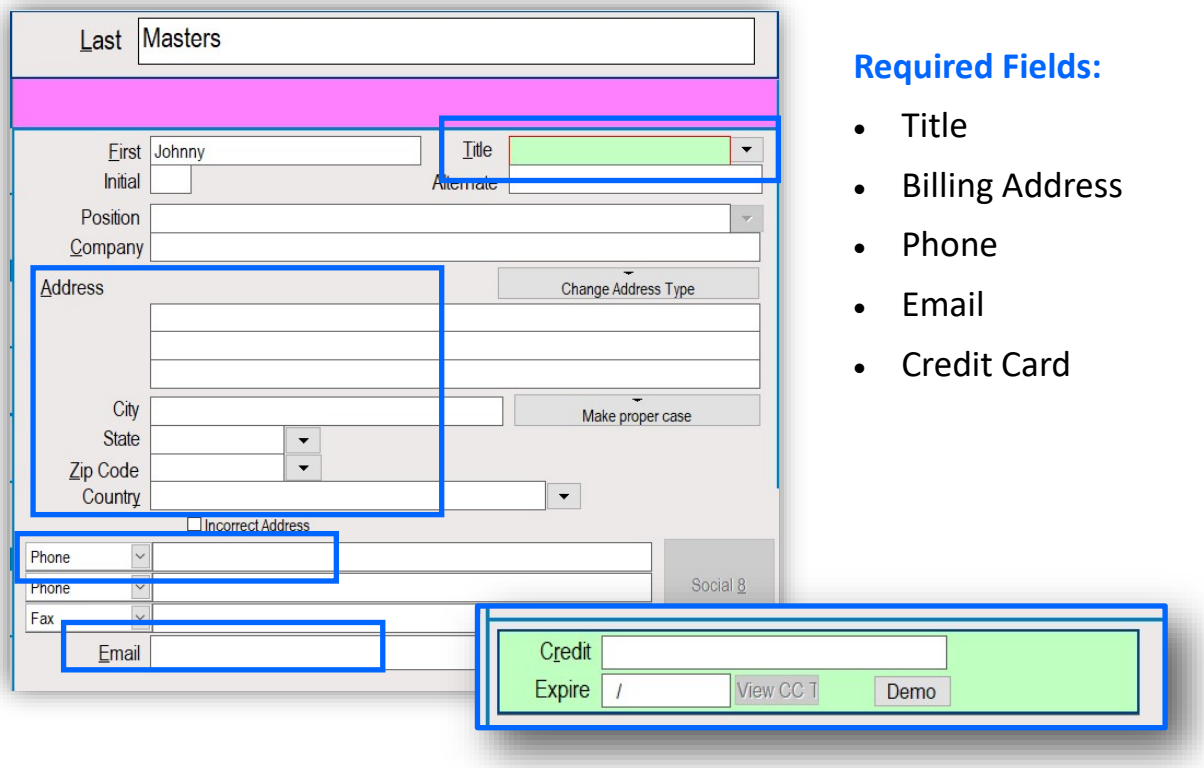
5. When you click **Add New Guest Tile**, you will receive the following message at the bottom of your Reservation Tile. Select **Yes** to update.



SMS Host | Whose A Guest Tile (2/2)

6. The "face" of the Guest Tile will open. Type E to Edit.

   You will enter all contact information you have for your group guest and all billing information from your Letter of Authorization.



Required Fields:

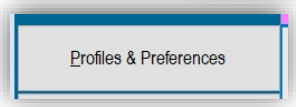
- Title
- Billing Address
- Phone
- Email
- Credit Card

7. Page Down to Save

8. A prompt window will open. Type 05 to select Sales



9. Type P to enter Profiles & Preferences

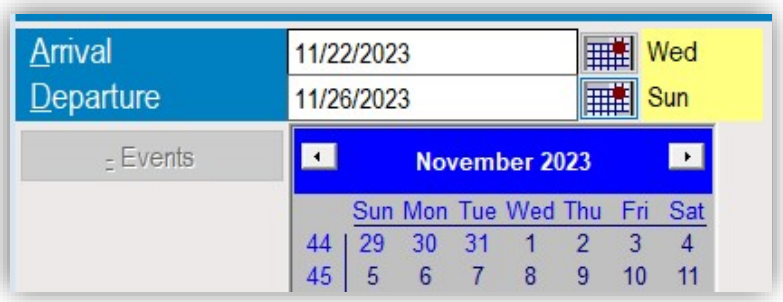


10. Type ESC to leave the Profiles & Preferences, thus making a profile on the Guest Tile for the system to use

11. Type Escape once more to return to the room

SMS Host | Change Dates

1. Run an Allotment Report
2. Check availability:
    - If you are exceeding the group's block - See the **Room Block Additions** SOP for additional instruction
    - If you are staying within the group's block—proceed to next step
3. Change Dates:
    - On the Reservation Tile, click the calendar buttons to set your new dates



    - Page Down to Save
    - Type N so we do not update the Package Code



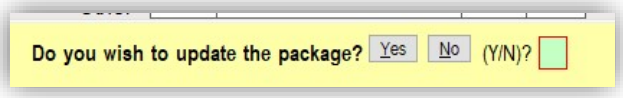
4. Run a new Allotment Report
5. Run a Delegates List report
6. If the room block changed, generate a Block to Actual or Contract Addendum accordingly [See Revisions Checklist]
7. Email the Delegates List to the Planner—include B to A or Addendum when appropriate

SMS Host | Change Room Category

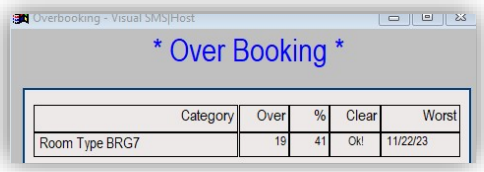
1. Run an Allotment Report
2. Check availability:
    - If you are exceeding the group's block - See the **Room Block Additions** section of your "Revisions Checklist" for additional instruction
    - If you are staying within the group's block—proceed to next step
3. Change Room Category:
    - On the Reservation Tile, Type E to Edit
    - Type the room code of your new room category in place of the existing room



    - Type Page Down to Save
    - Type N so we do not update the Package Code



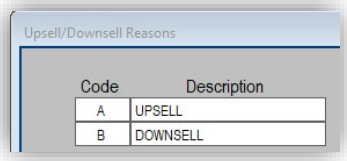
    - If you receive an Over Booking notification, press any key to continue



    - You will receive the following message asking you to either upgrade/upsell or downgrade/ downsell—Always choose the "sell" option



    - A Upsell/Downsell Reasons window will open—choose the same selection again



    - Your room change will auto-save at this point
4. Run a new Allotment Report
5. Run a Delegates List report
6. If the room block changed, generate a Block to Actual or Contract Addendum accordingly [See Revisions Checklist]
7. Email the Delegates List to the Planner—include B to A or Addendum when appropriate

SMS Host | Room Charges, Refunds, & Resells

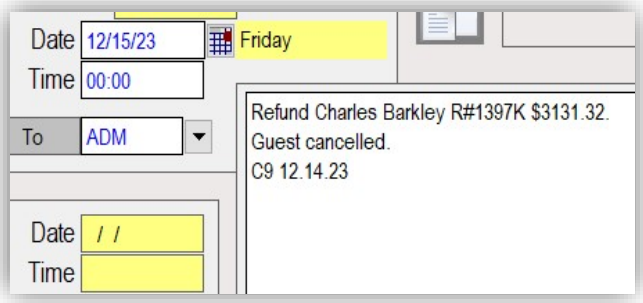
If a booking is IPO or a guest is paying for Pre/Post nights, you will need to adjust the funds on file any time you make a date change, room category change, or cancel a booking.

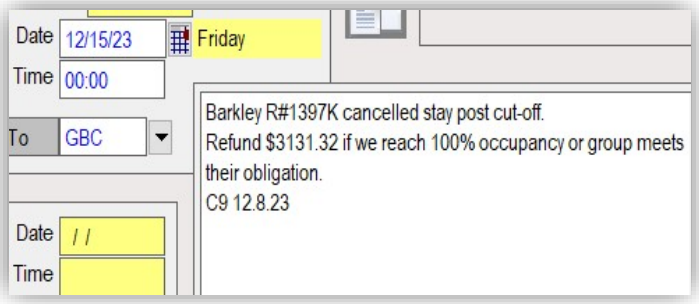
Room Upsells / Date Extensions

1. Make the Change on the Reservation Tile
2. Charge the CC for the difference in the room rate
3. Update the amount in the Deposit #1 of Special Billing to match the new room night total
4. Send a GEMAIL: Letters (L) > Add (A) > Select GEMAIL > Send Later
5. Run/Save a new Allotment Report
6. Send the planner a new Delegates List

Room Downsells / Date Reductions / Cancellations

1. Make the Change on the Reservation Tile
    - If a cancellation, write PER PLANNER / PER ATTENDEE as the cancellation reason
2. Adjust the funds
    - Pre-cutoff—set an ADM Trace (dated for tomorrow) to refund the room rate difference
    - Post-cutoff—Set a GBC Trace (arrival date) to refund only if obligation is met or we reach 100% occupancy
3. Update the amount in the Deposit #1 of Special Billing to match the new room night total
    - If post cut-off, skip this step
4. Send a GEMAIL
    - Letters (L) > Add (A) > Select GEMAIL > Send Later
5. Run & Save an Allotment Report
6. Send the planner a new Delegates List
    - If post cut-off, include a Block to Actual



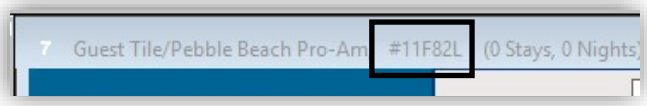


SMS Host | Import A Rooming List (1/3)

SMS allows us to import a Rooming List via Excel. Using this process, SMS will pick up the rooms, assign guest names to particular room categories, create shares when applicable, and input room feature requests.

Before you begin, ensure that the Group Template is set up and includes a Billing Profile

1.) Notate the Group Guest Tile #

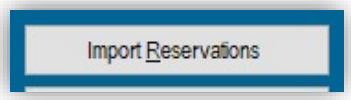


2.) Set up your Excel Spreadsheet:

- Include the following columns (in any order)
  - Res ID / City Ledger #
  - Package Code (L/B/P + last 5 characters of Res ID)
  - Name (Either Last,First or 2 separate columns for First and Last)
  - Arrival Date
  - Departure Date
  - Room Category Code
- Delete all column headers
- Save As “Microsoft Excel 5.0/9.5 Workbook”

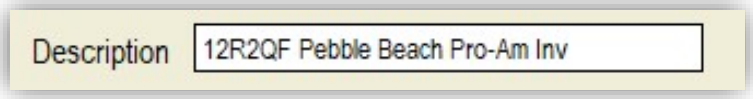
	A	B	C	D	E	F
1	Lindsay, Tanya	B2R2QF	2/8/2024	2/11/2024	BRC7	12R2QF
2	Campbell, Paige	B2R2QF	2/8/2024	2/11/2024	BRC7	12R2QF
3	Cortez, Erika	B2R2QF	2/8/2024	2/11/2024	BRC7	12R2QF
4	Fang, Krysjen	B2R2QF	2/8/2024	2/11/2024	BRC7	12R2QF

3.) From the Group Management window, click Import Reservations



4.) From the Group Management window, click Import Reservations

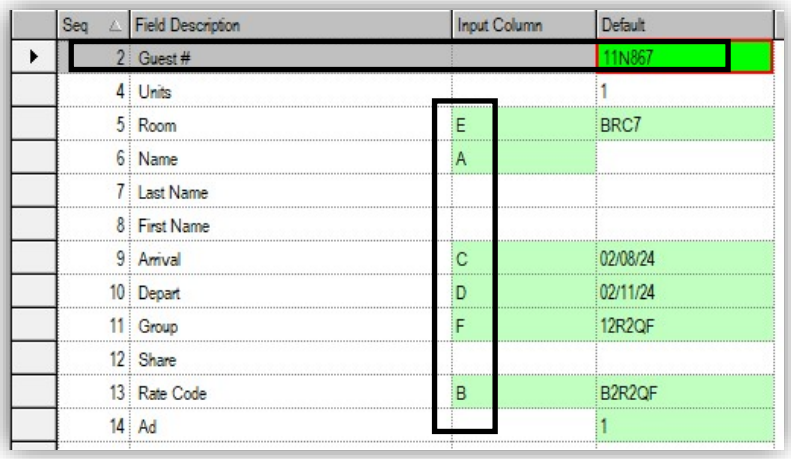
5.) Re-title the Description as [Res ID] [Group Post As Name]



SMS Host | Import A Rooming List (2/3)

6.) In the Field Mapping section:

- Input the Guest #
- Assign your columns to match your Excel Spreadsheet



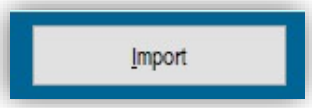
Seq	Field Description	Input Column	Default
2	Guest #		11N867
4	Units		1
5	Room	E	BRC7
6	Name	A	
7	Last Name		
8	First Name		
9	Arrival	C	02/08/24
10	Depart	D	02/11/24
11	Group	F	12R2QF
12	Share		
13	Rate Code	B	B2R2QF
14	Ad		1

7.) Ensure that following data correctly pulled from the Reservations Template:

- Pay Type = P “Cash Posting Allowed”
- Mkt
- Sub-mkt
- Source
- Gtd Type
- Suppress Rate Yes
- Trave Agency
- Commission %
- Housekeeping Service S
- Adult (defaults to 1 in case of shares)

8.) Click Save

9.) Click Import and select your saved Excel File



10.) Respond to the following prompts:

⇒ The default guest is [Group Guest Tile #]. Would you like to change it? - Select No if # is correct

⇒ The default group is [Group Res ID]. Would you like to change it? - Select No if ID is correct

⇒ Would you like to select a Corporation to apply to the reservations? - No

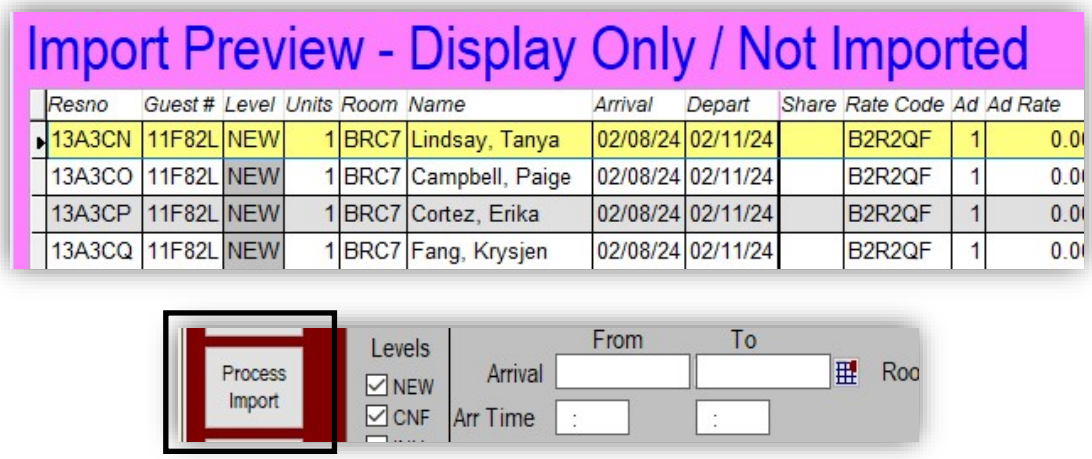
⇒ The default Rate Code is [Package Code]. Would you like to change it? - Select No if code is correct

⇒ Do you want to use the Group Template? - No

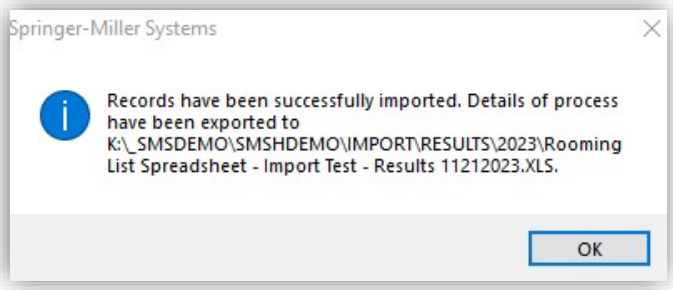
SMS Host | Import A Rooming List (3/3)

11.) The Import Preview screen will open—This screen mimics the Reservations Zoom screen

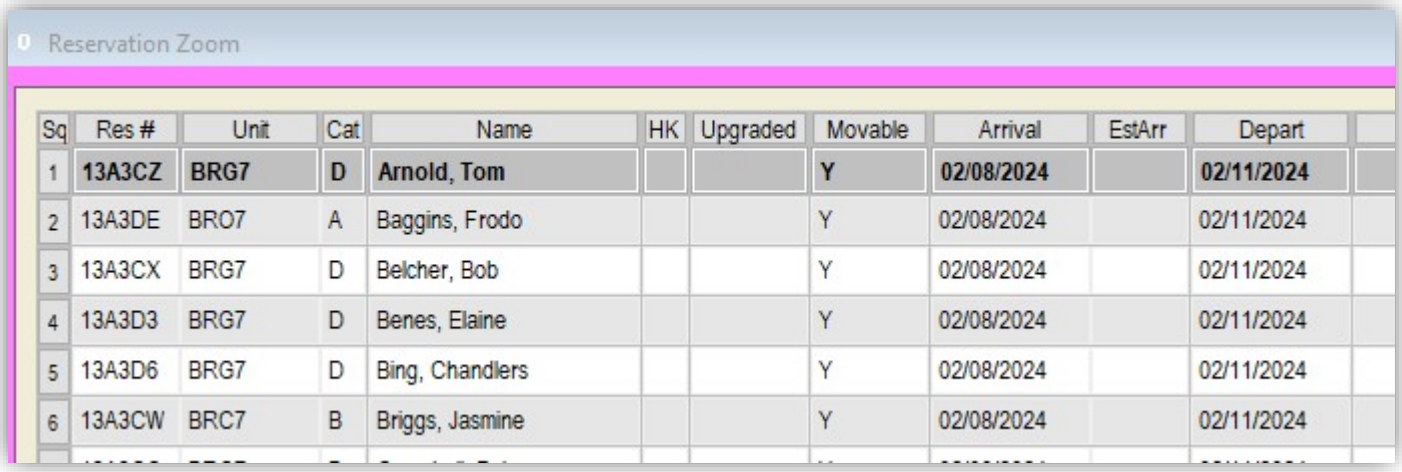
- If you see any red data, right click on the red text and select "Display errors for current row"
- If you do not see any red data, click Process Import



If the import was successful, you will see the following message:



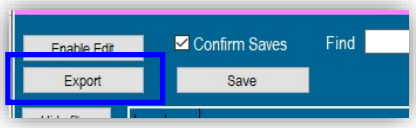
You can now view your picked up rooms in Reservations Zoom:



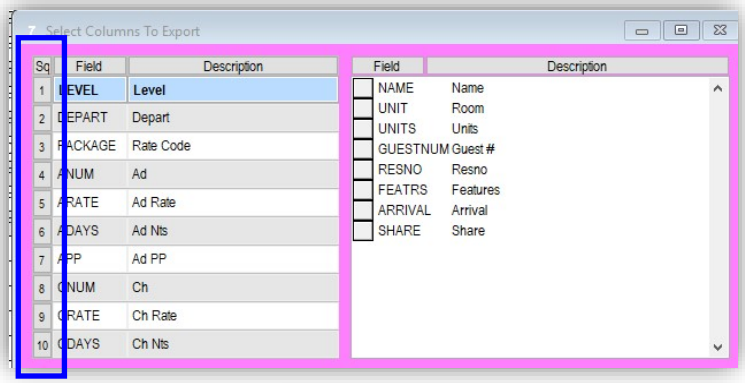
12.) Run and send a Delegates List to the Planner

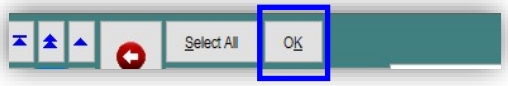
SMS Host | Export from Advanced Zoom

1. Access Advanced Res Zoom from the Group Management window

2. Click Export 

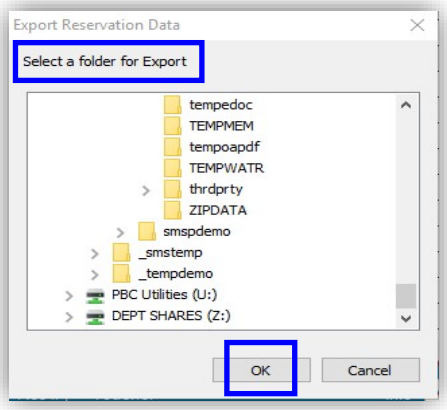
3. Click on the numbers of the columns you would like included in your spreadsheet
   Selected categories will move into the right pane



4. Type K to confirm 

5. Name your file, then Enter to continue 

6. This next window will allow you to browse files to select where you want to save your Export.
   Save your file to your Group's folder in the O Drive.



7. Click OK to save the file

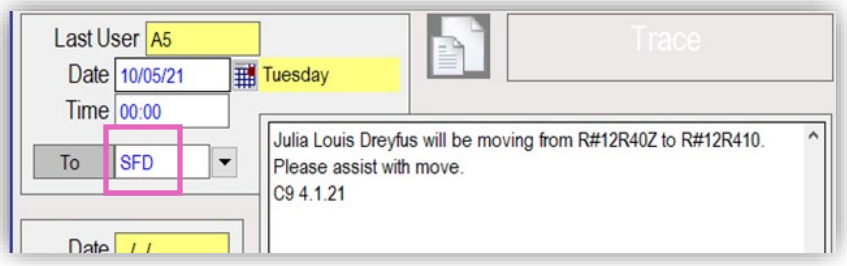
   You will now see your Excel Sheet Export in your selected group's folder



SMS Host | Room Moves

A **Room Move** is when a guest is staying for multiple nights, but will be changing from one room to another during their stay.

- Both rooms should be in the name of the Group Guest who will be moving
- Set the following Front Desk Trace on both rooms set for the date of the move:



- If the guest is moving between two properties, make sure the Front Desk trace on each Reservation Tile is directed to the Front Desk that matches the property

Note—

The Front Desk will move all of the guests belongings for them.

Guests will not have access to their rooms from 12pm-4pm on the date of the move.

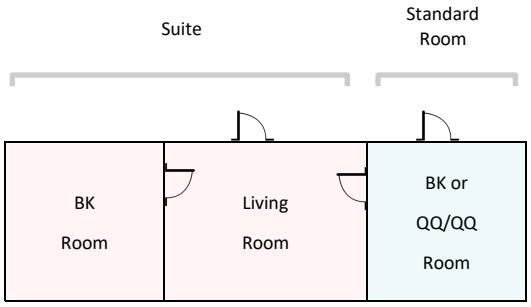
- **CFD = Casa Palmero Front Desk**
- **SFD = The Inn at Spanish Bay Front Desk**
- **LFD = The Lodge at Pebble Beach Front Desk**

SMS Host | 2-Bedroom Suite

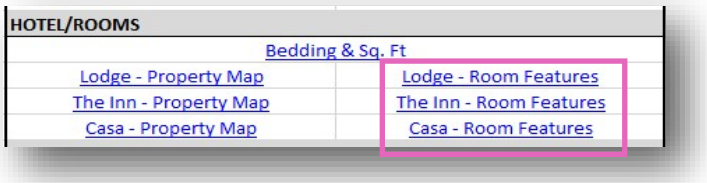
A **Two Bedroom Suite** is a suite with a standard room that connects either by an internal door or a common entry foyer.

- Suites always have BK bedrooms
- The connecting rooms *often* have QQ/QQ.

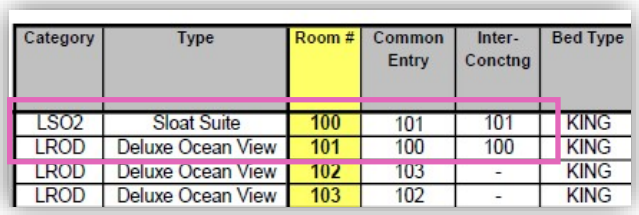
  This is not always true—verify bedding on the Room Features spreadsheet in the Digital Binder



1. In the Digital Binder, open the Room Features spreadsheet for the appropriate property

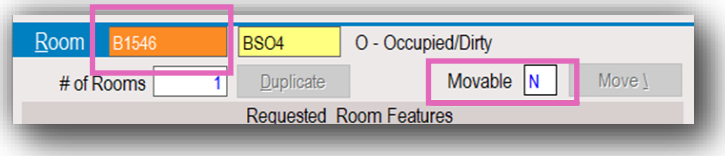


2. Locate the room number of the suite you are blocking—notate the room number of the suite and the room number of the connecting room

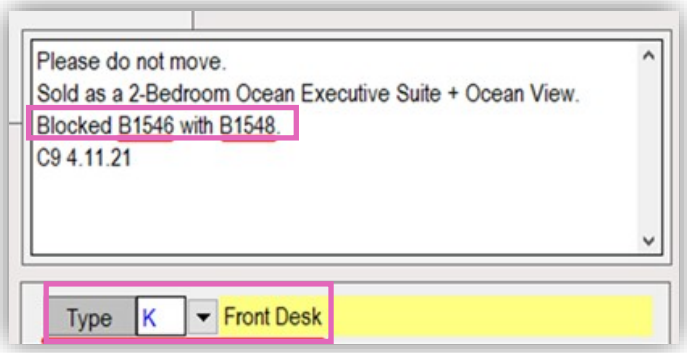


Category	Type	Room #	Common Entry	Inter-Conctng	Bed Type
LSO2	Sloat Suite	100	101	101	KING
LROD	Deluxe Ocean View	101	100	100	KING
LROD	Deluxe Ocean View	102	103	-	KING
LROD	Deluxe Ocean View	103	102	-	KING

3. On each Reservation Tile:
   - Type E to Edit
   - Type the exact room number of the suite / room into the Room Field
   - Type an N into the Moveable field
   - Page Down to save



4. Add the following K Note to both rooms:

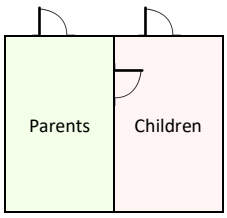


C9|BX 10.20.23

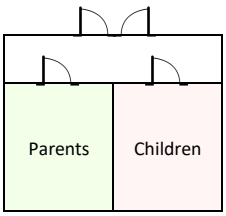
SMS Host | Families with Children

When a family visits and wants their underage children to stay in the room next door, we need ensure that the rooms are pre-blocked and connected to each other either by an internal door (inter-connecting) or a common foyer (common entry).

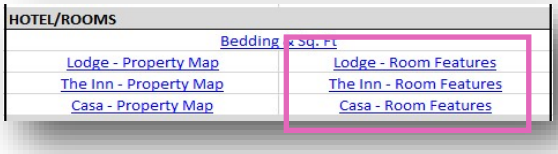
Interconnecting



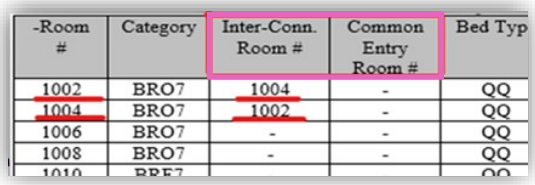
Common Entry



1. In the Digital Binder, open the Room Features spreadsheet for the appropriate property

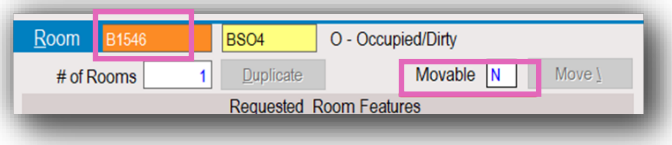


2. Locate the room category your guests are occupying—find room numbers of two rooms that connect to each other (ideally interconnecting, but we can use common entry for teenagers)

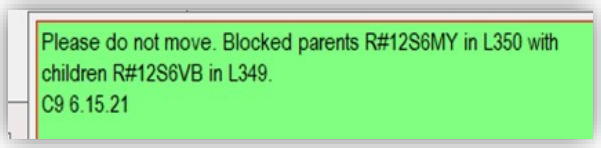


-Room #	Category	Inter-Conn. Room #	Common Entry Room #	Bed Typ
1002	BRO7	1004	-	QQ
1004	BRO7	1002	-	QQ
1006	BRO7	-	-	QQ
1008	BRO7	-	-	QQ
1010	BRE7			QQ

3. On each Reservation Tile:
   - Type E to Edit
   - Type the exact room number of the connecting room into the Room Field
   - Type an N into the Moveable field
   - Page Down to save



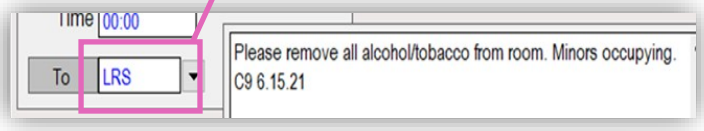
4. Add the following K Note to both rooms:

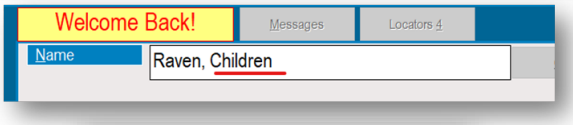


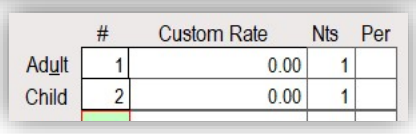
- ◊ SRS = Spanish Bay
- ◊ LRS = Lodge / Casa

5. On the children's room:

- Set a Room Service Trace for the date of arrival
- Rename the room to [Last Name, Children]
- Edit the number of adults to 1 and the number of children to the number of children who will occupy the room

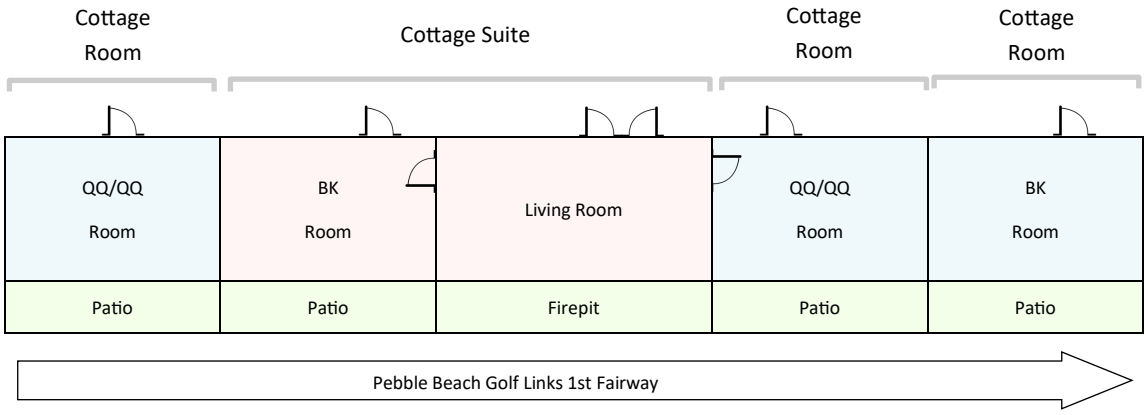






	#	Custom Rate	Nts	Per
Adult	1	0.00	1	
Child	2	0.00	1	

SMS Host | Fairway One Cottage



Your booking will consist of:

- ◊ (1) FW1 Cottage Suite [LSW1]
  &
- ◊ (3) FW1 Cottage Rooms [LRWF]

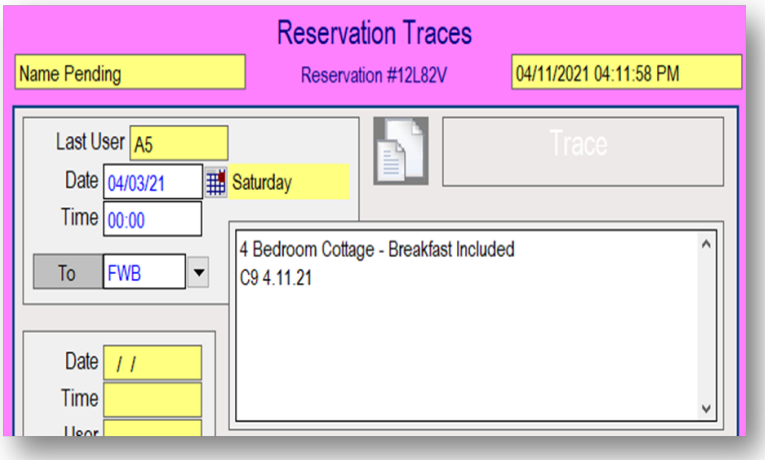
1. Duplicate all Cottage Rooms

2. Pre-block the Suite and all Cottage Rooms

   Eastwood Cottage Room Numbers:
   504 | 503 (suite) | 501 | 500
   Palmer Cottage Room Numbers:
   514 | 513 (suite)| 511 | 510

3. Mark the Suite and all Cottage Rooms as Non-Moveable

4. Set Fairway One Breakfast Traces for the Complimentary Cottage Breakfasts
   - Set an identical trace for each date that the guest will be having breakfast
   - Every single Reservation Tile in the 4 bedroom cottage must have these FWB Traces



Complimentary Cottage Breakfast:

If the cottage suite is reserved, all rooms receive complimentary breakfast. It will either be delivered to each room or set up in the main living room for all guests to enjoy as a group.

SMS Host | Cancel A Room

If a planner asks the Rooms & Golf Coordinator to replace the name on a room to another guest's name, we must cancel the initial reservation and create a new room reservation for the replacement guest.

This will ensure we have an accurate record of bookings and changes. It also ensures that accounting will not accidentally assign the wrong Billing Profile to a guest. Accounting applies Billing Profiles to Reservation #s, not names.

1.) Access the Reservation Tile

2.) Click the Cancel button in the top left corner

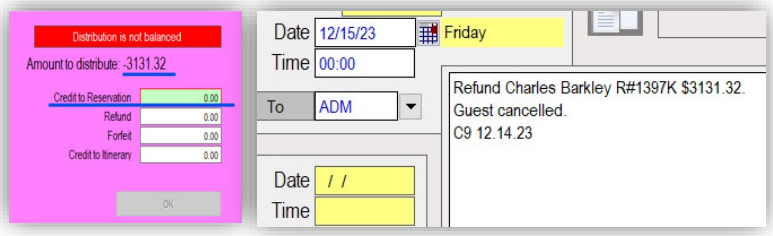
3.) Type Y to confirm



4.) If the guest had any money on file (for example, they booked pre/post nights):

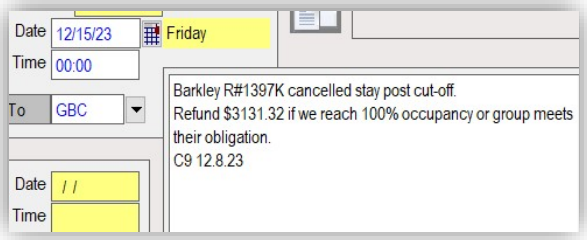
Pre-Cutoff Date

Input the balance on file into the Credit to Reservation line and set an ADM Trace for tomorrow to refund the CC on file.

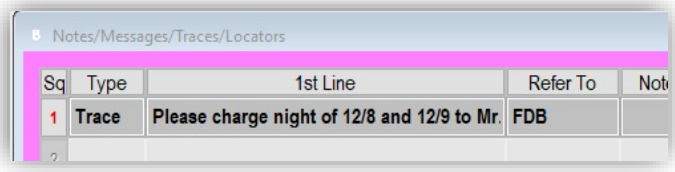


Post-Cutoff Date

Set a GBC Trace for the date of arrival to refund the funds only if we reach full occupancy, otherwise funds are forfeited.

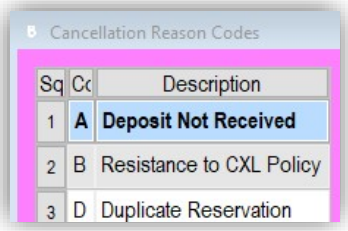


5.) If the booking has any Notes or Traces, a window will open—Click Close All Selected



6.) Y to confirm

7.) Select a Cancellation Reason Code (Typically "Plans Cancelled")



8.) In the cancellation reason field, write either PER PLANNER or PER PASSKEY



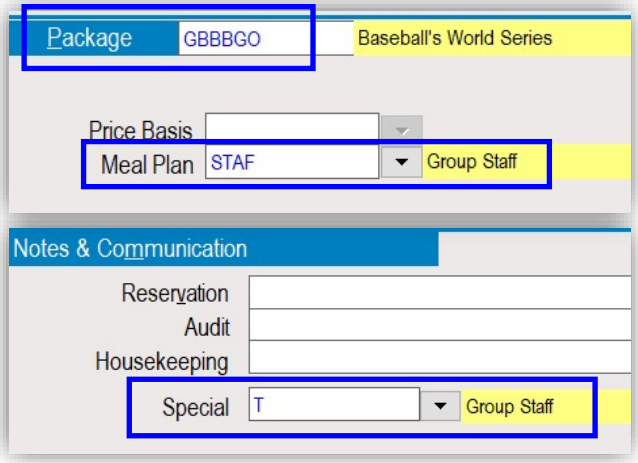
SMS Host | Apply Staff Rate

Staff Rates are rates applied to lower category rooms at a discount that are typically assigned to a group's onsite staff. The group's contract lists the number of allotted staff rooms.

When you receive your Turnover File, the Staff Rate Package Codes will be provided to you by the Group Reservations Manager. Your planner will tell you which guests will be at the Staff Rate when they send you their Rooming List.

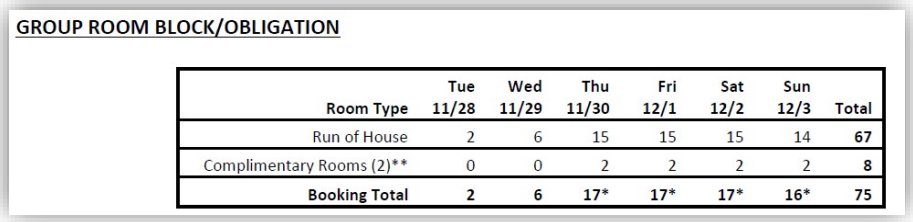
How to change a room to the Staff Rate:

1. Enter the customized Staff Rate Package Code
2. Set the Meal Plan to STAF
3. Set the Special field to T



SMS Host | Complimentary Rooms

Complimentary rooms will be outlined in the contract. The Planner will tell you which guests be in these rooms when they send you the Rooming List.



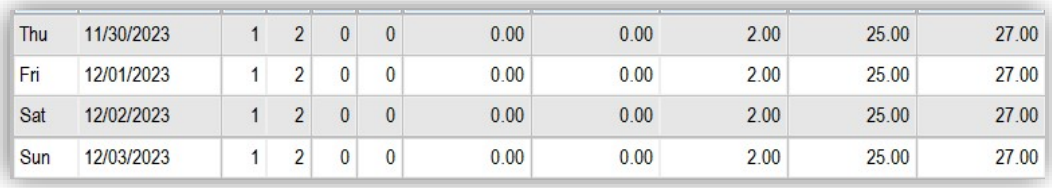
GROUP ROOM BLOCK/OBLIGATION

Room Type	Tue 11/28	Wed 11/29	Thu 11/30	Fri 12/1	Sat 12/2	Sun 12/3	Total
Run of House	2	6	15	15	15	14	67
Complimentary Rooms (2)**	0	0	2	2	2	2	8
Booking Total	**2**	**6**	**17***	**17***	**17***	**16***	**75**

Reservations uses standard complimentary rate codes for these guests.



When rooms nights are comped, taxes and gratuity still apply.



Thu	11/30/2023	1	2	0	0	0.00	0.00	2.00	25.00	27.00
Fri	12/01/2023	1	2	0	0	0.00	0.00	2.00	25.00	27.00
Sat	12/02/2023	1	2	0	0	0.00	0.00	2.00	25.00	27.00
Sun	12/03/2023	1	2	0	0	0.00	0.00	2.00	25.00	27.00

SMS Host | Verify Commissionable Rooms

Travel Agencies (unless stated in the contract) do not receive commission on **Comp** or **Staff** rooms. **Blind Commission Agencies** will receive commission on **Staff** rooms, but not **Comp** rooms.

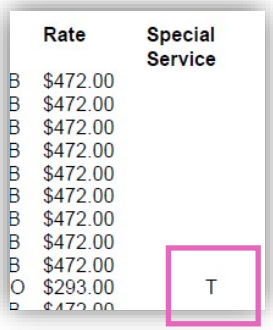
Since rooms are picked up in bulk, the Group Template will automatically assign the Travel Agency's IATA number to every room—which gives the agency commission on all rooms. The Group Rooms & Golf Coordinator must manually locate the rooms that do not qualify for commission and **remove the IATA number** from the Reservation Tile.

How to Remove Commission from Staff Rooms:

Note: You do not need to remove the IATA on complimentary rooms since agencies will automatically not receive commission on $0 nights.

1. Run an SR9 Delegates List

2. On this report, look for rooms that have a T in the Special Service field
   - The T indicates that it is a staff room

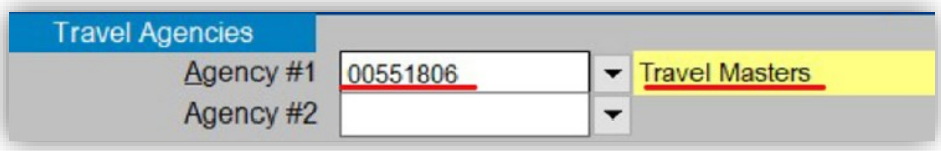


	Rate	Special Service
B	$472.00	
B	$472.00	
B	$472.00	
B	$472.00	
B	$472.00	
B	$472.00	
B	$472.00	
B	$472.00	
B	$472.00	
O	$293.00	T

3. Look up each Reservation Tile with the T in SMS

4. Open Special Billing

5. Remove the IATA Number from the Agency field



6. Once complete, run and save an SR29 Delegates List to the Group's Folder

SMS | Special Bill A Room

When do we Special Bill in SMS?

This is done in rare instances that will typically be outlined in the Special Billing section of the contract, involving things such as complimentary nights or split rates that only apply to specific people.

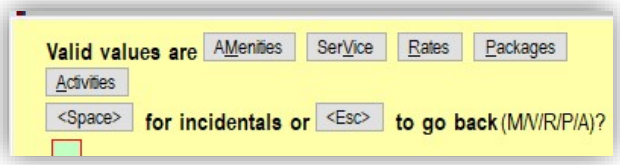
Whenever possible, we want to make rate adjustments in Amadeus.

HOW TO SPECIAL BILL A ROOM

1.) Access the Reservation Tile and open Special Billing

2.) Click A to Add Extra Charges

3.) Enter to bypass the menu

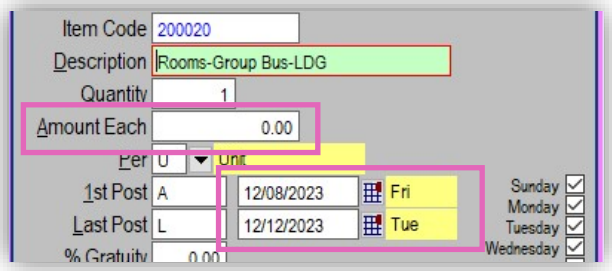


4.) Enter the appropriate code for your property, then click Enter:

- Lodge—200020
- Inn—100020



5.) Input the dates and the nightly rate that you want to apply



6.) OK to save, then Escape

Your Special Billed Rate will appear in Scheduled Special Charges:



Scheduled Special Charges

Sq	Pst	Typ	Code	Desc	Qy	Amt	Per	1st Post	Last Post	% Grats
1			200020	Rooms-Group Bus-LDG	1	-595.00	U	11/30/202	12/03/202	0.00

SMS Host | Golf Services

Carts
Driving Carts—complimentary for all guests, no need to reserve
Pull/Push carts—complimentary for all guests, first come/first serve supply, guests may bring own

Caddies
Single Caddie (enter number of caddies requested– 1,2,3,or 4)
Double Caddie (enter as 1/2 or 2/4) **This is the standard**
Forecaddie (enter number of golfers the forecaddie will service—3 or 4 only)

Rental Clubs
Must know right/left hand and male/female to request
Notate on golf tile as M or F followed by RH or LH [Example: MRH=Men's Right Hand]

Spectator
1 spectator allowed per golfer
Spectators are required to take a cart and pay the cart fee

Cart Path
All courses are cart path only except The Hay and Del Monte Golf Course
Starters may allow the 90 Degree Rule for The Links at Spanish Bay on day of play

ADA Accommodations
Guests can request blue flag access to drive on fairways—notate on golf tile "req. blue flag"
Solo Riders should be requested by email to the pro shop in advance

Driving Ranges
Pebble Beach Practice Facility—a large double sided range that hits off real grass
Spyglass Hill Driving Range—A smaller range that commonly hits off mats

Short Game Areas
Pebble Beach Practice Facility
Spyglass Hill Driving Range
Links at Spanish Bay

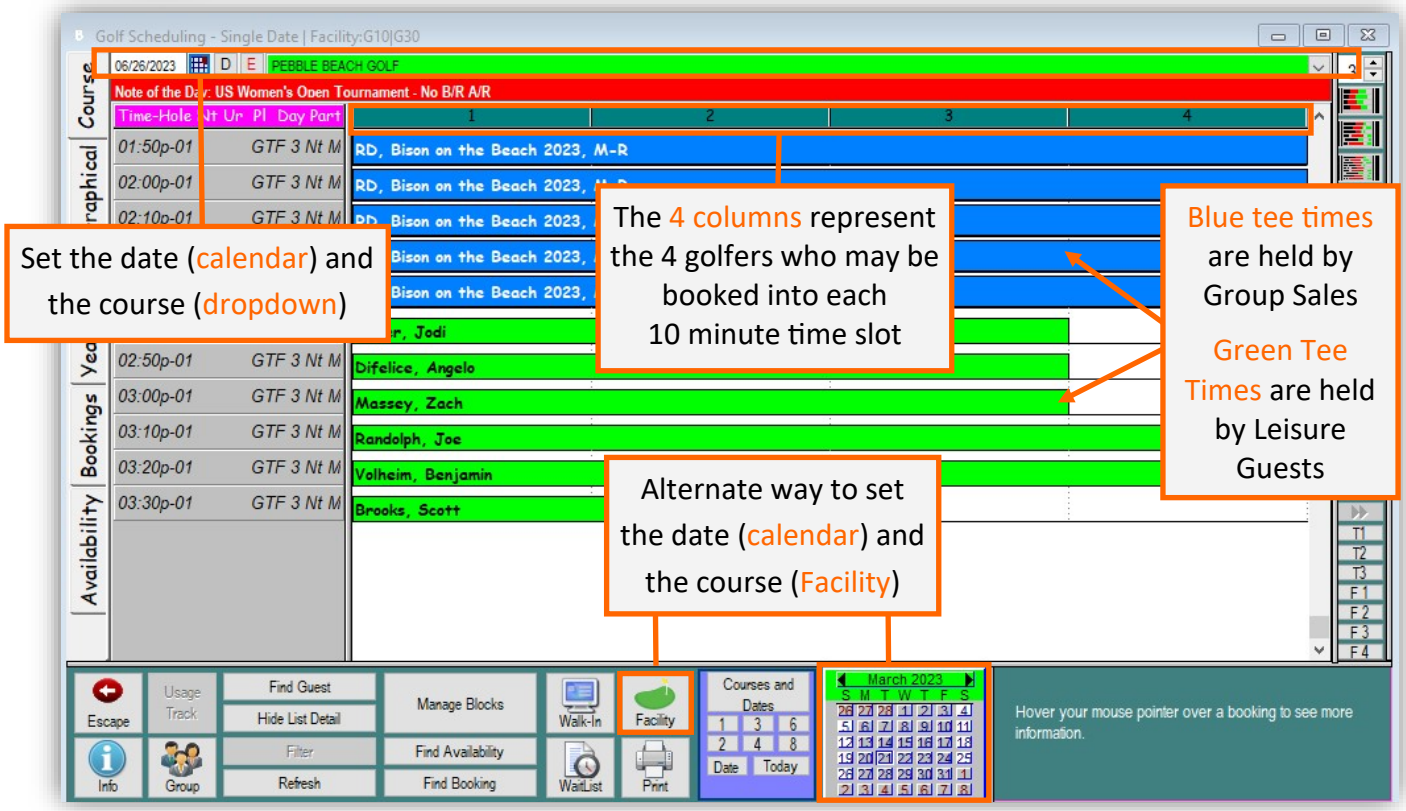
Putting Greens
All PBC courses have a practice putting green by the first tee box

Tournament Services (Certain restrictions apply)
All tournament services are arranged through the Pro Shops and may include:

- Shotgun Tournaments (simultaneous tee off from different holes)
- Scramble Tournaments (best ball)
- Shootout Tournaments (after revenue 4 hole contest)
- Glow Golf / Night Golf
- Closest to the Pin Contest
- Hole in One Contest
- Longest Drive Contest
- Personalized signs, banners, and pin flags
- Custom food and beverage, breakfast/lunch boxes
- Golf instruction clinics at The Hay
- Prizes and/or awards
- Personalized merchandise such as golf balls, hats, etc. (Pro Shops coordinate with Retail)

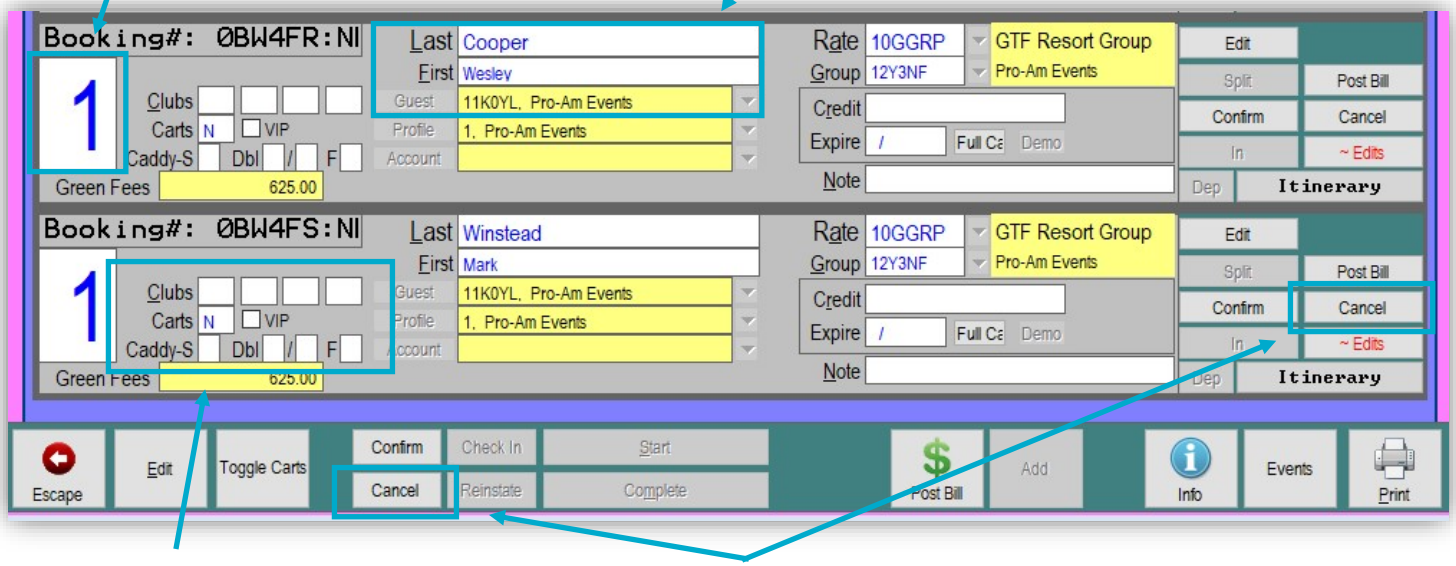
SMS Host | Tee Sheets & Golf Tiles

A **Tee Sheet** is the schedule of tee times occurring each day at each golf course.



The big number reflects how many golfers are booked in that golf tile.
Golf Tiles may be booked in groups of 1-4

When you input your pairings, the First/Last name field will update, but the Guest Tile will remain as the Group Guest Tile



The primary reason to enter a golf tile is to enter caddie requests and rental club requests.

You can cancel each individual golf tile separately by clicking the Cancel button on the right of each golf tile, or cancel all golfers in a time slot by clicking Cancel at the bottom of the window.

SMS Host | Edit A Golf Block

The Group Rooms & Golf Coordinator must ensure that we maintain an appropriate ratio of golfers to number of rooms booked by each group. As a general rule, we want to maintain the ratio of golfers to rooms as stipulated on the group's initial contract, never to exceed 2 golfers per room.

- Groups may decrease golf as much as they would like with no penalty up until their cutoff date—after which they will still be responsible for vacated tee times unless resold.
- Groups may increase golf proportionate to the number of rooms added, not to exceed 2 golfers per room. If existing ratio is 1:1, the corresponding golf add needs to coincide with room addition.
- Reduce golf according to the existing contract's ratio. If the existing ration is 1 room : 2 golfers, reduction of 2 rooms reduces 4 golfers

1.) Navigate to the group's block on the Tee Sheet

2.) Right click on the group's first tee time and select Manage Block

3.) Type E for Edit

4.) In this window, you can:

- Edit the # of players which will automatically change the End time of your golf block
  - ◊ Only expand or reduce in increments of 4
  - ◊ A tee time with less than 4 golfers needs to be its own block
- Edit the Daily Begin time to move the block within the same course and day
  - ◊ If your group wants to move to a different course or day, fully cancel the current block to preserve tee sheet history, then create a new block on the new day/course



5.) Click OK to save

6.) Run an SR18 Golf Exhibit Report

7.) Save a new Golf Confirmation

8.) Email the new Golf Confirmation to the Planner

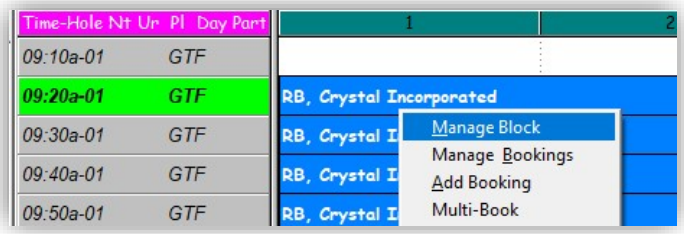
*CC Caddie Services if caddies have been changed/added

SMS Host | Cancel A Golf Block

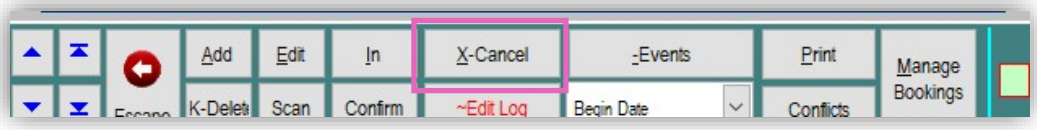
1.) Navigate to the group's block on the Tee Sheet

2.) Right Click on the blue space of the beginning time slot

3.) Select Manage Block



4.) Click Cancel at the bottom of the window



5.) Are you certain? Select Yes

C9|BX 6.19.24

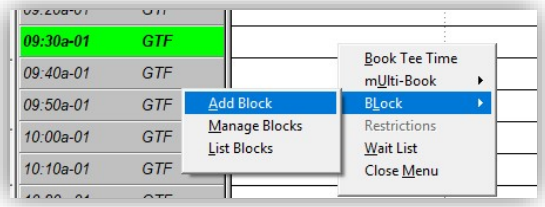
SMS Host | Create A Golf Block

Note: If the total # of golfers will not equate to all 4sms, create a separate block for the group that is less than 4 golfers. *Example: A group of 18 golfers should have 1 block of 16 players and 1 block of 2 players.*

When making a block of less than 4 golfers, you must set the Block Type to RB and immediately configure it, otherwise that time slot will be visible to be booked by Leisure Reservations.

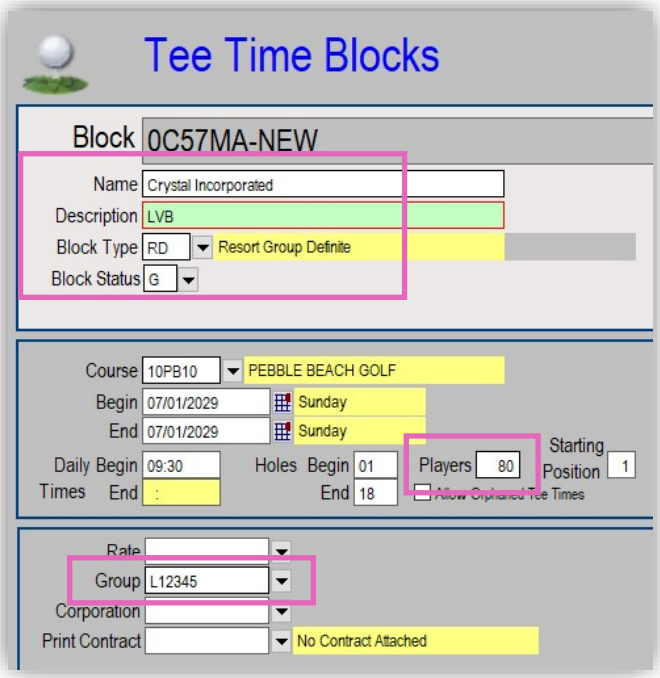
1.) Navigate to Tee Sheet of the group's desired date and course

2.) Double click on the white space of the start time



3.) Select Block > Add Block

4.) "Are you certain?" Select Yes



5.) Fill out the following:

- Name—(Post As)
- Description—(NSM initials)
- Block Type—RD
- Block Status—G
- Players—(Total # of golfers)
- Group—(Res ID#)

6.) Click OK to save, then escape

7.) Run an SR18 Golf Exhibit Report

8.) Save a new Golf Confirmation



9.) Email the Golf Confirmation to the Planner

SMS Host | Golf Configuration (1/2)

When we Configure Golf, we accomplish 3 things:

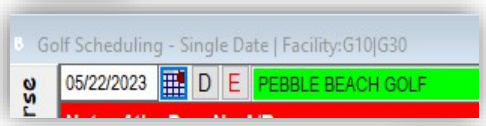
1. We are attaching the Group's City Ledger and Guest Tile to the tee times
2. We are setting the tee times to the correct Resort Group Rate Code
3. We generate golf bookings within the block

1.) Open the **Tee Sheet**

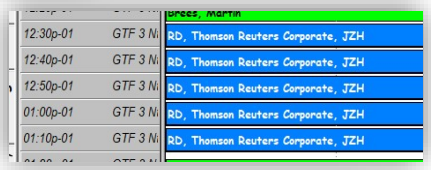


2.) Set the following:

- **Date**
- **Course**



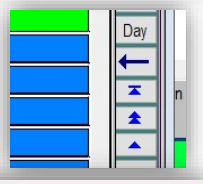
3.) Scroll to the **time slots** belonging to your Group



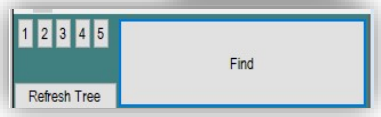
4.) Click on the **first row** to highlight that line



5.) Click the **Arrow** on the right side of the Tee Sheet

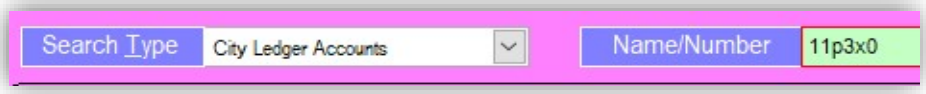


6.) Click "**Find**" to open Universal Lookup

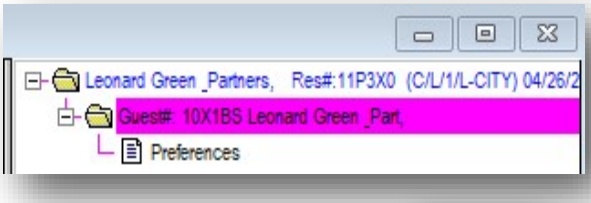


7.) In Universal Lookup:

- Change the **Search Type** to "**City Ledgers**"
- Type your Group's City Ledger Number (**Res ID**)
- **Double click** on the result



8.) Click "**Guest**"



9.) Click the **arrow** once more to close the pane



Proceed to next page...

SMS Host | Golf Configuration (2/2)

10.) **Right Click** on the first group tee time

11.) Select "**Manage Block**"



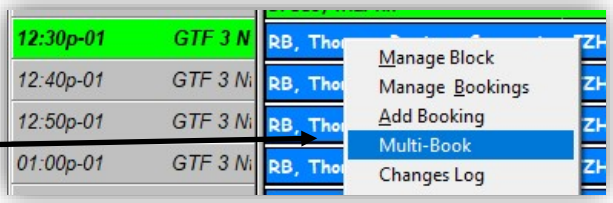
12.) In the Tee Time Blocks Window

- Type "**E**" for Edit
- Change the **Block Type** from "**RD**" (Resort Group Definite) to "**RB**" (Resort Group with Bookings)
- **Page Down** to Save
- **Escape** back to the Tee Sheet



13.) **Right Click** on the first group tee time again

14.) Select "**Multi-Book**"

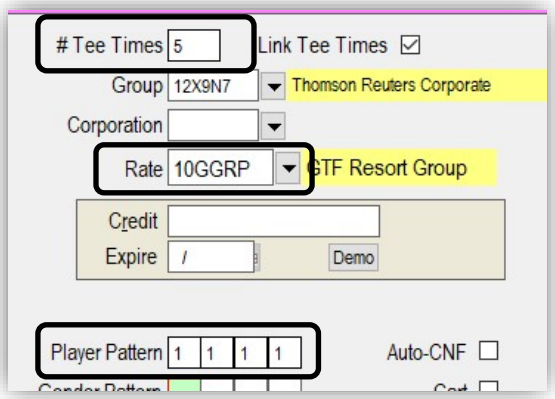


15.) Type "**S**" for Selected—Verify your group name!

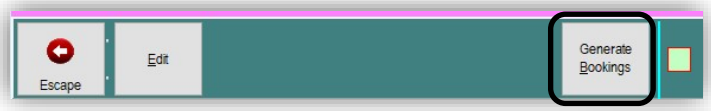


16.) In the Book Multiple Tee Times Window:

- Enter the **number of tee times** your group has reserved
- Set the "Rate" to "**GTF Resort Group**"
  Apply Custom Golf Rates when applicable
- Enter the "Player Pattern" as "**1, 1, 1, 1**"
- **Page Down** to Save



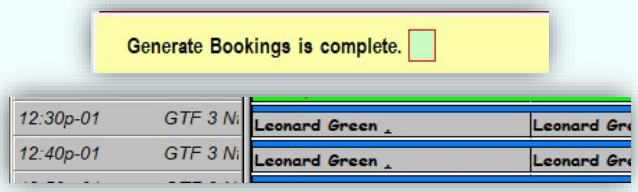
17.) Type "**B**" to "Generate Bookings"



Note: If you get this prompt, you inputted the wrong group. Start over!



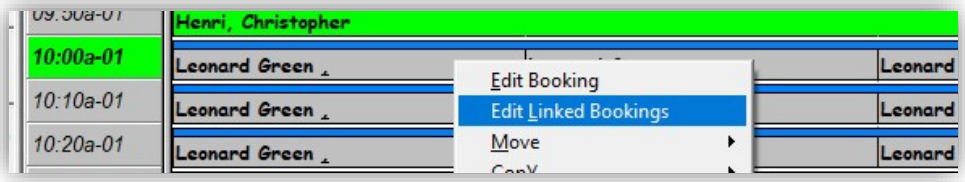
Once you see the message "**Generate Bookings is complete**," escape back to the tee sheet and you should see the colors of the tee times change from blue to blue/gray.



SMS Host | Enter Golf Pairings

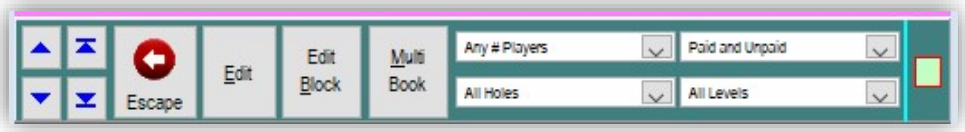
Configure Golf before beginning this process.

1. **Right click** on the first tee time in your group and select **Edit Linked Bookings**

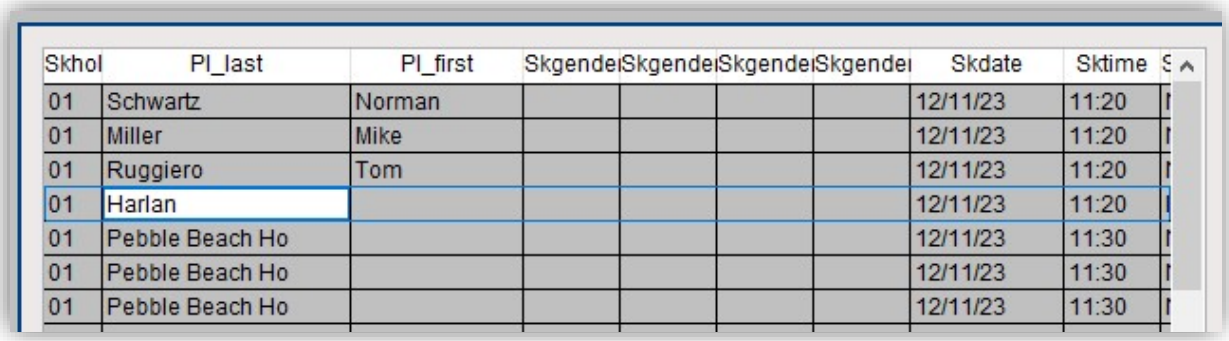


The **Manage Bookings** window will open

2. Type E to **Edit**



3. Type your parings into the **Last and First Name** columns
   Use your arrow buttons on your keyboard to move from cell to cell

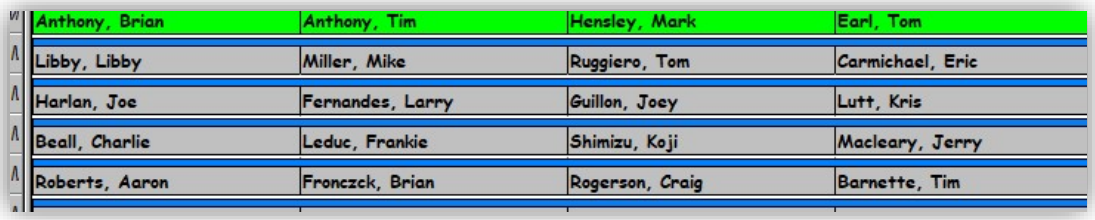


Skhol	Pl_last	Pl_first	Skgendel	Skgendel	Skgendel	Skgendel	Skdate	Sktime
01	Schwartz	Norman					12/11/23	11:20
01	Miller	Mike					12/11/23	11:20
01	Ruggiero	Tom					12/11/23	11:20
01	Harlan						12/11/23	11:20
01	Pebble Beach Ho						12/11/23	11:30
01	Pebble Beach Ho						12/11/23	11:30
01	Pebble Beach Ho						12/11/23	11:30

4. **Page Down** to Save

5. **Escape** to return to the Tee Sheet

Your tee times should now reflect individual names instead of the Group's name:



Anthony, Brian	Anthony, Tim	Hensley, Mark	Earl, Tom
Libby, Libby	Miller, Mike	Ruggiero, Tom	Carmichael, Eric
Harlan, Joe	Fernandes, Larry	Guillon, Joey	Lutt, Kris
Beall, Charlie	Leduc, Frankie	Shimizu, Koji	Macleary, Jerry
Roberts, Aaron	Fronczck, Brian	Rogerson, Craig	Barnette, Tim

SMS Host | Caddies & Rental Clubs

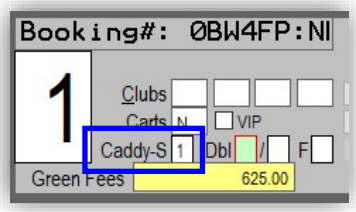
Caddie requests may all be inputted on the first Golf Tile of a time slot, or, you can enter them on-to each individual time slot. Rental Club Requests must be inputted on individual golf tiles.

If you are entering double caddies or forecaddies, enter the request only on the first golf tile. It will be assumed by Caddie Services that your request is for the entire foursome. Entering the double caddie request on each individual time slot may result in duplicate caddie requests.

After requests are inputted, send a new Golf Confirmation to the Planner and **CC Caddie Services**. Contact Caddie Masters by email or phone for changes made **within 2 weeks** of arrival.

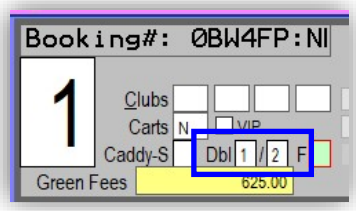
831.622.6162 | **pebble@caddiemasters.org**

Single Caddie



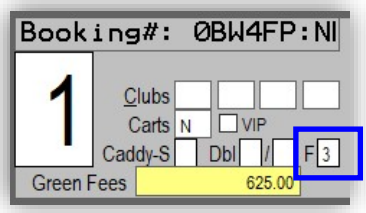
Enter the number of single caddies needed for time slot - **1**,**2**,**3** or **4**

Double Caddie



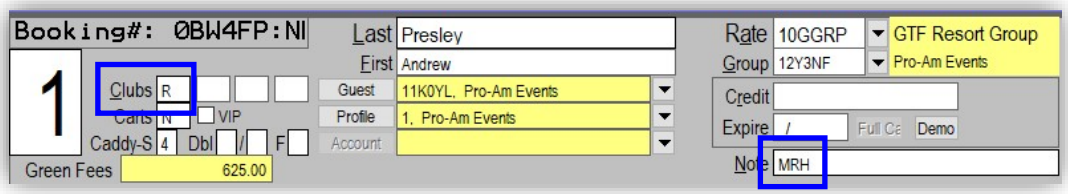
1/2 = 1 caddie carrying 2 bags
2/4 = 2 caddies carrying 4 bags

Forecaddie Caddie



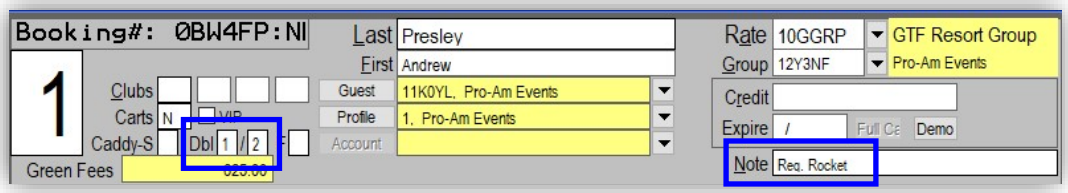
Forecaddies service a minimum of **3** golfers per time slot
4 = 1 Forecaddie servicing the entire 4sm

Rental Clubs



Enter **R** (right handed) or **L** (left handed) in the boxes
In the notes, **M** (male) or **L** (ladies) followed by **RH** (right hand) or **LH** (left Hand)

Specific Caddie



Input the **type of caddie** in the boxes
Type the **name** of the requested caddie into the **notes**

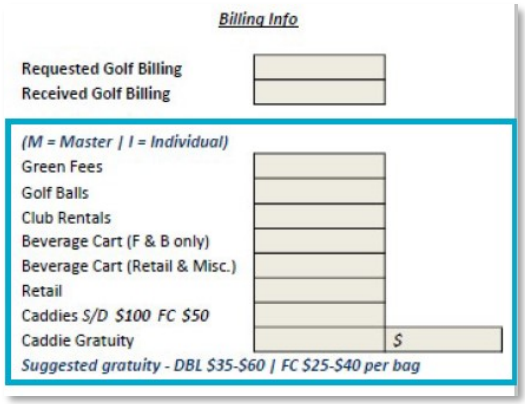
SMS Host | Golf Billing (1/2)

It is the responsibility of the Group Rooms & Golf Coordinator to verify the billing preferences of each group with the Planner.

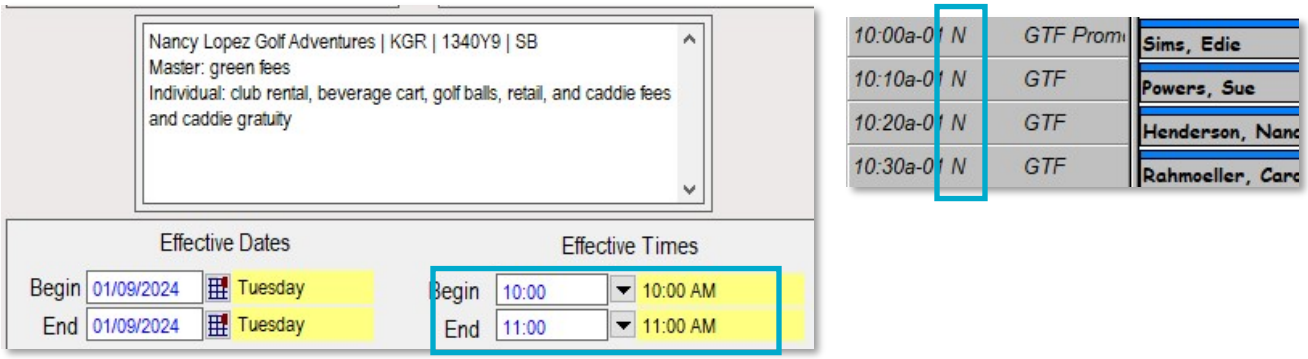
1. Send the Golf Configuration Template email to the planner which explains the billing options. This template is located within your Group Folder.



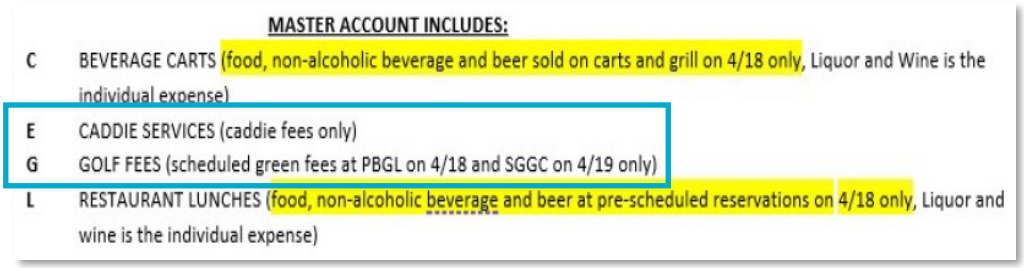
2. Billing Preferences must be tracked on the Golf Information Sheet



3. Create a Tee Sheet Note for each course to outline the billing instructions.
   The Tee Sheet note must span time range of the entire group golf block
   The top line should contain: **Group Post As | NSM initials | Res ID | Property**



4. Golf Billing information must also be emailed to the CSM to be included in the Resume



SMS Host | Golf Billing (2/2)

5. If the group wants to request caddies, create and save an updated Golf Confirmation

The following golf starting times have been reserved for you:

GOLF COURSE	DAY	DATE	TIME	NUMBER OF GOLFERS
SPANISH BAY	MONDAY	2/5/2024	10:30	24 GOLFERS
PEBBLE BEACH	TUESDAY	2/6/2024	7:30	24 GOLFERS
*CADDIE REQUEST				
SPANISH BAY	MONDAY	2/5/2024	10:30	12 DOUBLE CADDIES
PEBBLE BEACH	TUESDAY	2/6/2024	7:30	12 DOUBLE CADDIES

***Please Note:** *Caddies are reserved on a request basis and cannot be guaranteed.*

6. If a cash payout is needed, email this updated confirmation and the cash payout request to the Group Golf Coordinator

Subject: Infosys Caddie Cash

Hello Joe,

Infosys would like $50/bag in caddie cash. Golf confirmation sheet is attached.

Thank. You.

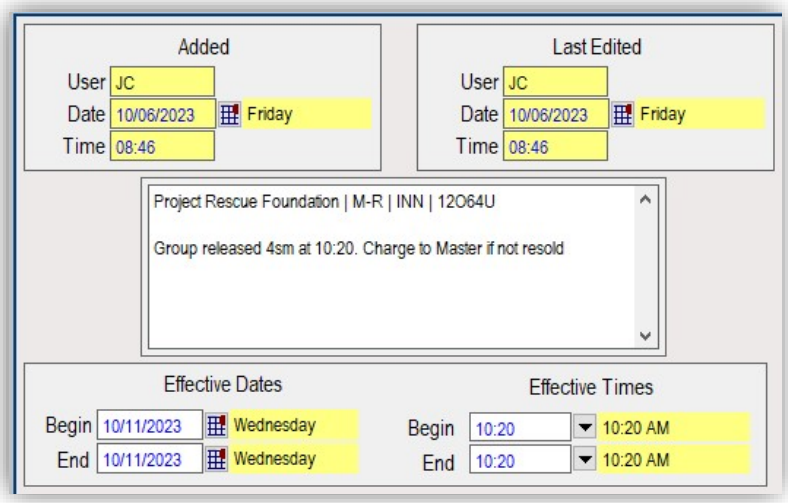
7. Email the updated Golf Confirmation to the Planner

SMS Host | Golf Resell

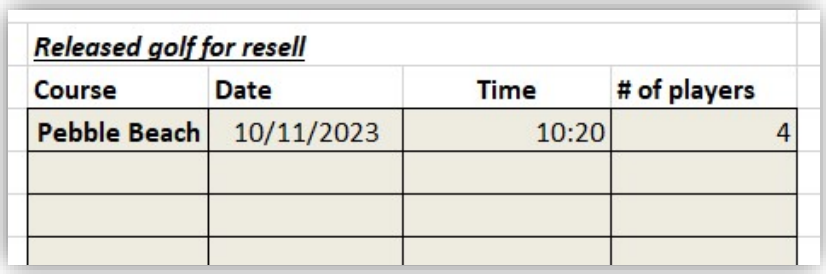
If a group decreases golf after their cutoff date, they will still be responsible for vacated tee times unless resold.

GOLF REDUCTIONS POST CUT-OFF

1. Reduce golf in the Tee Sheet per standard procedures
2. Leave a Tee Sheet Note with instructions to bill the group if tee times are not resold



3. Track Reduced Golf on the Golf Information Sheet



Released golf for resell

Course	Date	Time	# of players
Pebble Beach	10/11/2023	10:20	4

4. Periodically check the tee sheet (typically daily) to see if the golf was resold

Example: If a group releases a foursome, then another guest books that time slot, the group is no longer financially liable for that golf. Even if the guest who booked that time slot later cancels, the liability is no longer with the group.

Full Shotgun Tournament

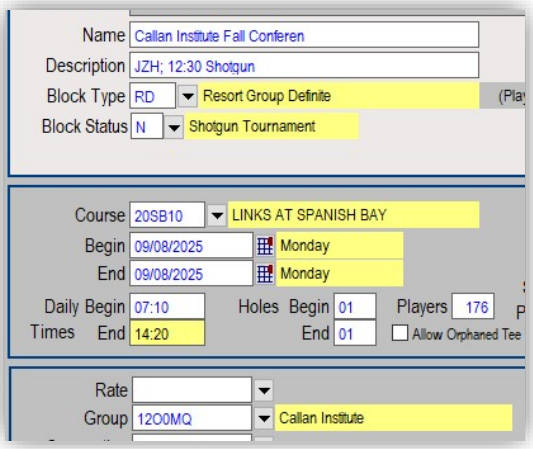
A Full Shotgun Tournament offers the advantage of allowing all players to simultaneously start and finish their rounds, making it ideal for groups with evening events or dining plans.

THE TEE SHEETS:

- A full Shotgun has a maximum of 144 golfers—which would have 2 groups (A and B) teeing off at each of the 18 holes at the start of the shotgun.
- Full Shotguns should ideally:
  - Start at least 1 hour prior to the final GTF tee time to ensure the group can finish
  - Start no earlier than 8:30am without Golf Division approval to prepare the course
- From the shotgun start time, the Golf Coordinator must book:
  - ◊ 5 1/2 hours down (33 Tee Times) or the end of the day (whichever comes first)
  - ◊ 4 1/2 hours up (27 Tee Times) or the beginning of the day (whichever comes first)

  Example: If a full shotgun starts at 12pm, the block should begin at 7:30am and end at 5:30pm. That would allow us to potentially sell times before 7:30am and after 5:30pm
- The block will be brown with the N Shotgun Tournament Block Status
- The Golf Coordinator will create a Note of the Day that must include the shotgun start time as well as "No BR/AR"





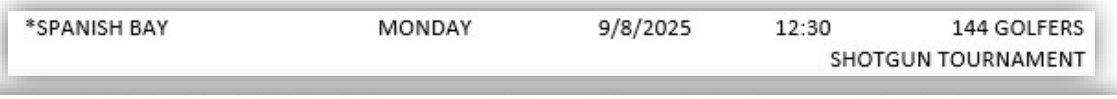
THE SR18:

- The SR18 will reflect the entire block—the number of playing golfers plus all time held



THE GOLF CONFIRMATION:

- The Golf Schedule will only reflect the number of players in the shotgun tournament
- A note must be written under the golf schedule explaining that the group will be financially responsible for the full block, including the time to clear the course



***Please Note:** The Links at Spanish Bay has been reserved for your 12:30pm shotgun tournament for 144 players on Monday, September 8, 2025. In order to accommodate a full shotgun tournament, 32 additional players will need to be held on The Links at Spanish Bay. Callan Institute is aware that these tee times are not to be filled with players and will be charged the current rate at The Links at Spanish Bay.*

GOLF CONFIGURATION:

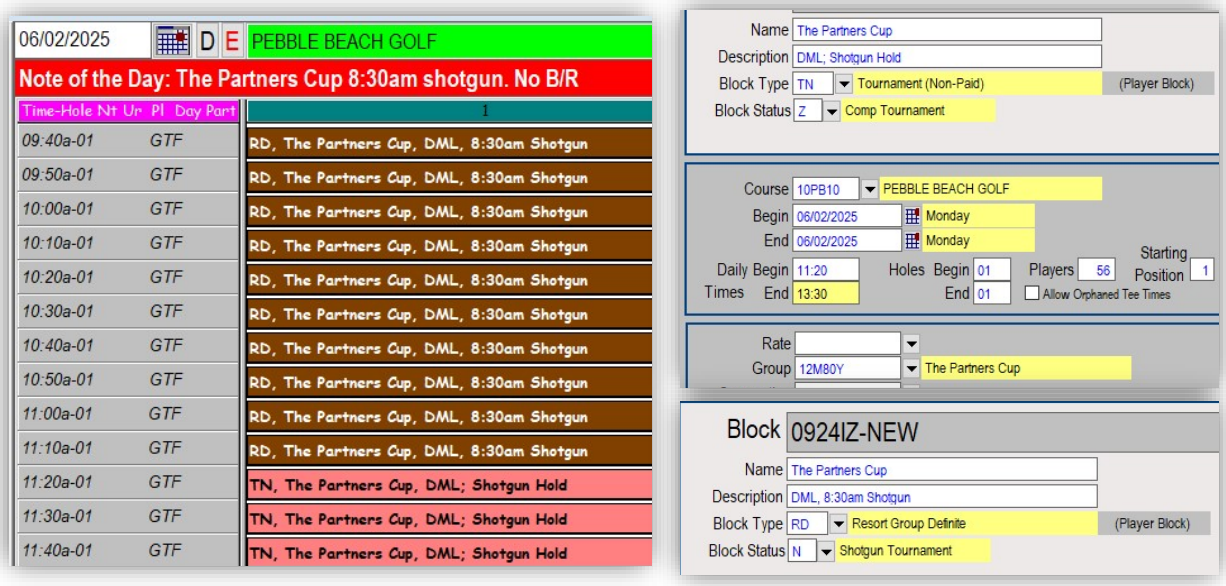
- Only configure the portion of the block that represents the players
- Do not configure the space held to clear the course
- Pairings/Caddies/Rental Clubs should be communicated to the Pro Shops rather than inputted on the Tee Sheets

Full Shotgun with Comp Hold

Certain groups, typically internal or special events, may not be required to cover the cost of the course clearing time for a Shotgun Tournament. In these cases, the players are marked in brown on the tee sheet.

THE TEE SHEETS:

- We still must fully block 4/12 hours up from the start time and 5 1/2 hours down from the start time—which is 10 hours total—but our blocks must be in 2 parts.
  - ◊ The first block must be our standard brown TN block which should equal the total number of golfers playing the shotgun—This block represents what the group will be charged
  - ◊ The second block, which should make up the remainder of the required 10 hour block, should be the pink Z Comp block—The group will not be charged for this time. If the total amount of GTF times are less than 10 hours, simply edit the Z Comp block to cover whatever time remains of the day.
- The Golf Coordinator will create a Note of the Day—If the shotgun touches the first tee time of the day, write "No A/R". If the shotgun touches the final time of the day, write "No B/R"



THE SR18:

- The SR18 will reflect two blocks—the players and the comp hold

Pebble Beach Golf Links	Monday	6/2/2025	6:10 am	124
Pebble Beach Golf Links	Monday	6/2/2025	11:20 am	56

THE GOLF CONFIRMATION:

- The Golf Schedule will only reflect the number of players in the shotgun tournament
- The hold does not need to be referenced on the confirmation because it is complimentary

PEBBLE BEACH	MONDAY	6/2/2025	8:30	124 GOLFERS SHOTGUN TOURNAMENT

GOLF CONFIGURATION:

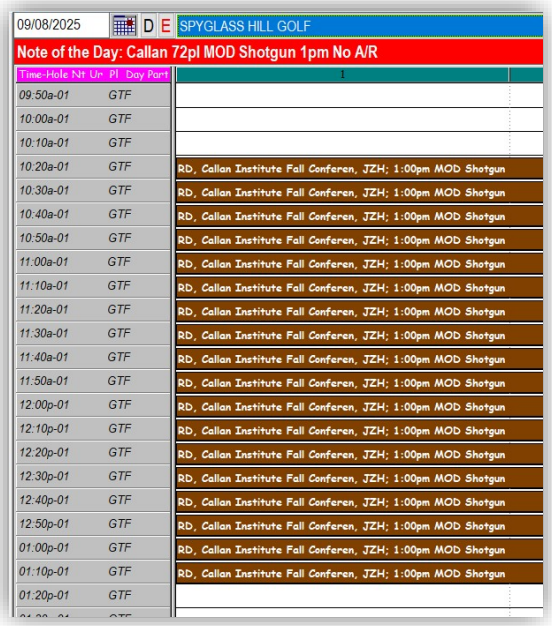
- Only configure the brown block that represents the players
- Do not configure the pink Hold block
- Pairings/Caddies/Rental Clubs should be communicated to the Pro Shops rather than inputted on the Tee Sheets

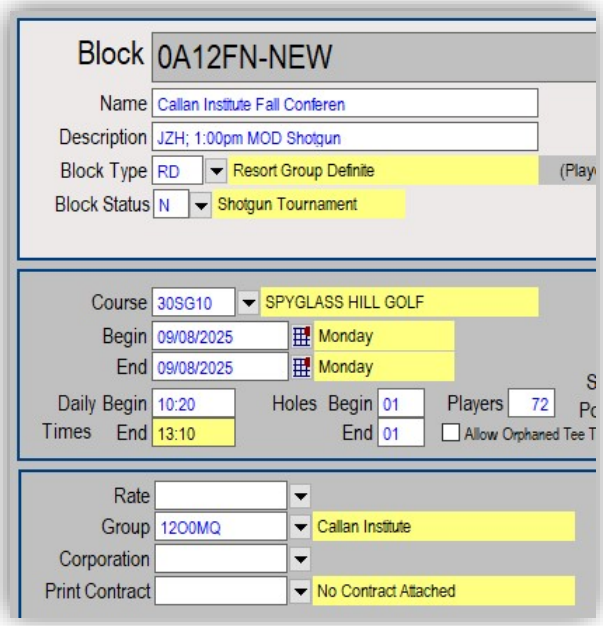
Modified Shotgun Tournament

Modified Shotguns are tailored for groups that are not large enough to warrant a full shotgun tournament. In this format, players are consecutively blocked on the tee sheet.

THE TEE SHEETS:

- The Golf Coordinator will create a Note of the Day that states "MOD Shotgun" with the start time and number of players
- A Modified Shotgun does not require a hold to clear the course of play because they are booked bottom-up on the tee sheet.
  Example: A MOD Shotgun that begins at 1pm will be blocked backwards from 1:10pm (to provide a buffer between leisure golfers), then subsequently at 1pm, 12:50, 12:40, etc. This ensures that the entire shotgun can start exactly at 1pm with all necessary holes cleared.





THE SR18:

- The SR18 will reflect an accurate number of players for the MOD Shotgun, but the start time will not match the Golf Confirmation since we blocked backwards from the shotgun start



THE GOLF CONFIRMATION:



- A note must be entered to explain the modified shotgun and the disclaimer that we cannot guarantee the number of starting holes for the group since the pace of play will only be established as the day commences.

Please Note: *Your group is currently scheduled for a 1:00pm modified shotgun tournament for 72 players on Spyglass Hill Golf Course on Monday, September 8, 2025. By selecting the modified shotgun option, rather than a full shotgun, we will base the 72-player modified shotgun on the exact number of players. Should the number of players reduce, the modified shotgun will be reduced accordingly. The number of starting holes available will be based upon pace of play that day and the weather conditions. We do not guarantee the number of starting holes that will be available.*

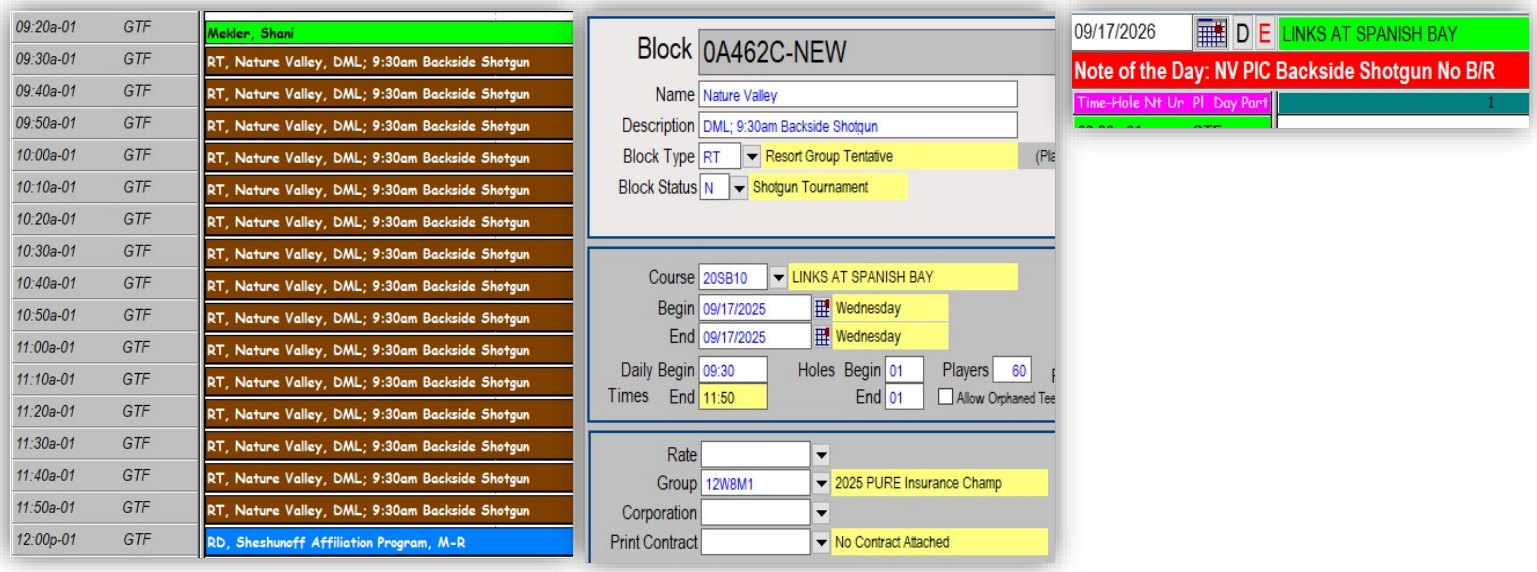
Backside Shotgun Tournament

A Backside Shotgun is scheduled for groups seeking a morning modified shotgun or during dates when revenue management advises against blocking tee times for a Shotgun Hold that could be utilized by guests booking both rooms and golf.

In this arrangement, players will begin on hole 1, then proceed to holes 18, 17, 16, and so on, based on the number of players in the group. Backside Shotguns cannot start at the very beginning of the day because maintenance requires time to prepare the final holes for play. Consequently, some golfers outside the group will be playing on the front nine of the course when the backside shotgun begins. To prevent non-group players from reaching the back nine before the backside shotgun starts, the backside shotgun must commence, at the latest, within the first 2 hours of the day.

Each year, the Pure Insurance Championship hosts a backside shotgun as part of their Program of Events for Tournament Week.

THE TEE SHEETS:



THE SR18:

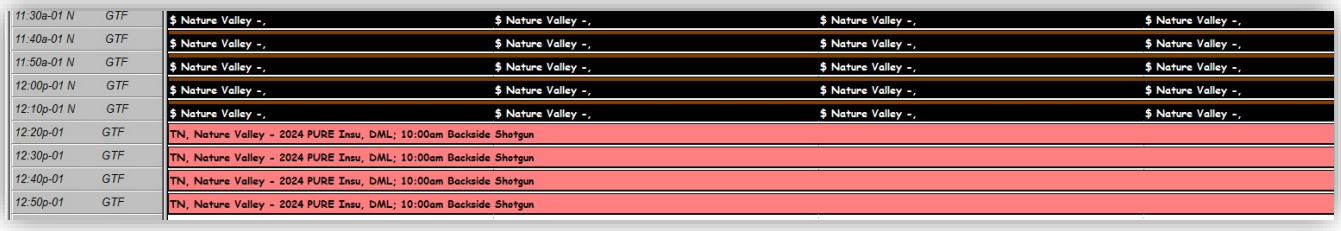


THE GOLF CONFIRMATION:

- Non-applicable for PIC Sponsor Events

GOLF CONFIGURATION:

- Only configure the brown block that represents the players
- If there is a pink Hold block, leave this unconfigured
- Pairings/Caddies/Rental Clubs should be communicated to the Pro Shops rather than inputted on the Tee Sheets



SMS Host | Squeeze Times

Some groups are allowed—per their contract—to have "**5th Player Comps**"

This means that they can add a 5th player to a foursome so five golfers may play at once. We refer to these as "**Squeeze Times**."

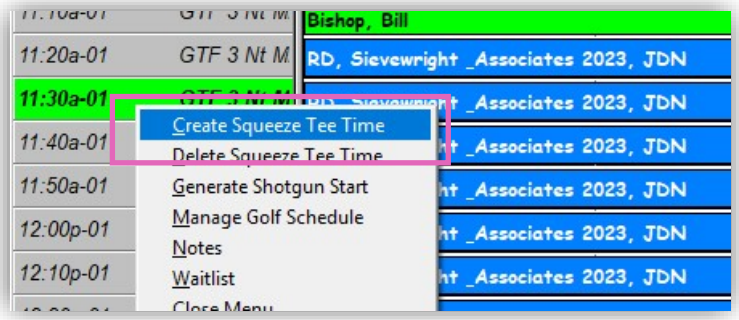
Example:
A group has bought out the entire day and, per their contract, they get three squeeze times. The Rooms and Golf Coordinator will add those squeeze times to the tee sheet anywhere on the schedule, but it is best practice to spread them out so we do not drastically affect pace of play.

How to Add A Squeeze Time

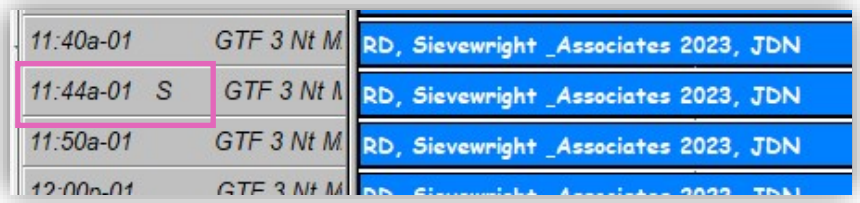
Add Squeeze times before you Configure Golf

1. **Double click** on the gray section of the tee sheet in the time slot you want to add the squeeze time

2. Select **Create Squeeze Time**

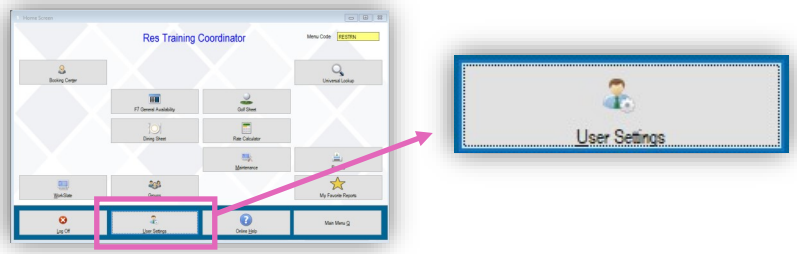


Your squeeze time will appear **4 minutes** after the tee time prior and will be marked with an **S:**

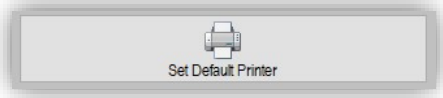


SMS Host | Set Your Default Printer

1. Log into SMS Host
2. On the Home Screen, click U for User Settings



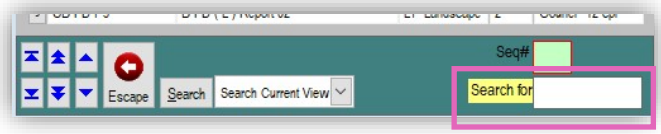
3. Click Set Default Printer



4. Click Reports

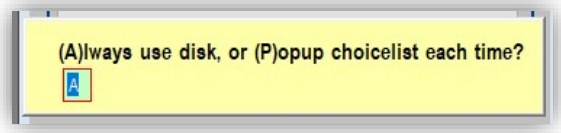


5. Search for the printer you want to make your default



   - Recommended printers:
     - ◊ PDFPRINTER
     - ◊ DISK

6. Click A for Always



7. Click Escape twice to return to the Home Screen

C9|BX 7.24.24

SMS Host | Generate An Allotment Report

BEFORE YOU BEGIN, MAKE SURE YOU HAVE SET UP YOUR SMS DEFAULT PRINTER

Information you need to have before running the report:

- Res ID
- Dates of Stay (+2 days on each end)

What to look for on the report before you edit rooms:

- Does it match the most recently saved allotment report?
- If not, someone edited the booking after your last edit. Double check that no mistakes were made on the booking.

What to look for after you complete your edits:

- Does the new Allotment Report accurately reflect what you intended to change?

Hotkey	Action
R	Opens Reports
R	Opens Reports Menu
5	Groups/Others
E	Group Block/Pickup Listings
A	Group Allotment/Pickup
A	Ad-Hoc
	Select your date range from the calendar The start date and end date should be set for 2 days beyond the group's date range so you can ensure that nothing blocked outside of their allotted dates
OK	Submit date range
Enter	"leave blank for all"
1	Print the Current Block
Tab	Move your cursor into the "Search for" field
	Type the Res ID of your group into the "Search for" field
Enter	Submit the search
01	Select the group
C	Components
	Your Allotment Report will open
	Save this report in the Allotment Report Folder within your Group Folder

SMS Host | Generate A Custom Report

BEFORE YOU BEGIN, MAKE SURE YOU HAVE SET UP YOUR SMS DEFAULT PRINTER

Hotkey	Action
R	Opens Reports
R	Opens Reports Menu
Z	Property Custom

Double Click on the report you wish to run:

SR18	Group Golf Exhibit, a.k.a "Golf Schedule"
SR29	Delegates List that includes Travel Agent Commission Percentage
SR9A	Passkey Delegates List
SR9	Standard Delegate's List
SR9—PBX	Delegates List that includes PBX Names
SR9 NR	Delegates List that hides the Room Category
SR9 NR	Delegates List that hides the Room Category and includes PBX Name

Alternatively, you can hit S for Scan to search for your report:



OK	You will see a message that states "Property must be in the list 'A,B,L,P,W;!"
	Type A into the Property field (delete the dots)
Enter	Enter to Accept
	Type your SMS Initials in the Printed By Field
Enter	Enter to Accept
	Type the Res ID of your group into the Group Code field in all caps
Enter	Enter to Accept
	Click OK
	Wait while the report begins to run—This can take up to 2 minutes and you will not be able to use SMS while it is running
	Your report will open
CTRL+P	Print to PDF
	Save this report within your Group Folder

Amadeus | Accounts & Bookings

Amadeus is where all Group Bookings live.
The National Sales Manager Admin will input all information about the group into Amadeus before Group Reservations receives the Turnover File.

Each group will have:

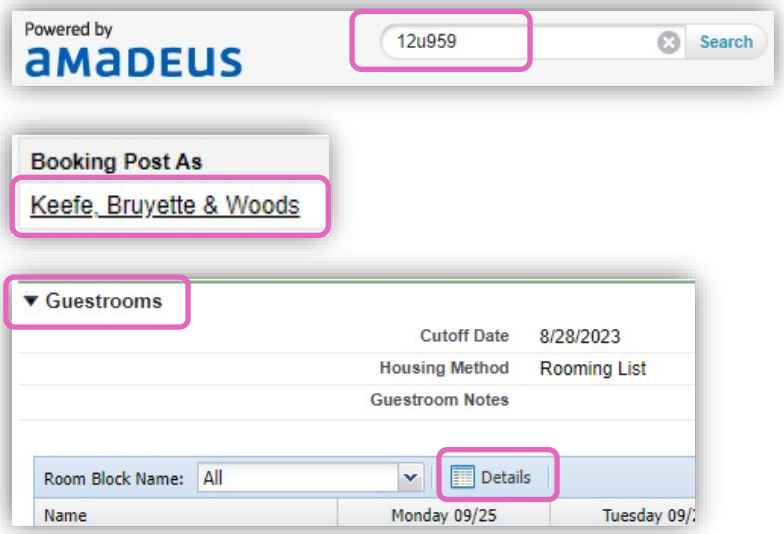
- **An Account**—This contains all contact information and history for the group
- **A Booking**—This outlines the group's specific Program

**A group will have one Account, but multiple Bookings (one for each time they visit)*

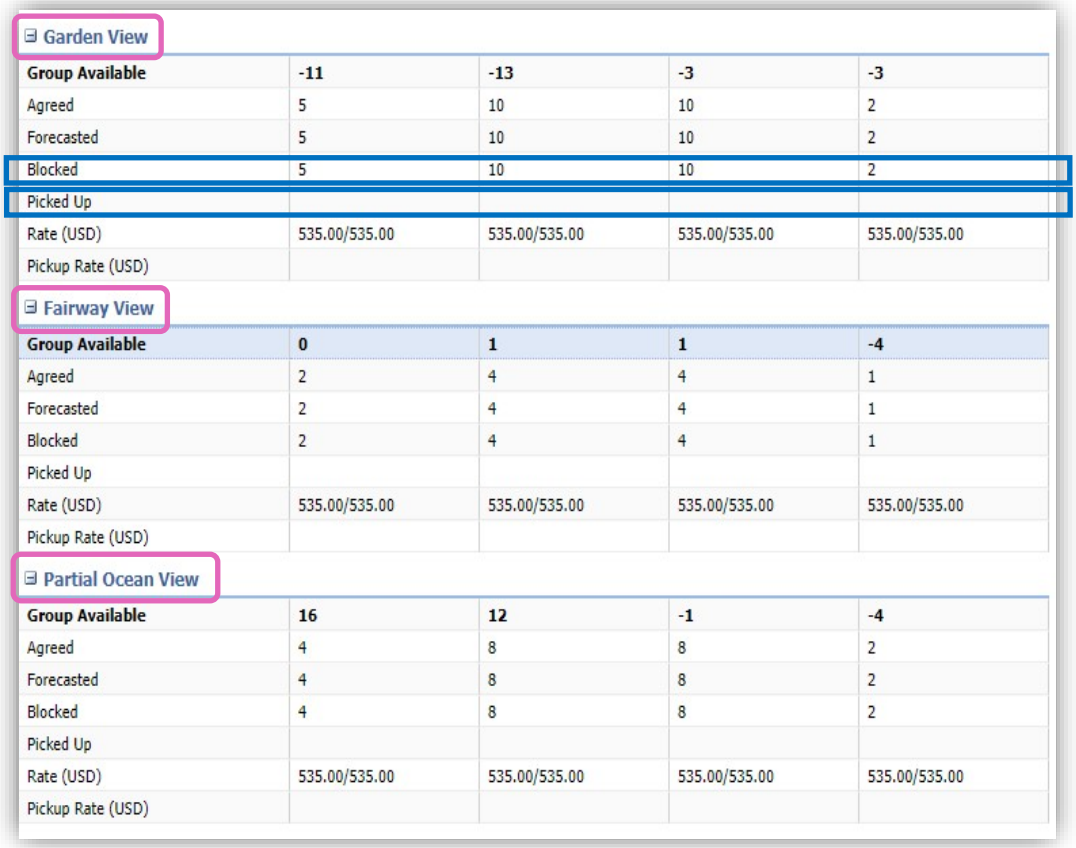
1.) Once you log into Amadeus, you will start by using the Search feature to look up your group's **Group ID**.

2.) This will direct you to the group's **Event**. Click on the hyperlinked name of the group to open the **Booking Details** of the group's Booking.

3.) Scroll to the **Guestrooms** section of the Event. This is where GRES details live. You can see a preview of the group's Room Block, or click Details to see more specific information about the **Room Block.**



This image is the Detailed view of a Group's Room Block



Garden View

Group Available	-11	-13	-3	-3
Agreed	5	10	10	2
Forecasted	5	10	10	2
Blocked	5	10	10	2
Picked Up				
Rate (USD)	535.00/535.00	535.00/535.00	535.00/535.00	535.00/535.00
Pickup Rate (USD)				

Fairway View

Group Available	0	1	1	-4
Agreed	2	4	4	1
Forecasted	2	4	4	1
Blocked	2	4	4	1
Picked Up				
Rate (USD)	535.00/535.00	535.00/535.00	535.00/535.00	535.00/535.00
Pickup Rate (USD)				

Partial Ocean View

Group Available	16	12	-1	-4
Agreed	4	8	8	2
Forecasted	4	8	8	2
Blocked	4	8	8	2
Picked Up				
Rate (USD)	535.00/535.00	535.00/535.00	535.00/535.00	535.00/535.00
Pickup Rate (USD)				

The two rows you will pay attention to for each room are:

- **Blocked**
- **Picked Up**

"**Blocked**" rooms are the rooms that the group is currently contracted to occupy.

"**Picked Up**" rooms are rooms that GRES has assigned to a specific guest after receiving the rooming list.

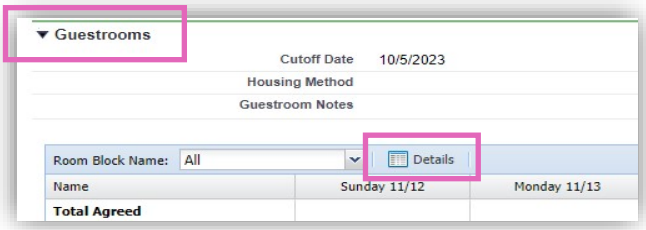
Amadeus | Edit A Room Block

Research:

1. Determine the contract structure
    - ROH—We must ensure to maintain the ROH% as we add rooms
    - Tiered Rates—The planner must request specific room categories to add
2. Check F7 General Availability and Notes
    - All rooms within the block are held from public inventory, but when increasing the block, we must ensure that we have a positive number of any room categories we add.
    - It can be ok to oversell a category if we are far enough from the arrival date and you are looking at a low tier category. Consult your manager for advice/approval.

Edit the Block

1. Locate the booking in Amadeus
2. In the Guestrooms Section, click Details



Edit the Room Block

- Scroll to the room category you wish to edit
- Type the new number of rooms you wish to block into the Blocked row
- Click Save at the top of the window



Edit the Room Rates

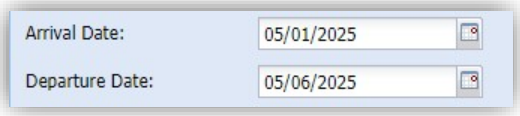
- Scroll to the room category you wish to edit
- Type the new rates into the Rate (USD) row under the appropriate dates
- Type the rates as $xxx.xx/$xxx.xx for both single and double occupancy
- Click Save at the top of the window



Edit the Date Range

Note—If any rooms have already been picked up, you can no longer edit the date range in Amadeus—it must be done in SMS.

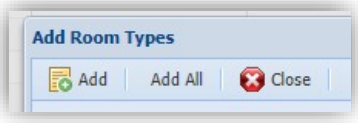
- Click Modify Room Block at the top of the window
- Set the Arrival/Departure dates
- Click Save



Add Additional Room Categories

Note—All Amadeus bookings should have all room categories added at the time of creation, but if that is not the case, you can add them yourself.

- Click Add Room Types
- Click Add All
- Close the window and click Save at the top of the Details window



Amadeus | Add Room Categories

Before adding a room category:

- Check Availability & Notes using in F7
- Get approval from the Group Reservations Manager
- Verify the rate (*If approved at rack, look up rack rates via the Digital Binder)*

"Hey Brendon, I'm going to sell the honeymoon suite. What can we offer it at?"

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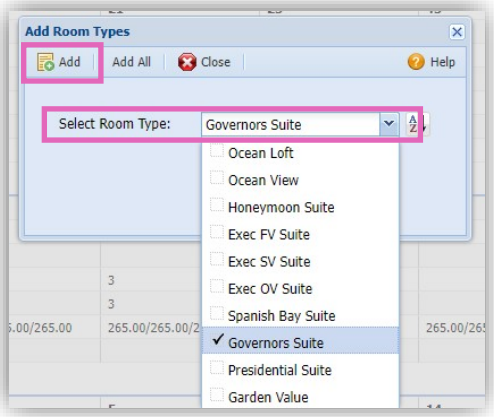
1) Open the group's Booking in Amadeus and navigate to the Guestrooms section

2) Click Details

3) Scroll down to see if your room category is already included in this window. It is common practice for the NSM Admin to add all room categories to all group Amadeus bookings even if they are not contracted to make additions easier.

4) If you do not see the category you need, at the top of the window, click Add Room Types

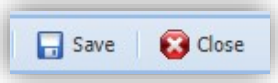
5) Check the boxes of all rooms categories you wish to add, then click Add



6) Once added, navigate to that category and input the blocked rooms and rates

Name	Sunday 11/12	Monday 11/13	Tuesday 11/14	Wednesday 11/15
Spanish Bay Suite				
Group Available	**0**	**0**	**0**	**0**
Agreed				
Forecasted				
Blocked				
Picked Up				
Rate (USD)				
Pickup Rate (USD)				

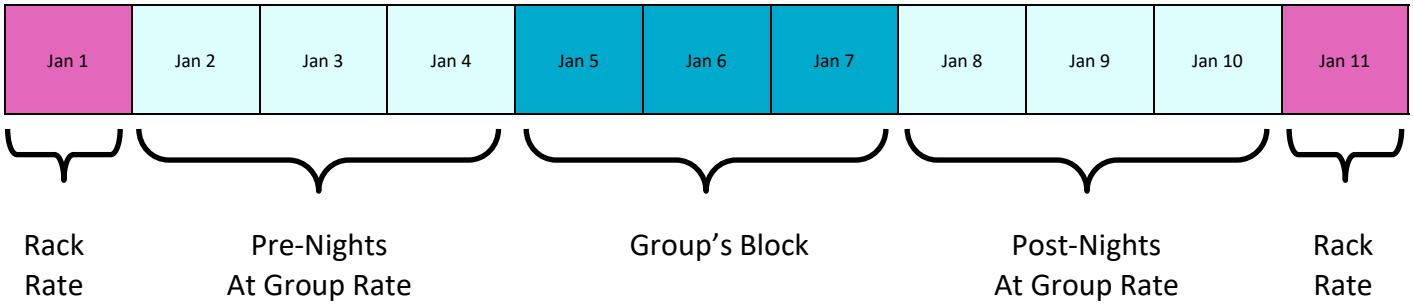
Note: Input the rate in the following format: xxx.xx / xxx.xx to apply the rate for both single and double occupancy

7) Save 

Amadeus | Pre/Post Nights

When a group guest wants to extend their stay, we will honor the group's room rates for 3 days prior and 3 days post the group's block.

If the guest wants to extend beyond the 3 day buffer, our policy is to charge the guest rack rate. The Group Rooms & Golf Coordinator must manually enter the rack rates for these requested nights into Amadeus—as opposed to Special Billing the rates in SMS.



Note: *Group rates can only be honored beyond 3 days pre/post if approved by the National Sales Managers. Group Rooms & Golf Coordinators should discuss this potential approval with the Group Reservations Manager.*

Add Pre/Post Room Nights:

1) Run and save an Allotment Report
2) Verify F7 General Availability and Notes
3) Have pre/post night rates approved by the Group Reservations Manager
4) Send a Letter of Authorization to the guest to collect their credit card information
5) Expand the block's date range (when necessary) in SMS Host
6) Wait 2-5 minutes for this change to filter to Amadeus
7) Edit the Rates for pre/post nights appropriately in Amadeus
8) Edit the guest's Reservation Tile in SMS to the new pre/post date range
9) Whose a Guest Tile for the group attendee
10) Charge the guest's credit card for all IPO nights
11) Send a GEMAIL to the guest
12) Run and save a new Allotment Report
13) Run and save a Delegates List
14) Send the Delegates List to the Planner

Amadeus | Overflow Bookings (1/2)

OVERFLOW RATES:

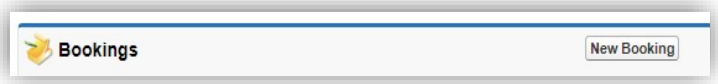
- Rates for Overflow Bookings must be approved by the Group Reservations Manager
- It is standard practice to apply the existing contracted rates if we are overflowing to The Inn at Spanish Bay, but increase the rates by $100 if we are overflowing to The Lodge at Pebble Beach

1.) Access the primary booking in Amadeus and write down the following data:

- Information Section:
  - Owner name (National Sales Manager)
  - Booking Post As name
  - Arrival/Departure dates
- Segmentation Section:
  - Lead Source Type (Commonly "Repeat Business")

2.) Click on the Account hyperlink within the Customer Information section

3.) Scroll to the Bookings section and click New Booking



4.) Select the overflow property, then click Create Booking



5.) Fill in all red fields:

- Booking Post As
- Arrival / Departure
- Market Segment (always Corporate)
- Booking Type (always Group)
- Lead Source (copy from main booking)

6.) Under Comments, write OVERLOW BOOKING—MAIN BOOKING AT [PROPERTY]

7.) Under Booking Sources, input yourself as the Service Manager

8.) Save

9.) Change the Owner to the name of the National Sales Manager (It defaults to you)

Amadeus | Overflow Bookings (2/2)

EDIT THE ROOM BLOCK

10.) In the Guestrooms section, click Details

11.) The New Room Block window will open—verify details, then hit Save

12.) Click Add Room Types at the top of the window and select Add All

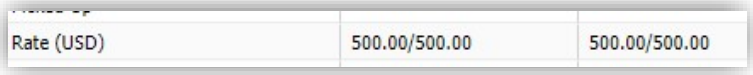
13.) Enter the number of rooms you need in each applicable room category

- Type the number into the first box, then use CTRL+SHIFT+B to copy across all columns
- The red triangle in the top left corner means that data is not yet saved



14.) Input the appropriate room rates for each room category

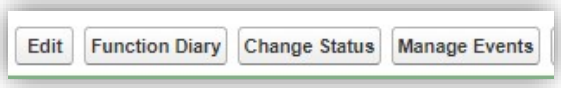
- If ROH, set all room categories to the ROH rate in case of upgrades
- Apply your rates in the format XXX.XX/XXX.XX to apply to single and double occupancy



15.) Save

16.) Close the Room Block window to return to the Booking

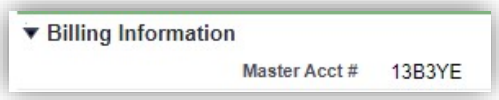
17.) At the top of the Booking, click Change Status



18.) Edit the Status dropdown to Definite, then click Change Status to Save

19.) In approximately 5 minutes, the Group City Ledger and Guest Tile will generate in SMS

- Locate the City Ledger in SMS (You can search in Workslate with =(group name)
- Notate the City Ledger # (Res ID) and input this into the Master Account # field in the Amadeus booking



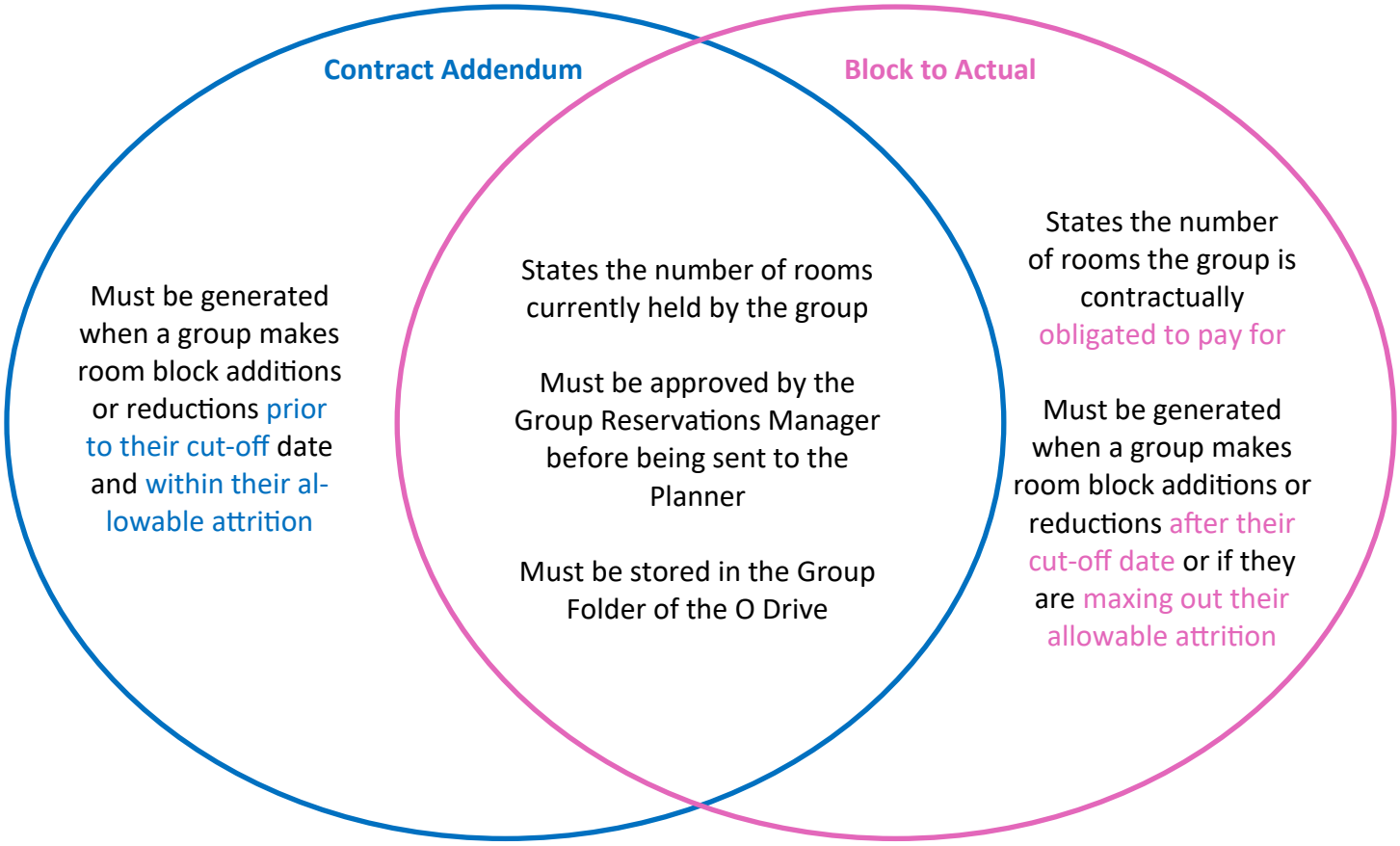
20) Complete the Overflow Process in SMS by setting the Group Template and picking up rooms

Amadeus | Contract Addendum vs. B to A

Both the **Contract Addendum** and **Block to Actual** are letters that coordinators can generate via Amadeus. These letters are emailed to the group Planners as evidence of a room block change.

Both of these letters are legal contracts, therefore the Group Reservations Manager must review and approve them before they can be sent to the Planner.

WHAT IS THE DIFFERENCE?



Dear Ron,

Following is an addendum to your contract of **May 20, 2022**. Summarized below is your current group room block with the changes we discussed:

- The addition of twenty (20) Run of House rooms for the nights of March 17th, 18th, 19th, and 20th

GROUP ROOM BLOCK

	Fri 3/10	Sat 3/11	Sun 3/12
Run of House	4	4	5
Suite Upgrades (4)	0	0	0
Total Rooms	4	4	5

Dear Jack,

The following represents your nightly group room block obligations at **The Lodge at Pebble Beach.** These obligations are based on your room block as of your first contracted cut-off date of **Thursday, September 1, 2022.**

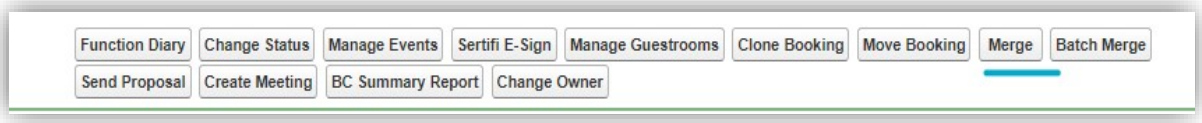
GROUP ROOM BLOCK/OBLIGATION

Rate	Room Type	Fri 3/10	Sat 3/11	Sun 3/12	Mon 3/13	Tue 3/14	Wed 3/15	Thu 3/16	Total
$1,055.00	Run of House	1	3	33	33	33	33	2	140
$0.00	Complimentary ROH Rooms (3)	0	2	3	3	3	3	0	12
	Booking Total	1	5	36	36	36	36	2	152

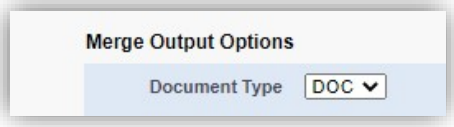
Amadeus | Generate an Amadeus Letter

1. Access your group's booking in Amadeus

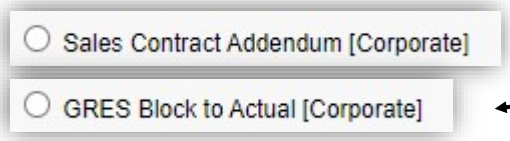
2. Click the "Merge" button at the top of the Booking Detail page



3. In the top right corner, change the Document Type to "DOC"



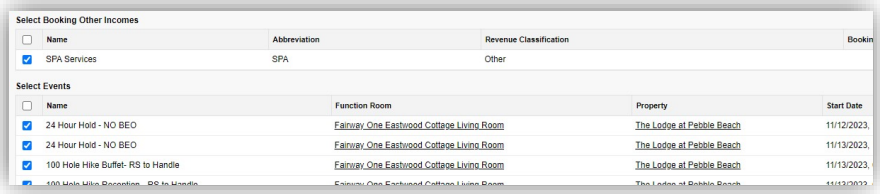
4.. Select the radio button of the letter you wish to generate



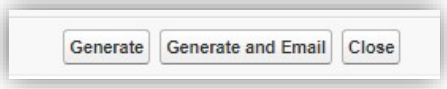
Note: The Block to Actual should only be generated by the Group Golf Coordinator

4.. Below the radio button menu, a list of checkboxes will populate

Un-check all of the checked boxes.



5. Click "Generate"



6. Your letter will download as a Word Document.

- Edit this Word Document with the correct Block and Obligation numbers
- Edit all fields highlighted in yellow
- Block to Actual: Add the name of the property within the introductory sentence
- Contract Addendum: Highlight the name of the property in the header of the document

7. Save your letter in both Word and PDF forms within your Group Folder

8. Send the letter to the Group Reservations Manager for approval

9. Once approved, you can email the PDF of this letter to the group's Planner

Create A Contract Addendum

- In Amadeus, Generate a Contract Addendum Letter:

- Save the Word Doc to the Contract Addendum folder within GROUP FOLDERS
  - ◊ Title the document [Post As] - B to A [Today's Date]

- Open the Contract within the GROUP FOLDER
  - ◊ If there are already previous addendums, open the most recent contract addendum

- In SMS Host, Run an Allotment Report and save to GROUP FOLDER
  - ◊ Make sure your date span encompasses all pre/post nights

- On the Block to Actual, edit the Block/Obligation Chart:
  - ◊ The chart structure should match the Block/Rate structure in the Contract/Addendum
    - ◊ See the Room Block/Allotment Report Comparison SOP for examples
  - ◊ The date span should include all pre/post nights per the Allotment Report
  - ◊ The block totals should match the Allotment Report

- Clean up the following fields on the Block to Actual:
  - ◊ Underneath the introductory paragraph
    - Write in bullet points exactly what changes were made to the group's block
    - If the group maxed out their allowable attrition, write this as a bullet point
  - ◊ Customize any fields highlighted in yellow as appropriate to your group
  - ◊ Input the name of the property within the introductory sentence
  - ◊ Remove unnecessary text/punctuation
  - ◊ If the text after "RE:" includes both the group name and a separate Post As, remove the Group Name
  - ◊ If the text bleeds to the second page, do either of the following:
    - Make text does not cut off mid-sentence or mid-paragraph at the page break
    - Edit the bottom margin to be short enough to keep all text on page 1

- Save the Contract Addendum as both Word and PDF

- Email the PDF to the Reservations Supervisor/Manager for Approval

Create A Block to Actual (1/2)

- In Amadeus, Generate a Block to Actual Letter:

- Save the Word Doc to the B to A folder within GROUP FOLDERS
  - ◊ Title the document [Post As] - BtoA [Today's Date]

- Open the most recent Contract Addendum within the GROUP FOLDER
  - ◊ If there are no addendums, open the Contract within the GROUP FOLDER

- In SMS Host, Run an Allotment Report and save to GROUP FOLDER
  - ◊ Make sure your date span encompasses all pre/post nights

- On the Block to Actual, edit the Block/Obligation Chart:
  - ◊ The chart structure should match the Block/Rate structure in the Contract/Addendum
    - ◊ See the Room Block/Allotment Report Comparison SOP for examples
  - ◊ The date span should include all pre/post nights per the Allotment Report
  - ◊ If the group has not exceeded their allowable attrition or reduced post cut-off, the block totals should match the Allotment Report
    - ◊ If the group has exceeded their allowable attrition or reduced past cut-off, see page 2/2 of Create A Block to Actual

- If the contract states that the attrition is figured on a cumulative basis:
  - Add the statement of obligation underneath the Room Block chart "Total Group Room Block / Obligation = ___ Room Nights"
  - Change the verbiage in the refund paragraph from "per night" to "cumulative

> A refund will be made for any rooms that are resold, however, these must be the last rooms sold in order for the Hotel to achieve 100% occupancy. Due to day-to-day variations in Hotel occupancy, room block obligations are figured on a cumulative basis over the group's meeting dates.

- Clean up the following fields on the Block to Actual:
  - ◊ Customize any fields highlighted in yellow as appropriate to your group
  - ◊ Input the name of the property within the introductory sentence
  - ◊ Remove unnecessary text/punctuation
  - ◊ If the text after "RE:" includes both the group name and a separate Post As, remove the Group Name
  - ◊ If the text bleeds to the second page, do either of the following:
    - Make sure text does not cut off mid-sentence/paragraph at the page break
    - Edit the bottom margin to be short enough to keep all text on page 1

- Save the Block to Actual as both Word and PDF

- Update the 2 Notes per the Block to Actual
  - See the 2 Notes SOP for instruction

- Email the PDF to the Group Reservations Supervisor/Manager for Approval

Create A Block to Actual (2/2)

Nightly Reduction

In the following situations, separate the Room Block/Obligation chart into one Room Block chart and one Room Block/Obligation chart:

GROUP ROOM BLOCK

Rate	Room Type	Wed 6/19	Thu 6/20	Fri 6/21	Sat 6/22	Sun 6/23	Mon 6/24	Total
$950.00	Run of House	4	39	79	89	68	5	284
$950.00	Suite Upgrade (1)	0	1	1	1	0	0	3
	Booking Total	4	40	80	90	68	5	287

GROUP ROOM BLOCK OBLIGATION

Rate	Room Type	Wed 6/19	Thu 6/20	Fri 6/21	Sat 6/22	Sun 6/23	Mon 6/24	Total
$950.00	Run of House	6	39	81	89	73	7	295
$950.00	Suite Upgrade (1)	0	1	1	1	0	0	3
	Booking Total	6	40	82	90	73	7	298

◊ If the group exceeds their allowable attrition:
- The Room Block totals should reflect the Allotment Report post-reduction
- The Room Block/Obligation chart should reflect the total block that the group is obligated to pay for according to their contract
  Tip—Use the Block/Obligation Calculator in the Digital Binder to find the total obligation according to the allowed reduction percentage in the contract

◊ If the group reduces their room block after the first Block to Actual is set:
- The Room Block totals should reflect the Allotment Report post-reduction
- The Room Block/Obligation chart should reflect the totals prior to reduction

Cumulative Reduction

In the following situations, split your statement of obligation to state separate Room Block and Obligation totals:

Total Cumulative Group Block = 146 Room Nights
Total Cumulative Group Block Obligation = 147 Room Nights

◊ If the group exceeds their allowable attrition:
- The Room Block totals should reflect the total
- The Room Block/Obligation chart should reflect the total block that the group is obligated to pay for according to their contract
  Tip—Use the Block/Obligation Calculator in the Digital Binder to find the total obligation according to the allowed reduction percentage in the contract

◊ If the group reduces their room block after the first Block to Actual is set:
- The Room Block totals should reflect the Allotment Report post-reduction
- The Room Block/Obligation chart should reflect the totals prior to reduction

Allotment Report / Group Block Comparison

Run of House Block

If your contracted block has exclusively Run of House rooms, your Room Block Chart only needs to reflect the nightly block totals from the Allotment Report.

Unit Type	Mon 08/12/24 Cur Blk	Cur PkUp	Tue 08/13/24 Cur Blk	Cur PkUp	Wed 08/14/24 Cur Blk	Cur PkUp	Thu 08/15/24 Cur Blk	Cur PkUp	Fri 08/16/24 Cur Blk	Cur PkUp	Sat 08/17/24 Cur Blk	Cur PkUp	Sun 08/18/24 Cur Blk	Cur PkUp	Mon 08/19/24 Cur Blk	Cur PkUp	Total Cur Blk	Cur PkUp
BRO7	0	0	0	0	1	1	3	3	3	3	3	3	3	3	0	0	13	13
BRC7	0	0	0	0	0	0	1	1	1	1	1	1	1	1	0	0	4	4
BRG7	0	0	1	1	2	2	2	2	2	2	2	2	2	2	0	0	11	11
BRF7	0	0	0	0	3	3	6	6	6	6	6	6	6	6	0	0	27	27
TOTALS	0	0	1	1	6	6	12	12	12	12	12	12	12	12	0	0	55	55

*Rate	Service Charge	Total	Room Type	Tue 8/13	Wed 8/14	Thu 8/15	Fri 8/16	Sat 8/17	Sun 8/18	Total
$1,370.00	$32.00	$1,402.00	Run of House	1	6	12	12	12	12	55
			Booking Total	1	6	12	12	12	12	55

Run of House Block with Additional Categories

The Run of House nightly total is the remainder after you subtract all other individual categories.

Unit Type	Wed 05/22/24 Cur Blk	Cur PkUp	Thu 05/23/24 Cur Blk	Cur PkUp	Fri 05/24/24 Cur Blk	Cur PkUp	Sat 05/25/24 Cur Blk	Cur PkUp	Sun 05/26/24 Cur Blk	Cur PkUp	Mon 05/27/24 Cur Blk	Cur PkUp
BRO7	0	0	0	0	1	1	3	3	10	10	20	20
BRL7	0	0	0	0	0	0	0	0	1	1	4	4
BRC7	0	0	0	0	0	0	0	0	4	4	9	9
BRG7	0	0	1	1	1	1	1	1	3	3	14	14
BRF7	0	0	0	0	0	0	2	2	22	22	53	53
BSO4	0	0	0	0	0	0	0	0	1	1	1	1
TOTALS	0	0	1	1	2	2	6	6	41	41	101	101

The Total Block on 5/27 is <u>101</u>

- ◊ Subtract 1 Suite
- ◊ Subtract 3 Staff Rooms
- ◊ Subtract 1 Complimentary Room
- ◊ Run of House Total = 96

Rate	Room Type	Thu 5/23	Fri 5/24	Sat 5/25	Sun 5/26	Mon 5/27	Tue 5/28	Wed 5/29	Thu 5/30	Fri 5/31	Sat 6/1	Total
$740.00	Run of House	0	1	4	37	96	96	97	97	7	3	438
$995.00	Run of House	1	0	0	0	0	0	0	0	0	0	1
$395.00	Staff Rooms (3)	0	0	1	3	3	3	3	3	0	0	16
$2,455.00	Suite	0	0	0	1	1	1	1	1	0	0	5
Complementary	Club Pro Room (1)	0	1	1	1	1	1	1	1	0	0	7
	Booking Total	1	2	6	42	101	101	102	102	7	3	467

Tiered Block

A Tiered Room Block will be itemized in the exact same fashion as the Allotment Report

Unit Type	Sun 08/25/24 Cur Blk	Cur PkUp	Mon 08/26/24 Cur Blk	Cur PkUp	Tue 08/27/24 Cur Blk	Cur PkUp	Wed 08/28/24 Cur Blk	Cur PkUp	Thu 08/29/24 Cur Blk	Cur PkUp	Fri 08/30/24 Cur Blk	Cur PkUp	Sat 08/31/24 Cur Blk	Cur PkUp	Sun 09/01/24 Cur Blk	Cur PkUp	Mon 09/02/24 Cur Blk	Cur PkUp	Total Cur Blk	Cur PkUp
PRX1J	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	0	0	4	4
PRX3J	0	0	1	1	4	4	3	3	3	3	3	3	3	3	3	3	0	0	20	20
PDX4	0	0	1	1	2	2	2	2	0	0	0	0	0	0	0	0	0	0	5	5
PRX5	0	0	1	1	5	5	5	5	2	2	2	2	2	2	2	2	0	0	19	19
TOTALS	0	0	3	3	11	11	10	10	6	6	6	6	6	6	6	6	0	0	48	48

*Rate	Service Charge	Total	Room Type	Monday 8/26/2024	Tuesday 8/27/2024	Wednesday 8/28/2024	Thursday 8/29/2024	Friday 8/30/2024	Saturday 8/31/2024	Sunday 9/1/2024
$1,345.00	30.00	$1,375.00	Estate Room	1	5	5	2	2	2	2
$1,445.00	30.00	$1,475.00	Estate Studio	1	2	2	0	0	0	0
$1,615.00	30.00	$1,645.00	Spa Room	1	4	3	3	3	3	3
$1,875.00	30.00	$1,905.00	Deluxe Spa Room	0	0	0	1	1	1	1
		Total	Booking Total	3	11	10	6	6	6	6

Block to Actual Data Collection

Contract—Find the Room Block and Rates

The COPi Cup - 2024

	Saturday 3/9/2024	Sunday 3/10/2024
Run of House	60	60
Total Rooms	60	60

Per this contract, the Block/Obligation Chart on the Block to Actual will need to reflect the Run of House Room Type at the rate of $620 plus the nightly service fee.

Confirmed rates for **The COPi Cup Presented by Legistics** during **March 8 - 10, 2025** are:

Room	Group Rate
Run of House	$655.00

Allotment Report—Find the Date Span and Block Totals

	Fri 03/07/25		Sat 03/08/25		Sun 03/09/25		Mon 03/10/25		Total	
Unit Type	Cur Blk	Cur PkUp	Cur Blk	Cur PkUp	Cur Blk	Cur PkUp	Cur Blk	Cur PkUp	Cur Blk	Cur PkUp
BRO7	1	1	12	1	12	1	1	1	26	4
BRL7	1	1	1	1	1	1	1	1	4	4
BRC7	1	1	8	1	8	1	1	1	18	4
BRG7	2	2	12	3	12	3	3	3	29	11
BRF7	2	1	27	1	27	1	1	1	57	4
TOTALS	7	6	60	7	60	7	7	7	134	27

Per this Allotment Report, the Block/Obligation Chart on the Block to Actual will need to have a date span that includes all pre/post nights. The chart will also list the nightly and overall block totals.

Block to Actual

- Run of House rooms at the rate of $620 plus the $35 nightly service fee per the Contract
- Room Block dates span 3/7/25 to 3/10/25 per the Allotment Report
- The group's block totals exactly match the Allotment Report

GROUP ROOM BLOCK/OBLIGATION

*Rate	Service Charge	Total	Room Type	Friday 3/7/2025	Saturday 3/8/2025	Sunday 3/9/2025	Monday 3/10/2025	Total
$620.00	$35.00	$655.00	Run of House	7	60	60	7	134
			Booking Total	7	60	60	7	134

Block Chart / 2 Notes Comparison (1/2)

2 Notes—Nightly Reduction Group Reached Cut-Off Date

GROUP ROOM BLOCK/OBLIGATION

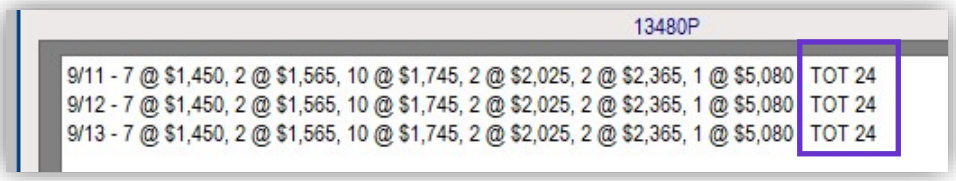
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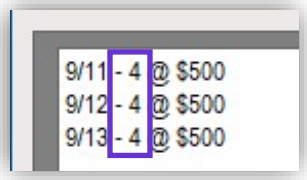
*Rate	Service Charge	Total	Room Type	Wednesday 9/11/2024	Thursday 9/12/2024	Friday 9/13/2024
$1,450.00	$30.00	$1,480.00	Estate Rooms	7	7	7
$1,565.00	$30.00	$1,595.00	Estate Studios	2	2	2
$1,745.00	$30.00	$1,775.00	Spa Rooms	10	10	10
$2,025.00	$30.00	$2,055.00	Deluxe Spa Rooms	2	2	2
$2,365.00	$30.00	$2,395.00	Courtyard Suites	2	2	2
$5,080.00	$30.00	$5,110.00	Palmero Suite	1	1	1
			Booking Total	24	24	24

The Lodge at Pebble Beach

*Rate	Service Charge	Total	Room Type	Wednesday 9/11/2024	Thursday 9/12/2024	Friday 9/13/2024
$500.00	$28.00	$528.00	Staff Rooms	4	4	4
			Booking Total	4	4	4

** Rate is exclusive of the **10.5%** per night county occupancy tax and a **0.195%** per night California Tourism Assessment. In addition, the county charges **$7.00** per occupied room night for the County Tourism Assessment.*



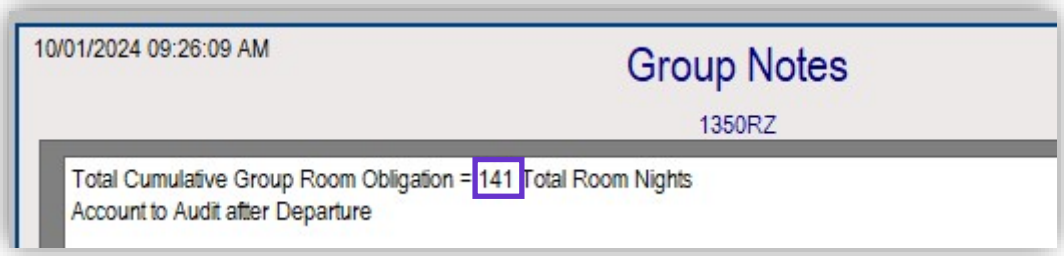


2 Notes—Cumulative Reduction Group Reached Cut-Off Date

GROUP ROOM BLOCK/OBLIGATION

Rate	Room Type	Tue 2/6	Wed 2/7	Thu 2/8	Fri 2/9	Total
$955.00	Run of House	8	56	57	20	141
	Booking Total	8	56	57	20	141

Total Group Room Block / Obligation = 141 Room Nights



Block Chart / 2 Notes Comparison (2/2)

2 Notes—Group Exceeded Their Allowable Nightly Reduction %

GROUP ROOM BLOCK

Rate	Room Type	Wed 6/19	Thu 6/20	Fri 6/21	Sat 6/22	Sun 6/23	Mon 6/24	Total
$950.00	Run of House	4	39	79	89	68	5	284
$950.00	Suite Upgrade (1)	0	1	1	1	0	0	3
	Booking Total	4	40	80	90	68	5	287

Should you require additional guestrooms, they will be confirmed on a space available basis and added to your contracted nightly group room block.

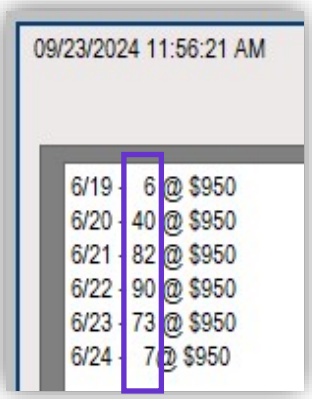
After **Monday, May 20, 2024**, any reduction to the Group Room Block will be assessed a cancellation fee equal to the group room rate multiplied by the number of guestrooms for each night.

Per your group's room reduction schedule, your nightly room obligation is:

GROUP ROOM BLOCK OBLIGATION

Rate	Room Type	Wed 6/19	Thu 6/20	Fri 6/21	Sat 6/22	Sun 6/23	Mon 6/24	Total
$950.00	Run of House	6	39	81	89	73	7	295
$950.00	Suite Upgrade (1)	0	1	1	1	0	0	3
	Booking Total	6	40	82	90	73	7	298

A refund will be made for any rooms that are resold, however, these must be the last rooms sold in order for the Hotel to achieve 100% occupancy. Due to day-to-day variations in Hotel occupancy, room block obligations are figured on a per night basis, rather than cumulatively over the group's meeting dates.



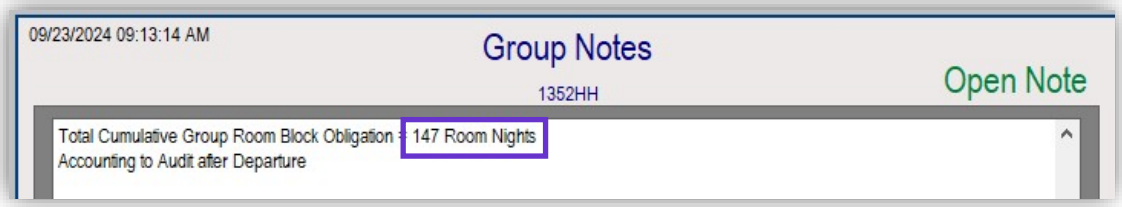
2 Notes—Group Exceeded Their Allowable Cumulative Reduction %

GROUP ROOM BLOCK/OBLIGATION

*Rate	Service Charge	Total	Room Type	Sun 8/25	Mon 8/26	Tue 8/27	Wed 8/28	Thu 8/29	Fri 8/30	Sat 8/31	Sun 9/1	Total
$920.00	$32.00	$952.00	Run of House	2	12	24	27	25	4	4	4	102
$920.00	$32.00	$952.00	Forest Executive Suite Upgrade (3)	0	0	3	3	3	0	0	0	9
$1,230.00	$32.00	$1,262.00	Scenic Executive Suite Upgrade (2)	0	2	2	2	2	0	0	0	8
$1,230.00	$32.00	$1,262.00	Ocean Executive Suite Upgrade (1)	0	1	1	1	1	0	0	0	4
$1,800.00	$32.00	$1,832.00	Ocean Executive Suite (1)	0	1	1	0	0	0	0	0	2
$460.00	$32.00	$492.00	Staff Rooms (4)	2	4	4	4	3	2	2	0	21
			Booking Total	4	20	35	37	34	6	6	4	146

** Rate is exclusive of the 10.5% per night county occupancy tax and a 0.195% per night California Tourism Assessment. In addition, the county charges $7.00 per occupied room night for the County Tourism Assessment.*

Total Cumulative Group Block = 146 Room Nights
Total Cumulative Group Block Obligation = 147 Room Nights



B to A | Allowable Reduction Exceeded

Group Exceeded Their Allowable Nightly Reduction %

GROUP ROOM BLOCK

Rate	Room Type	Wed 6/19	Thu 6/20	Fri 6/21	Sat 6/22	Sun 6/23	Mon 6/24	Total
$950.00	Run of House	4	39	79	89	68	5	284
$950.00	Suite Upgrade (1)	0	1	1	1	0	0	3
	Booking Total	4	40	80	90	68	5	287

Should you require additional guestrooms, they will be confirmed on a space available basis and added to your contracted nightly group room block.

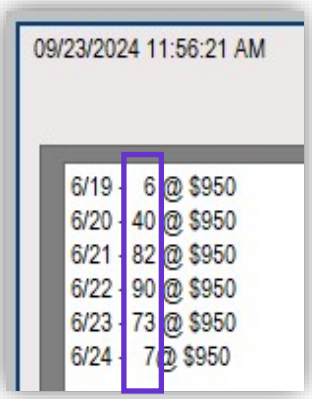
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Per your group's room reduction schedule, your nightly room obligation is:

GROUP ROOM BLOCK OBLIGATION

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	Booking Total	6	40	82	90	73	7	298

A refund will be made for any rooms that are resold, however, these must be the last rooms sold in order for the Hotel to achieve 100% occupancy. Due to day-to-day variations in Hotel occupancy, room block obligations are figured on a per night basis, rather than cumulatively over the group's meeting dates.



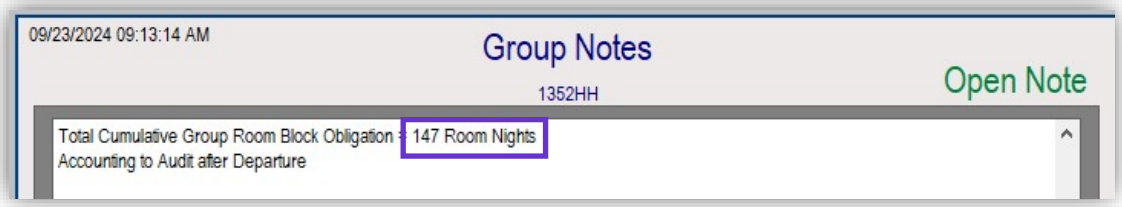
Group Exceeded Their Allowable Cumulative Reduction %

GROUP ROOM BLOCK/OBLIGATION

*Rate	Service Charge	Total	Room Type	Sun 8/25	Mon 8/26	Tue 8/27	Wed 8/28	Thu 8/29	Fri 8/30	Sat 8/31	Sun 9/1	Total
$920.00	$32.00	$952.00	Run of House	2	12	24	27	25	4	4	4	102
$920.00	$32.00	$952.00	Forest Executive Suite Upgrade (3)	0	0	3	3	3	0	0	0	9
$1,230.00	$32.00	$1,262.00	Scenic Executive Suite Upgrade (2)	0	2	2	2	2	0	0	0	8
$1,230.00	$32.00	$1,262.00	Ocean Executive Suite Upgrade (1)	0	1	1	1	1	0	0	0	4
$1,800.00	$32.00	$1,832.00	Ocean Executive Suite (1)	0	1	1	0	0	0	0	0	2
$460.00	$32.00	$492.00	Staff Rooms (4)	2	4	4	4	3	2	2	0	21
			Booking Total	4	20	35	37	34	6	6	4	146

** Rate is exclusive of the 10.5% per night county occupancy tax and a 0.195% per night California Tourism Assessment. In addition, the county charges $7.00 per occupied room night for the County Tourism Assessment.*

Total Cumulative Group Block = 146 Room Nights
Total Cumulative Group Block Obligation = 147 Room Nights



B to A Obligation Calculator

This calculator will calculate the minimum number of rooms that a group will be obligated to pay for according to the maximum allowed reduction percentage in their contract.

- Access the GROUP FOLDER and determine which contract to open:
  {The group's Allowable Reduction % will be calculated based off of the highest number of rooms held by the group prior to their cutoff date)
  - ◊ If the group has never increased their block, open the Original Contract
  - ◊ If the group increased their block at any point, open the Contract Addendum that reflects the group's highest block totals

- Locate the Group Room Block

GROUP ROOM BLOCK

The Lodge at Pebble Beach

Room Type	Wednesday 6/19/2024	Thursday 6/20/2024	Friday 6/21/2024	Saturday 6/22/2024	Sunday 6/23/2024	Total Room Nights
Run of House	5	34	64	84	44	231
Suite Upgrade (1)	0	1	1	1	0	3
Booking Total	**5**	**35**	**65**	**85**	**44**	**234**

Nightly Totals — Cumulative Total

- Locate the Allowable Reduction % and whether the reduction is cumulative or nightly

Between the date this contract is signed and, **Monday, May 20, 2024**, you may reduce up to 10% of the nightly Group Room Block without being assessed a cancellation fee. You will be assessed a cancellation fee for all rooms

- Open the B to A Obligation Calculator accessible in the Digital Binder

- Use either the Nightly or Cumulative calculator based on the contract
  Below is an example of how to input data for both the Nightly and Cumulative calculation using the above example Group Room Block.

Nightly Allowable Reduction

Step 1 - Select Allowable Reduction % 10%
Step 2 - Input the Nightly Totals from the Room Block chart

	Date	Date	Date	Date	Date	Date	Date
Nightly Total	5	35	65	85	44		
# of Rooms Group May Reduce w/o Obligation	0.5	3.5	6.5	8.5	4.4	0	0
# of Rooms to which Group is Obligated	4.5	31.5	58.5	76.5	39.6	0	0

Cumulative Allowable Reduction

Step 1 - Select Allowable Reduction % 10%
Step 2 - Input the Cumulative Total from the Room Block Chart

Total Room Block	234
# of Rooms Group May Reduce w/o Obligation	23.4
# of Rooms to which Group is Obligated	210.6

If the Allotment Report shows that the group is holding equal to or more than their obligation according to this calculator, your Block to Actual will reflect an equal BLOCK/OBLIGATION.

If the current Allotment Report shows that the group is holding less than their obligation on this calculator, your Block to Actual will need separately document the BLOCK and OBLIGATION.

Passkey | Group Website Interface

Passkey is an event management program that allows group attendees to book their rooms online rather than the planner sending us a Rooming List. This is used for groups who are entirely (or almost entirely) IPO, meaning that each attendee will be paying for their own room.

The **Group Reservations Manager** will create each group's website.

The manager then emails the planner to introduce the Group Rooms & Golf Coordinator and provide them with:

- Their website link
- Room Rates
- An access code for special rates such as Staff Rates
- Any pertinent details

Hi Rebecca,

Great to hear from you again and looking forward to another great event.

Your Group Rooms and Golf Coordinator will be Isabelle DeCocco. I have copied her into this e-mail.

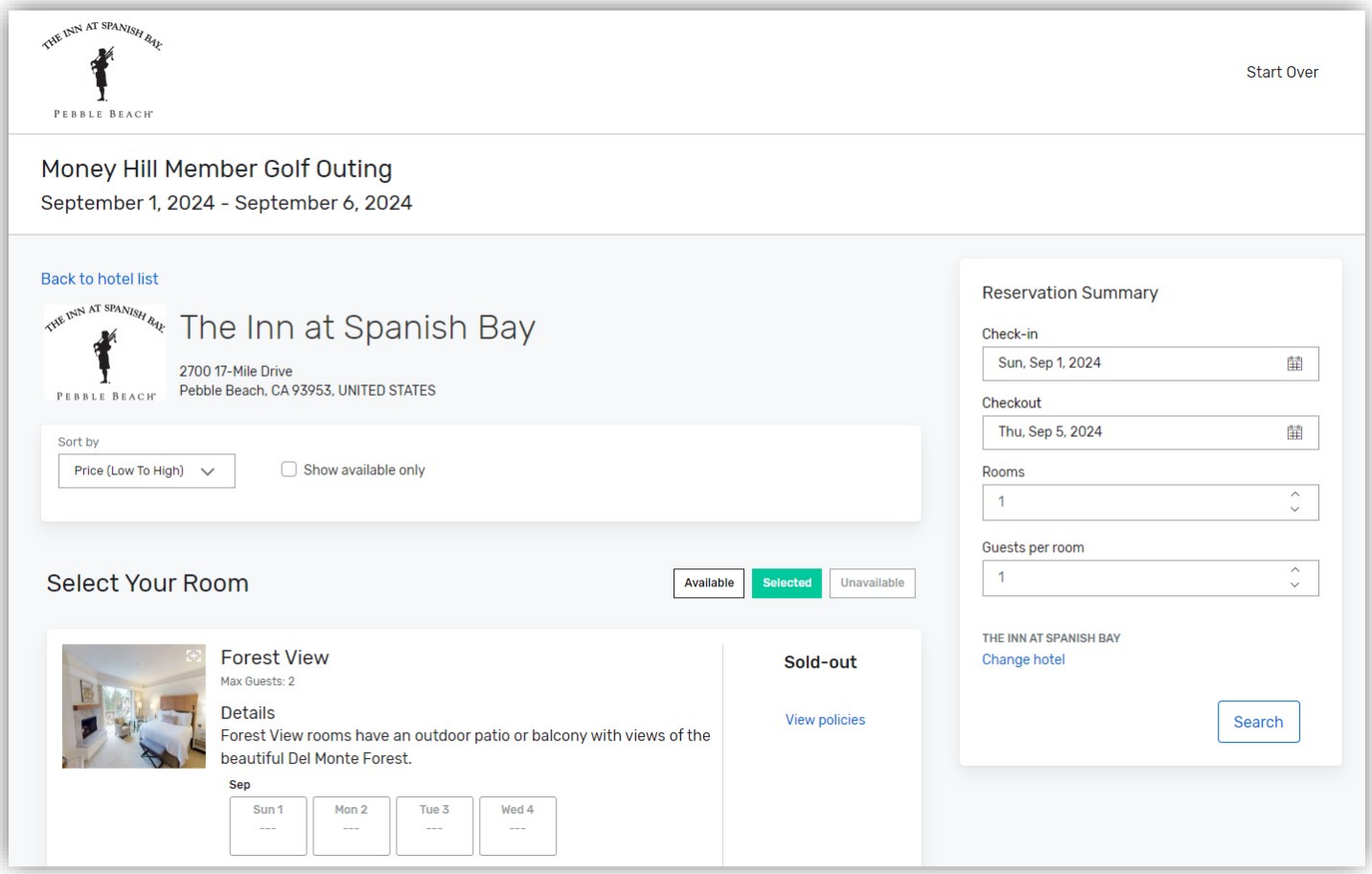
Here it the link to your booking website: https://book.passkey.com/go/legends2023

Guests who choose that they are an attendee will see the $655 contracted rate for all nights, and we will charge them accordingly.
Guest that are provided the access code by you, will see a $0.00 rate for Thu-Sun nights (4 nights total), and those 4 nights will be charged to the Master. Pre/post nights will show as your staff rate at $615.00 and if we will charge them for any nights they book at that rate.

The access code is LegendsPB2023. And same as previous years, that is case sensitive.

Please give the website a look over and let me know if any questions. Otherwise, we are ready to go and Isabelle will take over as your day to day contact moving forward!

Thanks, Rebecca!

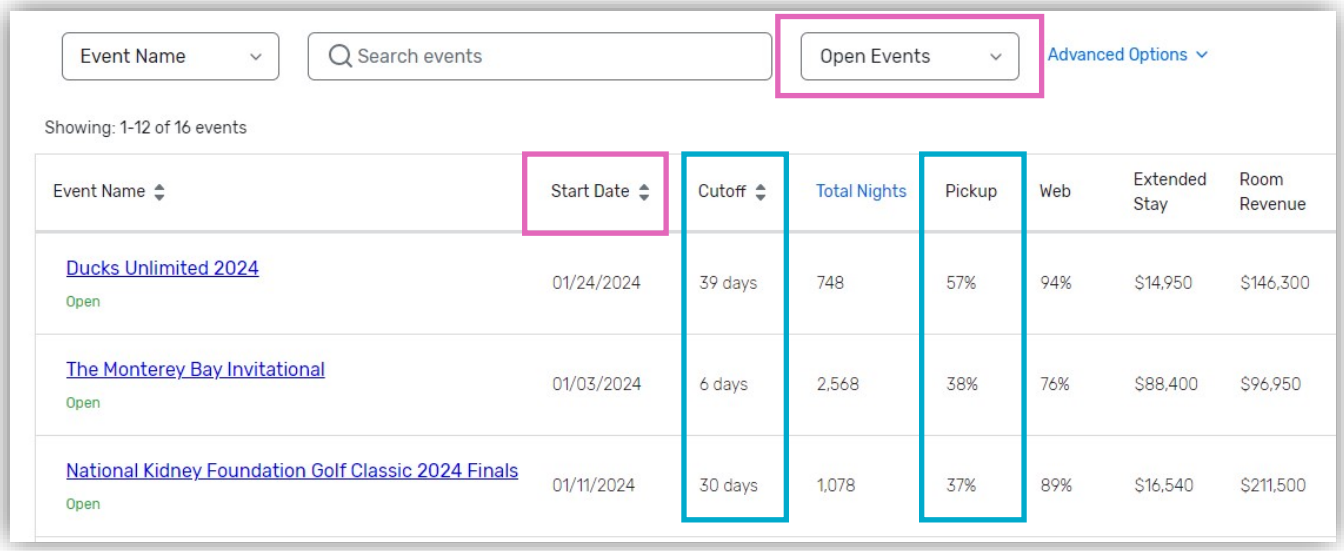


Passkey | Homepage

ORGANIZE YOUR HOMEPAGE:

The Homepage of Passkey defaults to a list of your **Recently Viewed Events.**

1. Set the sorting dropdown to **Open Events**
2. Click the **Start Date** heading to organize the list by date of arrival



VIEW YOUR EVENT:

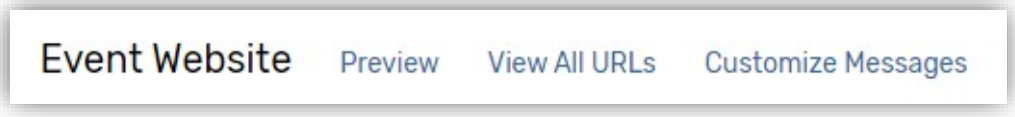
When you double click on your group, you will be taken to their **Event Page**.

- You will always have two properties to choose from: the main property and the overflow.
- Select your primary property to view the Room Block and other event details



VIEW YOUR GROUP'S WEBSITE:

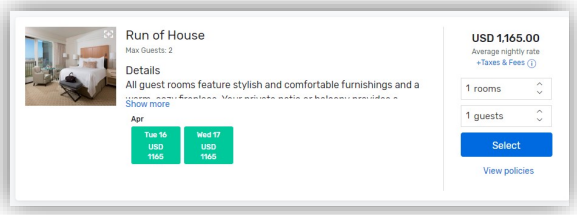
1. Once you are in the Event Page, click Website from the left side Menu
2. Click Event Website
3. Click Preview



Passkey | Block / Rate Variations

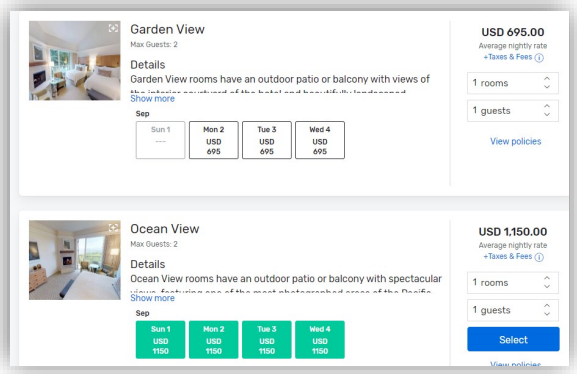
Run of House

- Group Attendees will only see the one room category when booking through the website.
- All bookings will feed to SMS as LRGS (Lodge) or BRF7 (Inn).
- It is the Group Rooms & Golf Coordinator's responsibility to modify the room categories to fit our Run of House per-centage as guests book their rooms.



Tiered

- Group Attendees will see options for all room categories contracted by the group and can therefore choose which room category they want based on price.
- The website will limit the number of rooms available to match the block which will prevent overbooking without manual room category management by the Group Rooms & Golf Coordinator

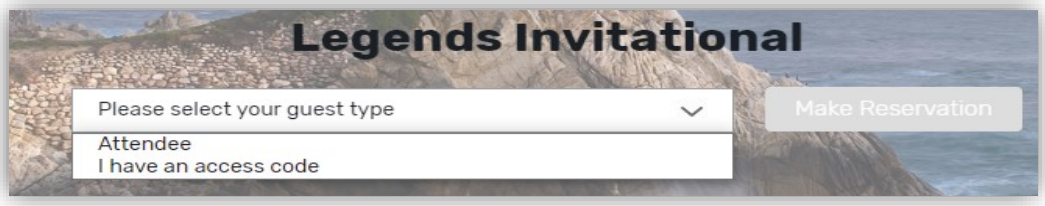


Staff Rates / Comps / Suite Upgrades

- For Passkey Groups, rooms and suites outside the normal ROH block / Standard Tiered Rooms will not be listed as a booking option on the Passkey Website.
- These rooms/suites are typically to the Master instead of IPO, so treat them like Rooming List bookings. The Planner tells the Coordinator which guests will be in these rooms/suites, and the Coordinator will manually pick them up in SMS.
- If the Staff/Suite Upgrade is IPO, but at a different rate than ROH, the Planner will sometimes still want these guests to book through the Passkey website. In that case, the guests can book ROH rooms, then the Coordinator will manually edit the room category/rate. We will need to get confirmation via email from the Planner to approve us charging the guests credit card at a different rate than the ROH rate listed on the Passkey website.

Access Codes

- If a group insists that everyone book through Passkey, we can hide special discounted rates by using an "Access Code"
- Guests who enter this access code will be directed to an alternate version of the group's website for pricing/options that differ from the ROH/Standard Tiered Room Rates.



Passkey | Communication & Management

Planner Communication

As soon as the Group Reservations Manager sends the introduction email, the Group Rooms & Golf Coordinator should reply and introduce themselves.

- Ask the planner how often they would like to receive Rooming List Updates
  Typically this is weekly
- Ask the planner when they plan to send the website link to their attendees
  This is when you will begin your weekly updates

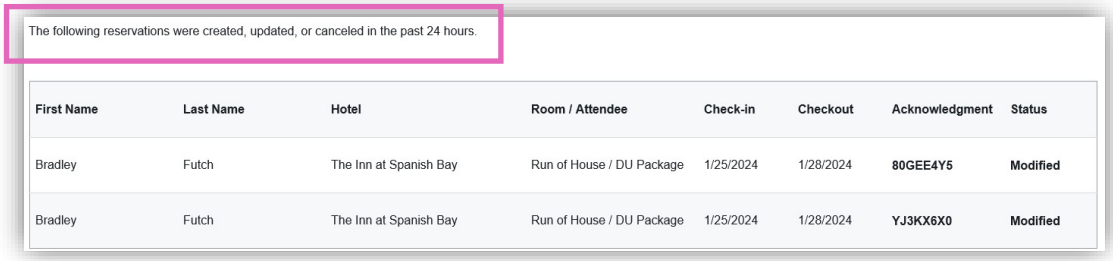
Manual Passkey Management

1) Set weekly Outlook reminders to check on your group and send your Planner Delegates List updates
2) Include "PK" in the title of your Outlook folder for this group so you can easily see which groups you manage that are Passkey



Automated Passkey Reminders

1) Each day, gres@pebblebeach.com will receive automated emails that list any changes that have been made to Passkey Bookings. It is the Coordinator's responsibility to see if these emails involve any of their assigned groups, and edit the reservation accordingly



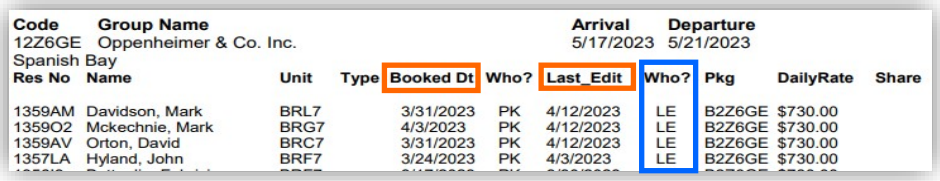
The following reservations were created, updated, or canceled in the past 24 hours.

First Name	Last Name	Hotel	Room / Attendee	Check-in	Checkout	Acknowledgment	Status
Bradley	Futch	The Inn at Spanish Bay	Run of House / DU Package	1/25/2024	1/28/2024	80GEE4Y5	Modified
Bradley	Futch	The Inn at Spanish Bay	Run of House / DU Package	1/25/2024	1/28/2024	YJ3KX6X0	Modified

2) The Group Reservations Manager will receive automated emails any time a group has an "Unprocessed Transaction." These are typically Passkey cancellations. The Group Reservations Manager will forward that message onto the appropriate Group Rooms & Golf Coordinator to process the cancellation.

Weekly Tasks

1) Check the SR9 report for <u>new</u> or <u>modified</u> bookings so you can edit the Reservation Tiles and charge/refund the guests accordingly:
   - If the Booked Dt and Last_Edit Dt match, this is likely a new booking
   - If PK is listed under "Who" next to Last_Edit, this is likely a change made by a guest online



Code 12Z6GE Group Name Oppenheimer & Co. Inc. Spanish Bay — Arrival 5/17/2023 Departure 5/21/2023

Res No	Name	Unit	Type	Booked Dt	Who?	Last_Edit	Who?	Pkg	DailyRate	Share
1359AM	Davidson, Mark	BRL7		3/31/2023	PK	4/12/2023	LE	B2Z6GE	$730.00	
1359O2	Mckechnie, Mark	BRG7		4/3/2023	PK	4/12/2023	LE	B2Z6GE	$730.00	
1359AV	Orton, David	BRC7		3/31/2023	PK	4/12/2023	LE	B2Z6GE	$730.00	
1357LA	Hyland, John	BRF7		3/24/2023	PK	4/3/2023	LE	B2Z6GE	$730.00	

2) Check the Allotment Report to ensure that ROH groups maintain the ROH%
   - Use the ROH Calculator in the Digital Binder to see what the ROH allotment should be.
   - ROH Pickups will automatically be placed in LRG7 (Lodge) or BRF7 (Inn). The coordinator must move guests out of those room categories and into other rooms within the block until the picked up rooms match the ROH percentage.
3) Adjust the Room Block on Pre/Post Nights to match our current SMS room availability:
   - Add Pre/Post Rooms to the Passkey Block—If you see a trend of guests picking up pre/post AND we have the room availability to add more pre/post rooms to the block
   - Reduce Rooms in the Passkey Block—If you see that that our SMS availability is dwindling on pre/post nights to the point that additional PK pickups will result in overbookings

Passkey | Reservation Tiles

ROOM PICK UP

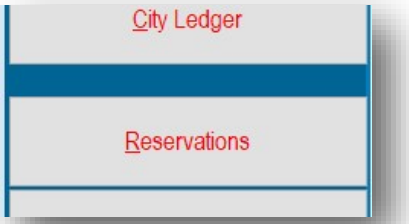
When guests book rooms through Passkey, the **rooms are automatically picked up in SMS**

- SMS creates a Reservation Tile
- SMS creates a Guest Tile for that attendee

LOCATING PASSKEY BOOKINGS IN SMS

All bookings paid for by the Master will need to be manually picked up just like a Rooming List group

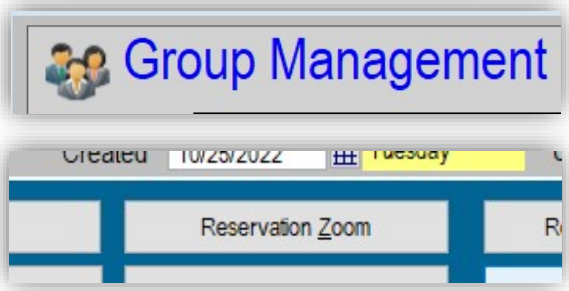
- Access the group's Guest Tile
- Click Reservations (R)
- You will see a list of all manually picked up rooms



All IPO bookings will be booked through Passkey

- Access the group's Guest Tile
- Click Group (G)
- Click Reservation Zoom (Z)

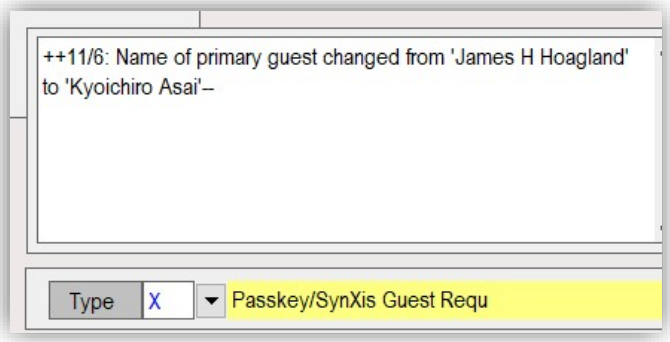
This will include both manually picked up rooms and Passkey rooms



PASSKEY RESERVATION TILES

- All groups booked via Passkey will have **PK** as the "Booked" initials in the "**Other**" section
- Passkey bookings may include an **X Note**—this will list anything the guest wrote into the notes field on their Passkey website and/or list any changes the guest made via Passkey since their initial booking.





C9|BX 7.1.24

Passkey | Edit New Bookings

1.) Run an Allotment Report and an SR9 report

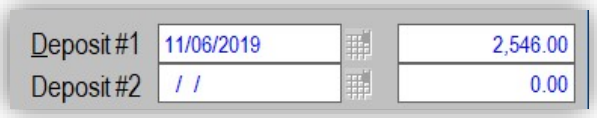
2.) Open the first Reservation Tile on the SR9 (Repeat this process for all Bookings that show on the report that they have been last edited by "PK")

3.) For ROH bookings, use the Allotment Report to determine if we must change the default Room Category so we maintain ROH% - All ROH Passkey bookings default to BRF7 (Inn) or LRGS (Lodge)

4.) Access Value+Zoom to calculate the total for all room nights (This is what we will charge the CC)

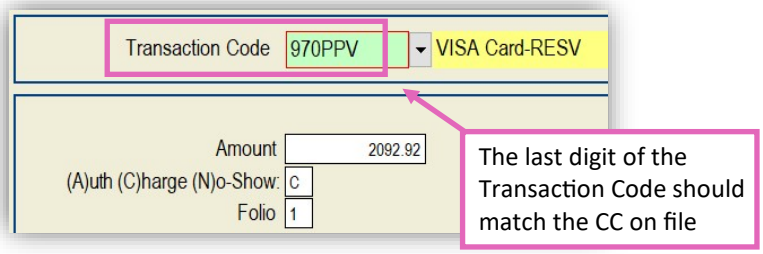


5.) Access Special Billing and input the total of all room nights into Deposit #1



6.) Access the Guest Tile and make a note of what type of credit card the guest has on file:
Mastercard | American Express | Visa | Discover

7.) From the Reservation Tile, click Bills and fill out the window based on the image below:



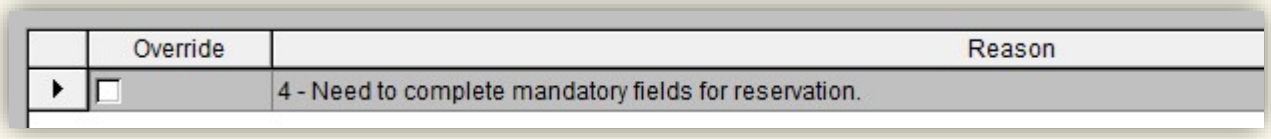
- Page Down to save
- Select Yes the charge is correct
- Page Down to initiate the charge
- Escape until you return to the Reservation Tile

8.) Check for an X Note
- This note contains any freeform notes written by the guest when they booked online
- This area commonly includes Room Feature Requests

9.) Send a **GEMAIL**
Letters > Add > Select GEMAIL > Send Later

10.) Once you have completed your edits for all bookings:
- Run and Save a new Allotment Report in the Group Folder
- Email an SR9A Delegates List to the Planner

Note—If you receive the below "Failure Reason", ensure the Market and Sub-Market are C and C10.



Passkey | Change A Passkey Booking

There are only two changes a Passkey guest would make through the website:
Date Modifications and Room Category Changes (Tiered Rates Only).

Passkey guests are instructed to make all edits to their stay through the Passkey website, as opposed to asking the Planner or the Group Rooms & Golf Coordinator to make the change. We explain to them that, if we make the change on our end, the interface between Passkey and SMS will be severed which will prevent them from making any further changes.

The more specific explanation is that, if we make a change, and the guest later makes an additional change in Passkey, the Passkey change will override anything we manually modified in SMS. This will cause problems by erasing our edits.

ROOM UPSELLS / DATE EXTENSIONS

1. Read the X Note to see what has been changed
2. Verify that the Change was successful on the Reservation Tile
3. Charge the CC for the difference in the room rate—we collect all IPO nights at time of booking
4. Update Deposit #1 within Special Billing to match the new room night total
5. Send a GEMAIL: Letters (L) > Add (A) > Select GEMAIL > Send Later
6. Run/Save a new Allotment Report
7. Send the planner a new Delegates List

ROOM DOWNSELLS / DATE REDUCTIONS

1. Read the X Note to see what has been changed
2. Verify that the Change was successful on the Reservation Tile
3. Adjust the funds
    - Pre-cutoff—set an ADM Trace (dated for tomorrow) to refund the room rate difference
    - Post-cutoff—Set a GBC Trace (arrival date) to refund only if obligation is met or we reach 100% occupancy

ADM Trace (dated for tomorrow)
Please Refund $596.45 to Charles Barkley R#12345. Guest downsold to lower room category.

GBC Trace (dated for arrival)
Charles Barkley R#12345 downsold stay post cut-off. Refund $596.45 if we reach 100% occupancy or group meets their obligation.

4. Update Deposit #1 within Special Billing to match the new room night total
    - If post cut-off, skip this step
5. Send a GEMAIL: Letters (L) > Add (A) > Select GEMAIL > Send Later
6. Run/Save an Allotment Report
7. Send the planner a new Delegates List
    - If post cut-off, include a Block to Actual

Passkey | Cancel A Passkey Booking

1. Manually Cancel the Reservation Tile
    - Write PER PLANNER / PER ATTENDEE as the cancellation reason

2. Adjust the funds
    - Pre-cutoff—set an ADM Trace (dated for tomorrow) to refund the room rate difference
    - Post-cutoff—Set a GBC Trace (arrival date) to refund only if obligation is met or we reach 100% occupancy

ADM Trace (dated for tomorrow)
Please Refund $4125.65 to Charles Barkley R#12345. Guest cancelled stay.

GBC Trace (dated for arrival)
Charles Barkley R#12345 cancelled stay post cut-off. Refund $4125.65 if we reach 100% occupancy or group meets their obligation.

3. Run/Save an Allotment Report

4. Send the planner a new Delegates List
    - If post cut-off, include a Block to Actual

Passkey | Edit A Room Block

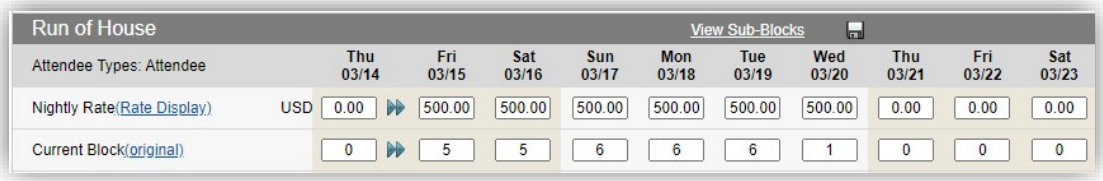
Note—All block edits for Passkey Groups must be done exclusively in Passkey, not SMS Host

Research:

1. Determine the contract structure
    - ROH—We must ensure to maintain the ROH% as we add rooms
    - Tiered Rates—The planner must request specific room categories to add
2. Check F7 General Availability and Notes
    - All rooms within the block are held from public inventory, but when increasing the block, we must ensure that we have a positive number of any room categories we add.
    - It can be ok to oversell a category if we are far enough from the arrival date and you are looking at a low tier category. Consult your manager for advice/approval.

Edit the Block

1. Navigate to your Event Home
2. Click on the property you wish to edit—This will open the "Event Inventory" page



Edit the Room Block

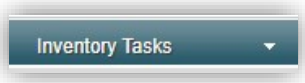
- Scroll to the Room Category you wish to edit (If ROH, there will only be a ROH category)
- Type the new number of rooms you want to block in the Current Block row
- Click Save at the bottom

Edit the Room Rates

- Scroll to the Room Category you wish to edit (If ROH, there will only be a ROH category)
- Type the new rates into the Nightly Rate row for the appropriate dates
- Click Save at the bottom

Edit the Date Range

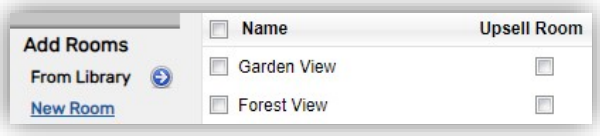
- Click the Inventory Tasks Dropdown and select Manage Dates
- Edit the date range of the Inventory Dates section using the calendars
- Close the window and click Save at the bottom of the Event Inventory Page





Add Additional Room Categories

- Click the Inventory Tasks Dropdown and click Add Rooms
- Check the boxes of the Room Categories you wish to add, then click Add
- Close the window and click Save at the bottom of the Event Inventory Page



Passkey | RezHUB

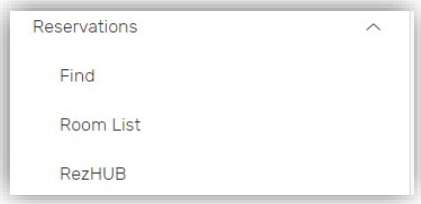
Why Look At RezHUB?

- If a group attendee claims that they did or did not make a particular booking or modification, you can check RezHub to find a time stamp of the booking or modification.
- If a group attendee says that they made a change, but SMS does not reflect this, you can check RezHub for any "Unprocessed Transactions."
- View Passkey Cancellations—These will appear in RezHub as "Unprocessed Reservations". (Cancellations in Passkey will not show up on the Passkey Delegates List.)
- View attendee credit card numbers (Requires Group Reservations Manager access)

1.) Access your group's Event Homepage



2.) Expand the menu tab labeled Reservations and click RezHUB

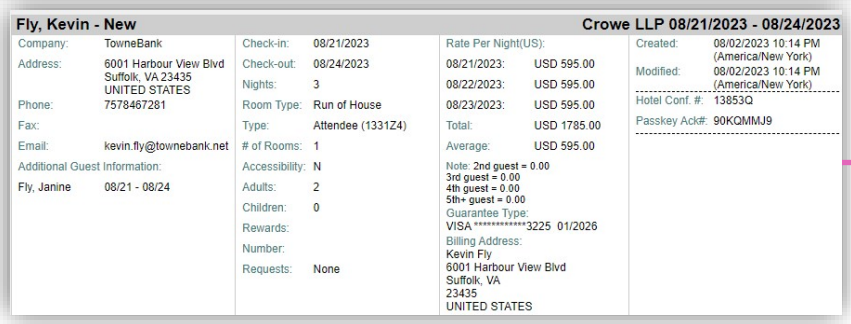


3.) Set the Res Delivery Status to your preferred search, then click Search





Res Stat	Last Name(adults)	Hotel Name	Event Name	Passkey ACK#	Hotel Confirmation#	Process Date	Reason	Action
New	Fly, Kevin(2)	The Inn at Spanish B...	Crowe LLP	90KQMMJ90	13853Q	08/02/2023		
Mod	Murphy, Kevin(1)	The Inn at Spanish B...	Crowe LLP	3RGPS6OC0	1349GP	07/31/2023		
Mod	Hayes, William(1)	The Inn at Spanish B...	Crowe LLP	RGMZ5MF30	1347XW	07/21/2023		
Mod	Hayes, Gregory(1)	The Inn at Spanish B...	Crowe LLP	V27LJM1B0	1347XY	07/21/2023		
Mod	Cvrkel, Mark(1)	The Inn at Spanish B...	Crowe LLP	Q9A834K00	1347Y0	07/21/2023		
Mod	Kliegl, James(1)	The Inn at Spanish B...	Crowe LLP	ENJZDBGI0	13475A	07/19/2023		
CANCEL	Wagner, Ronald(0)	The Inn at Spanish B...	Crowe LLP	VZT14IPC0	1349CY	07/17/2023		



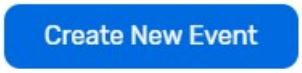
C9|BX 11.13.23

Passkey | Create A Website (1/5)

The Reservations Template must be set before you begin this process.

1.) Access the group contract and locate the Res ID and Group Room Block

2.) Access the Homepage of Passkey and click Create New Event

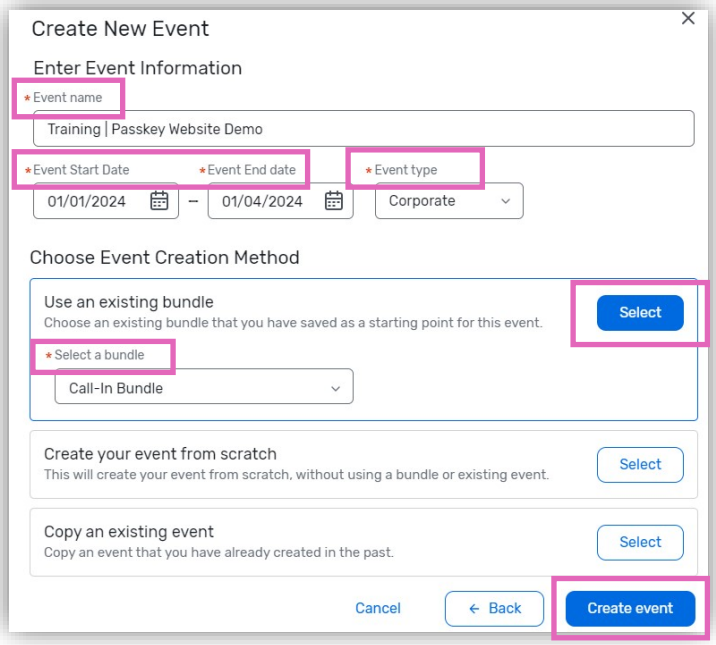


3.) Select Multiple Hotels, then hit Next

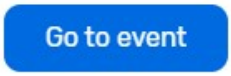
By default, we will generate a website for both The Inn at Spanish Bay and The Lodge at Pebble Beach

4.) Enter/Select the following:

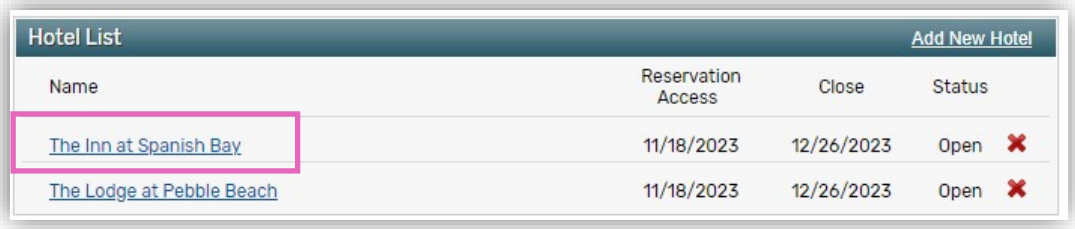
- Post-As name from the contract
- Peak Nights Only
- Always Corporate
- Always use the Call-In Bundle
- Click Create Event to complete



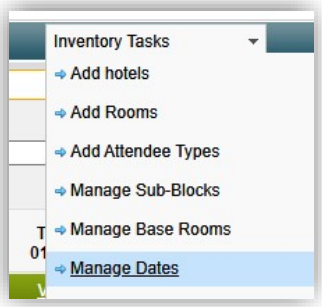
5.) Click Go to Event



6.) From the Hotel List, select the first property



7.) Click the dropdown labeled Inventory Tasks and select Manage Dates



Passkey | Create A Website (2/5)

8.) Input the following:

- Hotel Close = 3 business days prior to 1st date of room block
- Reservation Access = Today
- Click OK

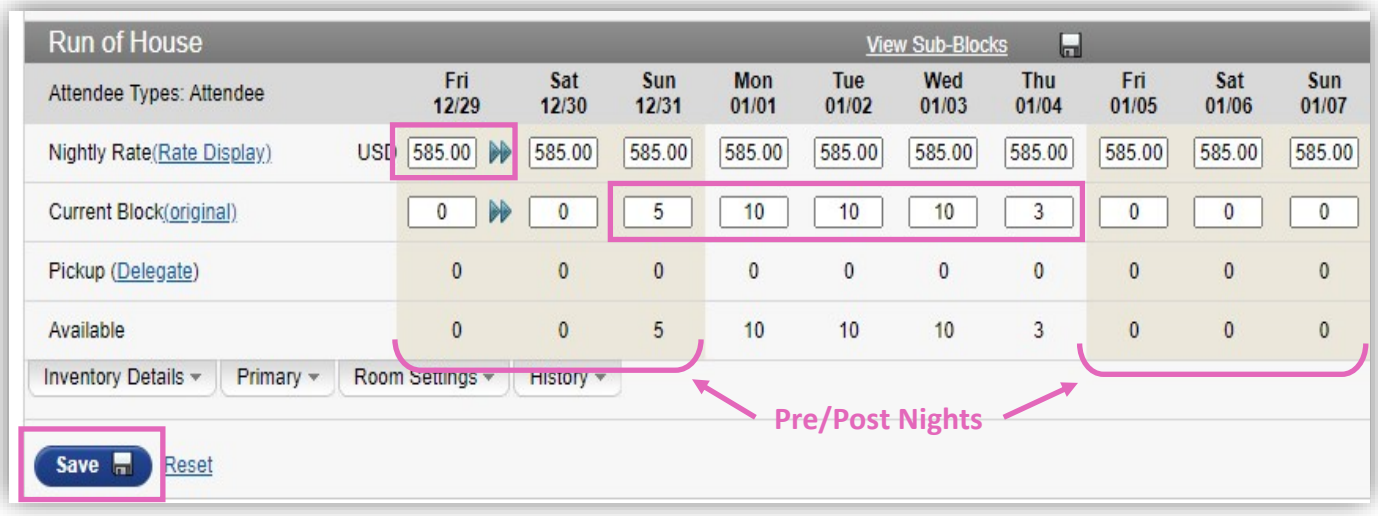
Repeat this step for both properties



INPUT THE ROOM BLOCK

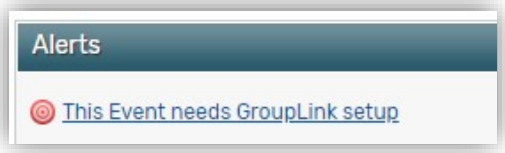
9.) Enter the block according to the contract:

- If you have a group with Tiered Rates:
  A. Click the Inventory Tasks button and select Add Rooms
  B. Check the boxes of all rooms at that property, then click Add to save
- Input the nightly rate into the first date in your block, then , click the double arrows to apply that rate to all nights
- Enter the room block into each appropriate room category according to the contract
- Do not input suite upgrades, comp rooms, or staff rooms
- Input Pre/Post Nights into the dark beige shaded dates
  A. Check SMS before entering pre/post nights to ensure we have inventory:
    - Check availability in F7 General Availability
    - Check for Notes such as Stop Sells
  B. Guidelines (subject to interpretation)
    - If availability is 40+, add 10 rooms
    - If availability is 15-40, add 5 rooms
    - If availability is less than 15, do not add any rooms
  C. If the planner asks you to add pre/post, build them into the group's contract and include them in the contracted block
- Click Save to finalize



Passkey | Create A Website (3/5)

GROUP LINK SETTINGS



10.) In Alerts, click This event needs GroupLink setup

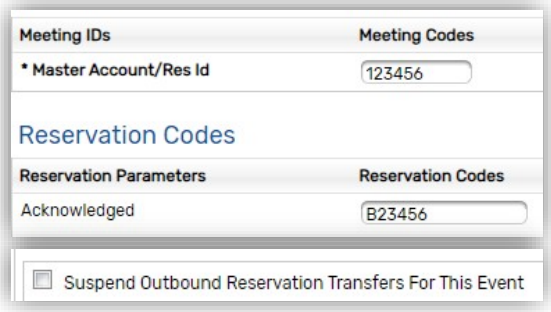
11.) Select the primary property, then hit continue

12.) Input the following on the Event tab:

- Master Account / Res ID
- Reservation Code (Package Code)

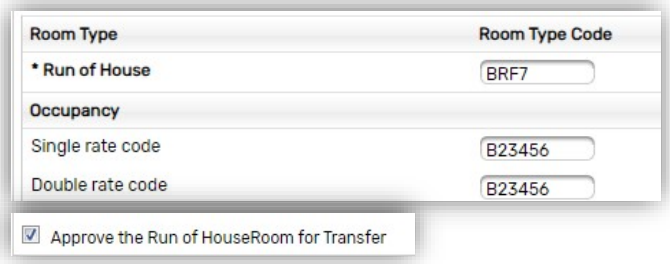
Note: The Package Code = the Property (L/B/P) + last 5 digits of the Res ID

- Make sure Suspend Outbound Reservation Transfers is un-checked
- Click Save



13.) Input the following on the Rooms tab:

- Run of House Room Type Code = LRGS at The Lodge / BRF7 at The Inn
- Occupancy = Package Code
- Check the box to Approve the Run of House Room for Transfer
- Click Save



14.) Review all data on the Groups tab and the Blocks tab, then hit Save

15.) Click GroupLink from the left menu, then repeat this process for the second property

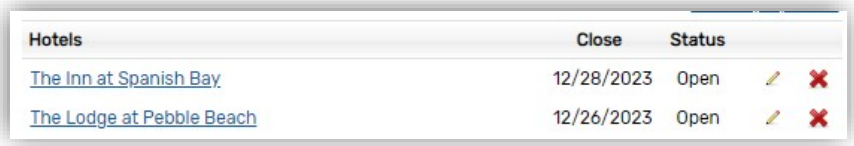
- The second property will be a "dummy" website, so you can use the same Res ID
- If the group decides later that they want rooms at the second property, you will create an overflow booking via Amadeus, then, once the City Ledger is created for the over-flow, you can update this property's Res ID in Passkey appropriately

Passkey | Create A Website (4/5)

WEBSITE DESIGN

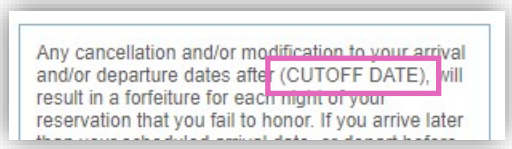
16.) Click Advanced Options from the left side menu, then select Hotels

17.) Select the first property



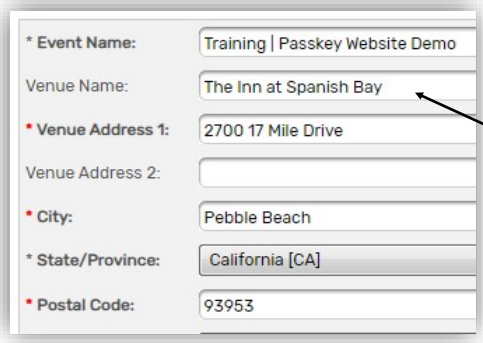
18.) In the text box of the Hotel Cancel Policy, input the cutoff date, then click Save

19.) Click on the next property and repeat



20.) For the Inn at Spanish Bay Only:

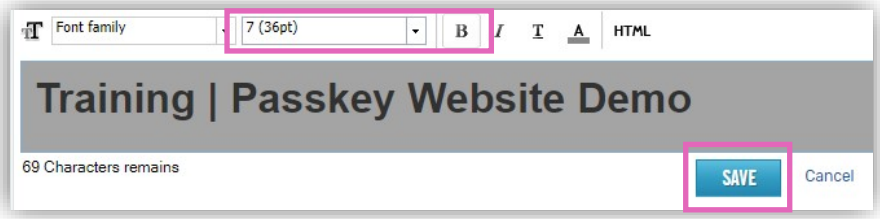
A. Click Details from the left side menu
B. Click Details within the dropdown
C. Update the Venue Name
D. Update the Address
E. Click Save



If your group is booking multiple properties, title the Venue Name "Pebble Beach Resorts"

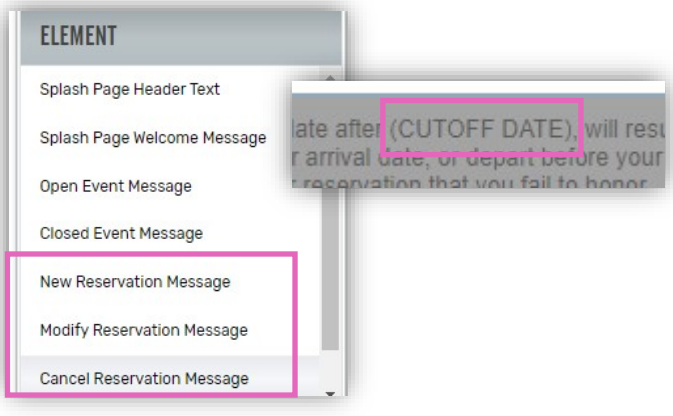
21.) Click on Website from the left side menu, then select Event Website

22.) Edit the Welcome message to the Post-As name—Use the biggest font and bold it, click Save



23.) Add the Cutoff Date to the following messages:

- New Reservation Message
- Modify Reservation Message
- Cancel Reservation Message



Passkey | Create A Website (5/5)

25.) Click on the Images tab

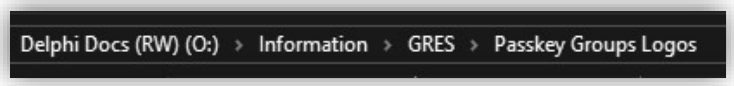
26.) Event Logo—This defaults to The Inn at Spanish Bay Logo, so you must edit this for The Lodge

A. Click the plus sign



A. Click Browse

B. Locate the desired logo in the O Drive:

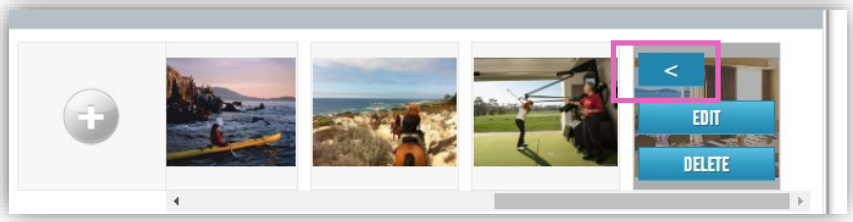


27.) Splash Page Image—If your group has a logo, you can upload that here

28.) Event Images—Add 3 images that are specific to the group's primary property

A. You can find these images in the same O Drive folder as above

B. The images will, by default, be added to the end of the image list—Use the arrow to move them one by one to the beginning of the list of images so they will be prominently displayed



29.) Click View All URLs at the top of the page



29.) For the Open Event, click Add

30.) Edit the end of this URL to the Post As Name of the group, then click the save icon



Sertifi | Send Letter of Authorization

Send A Letter of Authorization to collect credit card information from group attendees via email.
Note—If you will be sending more than 3 LOAs, create a custom LOA Form for your group.

1.) Log into **Sertifi**

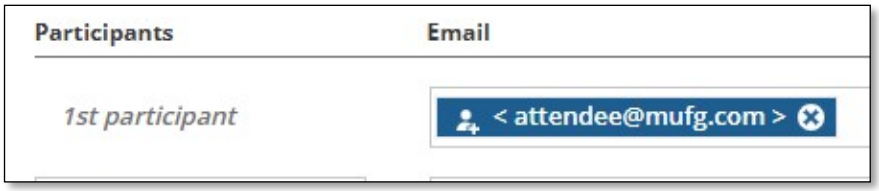
2.) On the Home page, click **Create New**



3.) Fill out the following fields:

- **File Name** = PBCAUTH_[Group Name]_[Reservation Tile #]
- **1st Level Signer** = Email address of the group attendee
- **CC (Non-Signer)** = gres@pebblebeach.com



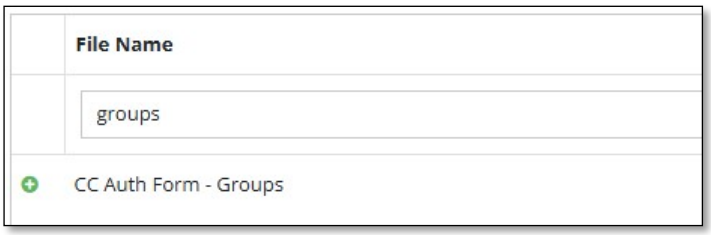




4.) Click **Next**

5.) Click **Add Document From Library**

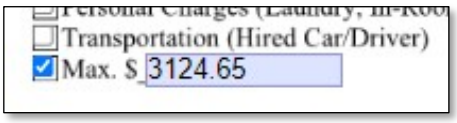
- Type 'Groups' into the search bar & Click on the form you want to send & Click add/remove



6.) Fill out the following fields on the form:

- **Guest Name**
- **Arrival Date**
- **Itinerary #** (Enter the Reservation Tile #)
- **Check the box** labeled "**Max**" and input the **total amount** you will charge the guest





7.) Click the **Save icon**, then click the **door icon** to exit



8.) Click **Next** then **Send Now**



*You will receive an Outlook Email when the guest **receives**, **opens**, and **signs** the document*

GRES Coverage Cheat Sheet

Billing Disputes/Inquiries:

- Review Billing Instructions on the Resume
- Review the Rooming List within the Group Folder for special billing notations
  See "Resumes" SOP in Digital Reference Guide

Golf Pairings/Add-Ons:

- Forward Pairings and Rental Club information to the appropriate Pro Shop
- Forward Caddie Requests to Caddie Masters

Golf Billing or Resell:

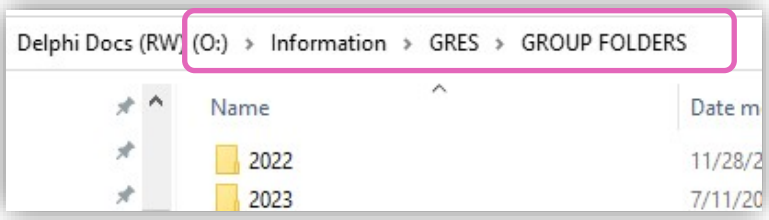
- Add Golf Billing Tee Sheet Notes based on the Resume
  See "Golf Billing" SOP in Digital Reference Guide

Golf Resell:

- Cancel the tee times and Reduce the Block according to the resell request
- Add A Resell Tee Sheet Note to the now available tee times
  See "Edit A Golf Block" and "Golf Resell" SOPs in Digital Reference Guide

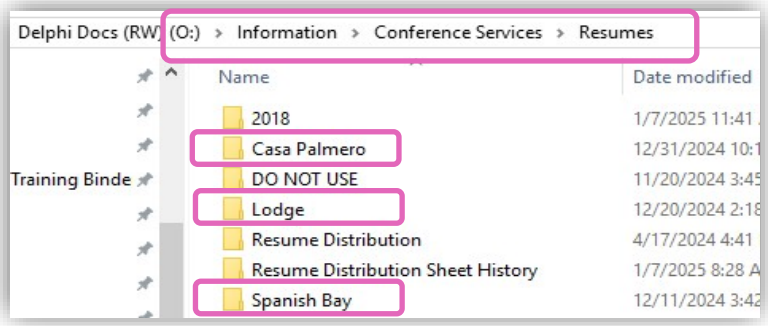
Update 2 Notes Upon Arrival:

- If 2 Notes are missing, update 2 Notes based on the Block to Actual in the Group Folder
- If Updating 2 Notes due to a change:
  - ◊ Groups may always increase room nights
    - ◊ Verify on the Block to Actual that the group is not exceeded their contracted number of Staff rooms per night
  - ◊ Groups may make lateral date shifts that do not change the totals
  - ◊ Groups may only decrease room nights if there are extenuating circumstances
    - ◊ Internal group decreases are permitted since there is no financial liability
- The "Group Variance Report" will not be accurate if the group is Obligated to pay for more rooms than they are occupying.
  - ◊ If the Front Desk asks us to increase the 2 Notes per the Group Variance Report, you can do this as the omission of rooms was likely a mistake.
  - ◊ If the Front Desk asks us to decrease the 2 Notes based on the Group Variance Report, check the Block to Actual to see if the group has a higher obligation than their current block.



GROUP FOLDERS contains

- Block to Actuals
- Rooming Lists



RESUMES contains Resumes for all groups stored in 3 separate folders, one for each property.

Block to Actual / 2 Notes Examples

GROUP'S OBLIGATION **MATCHES** THEIR BLOCK

GROUP ROOM BLOCK/OBLIGATION

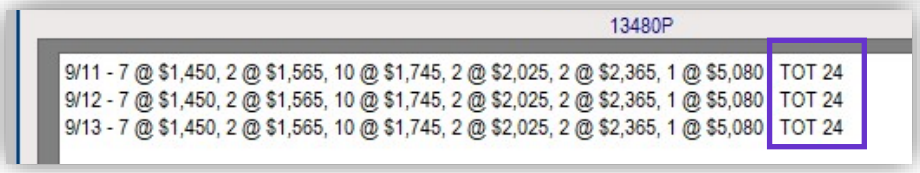
Casa Palmero

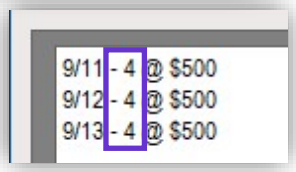
*Rate	Service Charge	Total	Room Type	Wednesday 9/11/2024	Thursday 9/12/2024	Friday 9/13/2024
$1,450.00	$30.00	$1,480.00	Estate Rooms	7	7	7
$1,565.00	$30.00	$1,595.00	Estate Studios	2	2	2
$1,745.00	$30.00	$1,775.00	Spa Rooms	10	10	10
$2,025.00	$30.00	$2,055.00	Deluxe Spa Rooms	2	2	2
$2,365.00	$30.00	$2,395.00	Courtyard Suites	2	2	2
$5,080.00	$30.00	$5,110.00	Palmero Suite	1	1	1
			Booking Total	24	24	24

The Lodge at Pebble Beach

*Rate	Service Charge	Total	Room Type	Wednesday 9/11/2024	Thursday 9/12/2024	Friday 9/13/2024
$500.00	$28.00	$528.00	Staff Rooms	4	4	4
			Booking Total	4	4	4

** Rate is exclusive of the **10.5%** per night county occupancy tax and a **0.195%** per night California Tourism Assessment. In addition, the county charges **$7.00** per occupied room night for the County Tourism Assessment.*





GROUP'S OBLIGATION IS **HIGHER** THAN THEIR BLOCK

GROUP ROOM BLOCK

Rate	Room Type	Wed 6/19	Thu 6/20	Fri 6/21	Sat 6/22	Sun 6/23	Mon 6/24	Total
$950.00	Run of House	4	39	79	89	68	5	284
$950.00	Suite Upgrade (1)	0	1	1	1	0	0	3
	Booking Total	4	40	80	90	68	5	287

Should you require additional guestrooms, they will be confirmed on a space available basis and added to your contracted nightly group room block.

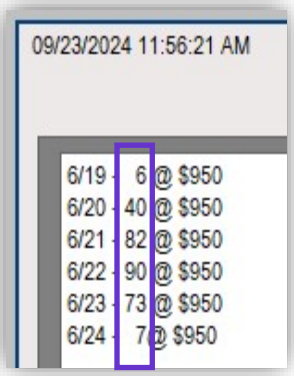
After **Monday, May 20, 2024,** any reduction to the Group Room Block will be assessed a cancellation fee equal to the group room rate multiplied by the number of guestrooms for each night.

Per your group's room reduction schedule, your nightly room obligation is:

GROUP ROOM BLOCK OBLIGATION

Rate	Room Type	Wed 6/19	Thu 6/20	Fri 6/21	Sat 6/22	Sun 6/23	Mon 6/24	Total
$950.00	Run of House	6	39	81	89	73	7	295
$950.00	Suite Upgrade (1)	0	1	1	1	0	0	3
	Booking Total	6	40	82	90	73	7	298

A refund will be made for any rooms that are resold, however, these must be the last rooms sold in order for the Hotel to achieve 100% occupancy. Due to day-to-day variations in Hotel occupancy, room block obligations are figured on a per night basis, rather than cumulatively over the group's meeting dates.

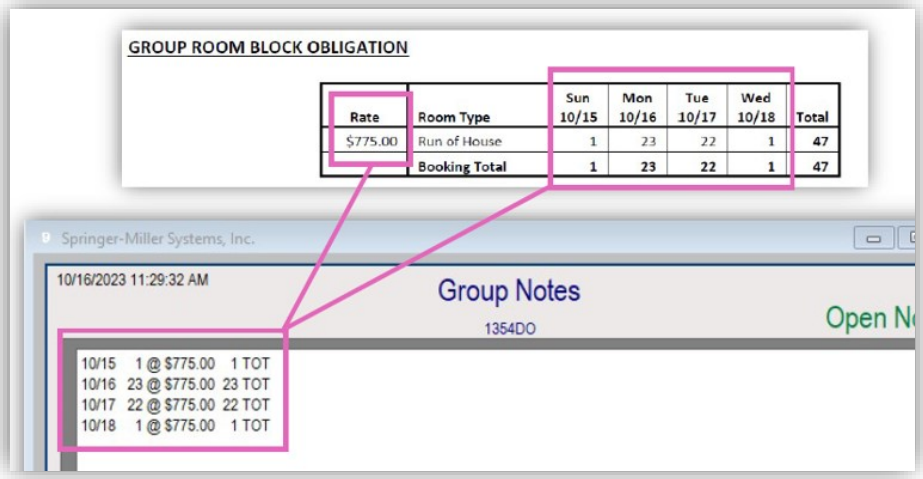


Update 2 Notes (1/2)

2 Notes are input based off of the Room Obligation chart within the Block to Actual

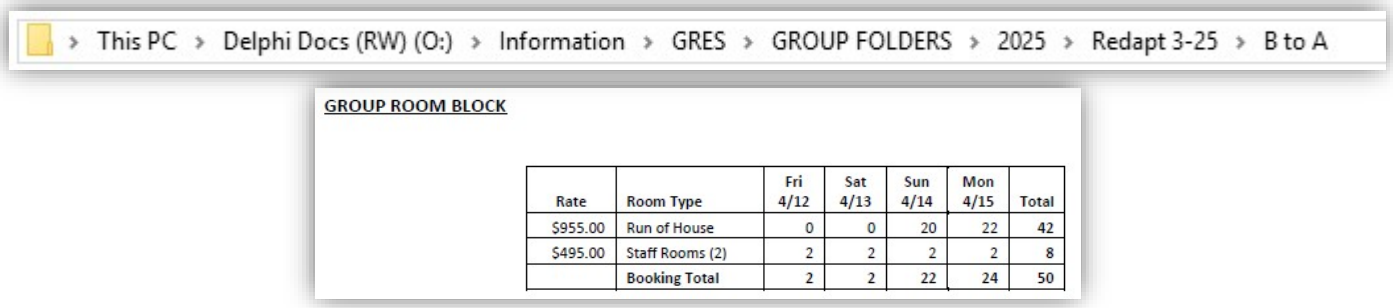
Access 2 Notes

- Access the SMS Homescreen
- W (Workslate)
- R + [Res ID]
- Page Down
- Escape
- G (Group Management)
- 2 (2 Notes)



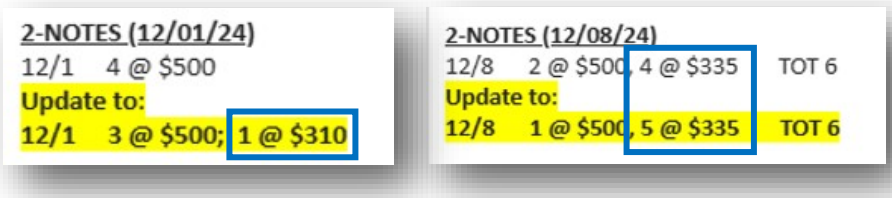
2 Notes Increase

- **General Rule**—Groups can always increase their number of rooms/nights
- **Staff Rooms Exception**—Groups cannot increase Staff Rooms per night above the contracted number
- **Verification**—Always check the current Block to Actual before making increases to ensure the nightly Staff Room limit is not exceeded.



Lateral 2 Notes Update

- **General Rule**—Groups can make changes that do not affect the overall room/nights totals, such as:
  - ◊ Date Shifts—Guests who are shifting their trip dates without decreasing the overall number of rooms/nights
  - ◊ Rate Changes—Requests to decrease the number of rooms at 1 rate while simultaneously increasing the number of rooms at another rate
- **Staff Rooms Exception:** Groups cannot increase Staff Rooms per night above the contracted number
- **Verification:** Always check the current Block to Actual before making increases to ensure the nightly Staff Room limit is not exceeded.



Update 2 Notes (2/2)

2 Notes Decrease

General Rule—Groups can only decrease rooms/nights without obligation if there are extenuating circumstances.

Good morning,

Can we please get the 2notes updated for yesterday. It should read 73 @ 685. We were ok'd to shorten as Gary Klasse could not make it due to medical complications. His replacement was only able to stay up to the 3rd. Thank you.

Exceptions— Internal (a PBC/LCC event) do not have a financial obligation when decreasing, so no extenuating circumstance is needed.

Subject: 2notes PB Team Championship #12L3SV

Good evening,

Can we please update the 2notes for the PB Team Championship? They should be updated to what is below:

*12/20 78 @ $641.00, 32 @ $894.00, 3 @ $1,260.00, 1 @ $380.00, TOT 114
*12/21 78 @ $641.00, 32 @ $894.00, 3 @ $1,260.00, 1 @ $380.00, TOT 114

We had a guest checkout early Margo and Brittany are aware. Thank you!

Group Rate Variance Report—
If the request to decrease is due to a difference in the Group Rate Variance Report, you must check the Block to Actual to see if the group is obligated to pay for more rooms than they are occupying.

Good morning Group Reservations,

Per attached Resume Change #1 (dated 11.25.24) and as per the Group Rate Variance Report dated Friday, December 6th 2024), can you please update the 2-NOTES for Lathrop Construction Associates Holiday Party (# 13E666) per below?

2-NOTES (12/06/24)
12/6 - 63 @ $450.00
Update to:
12/6 - 62 @ $450.00

If a group decreased their room block beyond allowable attrition or after their cut-off date:

- The Block to Actual will show two charts: the block of occupied rooms vs. the block of rooms the group is obligated to pay for
- 2 Notes should always be updated based off of the Obligation Chart

GROUP ROOM BLOCK

Rate	Room Type	Wed 6/19	Thu 6/20	Fr 6/
$950.00	Run of House	4	39	
$950.00	Suite Upgrade (1)	0	1	
	Booking Total	4	40	

GROUP ROOM BLOCK OBLIGATION

Rate	Room Type	Wed 6/19	Thu 6/20	Fri 6/21	Sat 6/22	Sun 6/23	Mon 6/24	Total
$950.00	Run of House	6	39	81	89	73	7	295
$950.00	Suite Upgrade (1)	0	1	1	1	0	0	3
	Booking Total	6	40	82	90	73	7	298

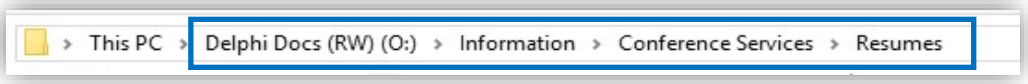
Billing Disputes/Inquiries

There are two resources you can use to verify billing for a Group:

- The Resume—Where all official billing instructions should be notated
- The Rooming List—Where planners will write billing instructions that do not always make it to the Resumes

Locate Billing on the Resume

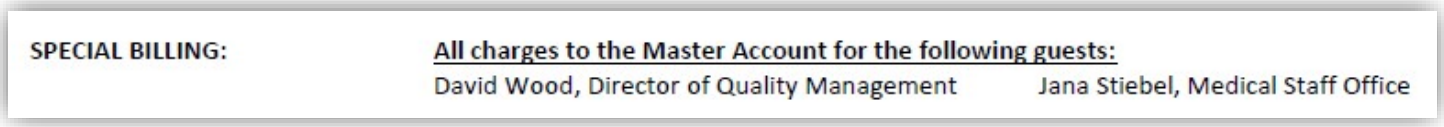
- Access the Resume:



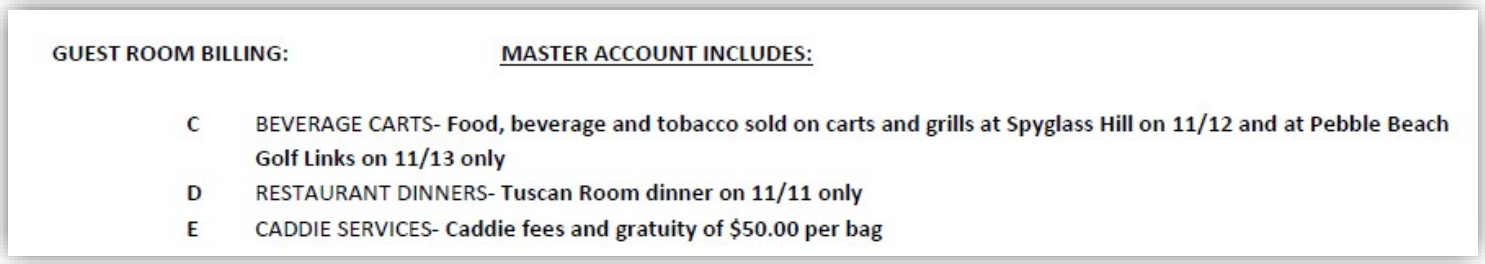
- Verify Billing
  - ◊ Authorized Signatures—The Planners as well as anyone indicated as an "Authorized Signature" are allowed to make changes to the billing for a group. Planners do not need to be listed as an Authorized Signature to make changes.



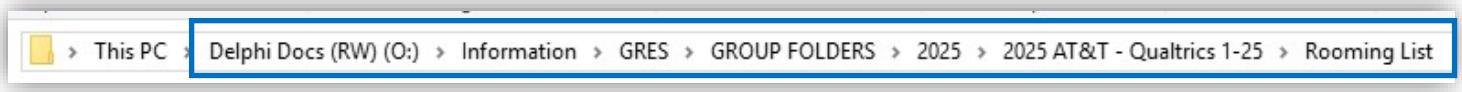
  - ◊ Special Billing—Anyone listed under "Special Billing" will have special instructions as to how their charges should be handled that differ from the majority of group guests.



  - ◊ Guest Room Billing—Will outline what charges are designated to be covered by the group vs. what will be paid for by each individual attendee.



Locate Billing on the Rooming Lists



1	First	Last	Lodge	ISB	Arrival Date	Departure Date	Payment	Room Type
2	Heidi	Shaffer	1		14-Aug	19-Aug	Guest Presents Own Credit Card	
3	John	Clinard	1		15-Aug	19-Aug	All Charges to Master Account	Suite 144
4	Mark	Truby	1		14-Aug	19-Aug	All Charges to Master Account	

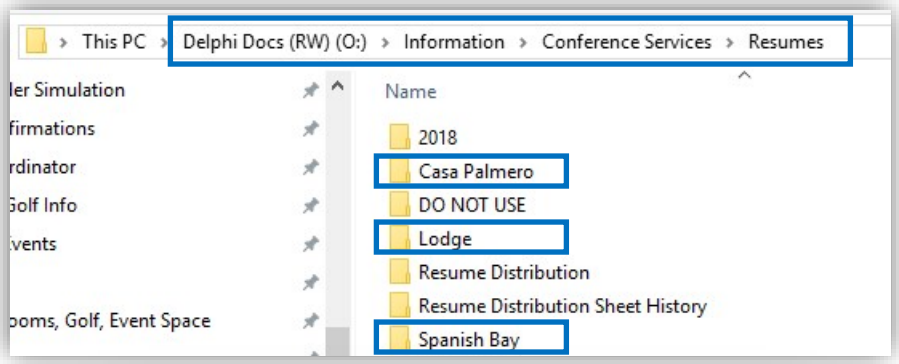
Group Golf Inquiries (1/2)

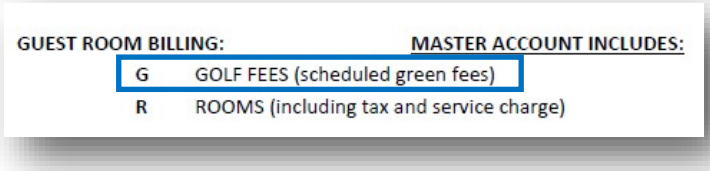
Golf Pairings/Add-Ons:

- Forward Pairings and Rental Club information to the appropriate Pro Shop
- Forward Caddie Requests to Caddie Masters

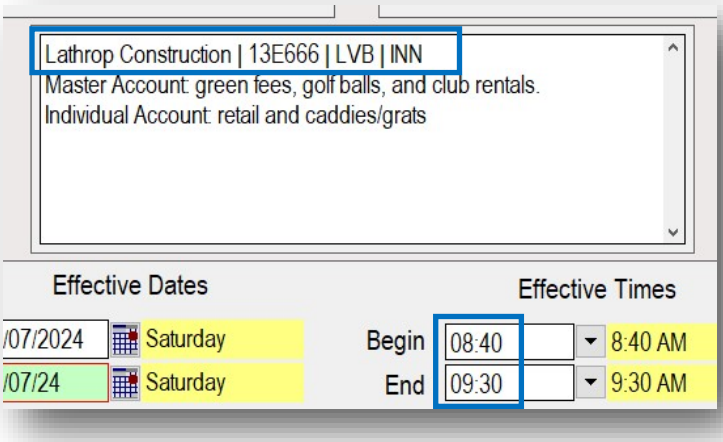
Input Golf Billing Note:

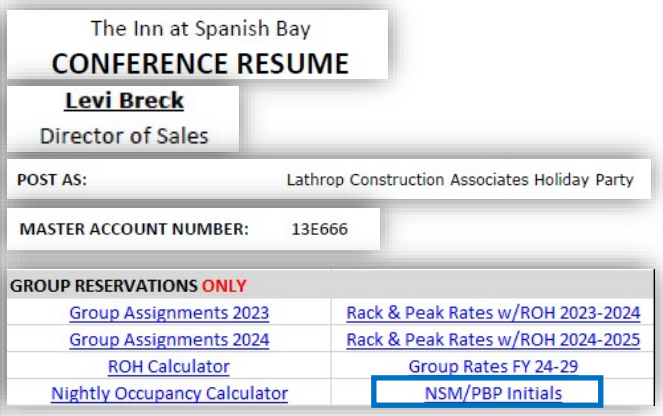
- Access the Resume and review the billing instructions for golf





- Locate the group's block on the tee sheet
- Input a Tee Sheet Note that outlines what charges will go to the Master vs. the Individual
    - ◊ The first line of the note must be Post As| Res ID | NSM/PBP Initials | Property
        - The Post As, Res ID, Property, and NSM/PBP name can be found on the Resume
        - Initials can be found on the "NSM/PBP Initials" document in the Digital Binder
    - ◊ The time span of the note must span the entire timeframe of the group's golf block



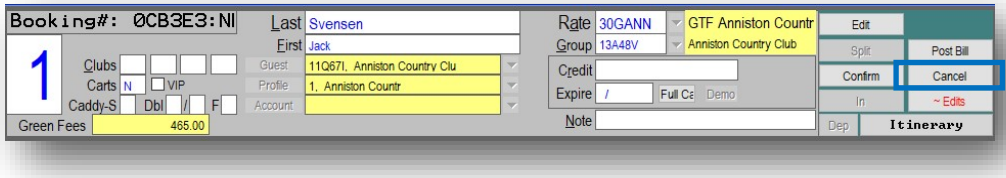


Group Golf Inquiries (2/2)

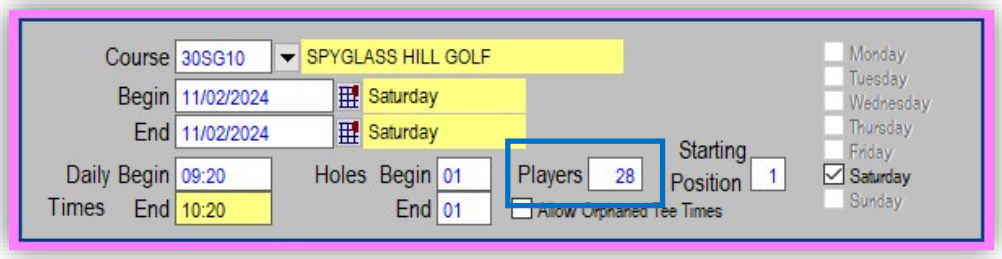
Golf Resell:

- Locate the group's block on the tee sheet

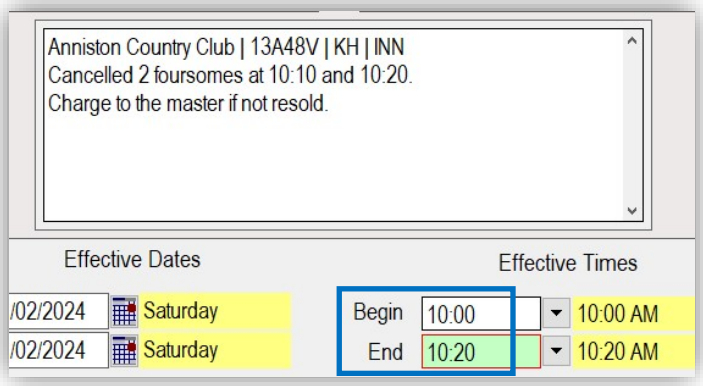
- Cancel the tee times that will be resold



- Reduce the Group's Block to open those time slots to leisure guests
  - ◊ Right click on the blue block and select "Manage Block"
  - ◊ Click Edit and reduce the "Players" in the block according to what you cancelled—Example: If you cancelled 2 foursomes, reduce the "Players" by 8
  - ◊ Page Down and Escape



- Leave a Resell Tee Sheet Note that explains to charge to the Master if not resold



  - ◊ The first line of the note must be Post As| Res ID | NSM/PBP Initials | Property
    - The Post As, Res ID, Property, and NSM/PBP name can be found on the Resume
    - Initials can be found on the "NSM/PBP Initials" document in the Digital Binder
  - ◊ The time span of the note must span the start and end time of tee times up for resell

Note—It is ok to combine this resell note with the existing Tee Sheet Billing Note:
- Leave the time span as the entire block including the time slots up for resell
- Specifically state which times and how many golfers are up for resell

Group Golf Coordinator

Resort Reservations

2024 Training Binder



Role Overview

The **Group Golf Coordinator** manages and optimizes golf operations for group bookings at Pebble Beach Company, coordinating golf reservations, room bookings, and special events.

Acting as a liaison between departments, the coordinator ensures seamless operations while maximizing course utilization and revenue, upholding Pebble Beach's high standards of service.



Primary Responsibilities:

- Manage golf reservation system inventory
- Coordinate group golf and room bookings for sales department and non-resort groups
- Configure golf tee times based on sunrise/ sunset calendar
- Set non-guaranteed and twilight starting times for all courses
- Coordinate shotguns with Sales and Golf Division
- Manage non-resort golf group requests
- Schedule special non-resort golf events and tournaments
- Maintain golf waitlist system
- Collaborate on yearly aeration schedule and communicate changes
- Assist with NCGA Tournaments, US Open, and other special events
- Identify occupancy holes and assist in soliciting Non-Resort Golf Groups

Programs & Resources

Amadeus is customer management system developed by Salesforce through which the Group Golf Coordinator manages Group Bookings and generates letters such as Golf Confirmations and Block to Actuals

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SMS Host is a hospitality management system through which the Group Golf Coordinator manages the tee sheets, runs vital reports, and manages group Guest Tiles and room blocks

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Passkey is an event management program that groups can use to reserve their rooms online rather than reserving through their company or organization's "Planner." The Group Rooms & Golf Coordinator will use this system to manage group bookings when they take on the role of Group Rooms & Golf Coordinator.

Sertifi is program that we use to securely collect confidential information, such as credit card numbers, electronically. Group Golf Coordinators use this to collect billing information for Non-Resort Golf Groups.

The Pebble Beach Company has a **Network Server** on which various departments can store documents, reports, and historical documentation.

The Group Rooms & Golf Coordinator will utilize:

- The O Drive—This drive holds documents saved by Group Reservations, Conference Services, and Sales
- The Z Drive—This drive holds documents saved by Resort Reservations which includes procedural resources

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Data Vision is a program that is required for the Group Golf Coordinator in order for them to be able to run macros on reports created by the IT department.

Outlook Organization

Folder	Subfolder
Daily Reports / Actions	Daily Transaction Summary SR1 Golf Out of Range SR8 Delegates out of Range Mis-Positioned Tee Times Group Def Ten Room Dates Tee Sheet Configuration Caddie Cash Payouts
Monday Only	SR25 RT Block Report SR7 Group Commitment Report GF23 Note of the Day Data Vision Live Golf Availability
Wednesday Only	GF21 Group Golf CXL by SY for Def/Ten GF19 Group Blocks with No Group Code SR6A Groups Cancelled Holding Blocks
Weekly Sales Report	
Employee Golf	
Golf Requests	One Sub-Folder for Golf Request formatting/verbiage updates One Sub-Folder for each Requestor One Sub-Folder for Internal Events Sort non-regular requesters into the main Golf Requests folder
Leisure Golf Moves	
Non-Resort Golf Groups	One Sub-Folder per Year
Discounted Golf Rate Codes	
Schedules	Employee Golf Aeration NCGA Robert Luis Stevenson Company Club Stillwater Golf Society Bagpipers Nike Junior Golf Camp
Youth on Course	
Block to Actuals	
AT&T Shotguns	One Sub-Folder per Year
VIP Reservations Done	Completed tasks from the _VIPRes email distribution
Suite Pickups / Turnovers	Group Golf Coordinator is backup to VIP One Sub-Folder for Groups waiting to Turnover One Sub-Folder for Turned Groups
Special Events	Special Event Holds One Sub-Folder per PBC Special Event

Department Contacts

National Sales Managers

Negotiate contracts for large corporate groups at Pebble Beach Resorts. Once signed, responsibility is transferred to Conference Services and Group Rooms & Golf Coordinators to implement the program. National Sales Managers (NSMs) will send Group Golf Requests to the Group Golf Coordinator to create, change, or cancel golf on behalf of their clients. They will also ask the Group Golf Coordinator to create Discounted Group Golf rate codes.

Sales Administrative Assistants

Provide administrative support to National Sales Managers, creating and editing contracts and client information. Sales Admins may reach out to the Group Golf Coordinator with Golf Requests and requests for Discounted Group Golf Rate Codes on behalf of their assigned NSMs.

Pebble Beach Preferred Managers

Oversee smaller groups, such as weddings, serving as the primary point of contact and managing all aspects of the event. PBP Managers will book their own group golf (meaning they will not send Group Golf Requests) and manage their own Golf Confirmations in their personal folders, but may reach out to the Group Golf Coordinator to create Discounted Golf Rate Codes.

Special Events Coordinators

Manage all special event groups, including participants and sponsors, ensuring successful execution of events. Like NSMs, Special Event (SE) Coordinators will send Group Golf Requests to the Group Golf Coordinator to create, change, or cancel golf on behalf of their clients. They will also ask the Group Golf Coordinator to create Discounted Group Golf rate codes.

Conference Services Managers

Oversee event spaces and food and beverage services for corporate groups, ensuring seamless execution. The Group Golf Coordinator may refer Non-Resort Golf Groups to Catering and Conference Services (CCS) if the group wants meeting space or food and beverage (F&B) service.

Group Rooms & Golf Coordinators

Manage room and golf bookings for corporate groups, ensuring accurate and timely arrangements. Additionally, handle edits to the contract post-initial signing, ensuring all changes are accurately reflected and communicated. Once a group's contract turns Definite and is handed over to the GRGC, the Group Golf Coordinator no longer manages that group's golf or Golf Confirmations

Group Spa Coordinator

Sell spa services and pitch spa events to corporate groups as add-ons after the initial contract is signed. The Group Spa Coordinator is also backup to VIP Reservations.

VIP Coordinators

Manage room and golf bookings for high-priority individuals, as designated by Pebble Beach Company executives, providing personalized service.

Tee Sheet Note of the Day

Add a Note of the Day

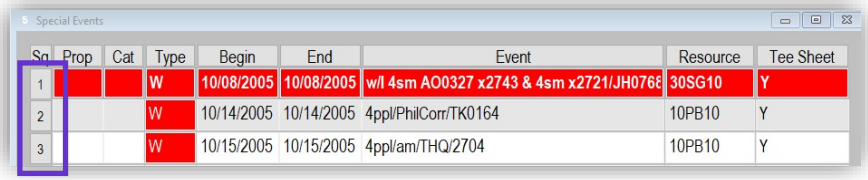
- Click E at the top of the Tee Sheet



- If the day currently has no notes, click any key to bypass this message

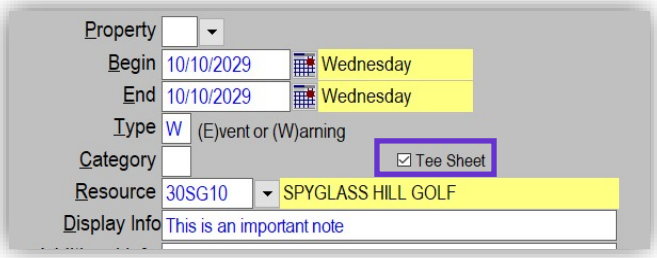


- The list of Special Events (Note of the Day Notes) will open—Select any saved event



- A—Add a Note

- Complete the following fields:
  - Property—leave blank
  - Begin / End Dates—Both default to today
  - Type—W will make the warming red / E will make the warning white
  - Check the box for "Tee Sheet" to ensure the note is visible from the Tee Sheet
  - Resource - Select the golf course the note applies to
  - Info – Type your note



- Page Down to save



Multiple Notes Same Day / Same Course

- When multiple Notes of the Day are created, only one will be visible from the Tee Sheet
- To select which note to display, check the Tee Sheet box on the not you want visible, then un-check the Tee Sheet box on all other notes
- On the Note that will be visible, type "SEE MORE" at the end of the message



Delete A Note of the Day

- Click E to open the Note(s) of the day
- Uncheck the Tee Sheet box of the note you are deleting, then save
- Click K to Delete

Group Golf Request Checklist

- Open the Golf Request Form to find the Res ID
- Open the Amadeus booking
  - ◊ Copy the Post As name
  - ◊ Check the status—Tentative or Definite
- Open the tee sheet to the day/course on the Golf Request
  - ◊ Add all golf blocks with appropriate status—RT or RD
  - ◊ If adding less than a 4sm, create that block separately and configure it as RB
- Run SR18 in SMS Host
- Make sure the SR18 matches the Golf Request
- Open the Golf Confirmation
  - ◊ If this is a new golf request, generate the Golf Exhibit in Amadeus
  - ◊ If this is a change, open the most recently saved Golf Confirmation from the O Drive Golf Confirmations folder
- Edit the Golf Confirmation to match the updated Golf Schedule
  - ◊ Date at the top must reflect today's date
  - ◊ Update the Golf Schedule to match the SR18
  - ◊ Ensure pace of play guidelines are included
  - ◊ Ensure golf rates are up to date
  - ◊ Ensure the CC section at the end is accurate / remove TBAs
- Save the confirmation into the O Drive Golf Confirmations folder
  - ◊ Save as both a Word Doc and PDF
  - ◊ Title format: "Post As MM-YY -GOLF"
- In Amadeus, attach the PDF Golf Confirmation to the Booking
- Print the following and save to the Tan Folder:
  - ◊ Golf Request Form (include the email if it has additional instruction)
  - ◊ The SR18 report
  - ◊ The updated Golf Confirmation
- In Outlook, edit Golf Calendar if:
  - ◊ You created new golf bookings
  - ◊ The group has changed courses, dates, or shotgun start times / # of players
- Reply to requestor's email and attach the PDF Golf Confirmation
- Sort the email into the Outlook Folder for that requestor
- Bring the Tan Folder to the Group Reservations Manager for approval

Golf Changes & Cancellations

GROUP GOLF REQUESTS

Changes

- Update the Golf Block on the Tee Sheet
- Run a new SR18 to confirm changes are accurate
- Update the Golf Confirmation to match the SR18
- Save the new Golf Confirmation as both a Word document and PDF to the O Drive Golf Confirmations folder
- Attach the new Golf Confirmation to the Amadeus Booking
- Print the Golf Request Form/Email, SR18, and Golf Confirmation and insert into the Tan Folder
- Update the Golf Calendar (If you changed courses, dates, or shotgun start time/# of players)
- Reply to the requestor's email and attach the PDF Golf Confirmation
- Bring the Tan Folder to the Group Reservations Manager for final review

Cancellations

- Cancel the Golf Block on the Tee Sheet
- Run a new SR18 to ensure all golf has been cancelled
- In the O Drive Golf Confirmations Folder, retitle both the Word and PDF documents by adding "zz - " to the beginning of the title



- Remove all cancelled bookings from the Golf Calendar
- Empty the physical tan folder
- Reply to the requestor's email to confirm the cancellation

NON-RESORT GOLF GROUPS

Changes

- Check the Cut-Off Date to determine guest obligation
- Quote any greens fee/deposit changes and reconfirm the cancellation policy
- Edit the Golf Block on the Tee Sheet
- Charge the additional Greens Fees/Carts+2% (or) Set an ADM Trace on the City Ledger to refund the difference in the deposit (Guests may also opt to keep funds on file for use during stay)
- If the group has changed dates, edit the Amadeus Booking to reflect the new dates
- Edit the Golf Confirmation/Contract to match the new schedule/rates/deposit
- Email the new Golf Confirmation/Contract to the Planner

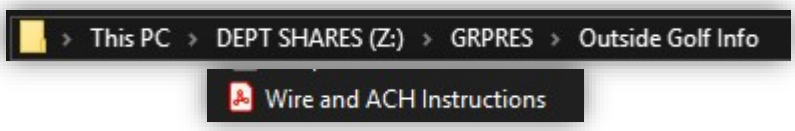
Cancellations

- Check the Cut-Off Date to determine if the guest will be refunded
- Cancel the Golf Block on the Tee Sheet
- Run a new SR18 to ensure all golf has been cancelled
- Set an ADM Trace on the City Ledger to refund the planner (or) if post cut-off, set an ADM Trace to advise that the funds are forfeit
- Cancel the Amadeus Booking
- Reply to the Planner to confirm the cancellation
- If refunding, advise 5-10 business days to receive funds

Wire Transfer / Check Payment

Wire Transfer

- Wire Transfer Instructions for the planner are located in the Outside Golf Info folder



- In your email to the planner:
  - ◊ Advise that you will be sending the contract and Wire Transfer instructions via Sertifi
  - ◊ Ask them to email you a receipt of the wire transfer instructions so you can forward it to our billing office
  - ◊ Advise that, once payment is received, we will countersign the contract

- In Sertifi
  - ◊ Send the contract via Sertifi as a Signature Document
  - ◊ Attach a PDF of the Wire Transfer instructions as a Reference Document

- Receipt of Payment
  - ◊ Hold the block as Tentative until you receive the wire transfer receipt, then turn Definite
  - ◊ Forward the receipt via email to _Billing Office and ask them to apply the funds to the group's City Ledger number
  - ◊ Countersign the contract and email the countersigned contract to the planner as evidence of the receipt of payment

Check Payment

- In your email to the planner:
  - ◊ Advise the planner to mail the check addressed to you:
    Pebble Beach Resorts
    Attention: [Golf Coordinator Name]
    2136 Sunset Drive, 2nd Floor
    Pacific Grove, CA 93950
  - ◊ Advise that, once payment is received, we will countersign the contract

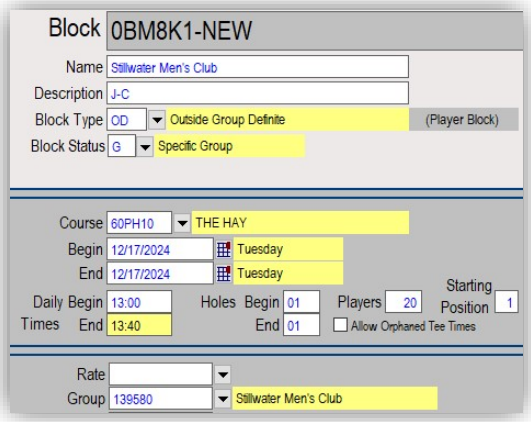
- In Sertifi
  - ◊ Send the contract via Sertifi as a Signature Document
  - ◊ You do not need to attach a credit card authorization form

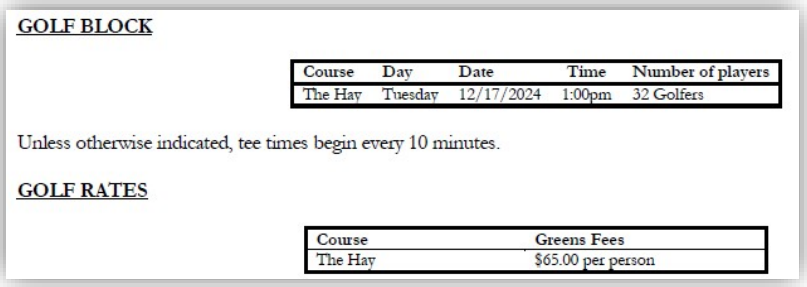
- Receipt of Payment
  - ◊ Hold the block as Tentative until you receive the check, then turn Definite
  - ◊ Upon receiving the check, walk it to the Accounting office at The Inn at Spanish Bay (do not interoffice)
  - ◊ Countersign the contract and email the countersigned contract to the planner as evidence of the receipt of payment

Non-Resort Golf Group at The Hay

Consecutive Tee Times

- Blocked according to the exact number of golfers





GOLF BLOCK

Course	Day	Date	Time	Number of players
The Hay	Tuesday	12/17/2024	1:00pm	32 Golfers

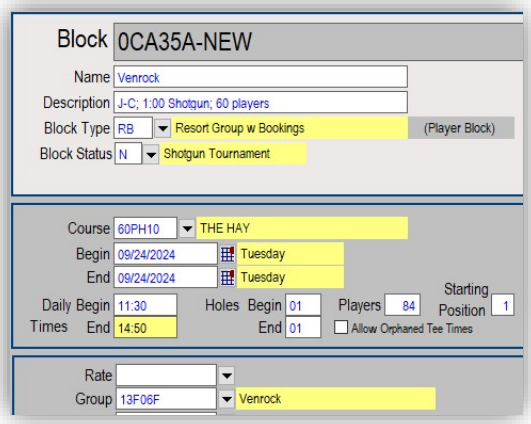
Unless otherwise indicated, tee times begin every 10 minutes.

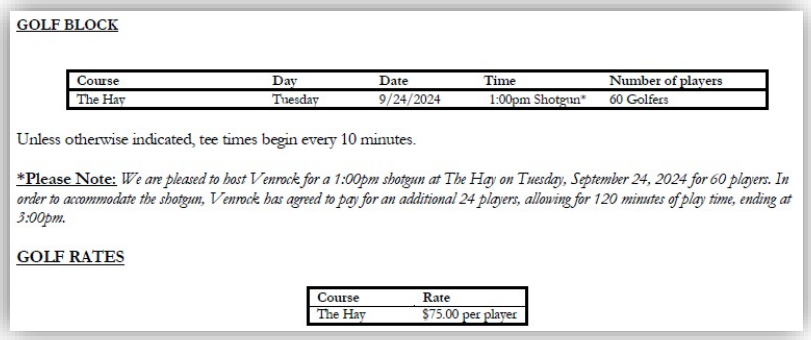
GOLF RATES

Course	Greens Fees
The Hay	$65.00 per person

Shotgun

- From the start time, block 1 hour up and 2 hours down
  For example, a Shotgun starting at 1pm would be blocked from 12pm to 3pm
- If the group is paying for all time held
  - ◊ Create one block for the entire shotgun timeframe with the block status "N"
  - ◊ When configuring, configure the entire block
- If the group will not pay for time held
  - ◊ Create one block with N status for the number of golfers being paid for
  - ◊ Create one comp block with Z status for all time remaining in the shotgun time span
  - ◊ When configuring, only configure the N block





GOLF BLOCK

Course	Day	Date	Time	Number of players
The Hay	Tuesday	9/24/2024	1:00pm Shotgun*	60 Golfers

Unless otherwise indicated, tee times begin every 10 minutes.

*Please Note: *We are pleased to host Venrock for a 1:00pm shotgun at The Hay on Tuesday, September 24, 2024 for 60 players. In order to accommodate the shotgun, Venrock has agreed to pay for an additional 24 players, allowing for 120 minutes of play time, ending at 3:00pm.*

GOLF RATES

Course	Rate
The Hay	$75.00 per player

Course Buyout

- Booked as an initial 2 hour increment with the option to purchase additional time
- Groups may buyout the 9 hole Short Course and/or the Putting Course
- Rates are set by Conference Services and involve a Food & Beverage minimum
- Consult with the Group Reservations Manager before referring to Conference Services
- Pricing as of November 2024:

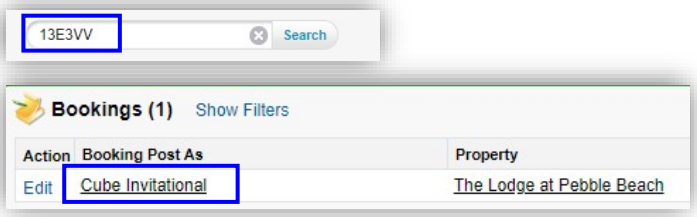
THE HAY	Buyout Fee	Food & Beverage Min.
Putting Course	$ 6,000	$ 5,000
Short Course	$ 9,000	$ 7,500
Putting & Short Course	$ 12,000	$ 12,500

Group Golf Request (1/6)

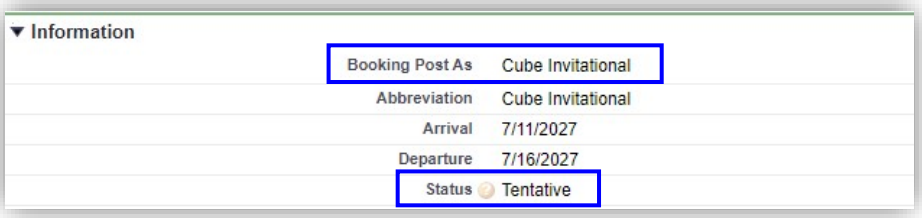
- Open the Golf Request Form to find the Res ID

Contact Name:	Denise Wynn
Contact Title:	Sr. VP Sales & Marketing
Account Name:	Alliant Insurance Services, Inc.
Address:	330 South Hope Street Suite 3750 Los Angeles, CA 90071
Phone:	213.443.2454
Res-ID	135563

- In Amadeus, locate the Booking by searching with the Res ID

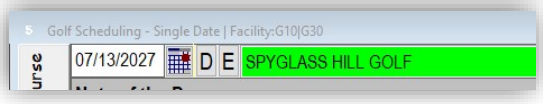


- Open the Amadeus booking
  - ◊ Copy the Post As name
  - ◊ Check the status—Tentative or Definite

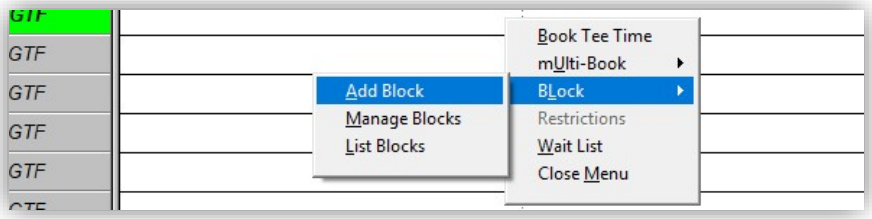


- Open the tee sheet to the day/course on the Golf Request

~ GOLF STARTING TIMES REQUESTED ~				
COURSE	**DAY**	**DATE**	**TIME**	**# PLAYERS**
Spyglass	Tuesday	7/13/2027	9:30am	16



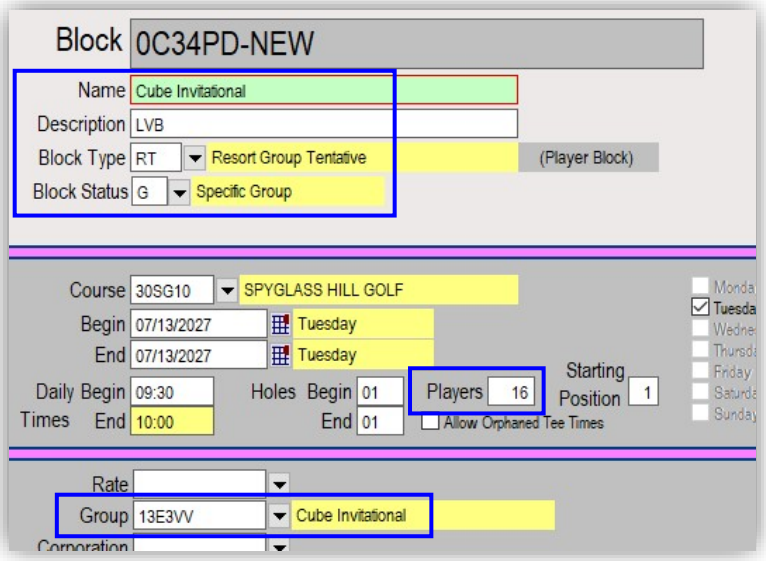
- Add all golf blocks with appropriate status—RT or RD
  - ◊ Right click in the white space of the starting time slot
  - ◊ Block > Add Block



  - ◊ If adding less than a 4sm, create that block separately and configure it

Group Golf Request (2/6)

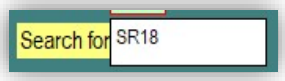
- Edit the following fields of the Tee Time Blocks window:
  - ◊ Name—Post As
  - ◊ Description—NSM initials (PBP will handle their own golf)
  - ◊ Block Type— RT (Tentative), RD (Definite), RB (Block of 3 or fewer–must be configured)
  - ◊ Block Status—G
  - ◊ Players—Total number of golfers
    - ◊ Note—this number must be divisible by 4. If the group's final tee time has less than 4 golfers, create that block separately and configure it.
  - ◊ Group—The Res ID of the Group



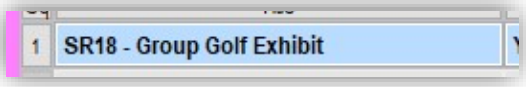
- Page Down to Save
- Repeat process for all requested blocks
- Once all blocks have been created, run an SR18 report in SMS Host
  - ◊ From the Home Screen of SMS, click R > R > S



  - ◊ Tab
  - ◊ Type SR18 into the Search for field



  - ◊ Enter
  - ◊ 01 to select the Golf Exhibit

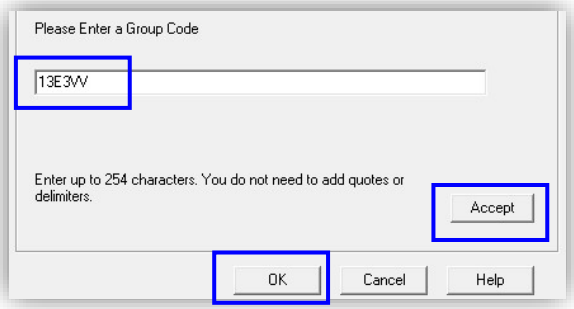


Group Golf Request (3/6)

- SR18 Continued….
  - ◊ Type Enter to select 1 Copy



  - ◊ Enter the group's Res ID (not case sensitive)
  - ◊ Click Accept
  - ◊ Click OK



- Compare the Golf Request to the SR18 to ensure you blocked everything accurately

Contact Name:	Lacy White
Contact Title:	Chief of Staff
Account Name:	Discovery Cube
Address:	2500 North Main Street Santa Ana, CA 92705
Phone:	714.913.5021
Res-ID	13E3VV

~ GOLF STARTING TIMES REQUESTED ~

COURSE	DAY	DATE	TIME	# PLAYERS
Spyglass	Tuesday	7/13/2027	9:30am	16
Pebble Beach	Wednesday	7/14/2027	11:20am	16
The Hay	Thursday	7/15/2027	2:00pm	16

Exhibit A

Ms. Lacy White
2500 North Main Stre
Santa Ana, CA 92705

Reservation Number: 13E3VV

RE: Cube Invitational
7/11/2027 - 7/16/2027

The following golf starting times have been reserved for you:

Golf Course	Day	Date	Time	Number of Golfers
Spyglass Hill Golf Course	Tuesday	7/13/2027	9:30 am	16
Pebble Beach Golf Links	Wednesday	7/14/2027	10:20 am	16
TheHay	Thursday	7/15/2027	2:00 pm	16

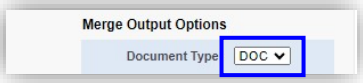
- In Amadeus, Generate A Golf Confirmation

  Note—If this is a change to an existing block, instead of generating a new Golf Confirmation, open the most recently saved Golf Confirmation in the O Drive Golf Confirmations folder

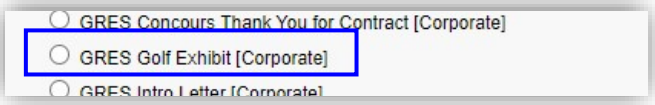
  - ◊ From the Amadeus Booking, click Merge



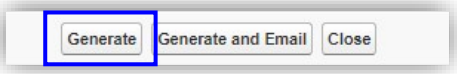
  - ◊ Change the Merge Output to Doc



  - ◊ Select GRES Golf Exhibit [Corporate]

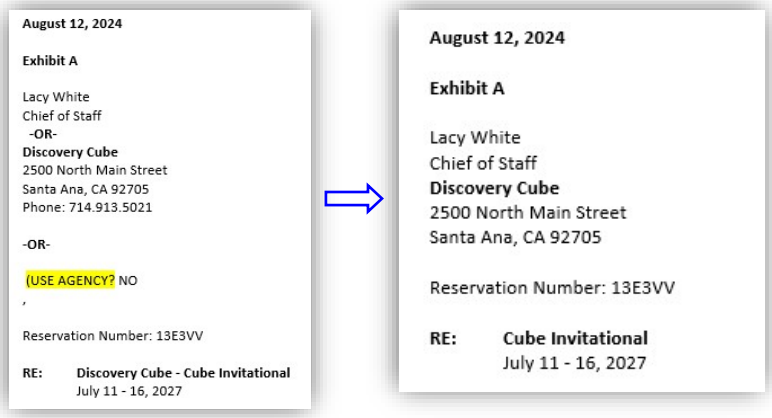


  - ◊ Un-check all checkboxes
  - ◊ Hit Generate



Group Golf Request (4/6)

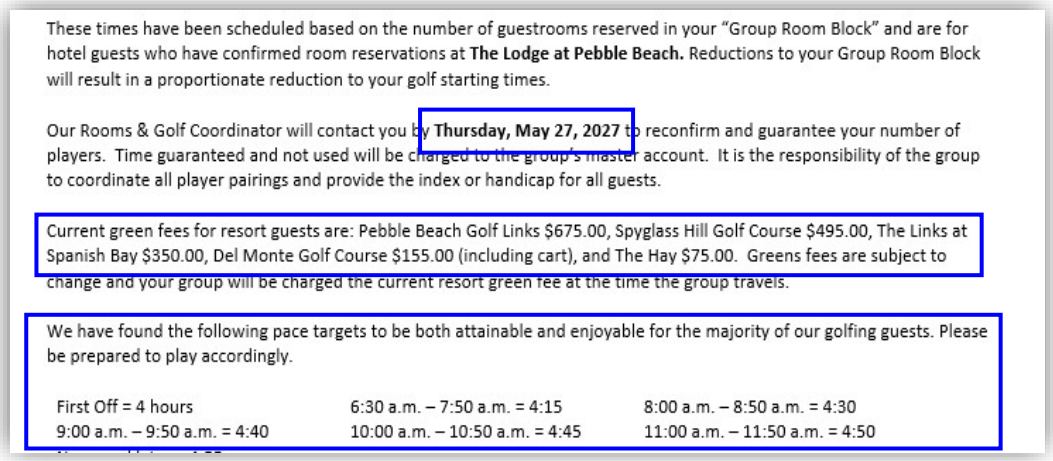
- Edit the Golf Confirmation to match the updated Golf Schedule
  - ◊ Ensure that the date in the top left reflects today's date
  - ◊ Consolidate the names that the letter is addressed to (individual, title, company)
  - ◊ Delete the Phone Number
  - ◊ In the "RE" section, use the Post As name only
  - ◊ Delete the blank table below the "RE" section



- In the Golf Course Schedule
  - ◊ Use all capital letters and un-bold text
  - ◊ Input courses in order by date
  - ◊ If multiple courses are on the same day, list them alphabetically
  - ◊ Ensure that columns properly align

GOLF COURSE	DAY	DATE	TIME	NUMBER OF GOLFERS
SPYGLASS HILL	TUESDAY	7/13/2027	9:30	16 GOLFERS
PEBBLE BEACH	WEDNESDAY	7/14/2027	10:20	16 GOLFERS
THE HAY	THURSDAY	7/15/2027	2:00	16 GOLFERS

- In the paragraphs below the Golf Schedule
  - ◊ Ensure the greens fees are accurate
  - ◊ Ensure the Pace of Play information is present


These times have been scheduled based on the number of guestrooms reserved in your "Group Room Block" and are for hotel guests who have confirmed room reservations at **The Lodge at Pebble Beach.** Reductions to your Group Room Block will result in a proportionate reduction to your golf starting times.

Our Rooms & Golf Coordinator will contact you by **Thursday, May 27, 2027** to reconfirm and guarantee your number of players. Time guaranteed and not used will be charged to the group's master account. It is the responsibility of the group to coordinate all player pairings and provide the index or handicap for all guests.

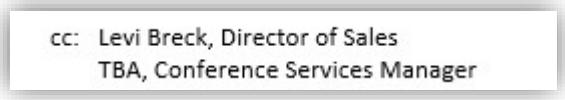
Current green fees for resort guests are: Pebble Beach Golf Links $675.00, Spyglass Hill Golf Course $495.00, The Links at Spanish Bay $350.00, Del Monte Golf Course $155.00 (including cart), and The Hay $75.00. Greens fees are subject to change and your group will be charged the current resort green fee at the time the group travels.

We have found the following pace targets to be both attainable and enjoyable for the majority of our golfing guests. Please be prepared to play accordingly.

First Off = 4 hours	6:30 a.m. – 7:50 a.m. = 4:15	8:00 a.m. – 8:50 a.m. = 4:30
9:00 a.m. – 9:50 a.m. = 4:40	10:00 a.m. – 10:50 a.m. = 4:45	11:00 a.m. – 11:50 a.m. = 4:50

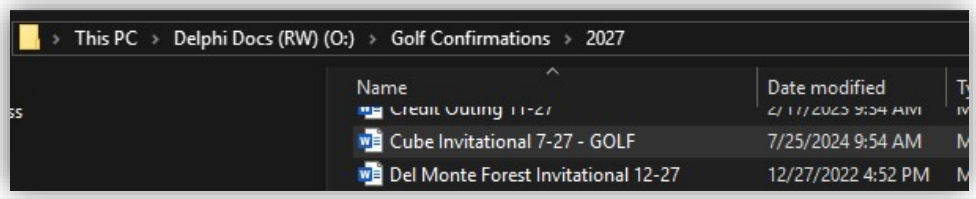
Group Golf Request (5/6)

- In the signature
  - ◊ Delete any TBA names
  - ◊ Ensure job titles are accurate





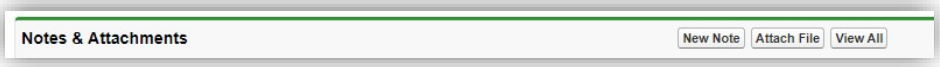
- Save the confirmation into the O Drive Golf Confirmations folder under the appropriate year:
  - ◊ Save as both a Word doc. and PDF
  - ◊ Document Title format: "Post As MM-YY -GOLF"



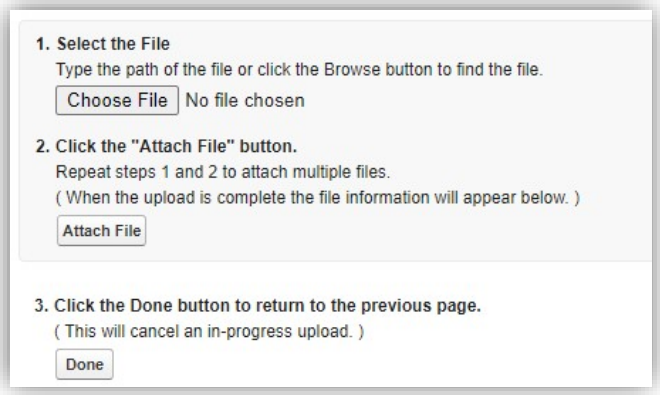
- In Amadeus, attach the PDF Golf Confirmation to the Booking
  - ◊ From the Booking, click Notes & Attachments



  - ◊ Click Attach File



  - ◊ Click Choose File > Attach File > Done



- Print the following and save to the group's physical Tan Folder:
  - ◊ Golf Request Form (include the email if it has additional instruction)
  - ◊ The SR18 report
  - ◊ The updated Golf Confirmation

Group Golf Request (6/6)

- In Outlook, edit Golf Calendar if:
  - ◊ You created new golf bookings
  - ◊ The group has changed courses or dates

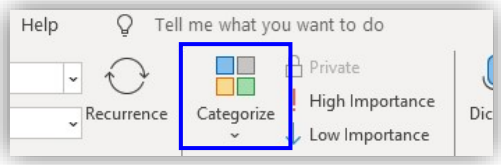
- How to Edit the Golf Calendar:
  - ◊ Open the Outlook app and click the calendar icon



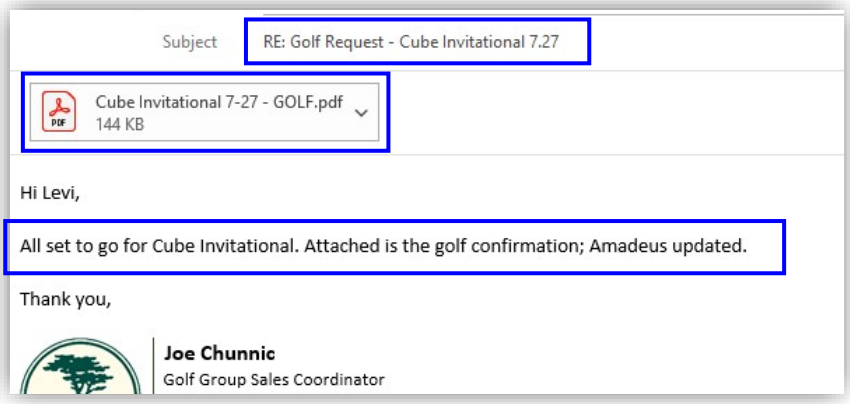
  - ◊ Double click on the first date of the group's golf schedule to create an Event
  - ◊ In the Title, write the Post As with followed by the initials for all courses they will play—use a comma to separate days



  - ◊ List the courses in the order that they will be played [SB,PB,SG]
  - ◊ If the group has a day in the middle with no golf, put an x on that day [SB, PB, x, SG]
  - ◊ If the group has multiple courses on one day, separate with a slash [SB, SG/PB, PH]
  - ◊ Use the Categorize icon to code the event purple



- Reply to requestor's email and attach the PDF Golf Confirmation



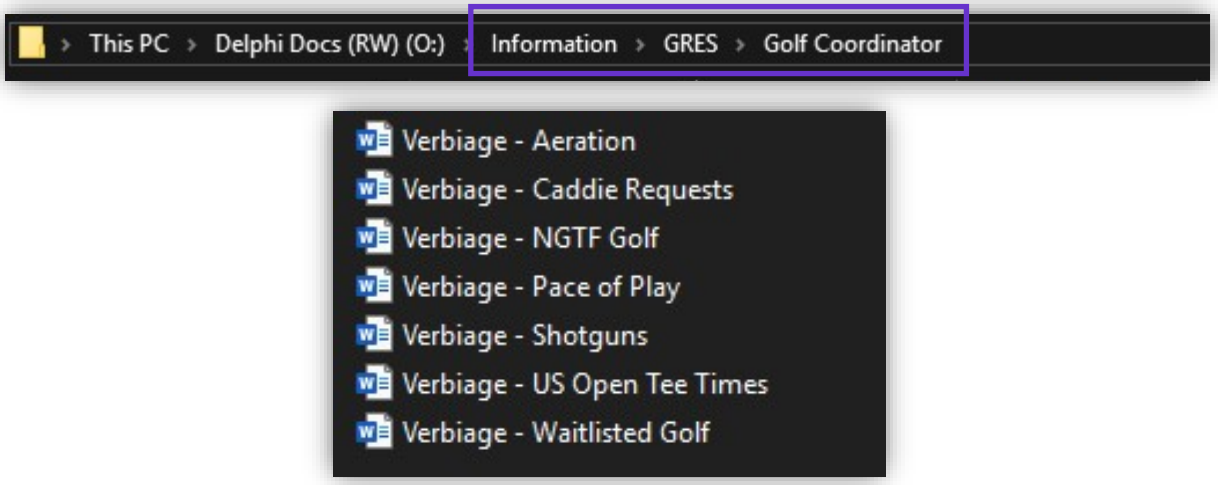
- Sort the email into the Outlook Inbox Folder you have created for that specific requestor
- Bring the Tan Folder to the Group Reservations Manager for approval

Golf Confirmation Verbiage

There are various situations for which the Group Golf Coordinator must add customized verbiage to Golf Confirmations.

In those cases, templates of these verbiages are saved in the Golf Coordinator folder within the O Drive. These templates are saved as Word documents to allow for text to be easily copied and pasted into Golf Confirmations as needed.

The Group Golf Coordinator should continue to document these templates to keep them up to date and add any future verbiage requirements.



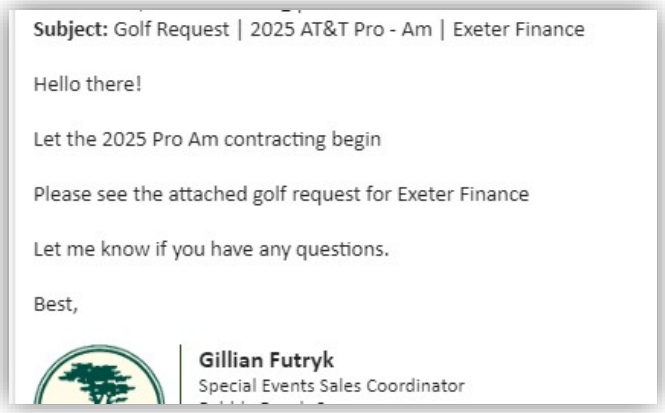
Set Up New Year Special Event Folder

PBC Special Events such as the AT&T Pro Am and the Men's and Women's U.S. Opens are tracked differently than standard golf groups:

⇒ Space is blocked out on the tee sheets 5 years in advance
⇒ Shotgun Tournaments (and some consecutive tee times) are tracked on excel spreadsheets rather than inputted directly on the tee sheets
⇒ The golf calendar is not updated for individual Sponsor Golf, but is instead inputted as more broad Special Event blocks

Start A New Year

The Group Golf Coordinator will receive the first Golf Request approximately 6 months prior to the event. When that request is received, the Group Golf Coordinator must set up the spreadsheets and folders for the new year.


Subject: Golf Request | 2025 AT&T Pro - Am | Exeter Finance

Hello there!

Let the 2025 Pro Am contracting begin

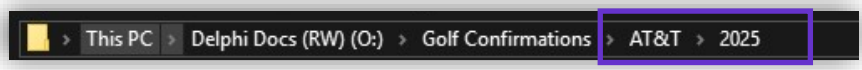
Please see the attached golf request for Exeter Finance

Let me know if you have any questions.

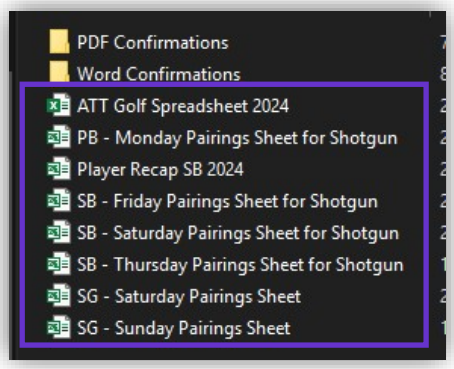
Best,

Gillian Futryk
Special Events Sales Coordinator

- Access the specific event's folder within Golf Confirmations and create a new folder for the upcoming year



- Go into the previous year's folder and copy/paste all spreadsheets (not the PDF/Word folders) into the folder for the upcoming year

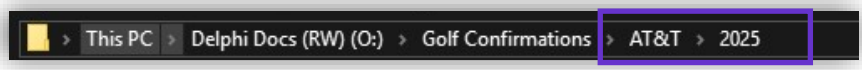


- Create empty folders for the PDF Confirmations and Word Confirmations

- Update Each Spreadsheet
  - ◊ Update the dates to the same day of the week, but in the new year
  - ◊ Delete all Res IDs and notes from the previous year's bookings

Special Event Golf Request Checklist

The following instructions are based on the Golf Coordinator procedures for our annual AT&T Pro-Am Tournament, but these procedures will also apply to other major Special Events like US Opens.



Consecutive Tee Times

- Block on the tee sheets per standard Golf Request Procedures
- Your Golf Confirmation should exactly match the SR18

Shotguns

- Do not block on the tee sheets
- Access the AT&T folder and input the group on the appropriate Shotgun Pairing Spreadsheet
    - Title Sponsors should be input in the top slots for the first starting holes
    - Input all other groups on a first come first serve basis
- Shotguns will not show up on an SR18, but should still be documented on the Golf Confirmation—Write "Shotgun" to the right of the time

Hay Buyouts

- Clear space on the Tee Sheet for the Hay Buyout by adjusting the AT&T Hold
- Create a Hay Buyout block on the tee sheet—Description: SE, Block Type: CB, Block Status: C
- Your Golf Confirmation will match the SR18, but instead of documenting the number of golfers, write "HAY BUYOUT"
- Add a special note under the schedule:
  ***Please note**: *The Hay Golf Course has been exclusively held for your group from 8:00a – 11:00a on Friday, January 31, 2025, and Saturday, February 1, 2025. The course buyout fee is $12,000.00 each day. This includes two hours of exclusive use of the course.*

Golf Request Finalization

- Do not update the Golf Calendar for Special Event Group Golf Requests
- Update the master AT&T Golf Spreadsheet with all golf reserved (also update for changes/cxl)
- Merge a Golf Exhibit from Amadeus (or edit existing)
- Run SR18 to verify the accuracy of consecutive golf and Hay Buyouts (No SR18 for Shotguns)
- Save the Golf Confirmation within the AT&T folder as both a PDF and Word
- Attach the Golf Confirmation to the Amadeus Booking
- Prepare the Tan Folder and bring to the Group Reservations Manager for Approval
- Reply to the email and attach the Golf Confirmation
- Sort the email into your AT&T Outlook folder

Special Event Finalization

7-21 Days prior to the event

- Input and configure bookings from the Shotgun Pairing Spreadsheets on the tee sheets
- Input all Billing Notes from the Shotgun Pairing Spreadsheets onto the Tee Sheets
- Update all Shotgun pairings, rental club/caddie requests on the tee sheets

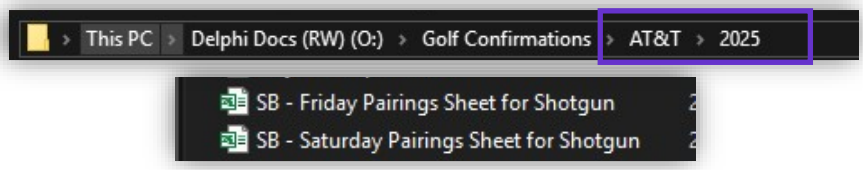
(Billing information and requests will be provided by the Group Rooms & Golf Coordinators)

Special Event Shotgun

Special Event Shotguns are not individually blocked on the tee sheets. Special Event Dates are fully blocked out 5 years in advance with Special Event Holds.

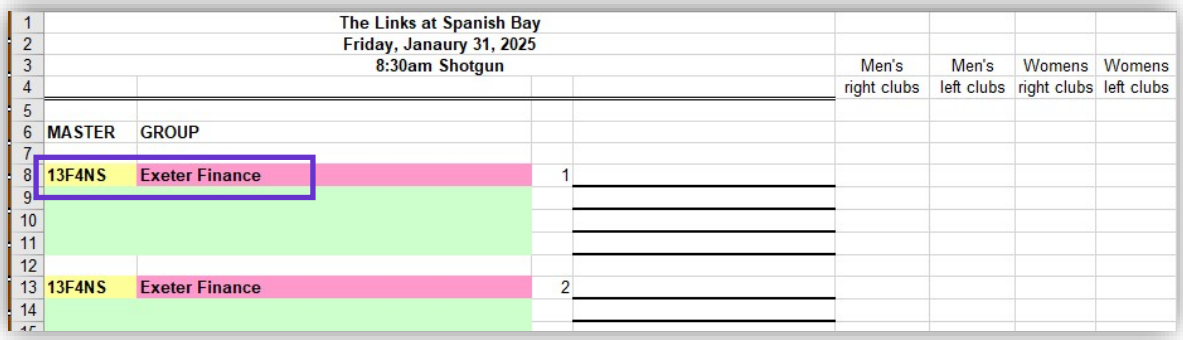


Instead of overriding these holds, Shotguns must be documented on Shotgun Pairing Spreadsheets stored within the Special Event Folder:



Open the appropriate spreadsheet and input the group's Res ID and Name into an empty slot

- Title Sponsors should be input at the top of the list at starting hole #1
- All other sponsors should be entered on a first come first serve basis



Shotguns will not show up on an SR18 since we do not input them on the Tee Sheets at this time, but should still be documented on the Golf Confirmation

- Write "Shotgun" to the right of the time

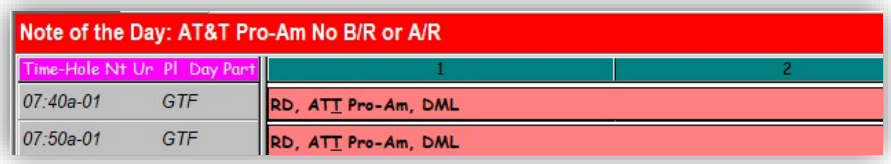


GOLF COURSE	DAY	DATE	TIME	NUMBER OF GOLFERS
SPANISH BAY	TUESDAY	1/28/2025	12:00	8 GOLFERS
SPANISH BAY	WEDNESDAY	1/29/2025	8:50	12 GOLFERS
SPANISH BAY	FRIDAY	1/31/2025	8:30 Shotgun	36 GOLFERS

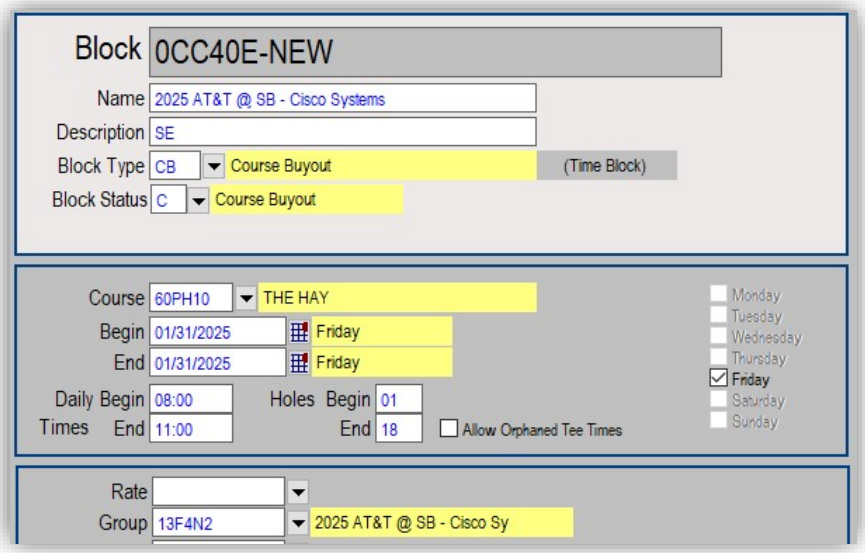
See Special Event Golf Request Finalization SOP for instructions on how to wrap up this request.

Special Event Hay Buyout

Hay Buyouts must be entered on the tee sheet, but all dates surrounding the Special Event will be held with a Special Event Hold. Before you can input the buyout block, you must edit Special Event Hold to make room on the tee sheet for the buyout.

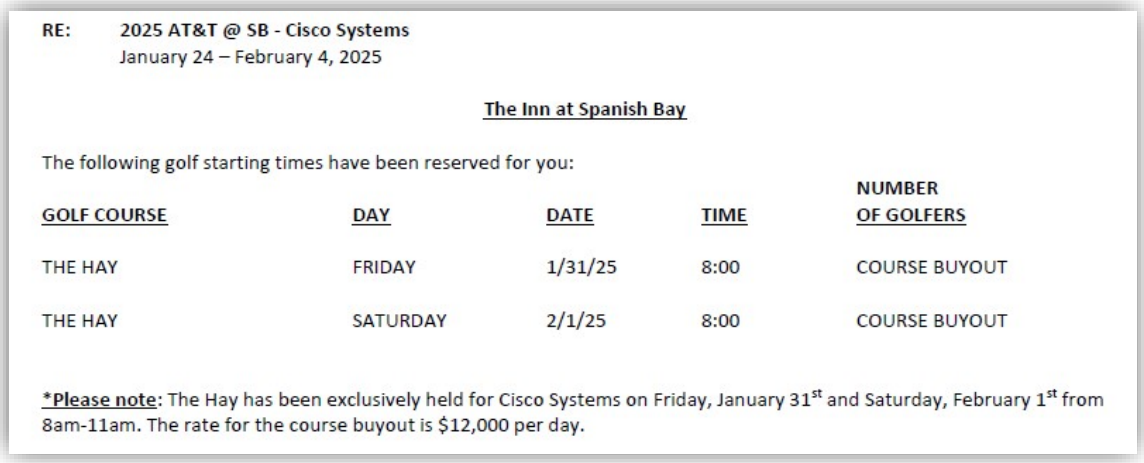


Once you have cleared space, create a Course Buyout Block for your group:



On the Golf Confirmation:

- Write "COURSE BUYOUT" in place of the number of golfers
- Add a note below the course schedule that states:
  ***Please note**: *The Hay Golf Course has been exclusively held for your group from 8:00a – 11:00a on Friday, January 31, 2025, and Saturday, February 1, 2025. The course buyout fee is $12,000.00 each day. This includes two hours of exclusive use of the course.*



RE: 2025 AT&T @ SB - Cisco Systems
January 24 – February 4, 2025

The Inn at Spanish Bay

The following golf starting times have been reserved for you:

GOLF COURSE	DAY	DATE	TIME	NUMBER OF GOLFERS
THE HAY	FRIDAY	1/31/25	8:00	COURSE BUYOUT
THE HAY	SATURDAY	2/1/25	8:00	COURSE BUYOUT

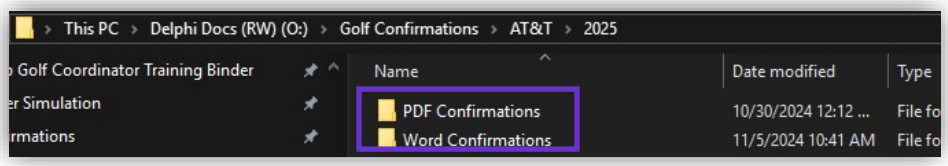
*Please note: The Hay has been exclusively held for Cisco Systems on Friday, January 31st and Saturday, February 1st from 8am-11am. The rate for the course buyout is $12,000 per day.

See Special Event Golf Request Finalization SOP for instructions on how to wrap up this request.

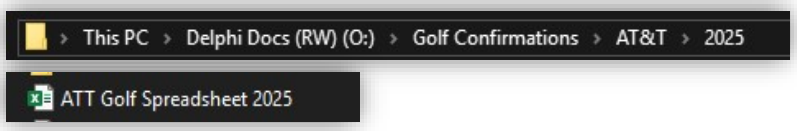
Special Event Golf Request Finalization

Once you have edited your Golf Confirmation:

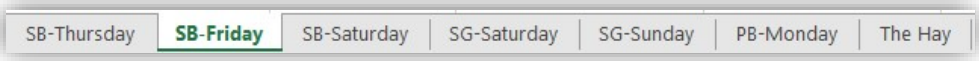
- Save the Golf Confirmation as both a Word and PDF within the Special Event Folder



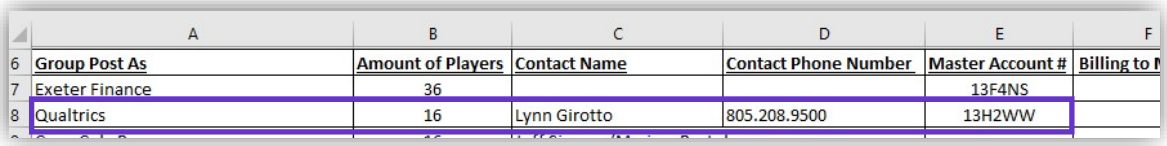
- Update the master Golf Spreadsheet according to what has been reserved:



  - ◊ Click the appropriate tab within the Excel document



  - ◊ Input data for columns A through E



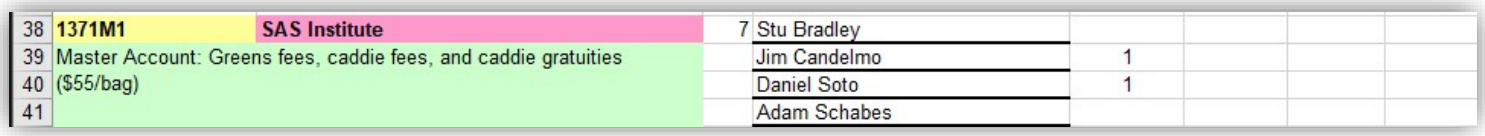
	A	B	C	D	E	F
6	Group Post As	Amount of Players	Contact Name	Contact Phone Number	Master Account #	Billing to M
7	Exeter Finance	36			13F4NS	
8	Qualtrics	16	Lynn Girotto	805.208.9500	13H2WW	

  - ◊ Save and close

- Attach the PDF Golf Confirmation to the Amadeus booking
- Print the SR18 (if you reserved consecutive tee times or Hay Buyouts), the Golf Request, and Golf Confirmation to save in the Tan Folder
- Bring the Tan Folder to the Group Reservations Manager for approval
- Respond to the email and attach the Golf Confirmation
- Sort the email conversation into your AT&T Outlook Folder

Prepare for Arrival

As we near the Special Event dates (21-7 days out), the Group Rooms & Golf Coordinators will fill you in on the Shotgun billing, caddie requests, and rental club requests.
When you receive this information, enter it into the Shotgun Spreadsheets:



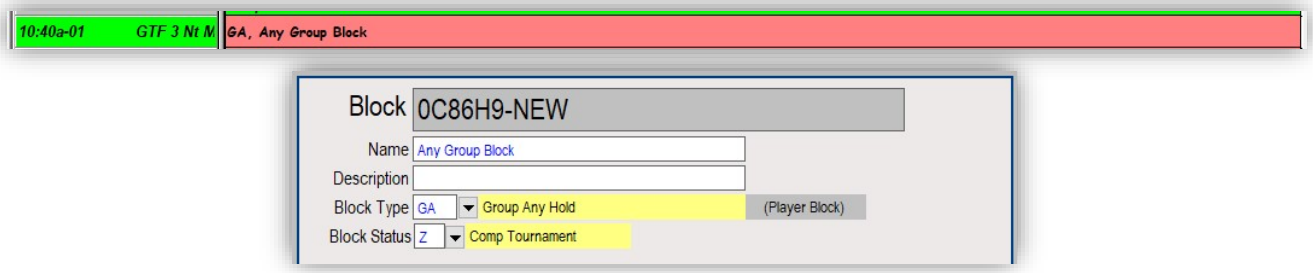
38	1371M1	SAS Institute	7	Stu Bradley				
39	Master Account: Greens fees, caddie fees, and caddie gratuities			Jim Candelmo	1			
40	($55/bag)			Daniel Soto	1			
41				Adam Schabes				

7 Days prior to the Special Event, input all Shotgun groups into the Tee Sheets, Configure the tee times, and input all caddie/rental club requests, and create Tee Sheet Billing Notes

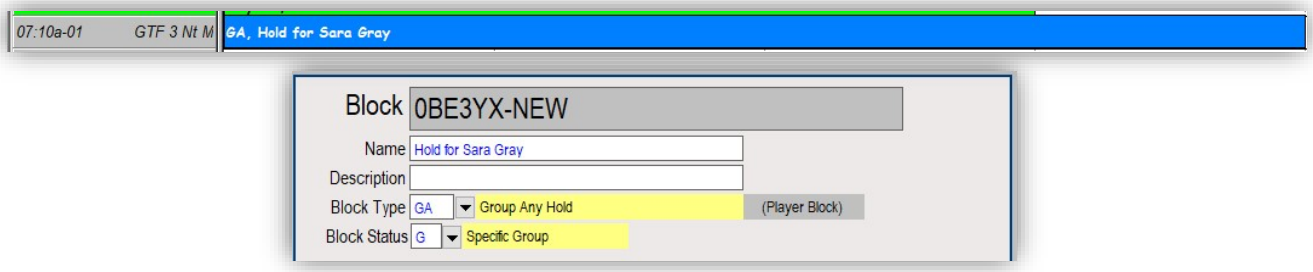
Golf Block Holds

The Group Golf Coordinator may be asked to input Holds on the tee sheet up to five years in advance for several reasons:

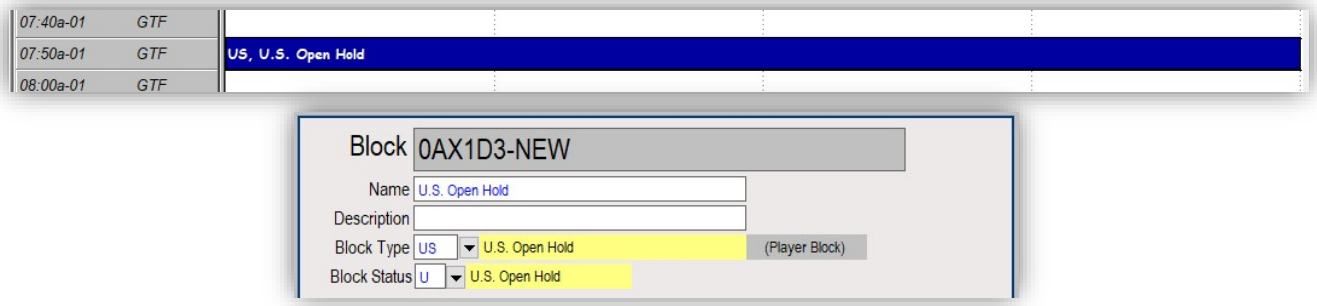
- Group Any Hold—Holds to reserve space for group business so it cannot be reserved by leisure reservations.



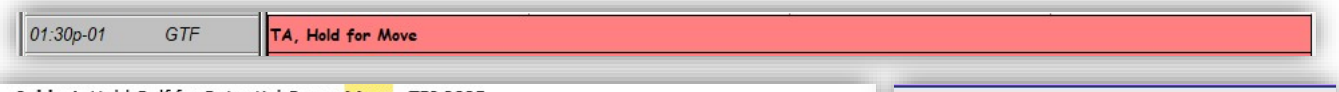
- Executive Office Holds—These holds may also be created at the directive of the Pebble Beach executive office to hold golf for VIPs.

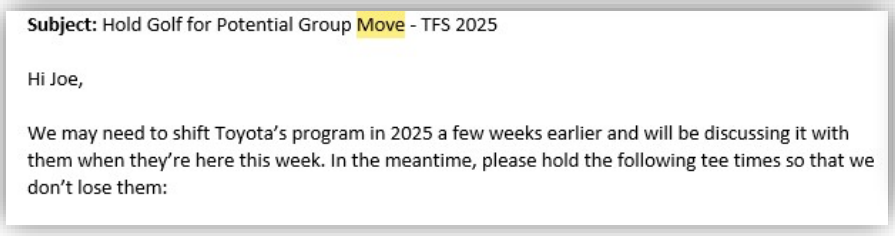


- Special Event Holds—Holds for special events, such as the US Open may be created to allow break in play to reduce guest impact on the course prior to special events



- Hold for Move—These holds are created to reserve a time slot in the event a group is in the process of moving dates/times




Subject: Hold Golf for Potential Group Move - TFS 2025

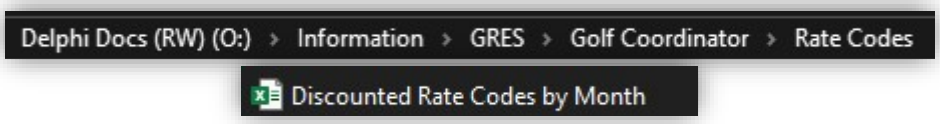
Hi Joe,

We may need to shift Toyota's program in 2025 a few weeks earlier and will be discussing it with them when they're here this week. In the meantime, please hold the following tee times so that we don't lose them:



Create Discounted Rate Codes (1/2)

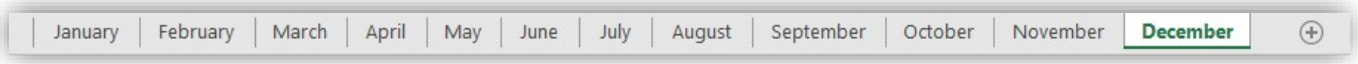
If a group has a contractually discounted golf, the Group Golf Coordinator must create the rate codes. The Group Golf Coordinator tracks all codes on the Discounted Rate Codes by Month Excel sheet:



PBP—PBP Managers will email the Group Golf Coordinator to create these rate codes in SMS Host.
NSM—Custom rate codes will be created by the Group Golf Coordinator at the Turnover. If the discount needs to be shown on the Golf Confirmation, the NSM will email the Term Sheet to the Group Golf Coordinator.

Create A New Discounted Rate Code

- Open the Discounted Rate Codes by Month Excel Sheet
- Navigate to the month for the code you are creating



- Check to see if your group has an existing discounted golf code from a previous year
- Open the Tee Sheet
- Click Info

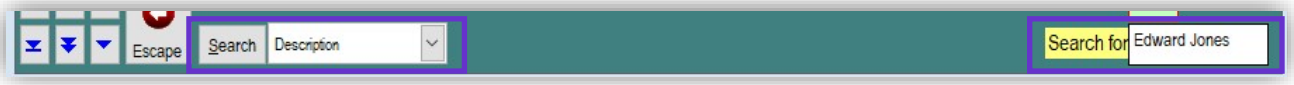


- Click Golf Rates from the Setup menu



- Click S for Scan to open the Rate Code Search window

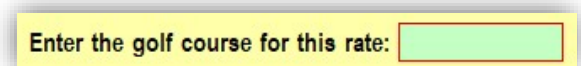
- If your group has an existing rate code from a previous travelled year, search for and select this code—Skip the step below this one, and proceed to edit the existing code

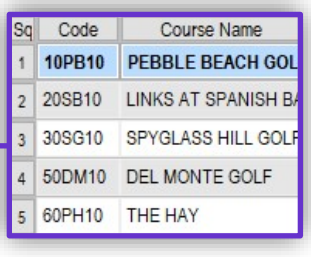


- If your group does not have an existing rate code,
  - ◊ Create a title for the new code you wish to create
    - Rate Code Title Format = Course # + G + 3 letters (Example: 30GCRY)
    - Course #s : PB=10, SG=30, SB=20, DM=50, PH=60
    - Scan for the code you want to create to make sure it doesn't already exist
  - ◊ Search for and select any code for the same course your new code will be for
    - ◊ This ensures all verbiage about the code you create are course-accurate
  - ◊ In the Golf Rate window
    - ◊ Click D for Duplicate
    - ◊ Type the rate code you are creating



    - ◊ Type the golf course code for your selected course

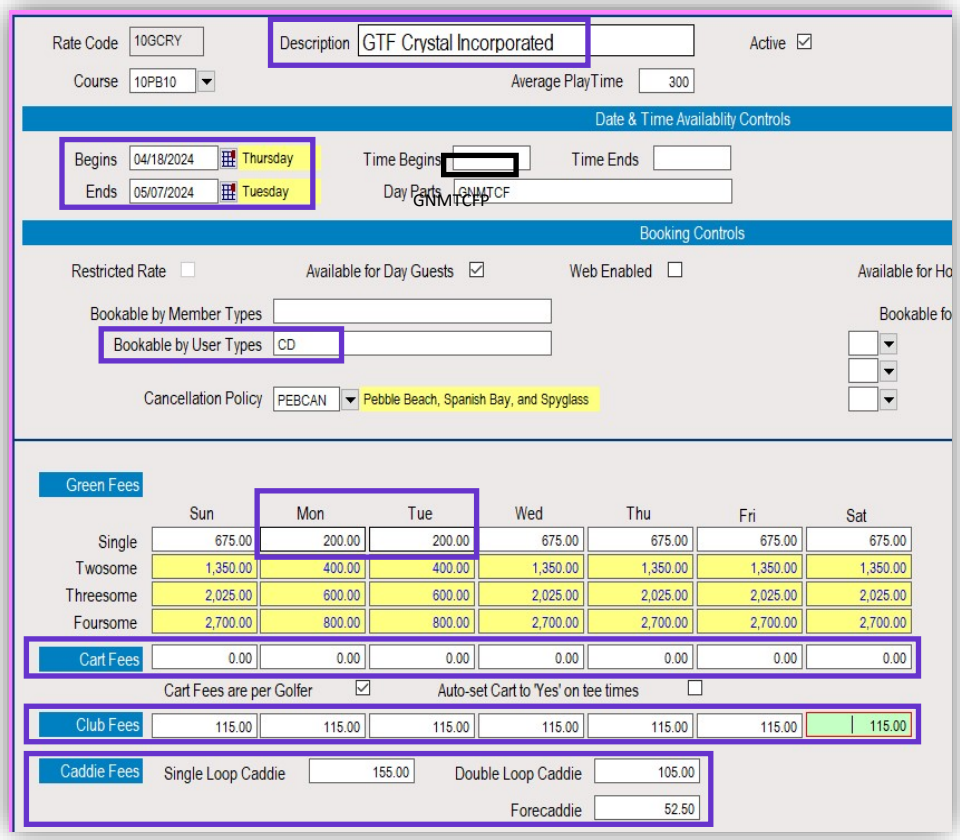




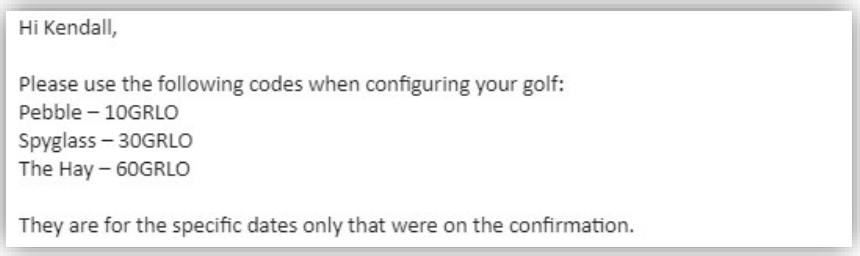
Sq	Code	Course Name
1	10PB10	PEBBLE BEACH GOL
2	20SB10	LINKS AT SPANISH BA
3	30SG10	SPYGLASS HILL GOLF
4	50DM10	DEL MONTE GOLF
5	60PH10	THE HAY

Create Discounted Rate Codes (2/2)

- Click E to Edit
- Edit the following fields for your Golf Rate:
  - ◊ Description—GTF + Post As
  - ◊ Dates—Set to span all dates that the discount applies to
  - ◊ Bookable by User Types—CD [This prevents Leisure Reservations (AB) from seeing this rate in the Booking Center]
  - ◊ Day Parts—Make sure this field includes GNMTCFP
  - ◊ Single Rate—Input the discount only on days that the group is scheduled to play this course at the discounted rate—leave all other days at rack
    - If a group has the discount on M and W, apply the discount to the full span of M-W, but make sure the golf is configured at rack for the middle day
  - ◊ Cart Fees—Resort Guests should be $0, Outside Guest Codes should be the current rate
  - ◊ Club Fees—Make sure this is set to the current rates
  - ◊ Caddie Fees—Make sure this is set to the current rates



- Page Down to Save
- Add this Golf Rate Code to the Discounted Rate Codes by Month Excel sheet
- Reply to the email inquiry



- File the email into the Outlook folder of the NSM/PBP who requested the codes
- If you created a code for the current month, email _RevManagement to inform them of the code

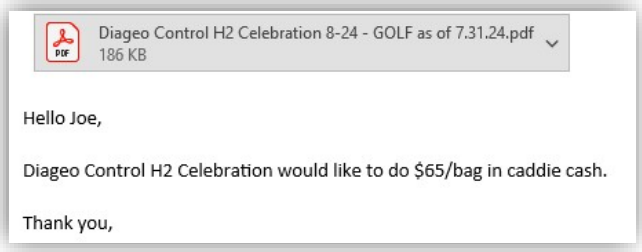
Caddie Cash Payout (1/3)

Caddie Cash Request Timing:

- Caddie cash requests should be sent 8-14 days in advance of the group's first round of golf.
- If requests are sent sooner, the Group Golf Coordinator should wait until we are a week prior to the first date of play to send the request so we account can for any changes in the interim.
- In these instances, the Group Golf Coordinator should set an Outlook reminder for 1 week prior to the group's first date of play to ensure timely submission of the request form.
- For requests exceeding $5,000, ensure that sufficient business days are allowed as per the request form (a minimum of 2 business days).

Merge the Caddie Cash Payout Form:

- The Group Rooms and Golf Coordinator will send the Group Golf Coordinator the Caddie Cash Request via email and attach the latest Golf Confirmation



- Review the Golf Confirmation to see how many and what type of caddies are requested



***CADDIE REQUEST

PEBBLE BEACH	SUNDAY	8/4/2024	6:50	2 DOUBLE CADDIES
SPYGLASS HILL	SUNDAY	8/4/2024	1:00	2 DOUBLE CADDIES
PEBBLE BEACH	MONDAY	8/5/2024	6:40	2 DOUBLE CADDIES
SPYGLASS HILL	MONDAY	8/5/2024	12:40	2 DOUBLE CADDIES
PEBBLE BEACH	TUESDAY	8/6/2024	6:30	10 DOUBLE CADDIES
**SPYGLASS HILL	TUESDAY	8/6/2024	1:10	6 DOUBLE CADDIES

- Open the group's Booking in Amadeus and merge the Caddie Cash Payout form:
  - ◊ From the booking, click Merge
  - ◊ Change the Document Type to Doc
  - ◊ Select Group Payout Request Form
  - ◊ Uncheck all checkboxes
  - ◊ Click Generate

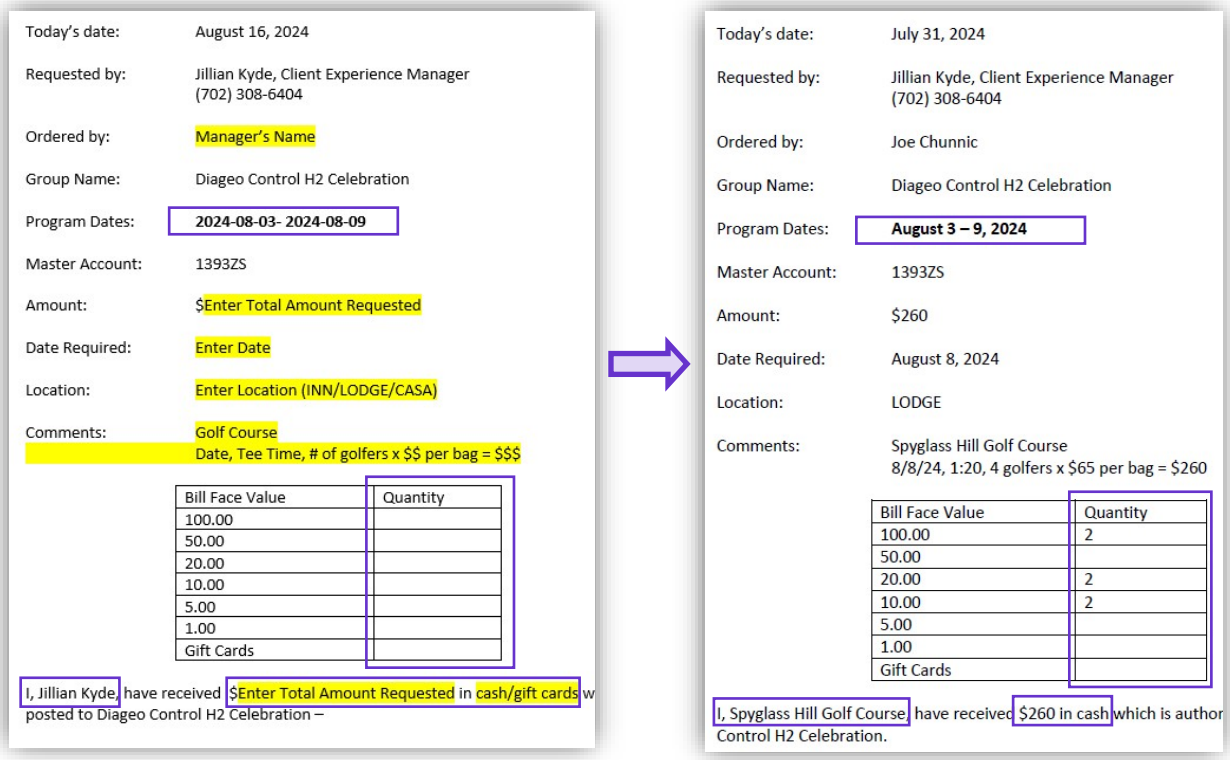


- The form defaults to your downloads folder—open the form to begin editing
  - ◊ You will need to fill out one form per day, per course

Caddie Cash Payout (2/3)

Fill Out the Caddie Cash Payout Form:

- Ordered By—Group Golf Coordinator Name
- Program Dates—Change the date format per the image below
- Amount—Total cash required at the Pro Shop
- Location—Input LODGE for PB/SG, Input INN for SB
- Comments: Course, Date, Time, "# Golfers x $$ per bag = $$$"
- Chart—Indicate how many of each type of bill to send to the pro shop
    - ◊ Request the largest denominations of bills that can be divisible between each caddie.
    - ◊ A Caddie Cash Calculator tool is available in the Digital Binder
- In the sentence underneath the bills chart, change the Planner name to the name of the golf course, and input the total amount requested in cash



Today's date: August 16, 2024

Requested by: Jillian Kyde, Client Experience Manager (702) 308-6404

Ordered by: Manager's Name

Group Name: Diageo Control H2 Celebration

Program Dates: 2024-08-03- 2024-08-09

Master Account: 1393ZS

Amount: $Enter Total Amount Requested

Date Required: Enter Date

Location: Enter Location (INN/LODGE/CASA)

Comments: Golf Course
Date, Tee Time, # of golfers x $$ per bag = $$$

Bill Face Value	Quantity
100.00	
50.00	
20.00	
10.00	
5.00	
1.00	
Gift Cards	

I, Jillian Kyde, have received $Enter Total Amount Requested in cash/gift cards w
posted to Diageo Control H2 Celebration –

Today's date: July 31, 2024

Requested by: Jillian Kyde, Client Experience Manager (702) 308-6404

Ordered by: Joe Chunnic

Group Name: Diageo Control H2 Celebration

Program Dates: August 3 – 9, 2024

Master Account: 1393ZS

Amount: $260

Date Required: August 8, 2024

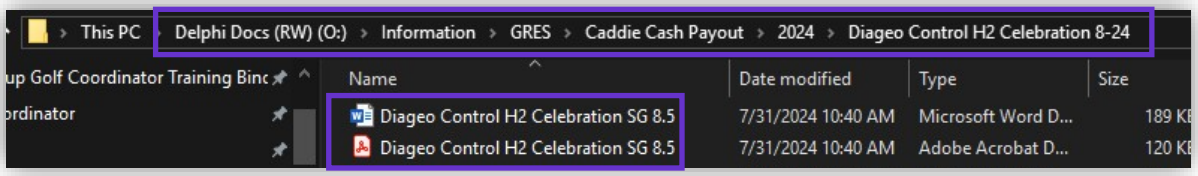
Location: LODGE

Comments: Spyglass Hill Golf Course
8/8/24, 1:20, 4 golfers x $65 per bag = $260

Bill Face Value	Quantity
100.00	2
50.00	
20.00	2
10.00	2
5.00	
1.00	
Gift Cards	

I, Spyglass Hill Golf Course, have received $260 in cash which is author
Control H2 Celebration.

- Create a folder for this group within the Caddie Cash Payout Folder
    - ◊ Label the folder "Post As, Month/Year"
- Click Save As [CTRL+SHIFT+S] to save your completed forms to the Caddie Cash Payout Folder
    - ◊ Save as both a Doc and PDF
    - ◊ Label the documents with the "Post As, Course Initials, Month/Day"



This PC › Delphi Docs (RW) (O:) › Information › GRES › Caddie Cash Payout › 2024 › Diageo Control H2 Celebration 8-24

up Golf Coordinator Training Binc
ordinator

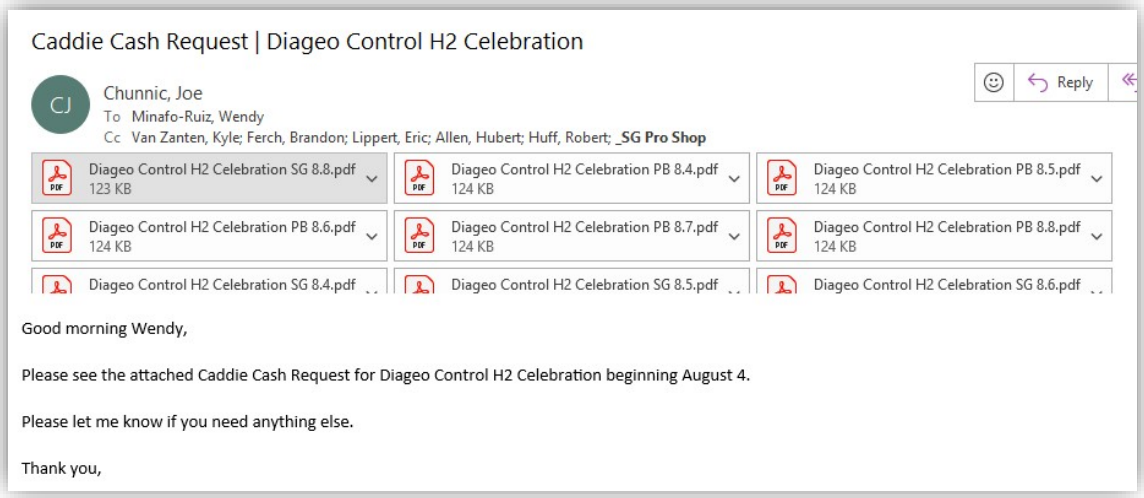
Name	Date modified	Type	Size
Diageo Control H2 Celebration SG 8.5	7/31/2024 10:40 AM	Microsoft Word D...	189 KB
Diageo Control H2 Celebration SG 8.5	7/31/2024 10:40 AM	Adobe Acrobat D...	120 KB

Caddie Cash Payout (3/3)

Submit the Caddie Cash Payout Form:

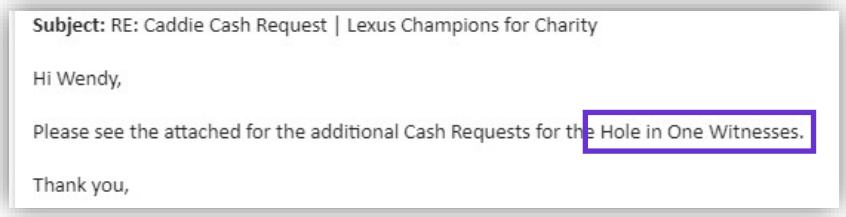
- Draft an email for the Caddie Cash Request:
  - ◊ Subject: Caddie Cash Request | Post As
  - ◊ Recipients:
    - Cashier (Wendy Minafo Ruiz) - *There is only 1 cashier for all properties*
    - CC: Group Rooms & Golf Coordinator
    - CC: Conference Services Manager
    - CC: Golf Course Head Pros.
      - ♦ PB Pros: Eric Lippert, Hubert Allen, Robert Huff
      - ♦ SG Pros: Shop: _SG Pro Shop
      - ♦ SB Pros: Rich Cosand, Jeff Pace, Thomas Schmidt, Matt Welling
  - ◊ Email Body Example:
    "Please see the attached Caddie Cash Request for Post As, beginning (insert date)."

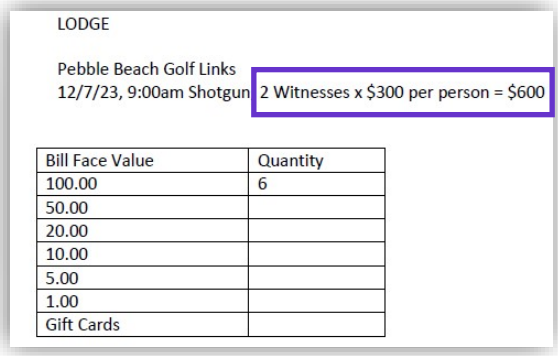
- Attach all finalized Caddie Cash Payout request forms to the email and send



Cash for Witnesses:

- Some groups will offer prizes for contests such as a hole-in-one contest. To ensure fair play, the group has witnesses stationed at that hole to monitor the golfers
- These witnesses receive a gratuity that is paid in cash billed to the Master Account, and therefore is included on the Caddie Cash Payout Form
- Either the Group Rooms & Golf Coordinator or the Golf Course Pros will inform the Group Golf Coordinator to request this witness gratuity





Leisure Golf Move

Sales may request from Group Reservations that a leisure guest be moved into a different tee time to better accommodate a group golf booking. The initial request will typically be sent from Sales to either the Group Golf Coordinator or the Group Reservations Manager.

The Group Reservations Manager will facilitate the conversation with the Leisure Reservations Managers, explaining whether the move is required or just an 'ask'. The Group Golf Coordinator will be copied on all communication.



From: Poss, Brendon <PossB@pebblebeach.com>
Sent: Friday, August 2, 2024 12:02 PM
To: Gonzalez, Marie <GonzalezM@pebblebeach.com>; Newton, Gage <NewtonG@pebblebeach.com>; Cortez, Connie <CortezC@pebblebeach.com>; Rivera Arce, Joanne <riveraarcej@pebblebeach.com>
Cc: Chunnic, Joe <ChunnicJ@pebblebeach.com>
Subject: Pebble Beach 6/26/25

Hi Team,

Quick and hopefully easy move request – Sales is trying to secure contract for US Bank in 2025 and are hopeful for one more foursome on Pebble Beach.

Can we see if Mark Sievers (11am) is willing to shift up to 10:30am? Vice versa would also work with Kris Kraft.

I have the 2somes on hold in both times while we attempt to make the move. Thank you!

Once the move(s) are complete, the Group Golf Coordinator must ensure that:

- The blocks are accurately updated on the tee sheets
- The Golf Confirmation is updated and stored
- The NSM/PBP is notified that the move(s) are complete

In this example, Mark Sievera was asked to change from 11:00am to 10:30am to allow the full 11:00am time slot to be reserved by the "2025 U.S. Bank Client Event." Temporary holds were placed on the open time slots to prevent other leisure guests from reserving those positions.





Non-Resort Golf Group Checklist

Initial Contact

- Obtain all details of the booking
- Verify that the booking meets guidelines
- Quote rates, deposit, and cancellation policy

Book Tentative Golf

- Book OT golf on the Tee Sheets
- Set a reminder to hold for no longer than 2 weeks

Create An Amadeus Account

- Check to see if one already exists—if so, use the existing account

Create An Amadeus Booking

- Change status to Tentative

Create A Booking Event

- Event Classification—Golf Contest
- Title—(Course Name) + "NO BEO"
- Function Room—TBA

Create A Contract

- Z Drive > GRPRES > Outside Golf Info > (Year)
- Title — (Post As) + (Month) + (Year)

Send Contract & LOA

- File Name— PBCAUTH_(Post As)_(Res ID)
- 1st Signer—Planner
- 2nd Signer—Group Golf Coordinator
- Pre-Fill the "CC Auth Form—Groups"
- Attach Contract as a signature Document and add Full Signature/Date

Charge the Deposit

- 970PP_—Greens Fees + Carts
- 970SFD—2% CC Service Recovery Fee
- Edit and Save the Golf Confirmation as PAID

Turn the Booking Definite

- Golf Block—OD
- Amadeus Booking—Definite
- Group Management—Definite

Finalize

- 7 Days prior to cut-off—Email Planner for final changes and billing
- Cut-off Date—Email Final Contract / Configure Golf
- 7 Days prior to arrival—Submit Caddie Cash Payout Requests
- 24-48 hours prior to arrival—Create/Send Resume

Non-Resort Golf Groups (1/11)

The Group Golf Coordinator is responsible for booking golf groups of 13 or more players who will not be staying at our resort properties. 12 or fewer golfers should be referred to the Day Guest Team.

Non-Resort Golf Group Leads are commonly forwarded to the Group Golf Coordinator from Leisure Reservations via the Group Guest Inquiry email template.

INITIAL CONTACT

- Vet the lead—Does it meet our Outside Guest Golf Guidelines?

Pebble Beach Golf Links	May be booked up to 1 day in advance If Major Aeration or Free Sell, groups may book up to 6 months in advance
Spyglass Hill Golf Course	May be booked up to 3 months in advance
The Links at Spanish Bay	May be booked up to 6 months in advance
Del Monte Golf Course	Refer the Lead to the Del Monte Pro Shop to handle
The Hay	May be booked up to 6 months in advance

- Collect Information (*this may be obtained through several emails)*
  - ◊ Obtain all details of what they wish to reserve:
    - ◊ Course
    - ◊ Date
    - ◊ Time
    - ◊ # of Golfers
  - ◊ Obtain guest details:
    - ◊ Full Name of primary contact
    - ◊ Group Name (if applicable)
    - ◊ Phone number
    - ◊ Email Address
  - ◊ Inquire about additional services for possible referrals to other departments:
    - ◊ Do they require Meeting Space? (Conference Services)
    - ◊ Do they require Food & Beverage service? (Conference Services)

- Quote Availability, Rates, & Guidelines

Rates	Non-Resort Groups pay Rack Rate • Always quote Cart Fees • Quote Rental Club/Caddie Fees (+recommended gratuities) when Applicable • See Digital Binder for Current Rates
Deposit Requirement	Total Greens Fees + Cart Fees + 2% Credit Card Recovery • All groups pay cart fees as part of their deposit—If anyone ends up walking, the Master will be refunded those cart fees post-event • If the Master will be responsible for caddies and/or rental clubs, charge this up front as well
Cancellation Policy	45 Days prior to Date of Play (In contract terms—"45 day Cut-off") • Cancellation within this timeframe will result in forfeiture of their deposit • Reductions in CXL Policy may be approved by the Group Reservations Manager for shorter term bookings

Non-Resort Golf Groups (2/11)

BLOCK TENTATIVE GOLF

- Once the guest confirms what they want to reserve, create a Tentative Golf Block
  - ◊ Double click on the first time slot
  - ◊ Add Block
  - ◊ Input the following settings:
    - ◊ Name—Post As
    - ◊ Description—Group Golf Coordinator Initials
    - ◊ Block Type—OT
    - ◊ Block Status—G
    - ◊ Save



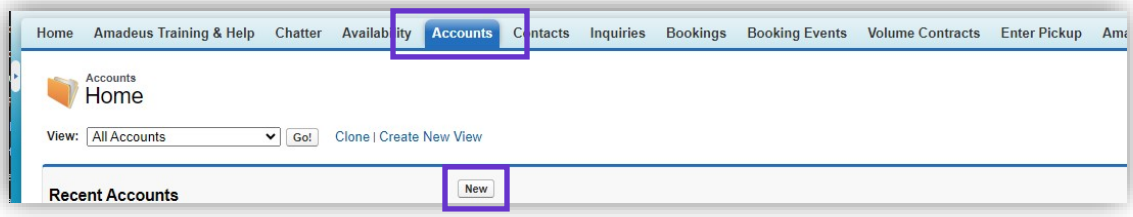
- Tentative Golf should only be held for a max of 2 weeks to allow the Planner time to sign the contract
  - ◊ This contract due date must not fall on a weekend or holiday
  - ◊ Shorter holds may be necessary for short term bookings—Group Golf Coordinator must obtain approval from the Group Reservations Manager

Non-Resort Golf Groups (3/11)

CREATE AN AMADEUS ACCOUNT

- Search Amadeus to see if the group has an existing account—If an account exists, create your booking on that existing account. If no account exists, proceed to the next steps.

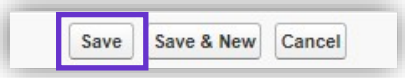
- On the Accounts tab, click New



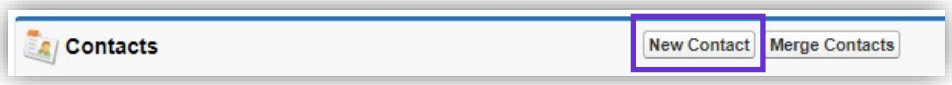
- Complete the following fields:

Account Information	
Account Name	The Business or Organization Name If none, input the name of the Planner
Primary Contact	Planner Name
Headquarters Address & Phone	
Address	Tip—Input zip code which will populate city/state
Phone	Planner Phone Number
Segmentation	
Type	Account
Market Segment	Golf Group
Lead Source	Enter if known (Commonly Repeat Business, Inquiry Call)

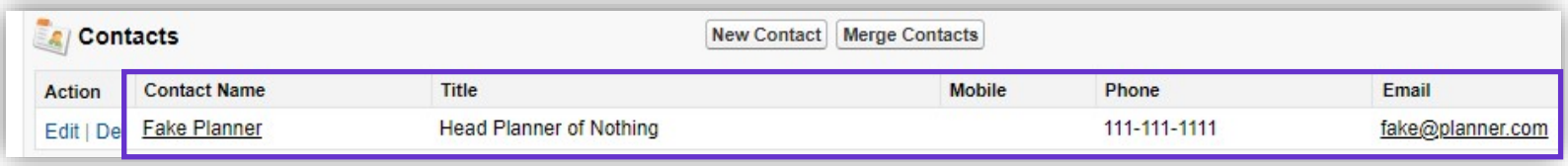
- Click Save at the bottom of the window to finalize



- Once saved, scroll to the Contacts section and click New Contact



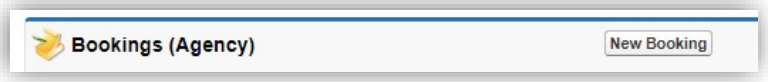
- In the new window, fill in the contact information for the Group Planner
  - Salutation, Name, Title, Phone, Email
  - Save
  - Repeat if you have multiple points of contact



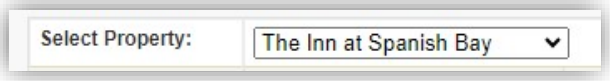
Non-Resort Golf Groups (4/11)

CREATE AN AMADEUS BOOKING

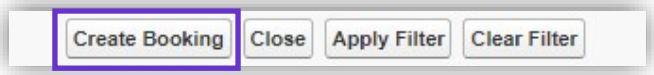
- On the Account, scroll to the Bookings section and click New Booking



- Select the Property
  - Lodge at Pebble Beach—Pebble Beach Golf Links, Spyglass Hill Golf Course, The Hay
  - Inn at Spanish Bay—Links at Spanish Bay



- Click Create Booking



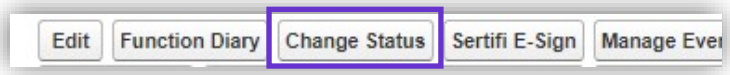
- Complete the Following Fields

Information	
Account Name	The Business or Organization Name If none, input the name of the Planner
Arrival/Departure	Date(s) of the Event
Decision Due	Due date for the Planner to sign the Contract Typically 2 weeks from the date the contract will be sent Must not be a weekend or holiday
Segmentation	
Market Segment	Golf Group
Booking Type	Non Resort Golf
Lead Source	(Commonly Repeat Business, Inquiry Call)
Service Manager	Group Golf Coordinator
Guestrooms	
Cutoff Date	45 days prior to first Date of Play unless otherwise approved Must not be a weekend or holiday

- Click Save at the bottom of the window



- Click Change Status at the top of the Booking



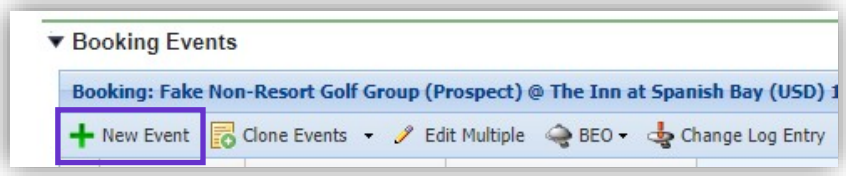
- Change the Status from Prospect to Tentative



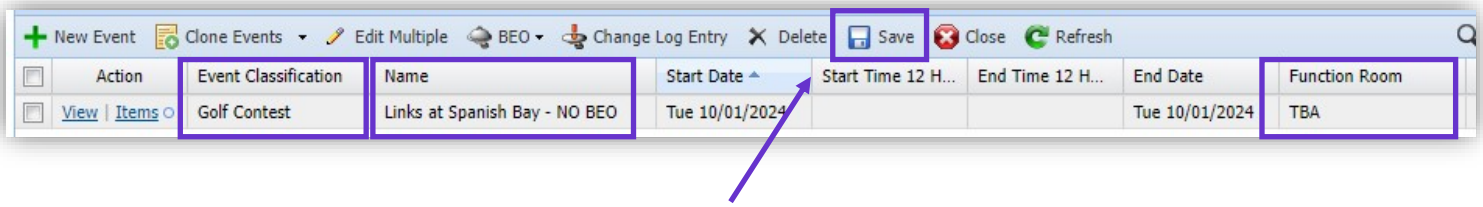
Non-Resort Golf Groups (5/11)

CREATE AN AMADEUS BOOKING EVENT

- On the Booking, scroll to the Booking Events section and click New Event



- Booking Event Settings:
  - Event Classification—Golf Contest
  - Event Name—(Name of Course) - NO BEO
  - Function Room—TBA



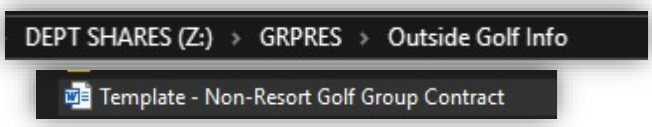
- Click the Save Icon to finalize the Event
  - ◊ You will know your event is saved when the red triangles in the top left corner of each field disappear



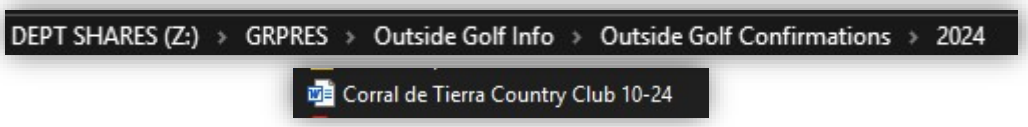
Non-Resort Golf Groups (6/11)

CREATE A CONTRACT

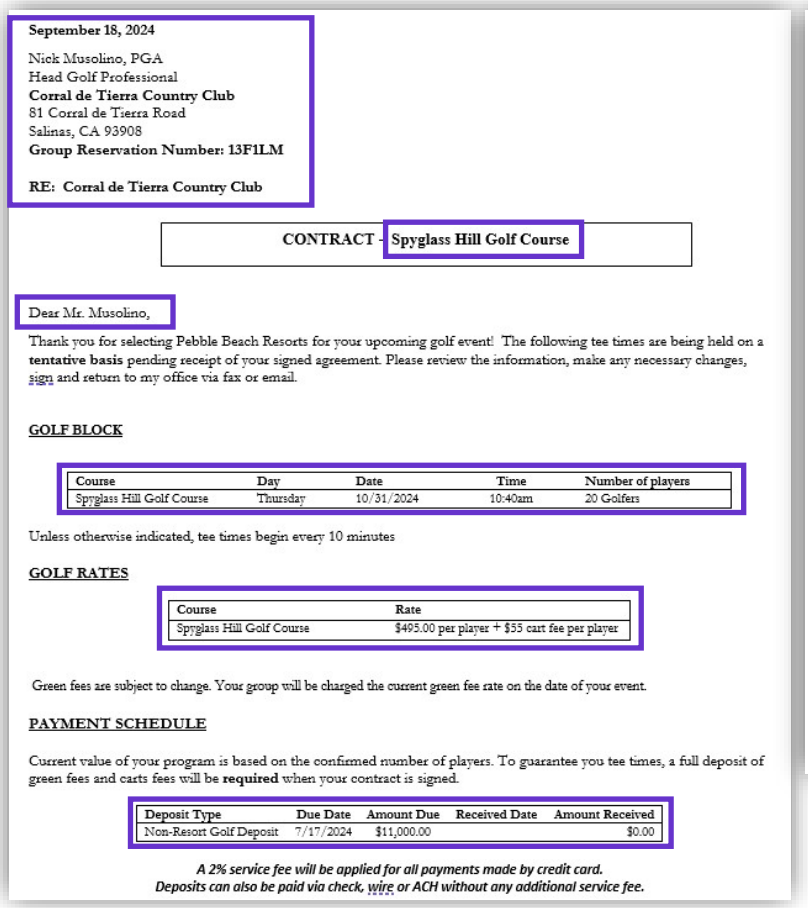
- Access the Outside Golf Info folder and open the Non-Resort Golf Group Contract template



- Open the document and select Save As
  - ◊ Save within the Outside Golf Confirmations folder in the appropriate year
  - ◊ Title format—(Post As) (Month)-(Year)



- Edit the following areas within the contract to match the group's booking:



September 18, 2024

Nick Musolino, PGA
Head Golf Professional
Corral de Tierra Country Club
81 Corral de Tierra Road
Salinas, CA 93908
Group Reservation Number: 13F1LM

RE: Corral de Tierra Country Club

CONTRACT - Spyglass Hill Golf Course

Dear Mr. Musolino,

Thank you for selecting Pebble Beach Resorts for your upcoming golf event! The following tee times are being held on a **tentative basis** pending receipt of your signed agreement. Please review the information, make any necessary changes, sign and return to my office via fax or email.

GOLF BLOCK

Course	Day	Date	Time	Number of players
Spyglass Hill Golf Course	Thursday	10/31/2024	10:40am	20 Golfers

Unless otherwise indicated, tee times begin every 10 minutes

GOLF RATES

Course	Rate
Spyglass Hill Golf Course	$495.00 per player + $55 cart fee per player

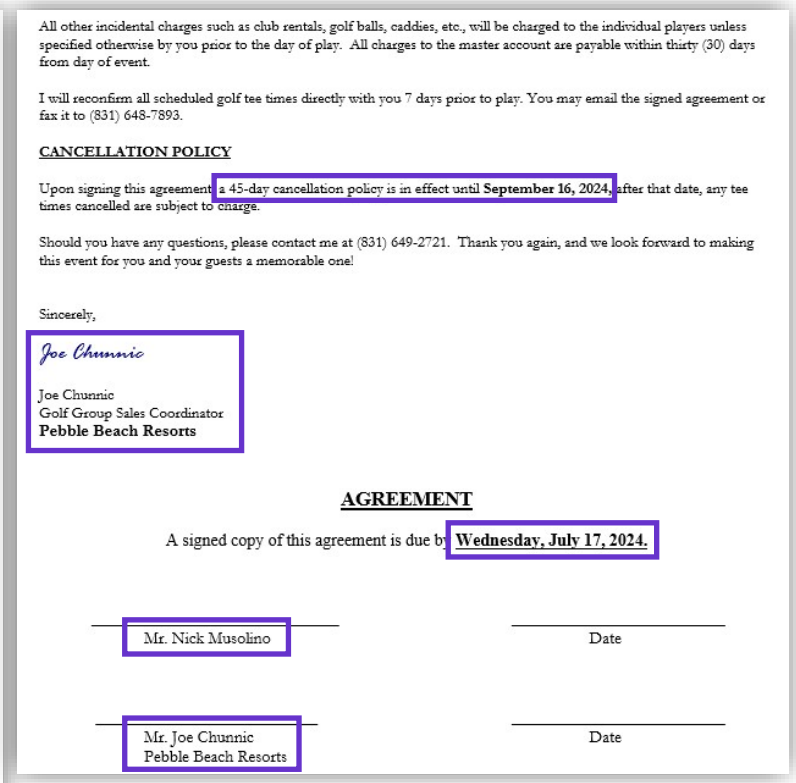
Green fees are subject to change. Your group will be charged the current green fee rate on the date of your event.

PAYMENT SCHEDULE

Current value of your program is based on the confirmed number of players. To guarantee you tee times, a full deposit of green fees and carts fees will be **required** when your contract is signed.

Deposit Type	Due Date	Amount Due	Received Date	Amount Received
Non-Resort Golf Deposit	7/17/2024	$11,000.00		$0.00

A 2% service fee will be applied for all payments made by credit card.
Deposits can also be paid via check, wire or ACH without any additional service fee.



All other incidental charges such as club rentals, golf balls, caddies, etc., will be charged to the individual players unless specified otherwise by you prior to the day of play. All charges to the master account are payable within thirty (30) days from day of event.

I will reconfirm all scheduled golf tee times directly with you 7 days prior to play. You may email the signed agreement or fax it to (831) 648-7893.

CANCELLATION POLICY

Upon signing this agreement a 45-day cancellation policy is in effect until **September 16, 2024**, after that date, any tee times cancelled are subject to charge.

Should you have any questions, please contact me at (831) 649-2721. Thank you again, and we look forward to making this event for you and your guests a memorable one!

Sincerely,

Joe Chunnic

Joe Chunnic
Golf Group Sales Coordinator
Pebble Beach Resorts

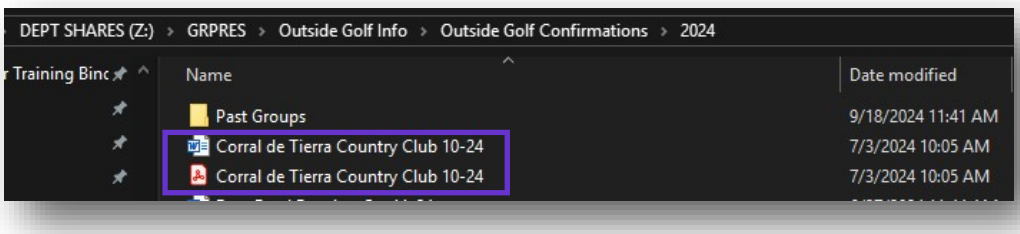
AGREEMENT

A signed copy of this agreement is due by **Wednesday, July 17, 2024.**

Mr. Nick Musolino _____ Date

Mr. Joe Chunnic
Pebble Beach Resorts _____ Date

- Save your completed contract in both Word and PDF form



Non-Resort Golf Groups (7/11)

CREATE A CONTRACT (Continued…)

Contract Variation Examples:

- Shotgun Tournament

Course	Day	Date	Time	Number of players
The Hay	Tuesday	9/24/2024	1:00pm Shotgun*	60 Golfers

Unless otherwise indicated, tee times begin every 10 minutes.

***Please Note:** *We are pleased to host Venrock for a 1:00pm shotgun at The Hay on Tuesday, September 24, 2024 for 60 players. In order to accommodate the shotgun, Venrock has agreed to pay for an additional 24 players, allowing for 120 minutes of play time, ending at 3:00pm.*

- Contracted Caddies (underneath the Golf Block)

***CADDIE REQUEST**

Course	Day	Date	Time	Number of players
The Links at Spanish Bay	Saturday	8/10/2024	12:10pm	10 Double Caddies
The Links at Spanish Bay	Saturday	8/10/2024	1:10pm	2 Double Caddies

***Please Note:** *Caddies are by request and cannot be guatanteed.*

- 2-Payment Deposit Schedule

Deposit Type	Due Date	Amount Due	Received Date	Amount Received
First Non-Resort Golf Deposit	10/6/2023	$1,040.00 – 50%		$0.00
Final Non-Resort Golf Deposit	11/1/2024	$1,040.00 or remaining balance		

CANCELLATION POLICY

Upon signing this agreement, half of the deposit will be required at contract signing, and we will have a 30-day cancellation policy in effect. The remaining balance is due at time of cutoff, which is scheduled to be **November 1st, 2024**. Any tee times cancelled on or before **November 1st, 2024,** will be issued a full refund. Tee times cancelled after **November 1st, 2024,** are subject to charge. The group will remain obligated for the full deposit amount, despite a lesser amount of players, unless the tee times can be resold.

- Major Aeration will occur during their event

GOLF BLOCK

Course	Day	Date	Time	Number of players
*Pebble Beach Golf Links	Friday	4/5/2024	12:40pm	8 Golfers
*Pebble Beach Golf Links	Friday	4/5/2024	1:20pm	4 Golfers
*Pebble Beach Golf Links	Friday	4/5/2024	1:40pm	12 Golfers

Unless otherwise indicated, tee times begin every 10 minutes

***Please Note:** *Pebble Beach Golf Links is currently scheduled for large tine greens aeration during your visit. Should this schedule remain, we would like to extend Athletes for Vets a special discounted green fee rate per player. If the aeration schedule changes, the group will be charged the current rack green fee rate per player.*

- Planner indicates they will pay by check (under Payment Schedule chart)

Deposits can be made by filling out the attached credit card authorization form, or sent to the following address: Joe Chunnic, Golf Group Sales Coordinator, **Pebble Beach Resorts**, 2136 Sunset Drive, 2nd Floor, Pacific Grove, CA 93950. If paying by bank wire, please request additional information.

Non-Resort Golf Groups (8/11)

SEND CONTRACT & LOA VIA SERTIFY

**Note—If the guest is sending a check or ACH Transfer, we still require a CC as a guarantee*

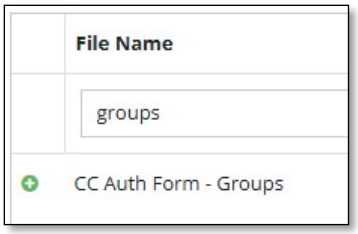
- Access Sertifi and select Create New 

- Fill in the following fields
  - ◊ File Name—PBCAUTH_(Post As)_ (Res ID)
  - ◊ 1st Level Signer—Planner's Email Address
  - ◊ 2nd Level Signer—Group Golf Coordinator Email Address
  - ◊ Expiration Date—Due Date for Signature per the Contract



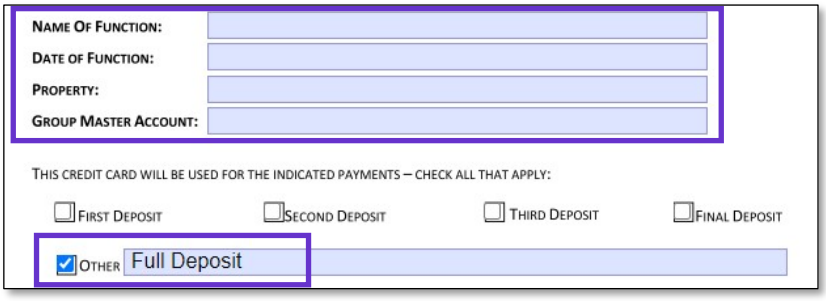
- Click Next at the bottom of the page

- Click Add Document From Library
  - ◊ Type 'Groups' into the search bar & Click the form & Click add/remove



- Click Pre-fill Form & Fill in the following fields: (All other fields will be filled in by the Planner)





- Once complete, click the Save icon, then the Door icon to exit (both in top right corner)



Non-Resort Golf Groups (9/11)

SEND CONTRACT & LOA VIA SERTIFY (Continued…)

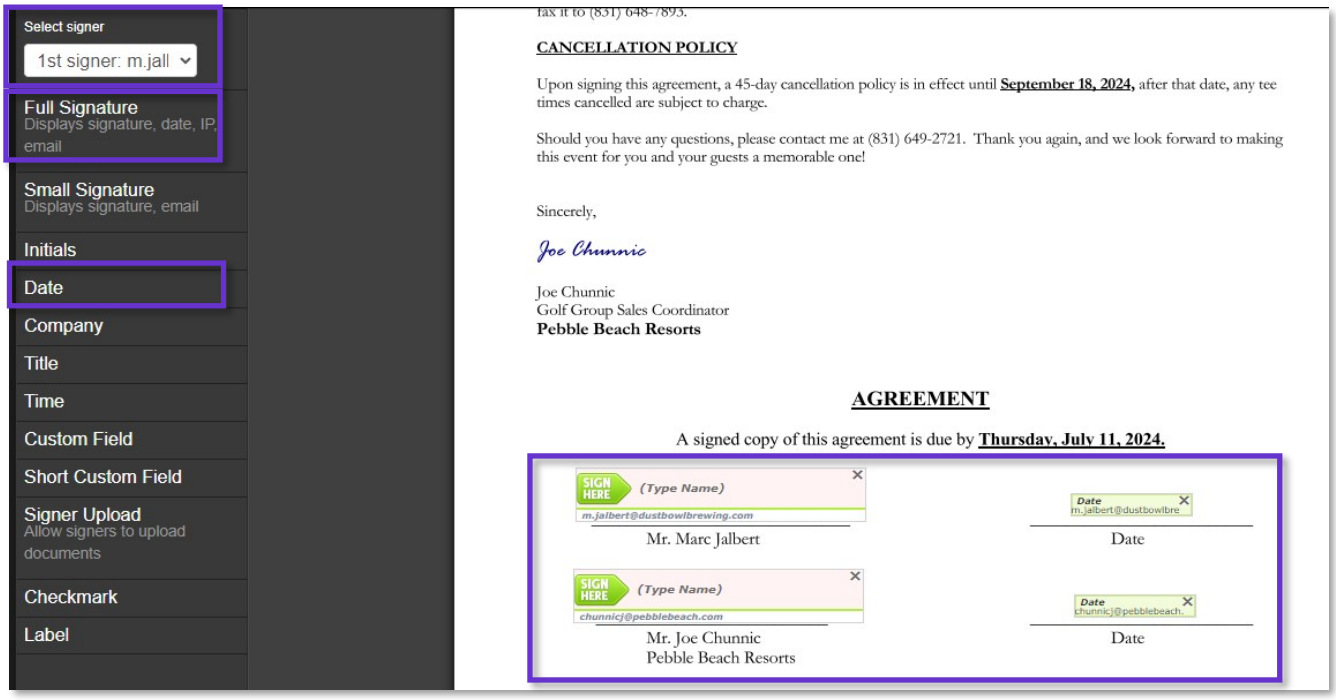
- Click Upload a Signature Document



- Attach the PDF version of the contract
- Once attached, click “Prefill/Add Locations



- Use the left pane menu to drag a signature field and date field into the appropriate areas of the contract for both the primary and secondary signers
    - ◊ Use the “select signer” dropdown to indicate which fields must be signed by the 1st level singer vs. the 2nd level signer



- Once complete, click the Save icon, then the Door icon to exit (both in top right corner)



- To finalize and send to the Planner for signature, click Next then Send Now



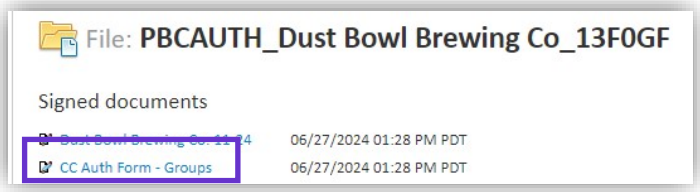
- Set a reminder to follow up at the due date in the event the guest has not yet signed

Non-Resort Golf Groups (10/11)

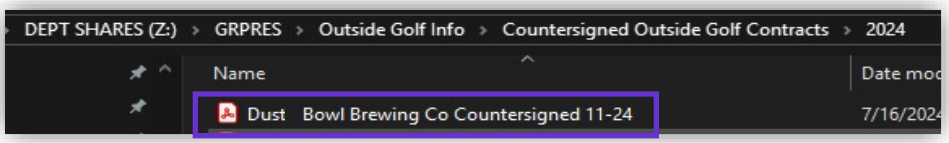
SEND CONTRACT & LOA VIA SERTIFY (Continued…)

- You will receive email notifications from Sertifi indicating that the Sertify email has been sent, opened, and signed by the Planner, then a final email will instruct you to sign.

- Once you sign the contract, download the countersigned PDF of the contract from Sertifi and save it to the Countersigned Outside Golf Contract folder

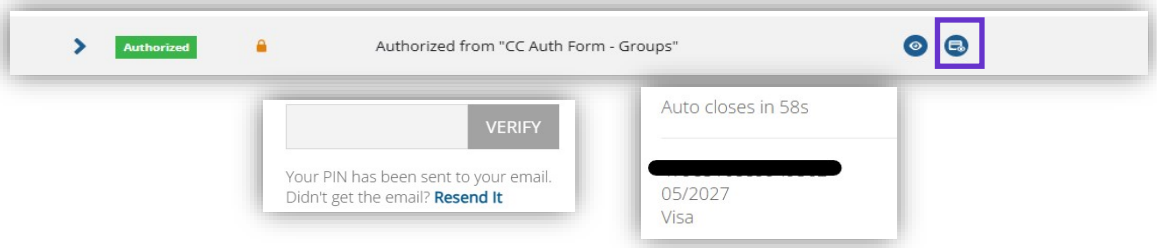


  - ◊ Title Format—(Post As) Countersigned (Event Month)-(Event Year)

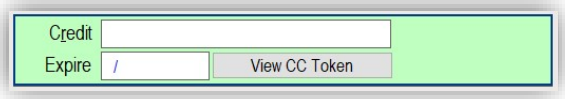


CHARGE THE DEPOSIT

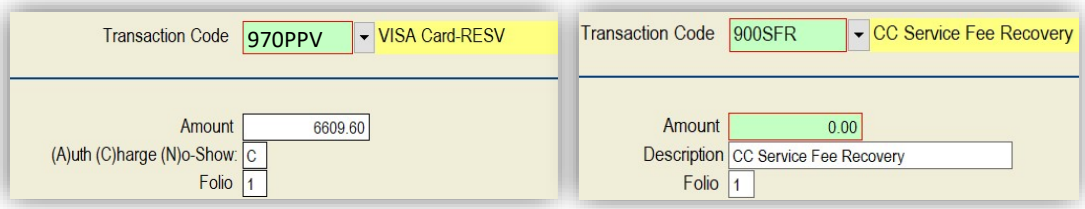
- In Sertifi, click on the credit card icon next to the Authorization Form
- You will be sent a "PIN" via email
- When you input the pin, you will have 1 minute to view the unmasked CC information



- In SMS Host, input the Credit Card info on the group's Guest Tile using your ID Tech reader



- Open the group's City Ledger and click the Bills button to charge the deposit
  - ◊ Transaction Code for greens fees +cart fees: 970PP + *M)astercard, (A)merican Ex-press, (V)isa, Di(S)cover)*
  - ◊ Transaction Code for 2% fee: 900SFR



- Download the countersigned PDF from Sertifi and email this to the planner

Non-Resort Golf Groups (11/11)

TURN THE BOOKING DEFINITE

- Update the Golf Block from OT to OD
- Update the Amadeus Booking from Tentative to Definite
- Update the SMS Host Group Management window from Tentative to Definite

FINALIZE

***Set reminders for the following finalization task checkpoints

- **7 Days** prior to the Cut-off date (Email Planner for final changes and billing)
  - ◊ Send the Non-Resort Golf Group Billing Email Template from the Digital Binder



- **Cut-off date** (Email final contract/confirmation and configure golf)
  - ◊ Run an SR18 to ensure the golf matches the final contract
  - ◊ Update the Golf Confirmation/Contract with any caddie/rental club requests and email this to the planner
  - ◊ Configure the golf: *(See Configure Golf SOP for full instructions)*
    - Use Find to connect the block to the Res ID
    - Manage Block—Change the Status from OD to OB
    - Multi-Book—
      - Split the tee times 1111
      - Apply Rack Rate
      - Generate Bookings
  - ◊ Manage Bookings—Edit, then Input Pairings (when given)
  - ◊ Double click on each tee time to open the Golf Tiles:
    - Input caddie requests
    - Input rental club requests
  - ◊ Leave a Tee Sheet Billing Note on the first time slot of the group's block
    Post As | Res ID | GGC Initials
    Master: (all that applies)
    Individual: (all that applies)

- **7 days** prior to the first date of play (Submit any Caddie Cash Payout requests)
  - ◊ This is required for any caddie requests billed to the Master

- **24-48 hours** prior to the first date of play (Create/Send Resume to the Pro Shop)
  - In the Outside Golf Info folder, open the Non-Resort Golf Group Resume Template
  - Save As—Save to the Outside Golf Resume folder in the appropriate year
  - Edit the highlighted fields on the template
  - Save both a Word & PDF version into the correct year in the Outside Golf Resume folder
  - Email the Resume to the Pro Shop for each course

SR1 | Golf Out of Range

This report will show you any group tee times that are out of range of the group's stay, meaning that the date of the tee time is outside of the group's program date range.

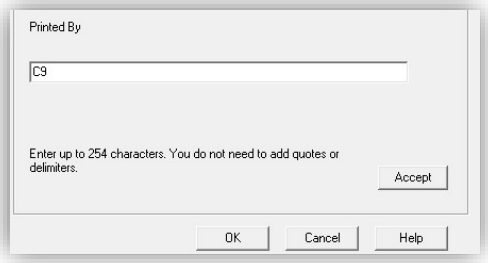
Groups are required to reserve rooms for every date they book golf. Additionally, groups must adhere to a minimum room-to-golfer ratio of 1 room for every 2 golfers to cover their golf reservations.

Run the Report:

- From the Home Screen of SMS Host, click R (Reports) > R (Report Menu) > S (Scan)
- Tab
- Type "SR1" into the Search for field
- Enter
- Type 01 to select "SR1—Golf out of Range Tee Times"



- Type your SMS Host initials into the Printed By field
- Accept
- OK



Investigate the Results:

- The group's Res ID is listed on the report under "Grp Code" - Use this to look up the group in Amadeus and see which Group Rooms and Golf Coordinator is assigned (if assigned)
- Send an email to the Group Rooms & Golf Coordinator and NSM/PBP Manager with:
  - ◊ A screenshot of the report
  - ◊ A message asking the coordinator to adjust golf/rooms as needed



- File the email into your "Golf Out of Range" folder in Outlook

Internal Club Pairings

The Golf Coordinator is responsible for managing the blocks and bookings for internal Pebble Beach Clubs which include:

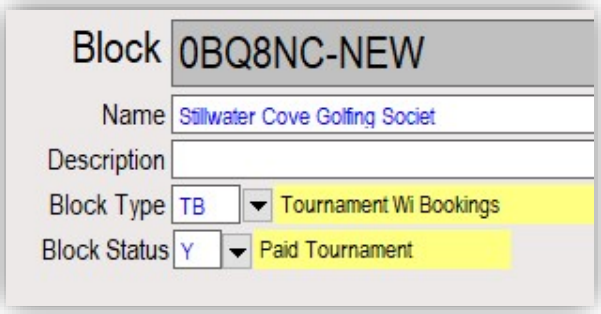
- The Beach and Tennis Club's Stillwater Cove Golfing Society
- The Spanish Bay Club's Bagpipers
- The Pebble Beach employee Company Club

As tee times near, the Group Golf Coordinator will receive emails from the various clubs with requests to input pairings onto the tee sheets. These emails will often have names in a spreadsheet:

3	DATE:	Monday, August 5, 2024	COURSE:	Spyglass - $160	
4					
5	FIRST TEE TIME:	3:30PM			
6	Name:	Trevor Hawkins	Name:	Zac Hawkins	
7	BC#	Phone:	BC#	Phone:	
8					

When the Group Golf Coordinator is sent the spreadsheet of golfer names, they must configure the tee times and input the parings

1. Edit the Block
    - Change the Block Type from TA to TB
    - Add the club's rate code
    - There is no Res ID, so you do not need to attach a Guest Tile / City Ledger



2. Split the Golf
    - Right click on the block to Multi-book
    - Enter the number of tee times in the block
    - Set the rate to the club's custom rate code
    - Enter the player pattern as 1111
    - Page Down to save
    - B to Generate Bookings
3. Input the pairings
    - Right click on the first tee time in the block and select Edit Linked Bookings
    - Click Edit in the Manage Bookings window
    - Type parings into the Last and First Name columns
    - Page Down to Save
    - Escape
4. Input Caddies and Rental Club requests as needed
5. Confirm release of any un-used tee times
6. Reply to the original email when you are done
7. File the email into the Schedules folder within Outlook under the appropriate club

Robert Luis Stevenson Schedule (1/2)

Spyglass Hill Golf Course hosts the Robert Louis Stevenson High School Golf Team twice per year, Spring and Fall. The Group Golf Coordinator is responsible for booking this group on the Tee Sheets.

- Communication
  - ◊ One to three months prior to the program, the Head Pro of Spyglass Hill Golf Course will send the proposed tournament schedule to the Group Golf Coordinator and the Golf Executive office.


Subject: RLS High School Girls Team Fall 2024 proposed days

Hello,

Please see attached for potential play dates for RLS Girls Team this fall.
This has 18 days, last year we had 17 days.

Thanks,

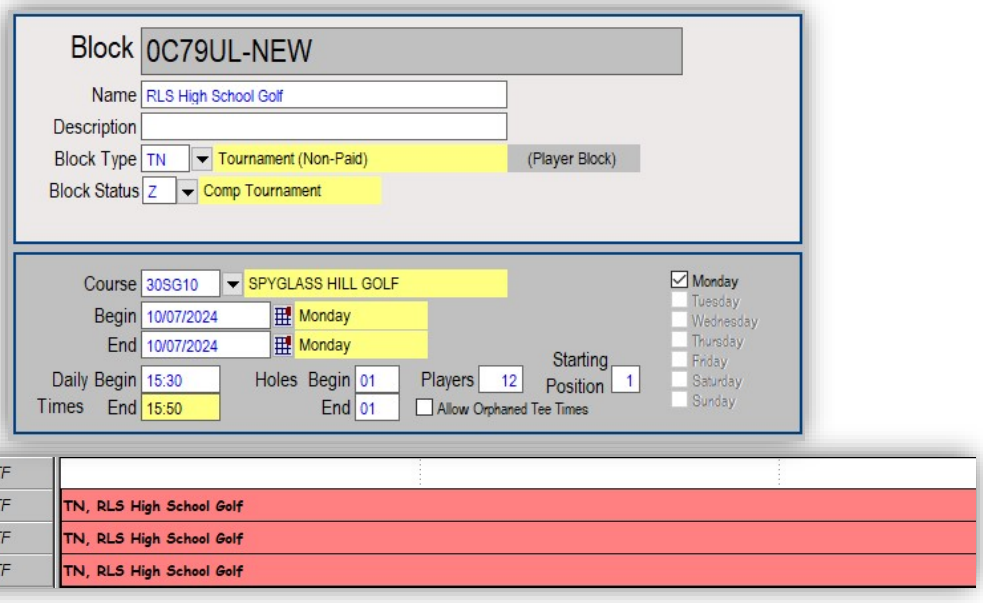
Patrick Gannon, PGA
Head Professional
Spyglass Hill Golf Course

  - ◊ The Golf Executive Office will review the schedule first. Once they approve the schedule, Group Golf Coordinator will input the schedule onto the Tee Sheets

- Look out for Conflicts
  - ◊ These tournaments takes place at the very end of the day after the final NGTF time.
  - ◊ If any of the proposed dates have a note stating “NO A/R,” the group cannot be booked on that day—Notate the day with the conflict so it documented on the schedule

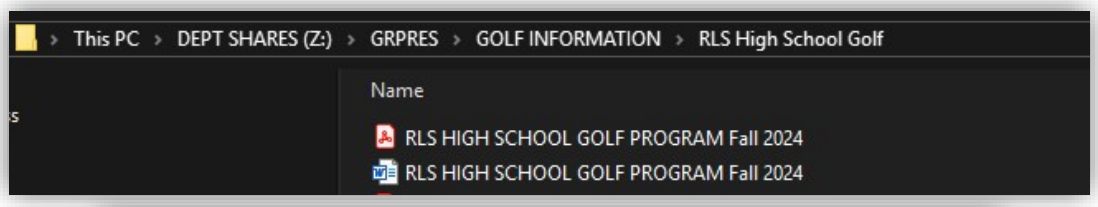


- Create the block:
  - ◊ Spyglass Hill Golf Course has 6 NGTF times each day, so you should add additional NGTF after the 6th time in order to block this group
  - ◊ Create the block with the Block Type “TN” and Block Status “Comp Tournament”
  - ◊ There will not be a Res ID for this group



Robert Luis Stevenson Schedule (2/2)

- Create the Schedule Document
  - ◊ Save within the RLS High School Golf folder
  - ◊ Save in both Word and PDF form
  - ◊ This schedule must detail any scheduling conflicts



September 24	Tuesday	Not Available – Greens Aeration	
September 25	Wednesday	Not Available – Fairway Aeration	
September 26	Thursday	3:30pm – 3:50pm	12 Players
September 30	Monday	Not Available – Fairway Topdress	
October 1	Tuesday	3:30pm – 3:50pm	12 Players
October 2	Wednesday	3:30pm – 3:50pm	12 Players

- Finalize
  - ◊ Send the schedule as a Word document to the Group Reservations Manager
  - ◊ The Group Reservations Manager will review the schedule then forward it on for approval by Revenue management and the Golf Executive Office



Subject: RLS Fall 2024 Proposed Schedule

Hi Ran,

Please see attached for the proposed RLS Fall 2024 golf schedule at Spyglass Hill. I have also attached 2023 for reference.

All tee times are in NGTF.

Once you are in agreement with dates, we will forward to John for his approval as well.

Let us know if any questions.

Thank you,

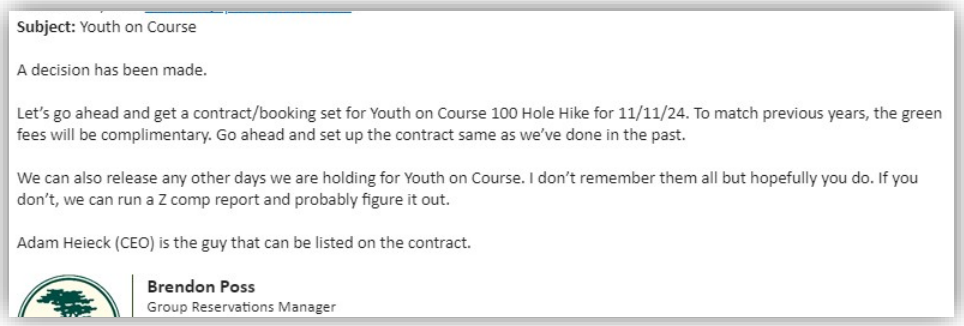
Brendon Poss
Group Reservations Manager

  - ◊ Sort the email conversation into your Outlook RLS Golf folder

Youth On Course (1/2)

The Group Golf Coordinator is responsible for creating the contract for, and managing, the annual Youth on Course 100 Hole Hike event at The Hay which is a recurring Non-Resort Golf Group for which Pebble Beach Resorts waives the greens fees.

- When the next year's event date is set, the Group Reservations Manager will inform the Group Golf Coordinator to create the contract and golf block.



Subject: Youth on Course

A decision has been made.

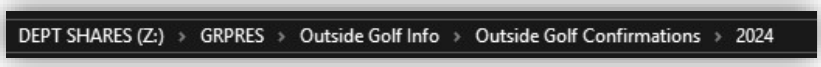
Let's go ahead and get a contract/booking set for Youth on Course 100 Hole Hike for 11/11/24. To match previous years, the green fees will be complimentary. Go ahead and set up the contract same as we've done in the past.

We can also release any other days we are holding for Youth on Course. I don't remember them all but hopefully you do. If you don't, we can run a Z comp report and probably figure it out.

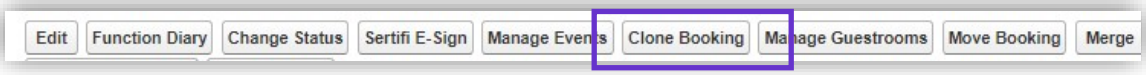
Adam Heieck (CEO) is the guy that can be listed on the contract.

Brendon Poss
Group Reservations Manager

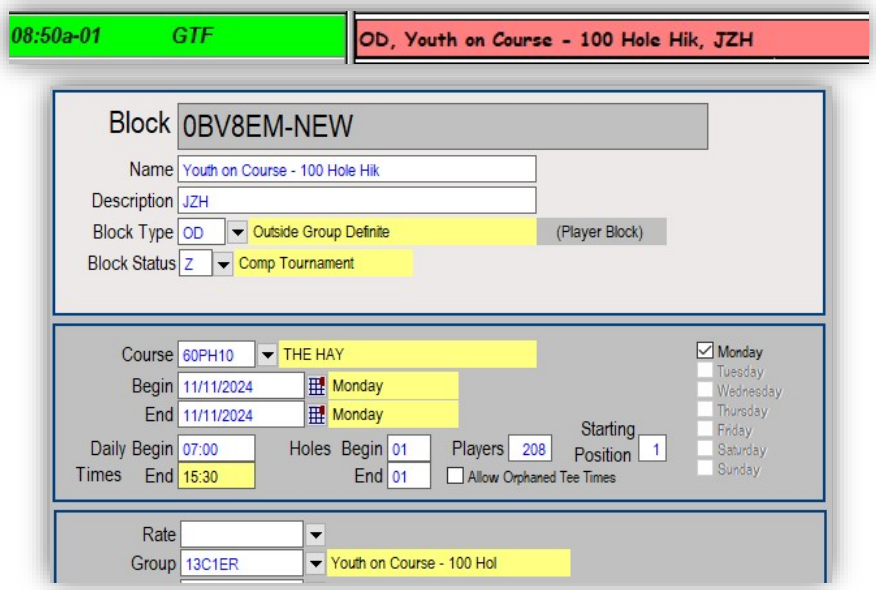
- Copy the same contract from the previous year
  - ◊ These contracts can be found in the Outside Golf Confirmations folder
  - ◊ Save the new contract as both a Word document and PDF



- In Amadeus, clone the previous year's booking
  - ◊ Edit the dates to match the new year
  - ◊ Set the status to Tentative
  - ◊ Update the Master Account # to the new Res ID generated by Amadeus



- Create the Golf Block on the Tee Sheet
  - ◊ This is a comp full day buyout
  - ◊ Work with the Group Reservations Manager to find the best date and/or work around any existing bookings on that day
  - ◊ The Block should be set as Outside Group Tentative, then changed to Outside Group Definite once the contract is signed



Youth On Course (2/2)

- Email the contract and details of the booking to the Group Reservations Manager for approval

To: Poss, Brendon <PossB@pebblebeach.com>
Subject: RE: Youth on Course

Golf has been held for 11/11/24 and noted on the tee sheet. Booking has been created, though waiting for Amadeus to do its thing and generate at ResID.

Released 9/30 and 10/24 holds.

Will need to move the (6) golfers out once signed.

Attached is contract without ResID

Thanks,

- Create the Contract
  - ◊ Include a note that explains the total fees waived
  - ◊ You will still include the Payment Schedule section with the amount due as $0

GOLF BLOCK

Course	Day	Date	Time	Number of players
The Hay	Monday	11/11/2024	7:00 a.m. – 3:30 p.m.	208 Golfers

Unless otherwise indicated, tee times begin every 10 minutes

GOLF RATES

Course	Rate
The Hay	$75.00 per player*

***Please Note:** As a special concession, we have waived all green fee charges for your event on The Hay. The waived green fees total a savings of $15,600.00 for Youth on Course.*

- Send the Contract and Letter of Authorization via Sertifi
  - ◊ This is a complimentary booking, so there is no deposit requirement, but we still collect a credit card as a guarantee
  - ◊ In addition to 1st and 2nd signer, add the Group Reservations Manager as a Non-Signer

PBCAUTH_Youth on Course 100 Hole Hike_13C1ER	chunnicj@pebblebeach.com	adam@youthoncourse.org

Signed documents

Youth on Course - 100 Hole Challenge 11-24	02/14/2024 09:41 AM PST
CC Auth Form - Groups	02/14/2024 09:41 AM PST

- Once signed, change the Amadeus Booking, Golf Block, and Group Management tile from Tentative to Definite

- Forward the email conversation to Catering and Conference Services so they are aware of the event for food and beverage components

- File the email conversation in to your Youth on Course folder

Golf Course Calendar





When to Edit the Calendar

- You create new group golf block
- You Edit a group's golf block date
- You cancel a group golf block
- You edit a Shotgun start time or # of golfers

  Note—*Changes to the Golf Course Calendar stop at the turnover since the task of editing the group's golf block is now the responsibility of the Group Rooms and Golf Coordinator*

Events

- All items are added to the calendar as "Events"
- Standard Group Golf is entered on the calendar as one event per group spanning all dates of their golf schedule
- For Shotgun Tournaments, create one event per Shotgun:



Event Titles

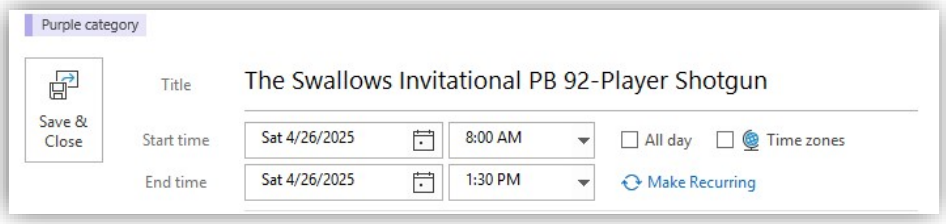
- In the Title, write the Post As with a comma followed by the initials for all courses they will play



- List the courses in the order that they will be played with commas to separate days [SB,PB,SG]
- If the group has a day in the middle with no golf, put an x on that day [SB, PB, x, SG]
- If the group has multiple courses on one day, separate with a slash [SB, SG/PB, PH]

Event Times

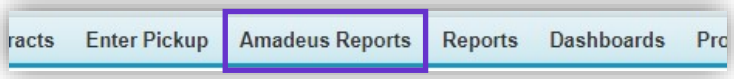
- Regular tee times are marked "all day"
- Shotguns on the calendar are set to the start time of the shotgun and set it for 5 ½ hours
- Shotgun courses will still be included on the calendar event that spans all golf program dates.



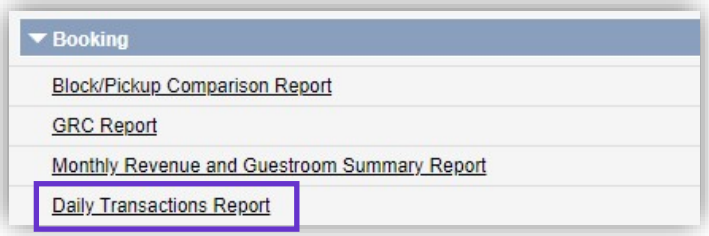
Daily Transaction Summary (1/5)

Run the Report:

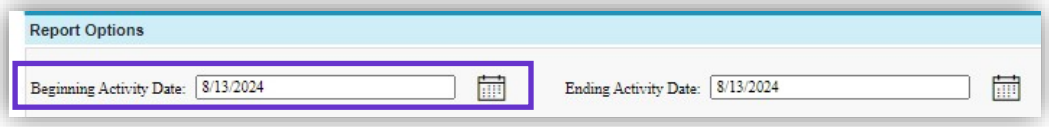
- In Amadeus, click the Amadeus Reports tab



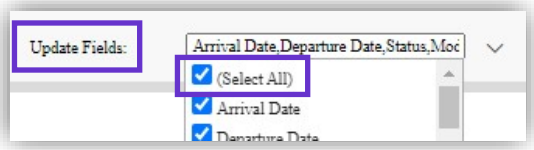
- In the Booking section, click Daily Transactions Report



- If it is Tues-Friday, do not edit the dates
  If it is Monday, edit the Beginning Activity Date to the previous Friday so the report will capture all transactions from the weekend (Friday through Sunday)

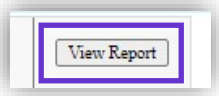


- In Update Fields, de-select the Select All checkbox

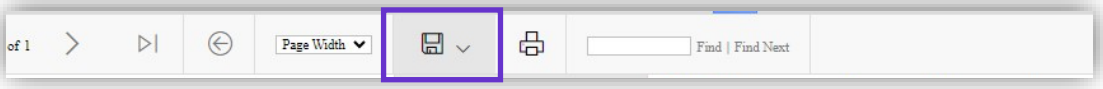


- In Update Fields, select the following boxes:
  - ◊ Arrival Date
  - ◊ Departure Date
  - ◊ Status
  - ◊ Average Rate
  - ◊ Blocked Guestrooms

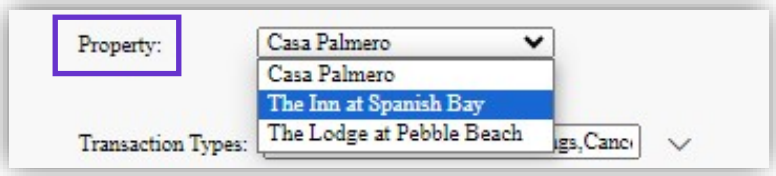
- Click the View Report button in the top right corner



- When the report generates, click the Save icon and save as a PDF



- Once saved, change the Property to the next property,



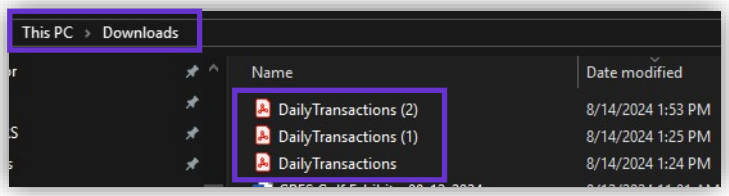
Daily Transaction Summary (2/5)

Run the Report (continued):

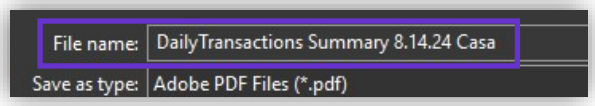
- Click View Report, then save the new report as a PDF
- Repeat until you have a report for all three properties

Save the Reports:

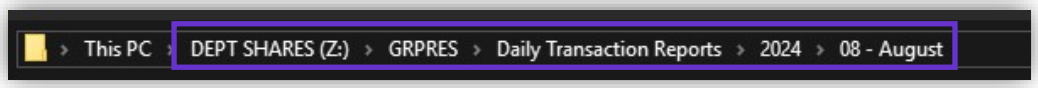
- Access your Downloads folder in File Explorer and open all three reports



- Save As [CTRL+SHIFT+S]
- Title the file "DailyTransactions Summary x.x.xx [Property]"



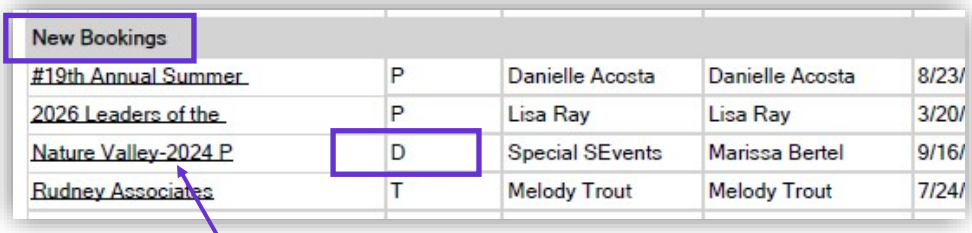
- Save the file to the Daily Transaction Reports folder for the appropriate year and month



- Repeat until all three reports are saved to this folder

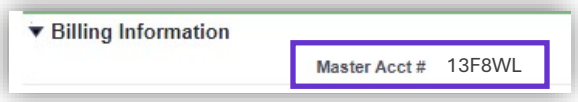
Examine the Reports:

New Bookings—Look for any new bookings that are definite



- Click on the hyperlink of the booking to open the booking in Amadeus

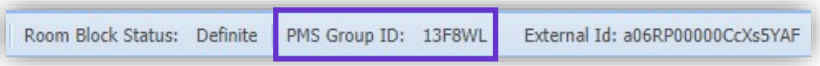
- In the Billing Information section, copy the Res ID from the Master Acct # field



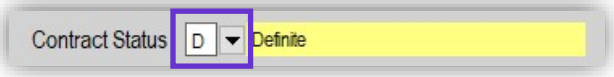
Daily Transaction Summary (3/5)

New Bookings (Continued)

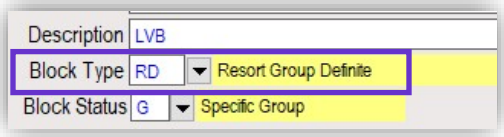
- If there is no Res ID in the Master Acct # field—go to Guestrooms > Details > The Res ID will be in the header as the PMS Group ID



- Use the Res ID to look up the group in SMS Host
- Navigate to the Group Management window
- Change the group's Status to Definite



- Reasons SMS Host may not let you save your change:
  - ◊ The Market Segment and Sub-Market do not match—Fix it! *(This is a temporary change since they will default back to the original selections when Amadeus syncs)*
  - ◊ There is no address—Put a dot in the address field!
- Run an SR18 to see if the booking has golf attached
- If there is golf attached, look the golf up on the tee sheet and make sure the block status is set to RD for all golf blocks



Updated Bookings #1—Look for significant drops in room count

- Compare Previous Value to Current Value

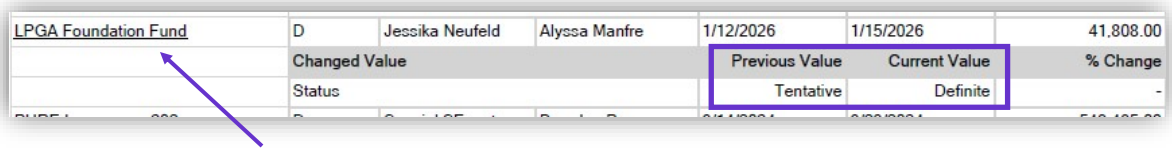
$Legends Invit	D	Jayne Hankison	Brendon Poss	11/9/2024	11/19/2024	444,710.00
	Changed Value			Previous Value	Current Value	% Change
	BlockedGuestrooms			533	538	0.94 %
			11/14/2024	130	131	0.77 %
			11/15/2024	130	131	0.77 %
			11/16/2024	130	131	0.77 %
			11/17/2024	125	126	0.80 %

- You are looking for significant changes that could possibly mean the system cut rooms by mistake or something has occurred that should be brought to the GRES Manager's attention ("Significant" can be defined as a drop of more than 25% or the loss of an entire night)
- If you see a significant drop (we do not care about increases or rate changes), send an email to the whoever owns the booking
  - If Tentative, email the NSM/PBP
  - If Definite, email the Group Rooms & Golf Coordinator/PBP
  - Do not send an email if the group is owned by PBC Special Events

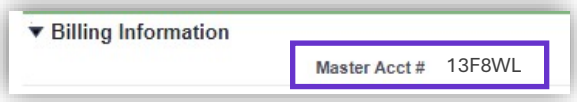
Daily Transaction Summary (4/5)

Updated Bookings #2—Look for groups with a status change from Tentative to Definite

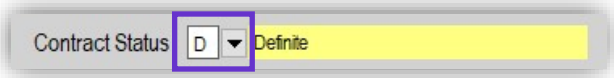
- Compare Previous Value to Current Value



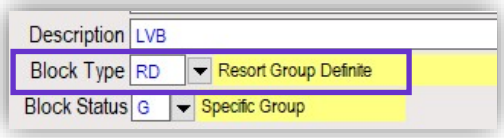
- Click on the hyperlink of the booking to open it in Amadeus
- In the Billing Information section, copy the Res ID from the Master Acct # field



- Use the Res ID to look up the group in SMS Host
- Navigate to the Group Management window
- Change the group's Status to Definite

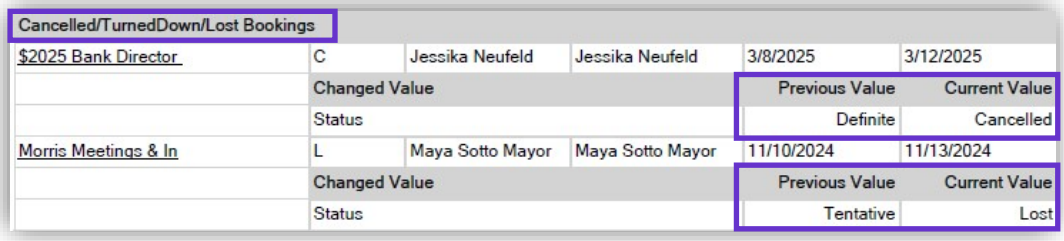


- Run an SR18 to see if the booking has golf attached to the booking
- If there is golf attached, look the golf up on the tee sheet and make sure the block status is set to RD for all golf blocks

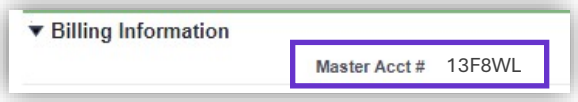


Cancelled/Turned Down/Lost Bookings—Look for bookings that were previously Tentative/Definite

- Compare Previous Value to Current Value
  Note—There is no need to investigate any bookings that were previously "Prospect" since Prospect Amadeus bookings do not generate anything in SMS Host



- Click on the hyperlink of the booking to open the booking in Amadeus
- In Billing Information section, copy the Res ID from the Master Acct # field



Daily Transaction Summary (5/5)

Cancelled/Turned Down/Lost Bookings (Continued)

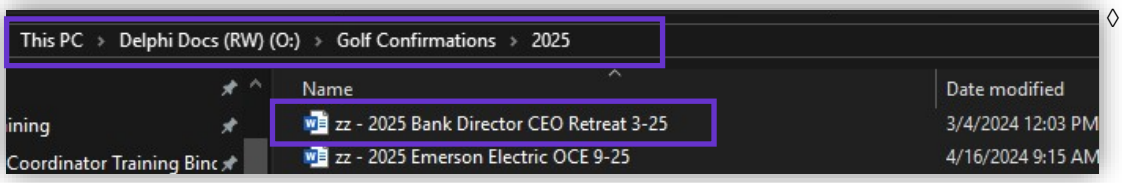
- Use the Res ID to look up the group in SMS Host
- Navigate to the Group Management window
- Change the group's Status to the new Cancelled/Turned Down/Lost status



- Run an SR18 to see if the booking has golf attached to it
- If there is golf attached, look the golf up on the tee sheet and cancel all blocks
  - ◊ Right click on the block > Mange Block
  - ◊ Click Cancel at the bottom of the window



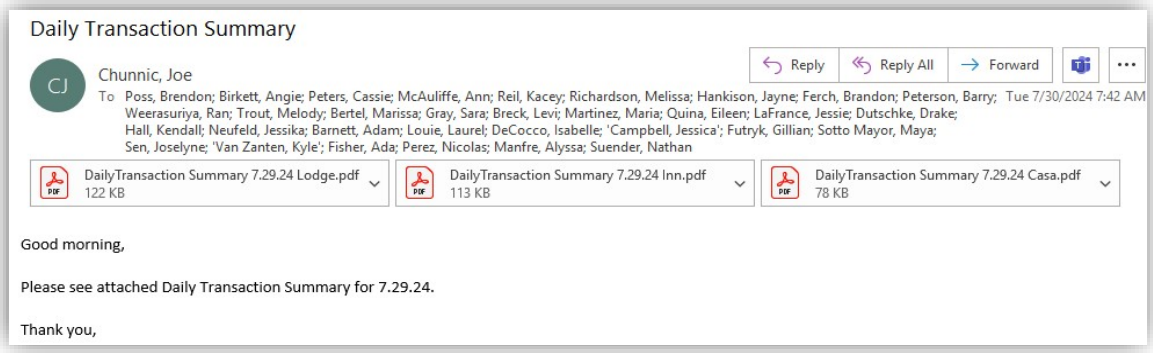
  - ◊ Click Yes to confirm the cancellation
- Once all blocks are cancelled, archive the Golf Confirmation
  - ◊ Locate the group's Golf Confirmation in the Golf Confirmation folder
  - ◊ Edit the title of the confirmation and add "zz—" before the name in both the Word and PDF documents



- Discard all contents of the Tan Folder (NSM only, n/a to PBP)
- Update the Golf Course Calendar if the group changed dates, courses or a shotgun start time (NSM only, n/a to PBP)

Distribute the Report

- Attach all three reports to an email, referring to the previous day's email to copy contacts



- File this email into your Daily Transaction Summary folder in Outlook

SR1 | Golf Out of Range

This report will show you any group tee times that are out of range of the group's stay, meaning that the date of the tee time is outside of the group's program date range.

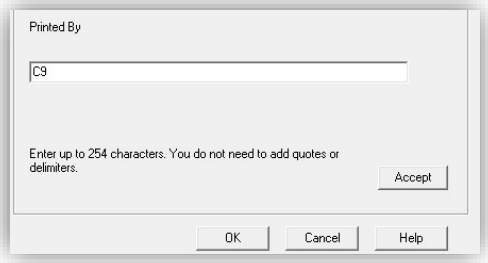
Groups are required to reserve rooms for every date they book golf. Additionally, groups must adhere to a minimum room-to-golfer ratio of 1 room for every 2 golfers to cover their golf reservations.

Run the Report:

- From the Home Screen of SMS Host, click R (Reports) > R (Report Menu) > S (Scan)
- Tab
- Type "SR1" into the Search for field
- Enter
- Type 01 to select "SR1—Golf out of Range Tee Times"



- Type your SMS Host initials into the Printed By field
- Accept
- OK



Investigate the Results:

- The group's Res ID is listed on the report under "Grp Code" - Use this to look up the group in Amadeus and see which Group Rooms and Golf Coordinator is assigned (if assigned)
- If Definite—send an email to the Group Rooms & Golf Coordinator or PBP Manager
- If Tentative—send an email to the NSM or PBP Manager
- Include a screenshot of the report and a message asking the coordinator to adjust golf/ rooms as needed



- File the email into your "Golf Out of Range" folder in Outlook

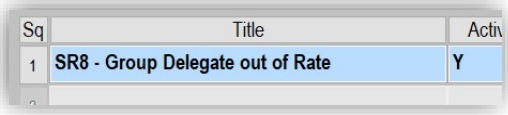
SR8 | Delegates Out of Range

This report will show you rooms with dates that extend outside of the group's program dates.

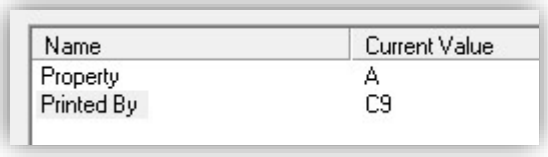
Group Rooms & Golf Coordinators must ensure that the program dates of their assigned groups encompass all rooms within the group, including rooms with pre/post nights.

Run the Report:

- From the Home Screen of SMS Host, click R (Reports) > R (Report Menu) > S (Scan)
- Tab
- Type "SR8" into the Search for field
- Enter
- Type 01 to select "SR8—Group Delegate out of Rate"

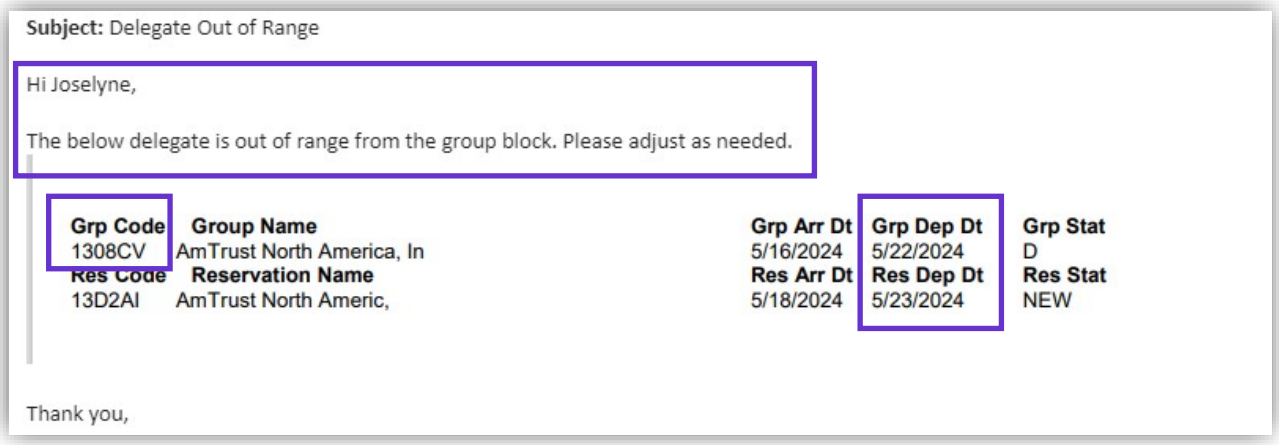


- Type A, then Enter (Accept) to run the report for All Properties
- Type your SMS Initials, then Enter (Accept)
- Click OK



Investigate the Results:

- The group's Res ID is listed on the report under "Grp Code" - Use this to look up the group in Amadeus and see which Group Rooms and Golf Coordinator is assigned
- Send an email to the Group Rooms & Golf Coordinator or PBP Manager with:
  - ◊ A screenshot of the report
  - ◊ A message asking the coordinator to adjust rooms as needed

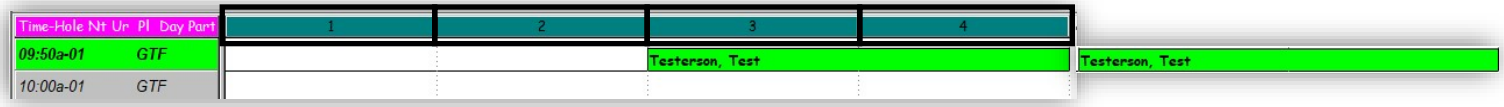


- File the email into your "Delegate Out of Range" folder in Outlook

Mis-Positioned Tee Times

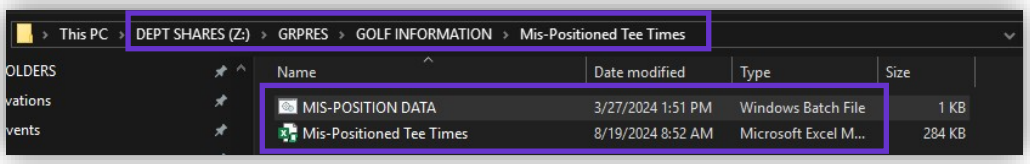
This report highlights tee times that have overlapping bookings.

Each tee time has 4 positions on the tee sheet. When golfers in positions 3 and 4 add two more golfers to their tee time, the system may try to put the new golfers in positions 5 and 6, which don't exist. Instead, the new golfers are added on top of positions 3 and 4. This can make it look like positions 1 and 2 are open, but really, the tee time is full with four golfers.

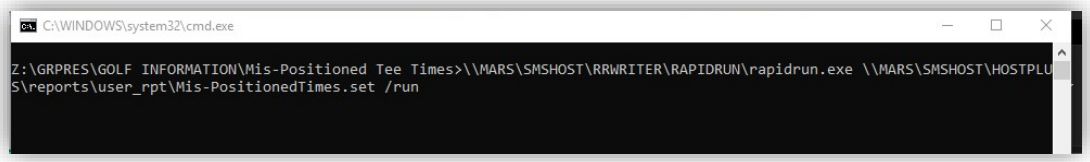


Run the Report:

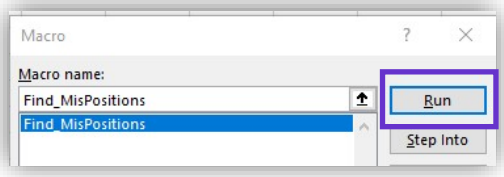
- Open the Mis-Positioned Tee Times folder in the Z Drive

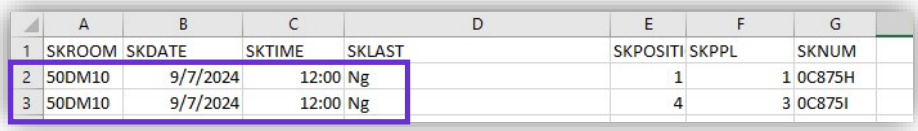


- Double click on the MIS-POSITION DATA Batch File
  - ◊ Once opened, let it run—This will update the report so you can view it in Excel
  - ◊ This process requires the agent to have Datavision



- Once the report is done running, open the Mis-Positioned Tee Times Excel Document
- In the Excel document, click ALT+F8 to View Macros
  - ◊ Manual access: View (header) > Macros > View Macros
- In the Macros window, click Run





	A	B	C	D	E	F	G
1	SKROOM	SKDATE	SKTIME	SKLAST	SKPOSITI	SKPPL	SKNUM
2	50DM10	9/7/2024	12:00	Ng	1	1	0C875H
3	50DM10	9/7/2024	12:00	Ng	4	3	0C875I

Investigate the Results:

- Locate the golf from the report on the tee sheet
- Drag and drop the overlayed tee times into the open positions

Common error: If you cannot move these tee times, double click on the golf tile click edit, then click Page Down—This will put all golfers into the correct positions

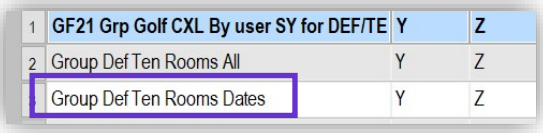
Group Def Ten Rooms Dates

This report will show you bookings (City Ledgers + Group Guest Tiles) that were created by the system (SY) yesterday as a result of a booking being changed to Tentative.

We must ensure that all system-created bookings in SMS are valid in Amadeus. Bookings that appear in SMS, but not Amadeus are the result of NSMs/PBPs deleting bookings in Amadeus instead of cancelling or turning them down.

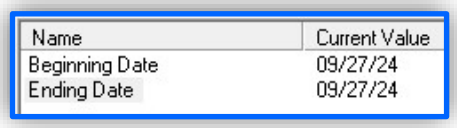
Run the Report:

- From the Home Screen of SMS Host, click R (Reports) > R (Report Menu) > S (Scan)
- Tab
- Type "Def" into the Search for field
- Enter
- Select "Group Def Ten Room Dates"

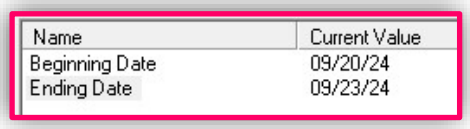


1	GF21 Grp Golf CXL By user SY for DEF/TE	Y	Z
2	Group Def Ten Rooms All	Y	Z
3	Group Def Ten Rooms Dates	Y	Z

- Set the Beginning Date and Ending Date
  - Tuesday-Friday, set both dates to yesterday
  - On Mondays or post-holidays, set the Beginning Date to the previous Friday and the Ending Date to yesterday



Name	Current Value
Beginning Date	09/27/24
Ending Date	09/27/24

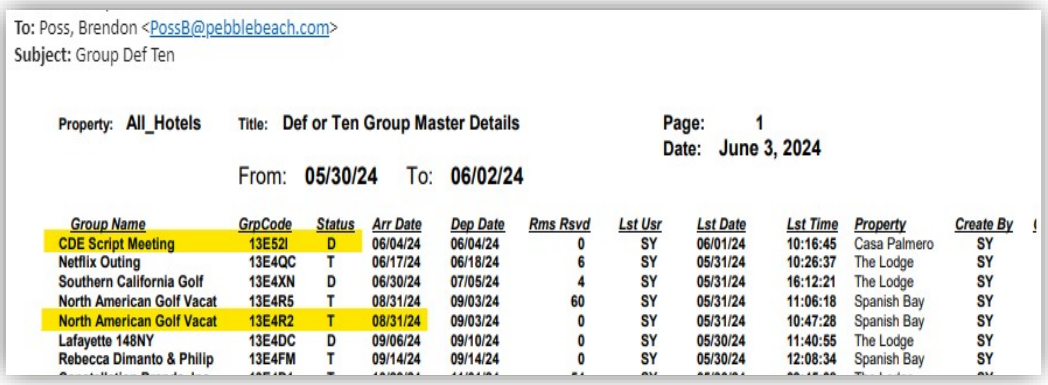


Name	Current Value
Beginning Date	09/20/24
Ending Date	09/23/24

- OK to run the report

Investigate the Results:

- Look up each Group Code (Res ID) from the report in Amadeus to make sure a Booking pulls up in the search results
- If any Res IDs do not pull up a booking:
  - Take a screenshot of the report and highlight those invalid Res IDs
  - Email this screenshot to the Group Reservations Manager
- The manager will speak to the NSM/PBP about the booking, then reply "done" to your email



To: Poss, Brendon <PossB@pebblebeach.com>
Subject: Group Def Ten

Property: All_Hotels Title: Def or Ten Group Master Details Page: 1
Date: June 3, 2024

From: 05/30/24 To: 06/02/24

Group Name	GrpCode	Status	Arr Date	Dep Date	Rms Rsvd	Lst Usr	Lst Date	Lst Time	Property	Create By
CDE Script Meeting	13E52I	D	06/04/24	06/04/24	0	SY	06/01/24	10:16:45	Casa Palmero	SY
Netflix Outing	13E4QC	T	06/17/24	06/18/24	6	SY	05/31/24	10:26:37	The Lodge	SY
Southern California Golf	13E4XN	D	06/30/24	07/05/24	4	SY	05/31/24	16:12:21	The Lodge	SY
North American Golf Vacat	13E4R5	T	08/31/24	09/03/24	60	SY	05/31/24	11:06:18	Spanish Bay	SY
North American Golf Vacat	13E4R2	T	08/31/24	09/03/24	0	SY	05/31/24	10:47:28	Spanish Bay	SY
Lafayette 148NY	13E4DC	D	09/06/24	09/10/24	0	SY	05/30/24	11:40:55	The Lodge	SY
Rebecca Dimanto & Philip	13E4FM	T	09/14/24	09/14/24	0	SY	05/30/24	12:08:34	Spanish Bay	SY

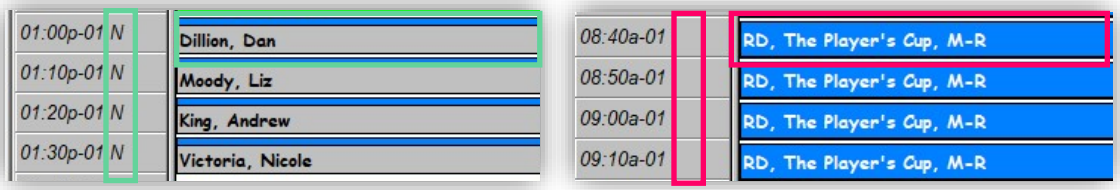
Tee Sheet Configuration

To Configure the Tee Sheets means ensuring proper setup for golf scheduled the following day.

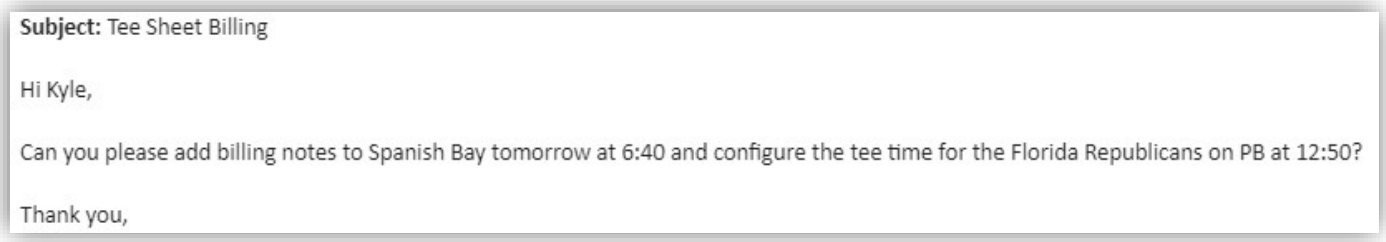
- **Review Tee Sheets**
  - ◊ Begin your review in the last hour of the day to allow time for coordinators to input last minute changes
  - ◊ Monday to Thursday: Review tee sheets for the next day
  - ◊ Fridays: Review tee sheets for Saturday, Sunday, and Monday

- **Verify Group Golf Configuration:**
  - ◊ Look for group golf blocks that are not configured
  - ◊ Look for group golf blocks that are missing the Tee Sheet Billing Note
    Note—It is ok for DM to have unconfigured OD group blocks

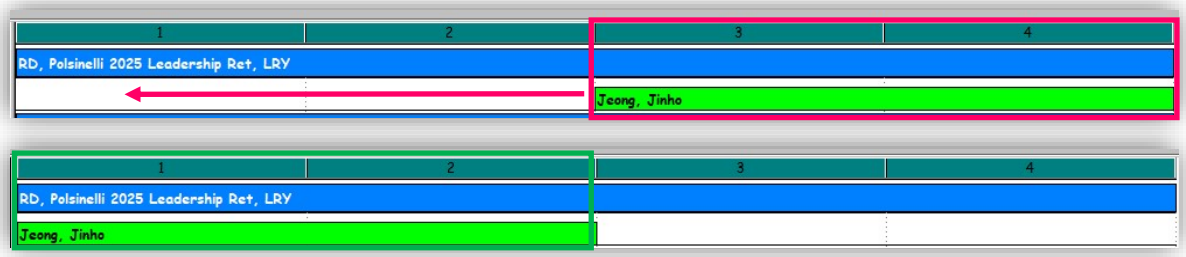
Note Configured No Note Not Configured



- **Email Configuration Issues to PBP / GRES Coordinators**
  - ◊ Advise them to address the issue, and include group details
  - ◊ Best Practice: Send only one email per person after reviewing all 5 courses
  - ◊ File the email into your Golf Configuration folder in Outlook



- **Optimize Tee Times**
  - ◊ Position tee times with less than 4 golfers starting player 1 to avoid overlapped bookings



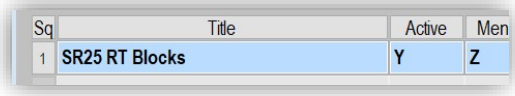
SR25 | RT Block Report

This report will show you all Tentative Golf Blocks within the next three months.

We must make sure that we do not have any Tentative Golf that is associated with a Definite Booking. This report may catch discrepancies that were missed when reviewing the Daily Transaction Summary.

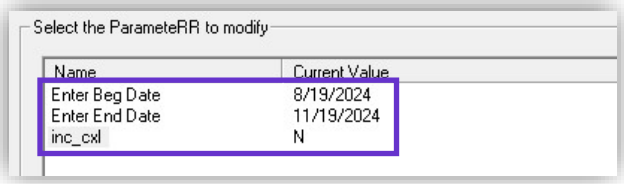
Run the Report:

- From the Home Screen of SMS Host, click R (Reports) > R (Report Menu) > S (Scan)
- Tab
- Type "SR25" into the Search for field
- Enter
- Select "SR25 RT Blocks"



Sq	Title	Active	Men
1	SR25 RT Blocks	Y	Z

- Set the report parameters (Click Accept after each entry):
  - ◊ Set the Beginning Date to today
  - ◊ Set the and Ending Date to 3 Months Out
  - ◊ Select N so the report does not include cancelled blocks



- OK to run the report

Investigate the Results:

- The Res ID for each group is in the BLGROUP column of the report—use this to look up the Booking in Amadeus
- Look at the Status of the Booking in the Information section:

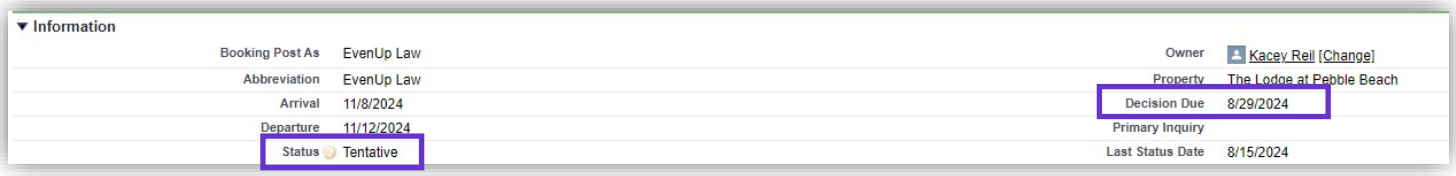


BLNUM	BLGROUP	BLLEV	Group Name	BLCOURSE	BLCODE	BLBEGDATE	BLENDDATE	BLPLAYERS	BLBEGTIME	BLENDTIME
0C86BL	13F9HT	NEW	EvenUp Law	10PB10	RT	11/11/2024	11/11/2024	32	07:10	08:20
0C86BM	13F9HT	NEW	EvenUp Law	10PB10	RT	11/11/2024	11/11/2024	8	08:40	08:50

  - If the status is Definite—Locate the golf blocks on the Tee Sheets and change the golf Block Type from RT (Tentative) to RD (Definite)



  - If the Status is Tentative—Make sure the Decision Due date is in the future. If it is, no further action is needed. If not, email the Group Reservations Manager



SR7 | Group Commitment Report (1/2)

This report will show all groups arriving within the next 3 months.

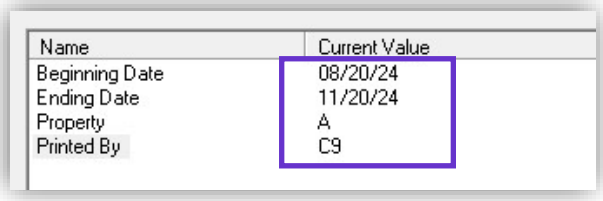
This report lets the hotel operations staff understand the outlook of group blocks for the next three months and lets Group Reservations see a snapshot of the progress of room pickups.

Run the Report:

- From the Home Screen of SMS Host, click R (Reports) > R (Report Menu) > S (Scan)
- Tab
- Type "SR7" into the Search for field
- Enter
- Select "SR7—Group Block Summary By Date"

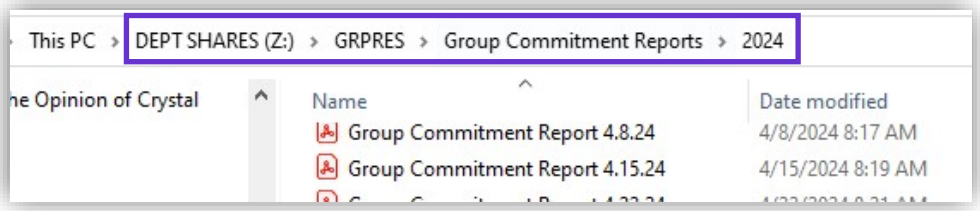


- Set the report parameters (Click Accept after each entry):
  - ◊ Set the Beginning Date to today
  - ◊ Set the and Ending Date to 3 Months Out
  - ◊ Select A to include All Properties
  - ◊ Input your SMS Initials



- Allow time for the report to run—You cannot use SMS Host during this process

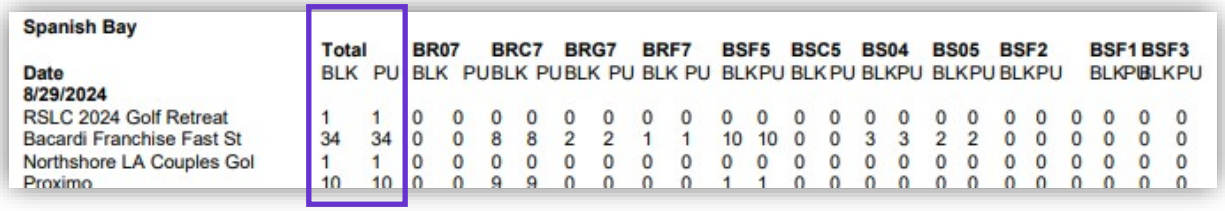
- Once the PDF is generated, save this in the Group Commitment Report folder under the appropriate year



SR7 | Group Commitment Report (2/2)

Investigate the Results:

- Review the Total Block and Pick Up looking for instances in which the Block and Pickup do not match
  - ◊ For Spanish Bay and The Lodge, review all bookings arriving within the next two weeks, excluding today
  - ◊ For Casa Palmero, review all months



Spanish Bay	Total		BR07		BRC7		BRG7		BRF7		BSF5		BSC5		BS04		BS05		BSF2		BSF1		BSF3	
Date	BLK	PU	BLK	PU	BLK	PU	BLK	PU	BLK	PU	BLK	PU	BLK	PU	BLK	PU	BLK	PU	BLK	PU	BLK	PU	BLK	PU
8/29/2024																								
RSLC 2024 Golf Retreat	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Bacardi Franchise Fast St	34	34	0	0	8	8	2	2	1	1	10	10	0	0	3	3	2	2	0	0	0	0	0	0
Northshore LA Couples Gol	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Proximo	10	10	0	0	9	9	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0

- If you find a discrepancy, look up the group in Amadeus to see who owns the booking—You must look groups up by name and locate the booking that matches the report dates

- Email the coordinator to advise of the discrepancy and ask them to adjust accordingly
  Note—Most bookings within 3 months will be Definite, so you will be contacting the Group Rooms & Golf Coordinator or PBP. If Tentative, contract the NSM or PBP.



Subject: Block/Pickup

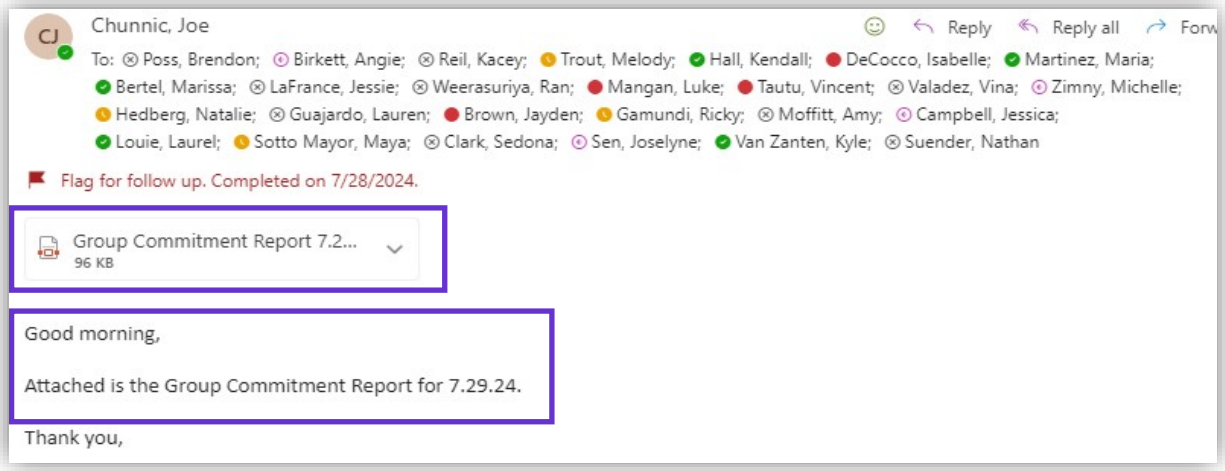
Hi Kyle,

The following group's block/pickup do not match:
- Diageo Control H2 Celebration – 1393ZS
- Cantor Fitzgerald – 13329T
- Florida Republicans - 1371LQ

Please either pickup the remaining unused rooms as TBAs or release the remaining unused rooms from the block for resell so these numbers align moving forward.

Tip: Review the entire report before you send your emails to avoid sending multiple emails to the same Group Rooms & Golf Coordinator

- Email the PDF of the entire report (Copy contacts from the previous email)



Chunnic, Joe — Reply — Reply all — Forw

To: Poss, Brendon; Birkett, Angie; Reil, Kacey; Trout, Melody; Hall, Kendall; DeCocco, Isabelle; Martinez, Maria; Bertel, Marissa; LaFrance, Jessie; Weerasuriya, Ran; Mangan, Luke; Tautu, Vincent; Valadez, Vina; Zimny, Michelle; Hedberg, Natalie; Guajardo, Lauren; Brown, Jayden; Gamundi, Ricky; Moffitt, Amy; Campbell, Jessica; Louie, Laurel; Sotto Mayor, Maya; Clark, Sedona; Sen, Joselyne; Van Zanten, Kyle; Suender, Nathan

Flag for follow up. Completed on 7/28/2024.

Group Commitment Report 7.2...
96 KB

Good morning,

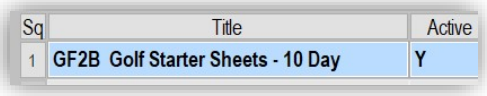
Attached is the Group Commitment Report for 7.29.24.

Thank you,

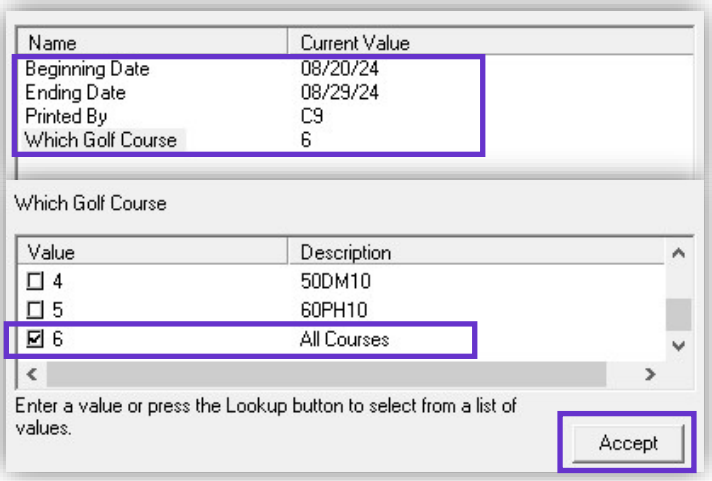
GF2B | Save 10 Day Tee Sheets

Run the Report:

- From the Home Screen of SMS Host, click R (Reports) > R (Report Menu) > S (Scan)
- Tab
- Type “GF2B” into the Search for field
- Enter
- Select “GF2B Golf Starter Sheets—10 Day”

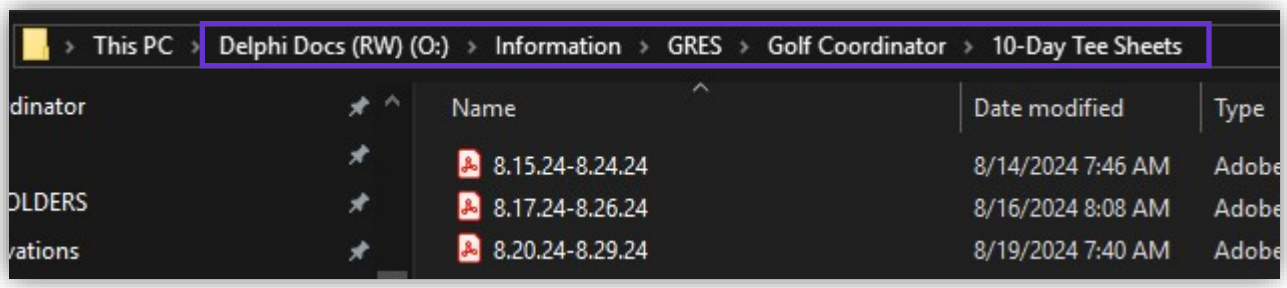


- Set the report parameters (Click Accept after each entry):
  - ◊ Set the Beginning Date to tomorrow
  - ◊ Set the and Ending Date to 10 days into the future
  - ◊ Set Printed By to your SMS initials
  - ◊ Check All Courses



- OK to run the report

- Save this report to the 10 Day Tee Sheets folder in the O Drive:



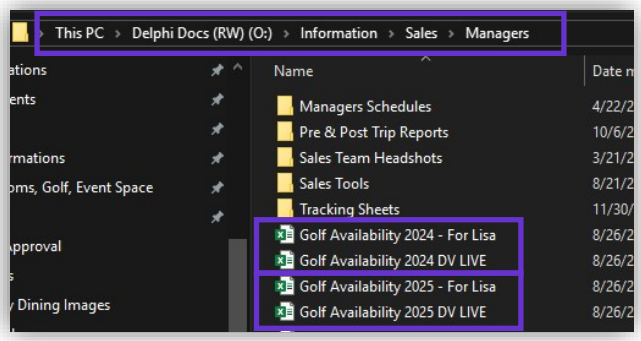
- Past reports can be deleted as soon as we are past the date range of the report

Data Vision Live | Golf Availability

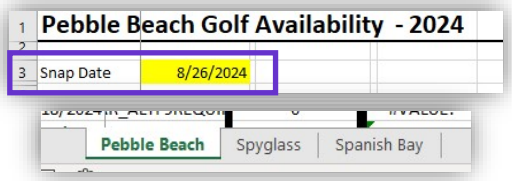
These reports shows the number of player availability across PB/SG/SB for the next two years. These two reports are updated weekly for the Sales Team to use when planning new contracts.

Run the Report:

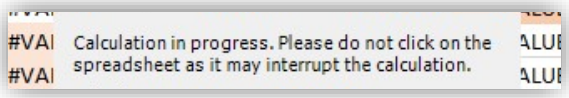
- Navigate to the Managers folder within the O Drive



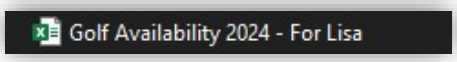
- Open the first year's "DV LIVE" file
- Change the Snap Date to today, which will automatically update across all three tabs



- Type ALT+F9 to recalculate all formulas in the workbook

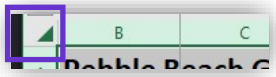


- Once complete, Save the document
- After saving, click Save As to replace the "for Lisa" file

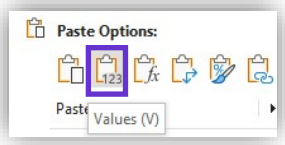


- Repeat this process for the second year's "DV LIVE" file

- Edit the "For Lisa" file
  - ◊ Select all by clicking the arrow in the top left of the excel sheet



  - ◊ CTRL+C or Right Click to Copy
  - ◊ Right Click to Paste
  - ◊ Select the Paste Option: Values (V)



This removes the formulas, leaving only the values. We are taking the live DV version and making it a non live version for Lisa and the Sales Team

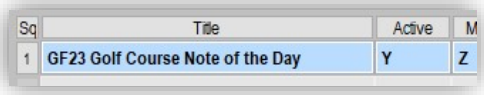
  - ◊ Repeat this Copy/Paste on all tabs
- Repeat this process for the second "For Lisa" file

GF23 | Note of the Day

This report will show all "Notes of the Day" for all golf courses. This report is run weekly from today to 1 year in the future. 1 week out of the month, we run the report from today to 5 years from now.

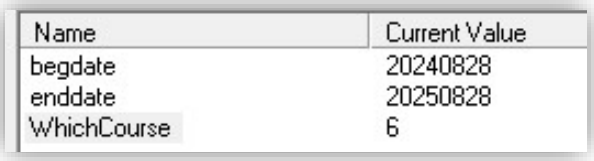
Run the Report:

- From the Home Screen of SMS Host, click R (Reports) > R (Report Menu) > S (Scan)
- Tab
- Type "GF23" into the Search for field
- Enter
- Select "GF23 Golf Course Note of the Day"



Sq	Title	Active	M
1	GF23 Golf Course Note of the Day	Y	Z

- Set the report parameters (Click Accept after each entry):
  - ◊ Set the begdate to today (enter in YYYYMMDD format)
  - ◊ Set the and enddate to 1 year out (enter in YYYYMMDD format)
  - ◊ Check the box for 6 "All Courses"

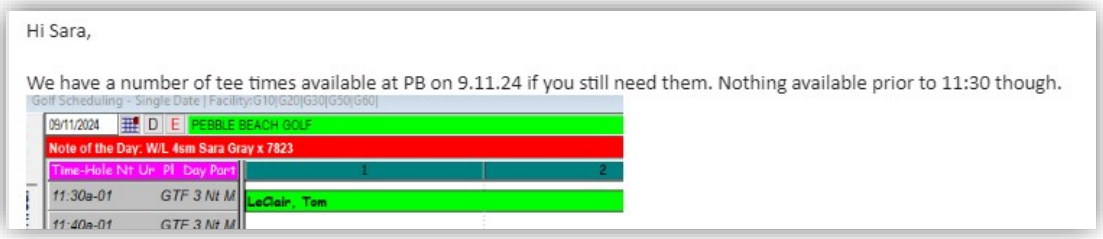


Name	Current Value
begdate	20240828
enddate	20250828
WhichCourse	6

Investigate the Results:

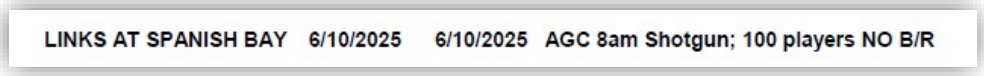
Waitlist Notes

- Look up these dates/times on the tee sheet to see if any waitlisted golf is now available—If so, send a message to the person who input the waitlist.



Shotgun Notes

- Look for any notes that might belong to groups who have already cancelled or look like duplicates
- Delete or edit any shotgun notes that are inaccurate
- Review the Golf Confirmations to ensure the shotguns are appropriately notated or removed



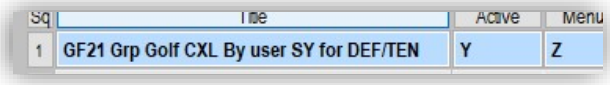
Del Monte Golf Course Notes—This course manages their own tee sheets. The Group Golf Coordinator is not responsible for auditing their notes.

GF21 | Group Golf CXL By SY for DEF/TEN

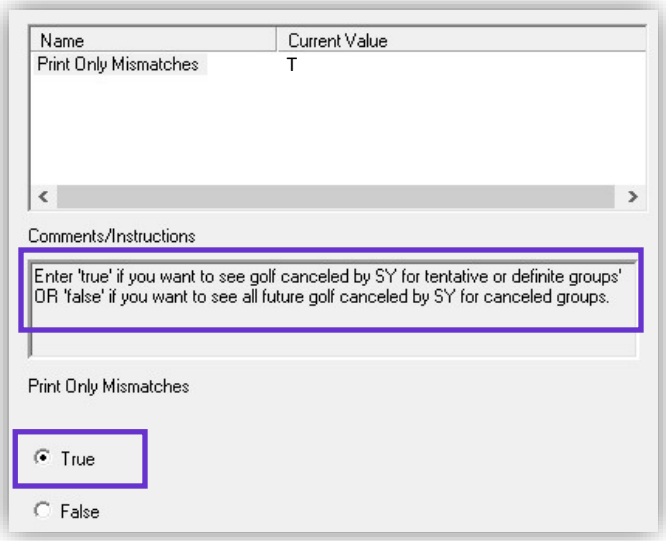
This report will show Definite or Tentative Golf Blocks that were canceled by the system (SMS Host).

Run the Report:

- From the Home Screen of SMS Host, click R (Reports) > R (Report Menu) > S (Scan)
- Tab
- Type "GF21" into the Search for field
- Enter
- Select "GF21 Grp Golf CXL By user SY for DEF/TEN"



- Select True to limit the results to only tentative/tentative groups with golf cancelled by SY



- Click Accept
- Click OK - *Note: This report takes approximately 5-10 minutes to run*

Investigate the Results:

- If you find results on this report, look up the group in SMS Host to verify that the status of the group is tentative or definite
- If so, investigate whether the Group Golf Block(s) was cancelled by mistake
- If it was a mistake, reinstate the golf blocks and ensure that the Golf Confirmation is accurate
- Be sure to loop in the Group Rooms & Golf Coordinator to this issue



Property: All_Hotels
Printed: 09:21
K:\HOSTPLUS\RS_SKED.DBF

Title: **Groups Tentative or Definite Where Golf Has Been Canceled By 'SY'**

Page: 1
Date:8/28/2024

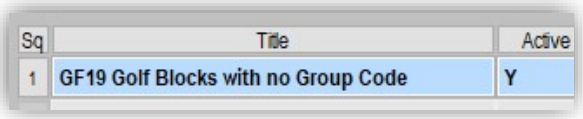
SKGNUM	SKPPL	SKLEV	SKDATE	SKTIME	SKROOM	SKGROUP	SKCHLOG
9/27/2024	1	CAN	8/28/2024	07:40	Del Monte Golf Course	0C91R4	08/28/24 07:37 WC CAN #44RB9CA 08/28/24 07:37 WC Level: NEW to CAN 08/28/24 07:37 WC Service Duration: 270 to 0

GF19 | Group Blocks with No Group Code (1/2)

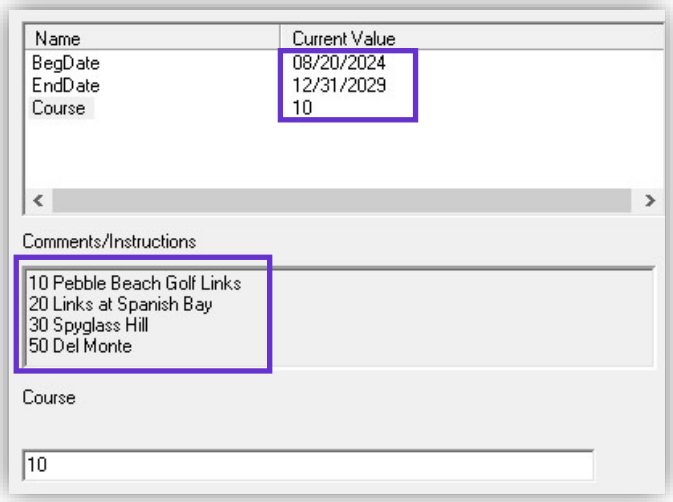
This report will show all Group Golf Blocks that are not associated with a Res ID.

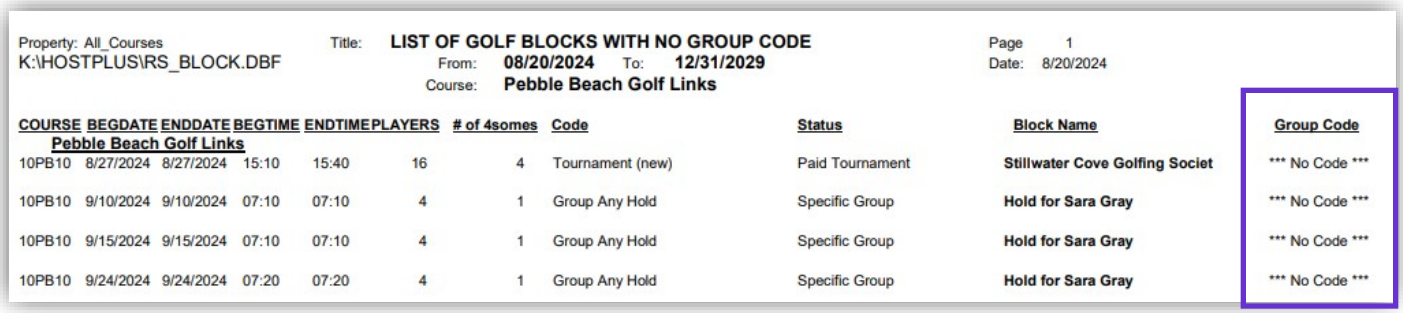
Run the Report:

- From the Home Screen of SMS Host, click R (Reports) > R (Report Menu) > S (Scan)
- Tab
- Type "GF19" into the Search for field
- Enter
- Select "GF19 Golf Blocks with no Group Code"



- Set the report parameters (Click Accept after each entry):
  - ◊ Set the Beginning Date to today
  - ◊ Set the and Ending Date to December 31st 5 years out
  - ◊ Select A to include All Properties
  - ◊ Input the code of the golf course
    Note—You will need to run this report 3 times—one report for each of the big three courses: PB, SG, SB





Property: All_Courses
K:\HOSTPLUS\RS_BLOCK.DBF

Title: **LIST OF GOLF BLOCKS WITH NO GROUP CODE**
From: **08/20/2024** To: **12/31/2029**
Course: **Pebble Beach Golf Links**

Page 1
Date: 8/20/2024

COURSE	BEGDATE	ENDDATE	BEGTIME	ENDTIME	PLAYERS	# of 4somes	Code	Status	Block Name	Group Code
Pebble Beach Golf Links										
10PB10	8/27/2024	8/27/2024	15:10	15:40	16	4	Tournament (new)	Paid Tournament	**Stillwater Cove Golfing Societ**	*** No Code ***
10PB10	9/10/2024	9/10/2024	07:10	07:10	4	1	Group Any Hold	Specific Group	**Hold for Sara Gray**	*** No Code ***
10PB10	9/15/2024	9/15/2024	07:10	07:10	4	1	Group Any Hold	Specific Group	**Hold for Sara Gray**	*** No Code ***
10PB10	9/24/2024	9/24/2024	07:20	07:20	4	1	Group Any Hold	Specific Group	**Hold for Sara Gray**	*** No Code ***

GF19 | Group Blocks with No Group Code (2/2)

Investigate the Results:

- Open all three reports before you begin investigating

- What you are looking for:
  - Golf blocks that have the group's Res ID missing by mistake
  - Groups that are holding golf without a Tentative/Definite rooms contract

- Look for Groups holding golf without a Res ID that do not fall into the following exceptions:
  - ◊ Internal Golf Groups (Bagpipers, Stillwater Golfing Society, Employee Golf)
  - ◊ Holds for Internal Events (US Open Holds, AT&T Holds, Holds per Executives)
  - ◊ Any Group Block Holds / Hold for Move
  - ◊ Groups managed by Special Events (Donna Langley)

10PB10	11/27/2024	11/27/2024	11:00	11:30	16	4	Group Any Hold	Comp Tournament	**Any Group Block**	*** No Code ***
10PB10	11/27/2024	11/27/2024	07:20	07:20	4	1	Group Any Hold	Specific Group	**Hold for Sara Gray**	*** No Code ***
10PB10	12/16/2024	12/16/2024	12:40	13:00	12	3	Tournament (new)	Comp Tournament	**Company Club Championship**	*** No Code ***
10PB10	12/16/2024	12/16/2024	10:50	12:00	32	8	Tournament (new)	Paid Tournament	**Stillwater Club Championship**	*** No Code ***
10PB10	4/26/2027	4/26/2027	10:50	10:50	4	1	U.S. Open Hold	U.S. Open Hold	**U.S. Open Hold**	*** No Code ***

- If you find a golf block that looks like it should not be held, look up the group by name in Amadeus to see if a booking exists
  - If you see a booking in Amadeus in Tentative or Definite status:
    - ◊ Add the Res ID for that booking to the Golf Block on the Tee Sheets, since this was likely omitted in error
  - If you do not find an Amadeus booking OR the booking is in Prospect Status:
    - ◊ Email the NSM/PBP to alert them that they are holding golf without a Tentative or Definite contract
    - ◊ Attach a screenshot of the report
    - ◊ Ask when they plan to turn the group Tentative—If it is soon, we can continue to hold the golf

Subject: RE: Hold TT - Paymentus | September 2025

Hi Melissa,

I have held the tee times as requested. Let me know when you're ready to go tentative!

COURSE	BEGDATE	ENDDATE	BEGTIME	ENDTIME	PLAYERS	# of 4somes	Code	Status	Block Name
Links at Spanish Bay									
20SB10	9/22/2025	9/22/2025	08:40	09:30	24	6	Resort Group Tentative	Specific Group	**Paymentus Client Summit**
20SB10	9/23/2025	9/23/2025	12:10	13:50	44	11	Resort Group Tentative	Specific Group	**Paymentus Client Summit**

- If you see a Golf Block on the report that is blank in the group data fields, this typically means someone started to make the block, but then closed out of the tee sheet

10PB10	12/4/2024	12/4/2024	07:30	07:30	4	1	*** No Code ***

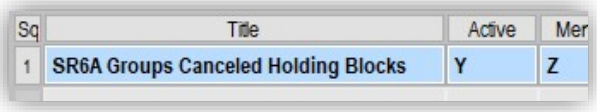
  - ◊ Locate that block on the tee sheet and cancel it

SR6A | Groups Canceled Holding Blocks

This report will show any Cancelled Groups that are tied to active Golf Blocks.

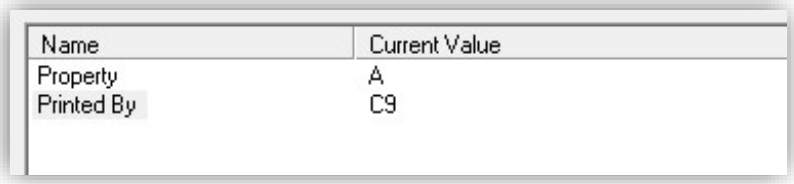
Run the Report:

- From the Home Screen of SMS Host, click R (Reports) > R (Report Menu) > S (Scan)
- Tab
- Type "SR6A" into the Search for field
- Enter
- Select "SR6A Groups Canceled Holding Blocks"



Sq	Title	Active	Mer
1	SR6A Groups Canceled Holding Blocks	Y	Z

- Set the report parameters (Click Accept after each entry):
  - ◊ Select A to include All Properties
  - ◊ Input your SMS Initials



Name	Current Value
Property	A
Printed By	C9

Investigate the Results:

- If you see any results on this report, look up the booking in Amadeus to see if the status is genuinely turned down, lost, or canceled

- If it is, cancel all existing golf blocks on the tee sheets

Tee Sheet Build Timeline

The Group Golf Coordinator is responsible for building out the Tee Sheets starting 5 years in advance. Below is the order in which items should be added to each new year's tee sheet.

5 Years

Create the Tee Sheets

Special Event & Internal Events Holds

NCGA events

5 year out Golf requests

2-5 Years

Aeration Schedule

The Hay Maintenance Holds

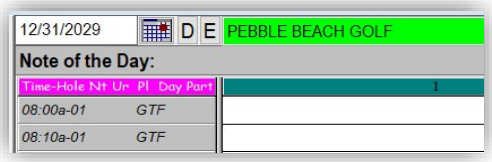
Any Group Blocks

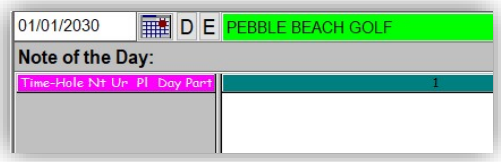
1 Year

Internal Club Schedules

Create the Tee Sheet

The Tee Sheet is set up 5 years in advance. Toward the end of each year (November-December), the Group Golf Coordinator must set up another year in the Tee Sheet from January 1st-December 31st. It is very important to take your time with this task and be accurate.

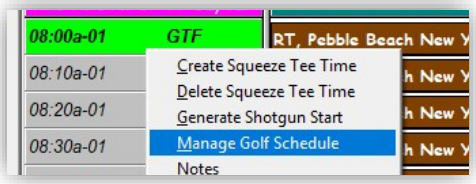




Create the Tee Sheet

- Open the tee sheet to January 1 of the year before the year you need to create (If you are creating the 2030 tee sheet, open January 1, 2029)

- Double Click on the tee time pane and select Manage Golf Course Schedule



- Use the Down Arrow to find the last date that has the same Start/End of Day time span



- Click Copy

- Set the dates to the date span with the same start/end times, but for the following year. (If 1/1/29-1/8/29 have the same start/end times, set your dates to 1/1/30-1/8/30)



- Do not touch SMS Host while the Tee Sheet is being copied

- Once complete, repeat the above process to find the next time span that has matching Start/End Times

Important Note—The only dates in which you cannot directly copy the tee sheet are Daylight Savings days (March and November). Make sure you adjust the dates you copy to ensure the begin/end times shift forward and backward 1 hour on the appropriate days.

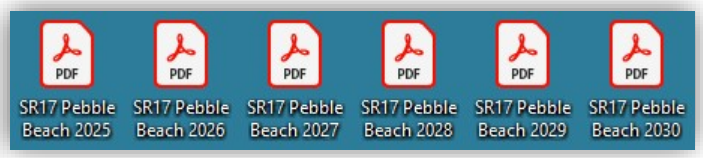
SR17 Tee Sheet Audit (1/2)

After creating the tee sheet for the year that is 6 years out, the Group Golf Coordinator must run the SR17 Report for all courses and compare the 6 existing years to ensure consistent open and close times.

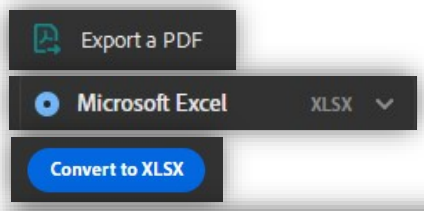
Follow the below instructions per course:

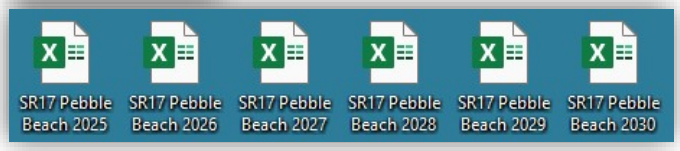
- Run the SR17 Report as a PDF and save all 6 years labeled "SR17 [Year] [Course]"



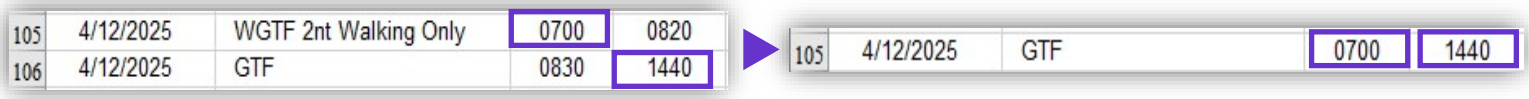


- Convert each PDF to Excel
  - ◊ Open the PDF in Adobe
  - ◊ Click Export A PDF
  - ◊ Select Microsoft Excel XLSX
  - ◊ Click Convert to XLSX
  - ◊ Keep the same File Name





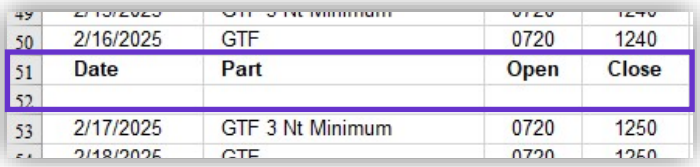
- Edit each Excel Sheet:
  - ◊ Delete all columns except:
    - C (Date)
    - D (Part)
    - E (Open)
    - F (Close)
  - ◊ Highlight the Open column in pale pink
  - ◊ Highlight the Close column in pale blue
  - ◊ Delete rows 1 and 2 so 1/1/XX is in cell A1
  - ◊ Delete all rows except GTF, i.e. Maintenance of NGTF
  - ◊ If you see WGTF and GTF for the same date, combine them into one row



105	4/12/2025	WGTF 2nt Walking Only	0700	0820
106	4/12/2025	GTF	0830	1440

105	4/12/2025	GTF	0700	1440

  - ◊ Delete all rows that separate "pages" of the report



50	2/16/2025	GTF	0720	1240
51	**Date**	**Part**	**Open**	**Close**
52				
53	2/17/2025	GTF 3 Nt Minimum	0720	1250

  - ◊ On any reports that do not include February 29th, insert a blank row where that 2/29 would be



59	2/28/2025	GTF	0700	1300
60				
61	3/1/2025	GTF	0700	1300

  - ◊ If you have edited your spreadsheet correctly, the data should end at Row #366

SR17 Tee Sheet Audit (2/2)

- Your final edit of each SR17 should look like this:

	A	B	C	D	E	F	G	H
1	1/1/2025	GTF	0740	1200				
2	1/2/2025	GTF	0740	1200				
3	1/3/2025	GTF 3 Nt Minimum	0740	1200				

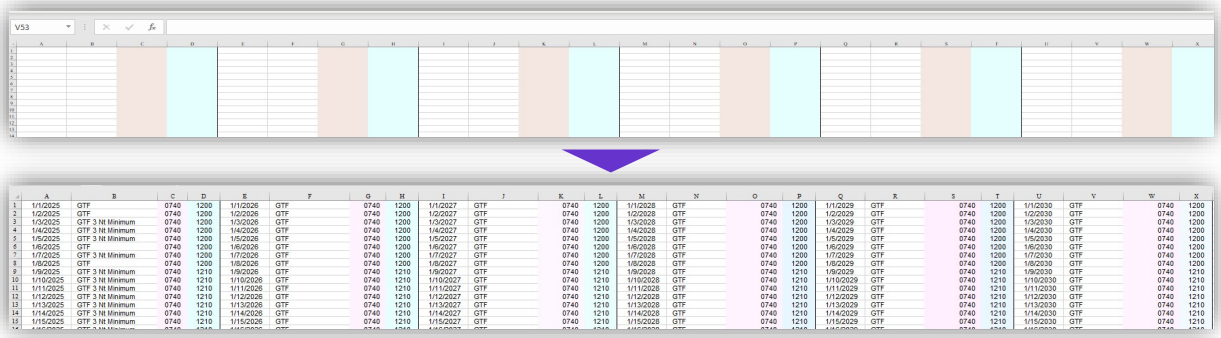
- Once all 6 excel sheets are edited, open the SR17 Tee Sheet Audit Template from the Digital Binder



- Save As the file to the GRPRES SR17 Tee Sheet Audit Folder



- Open the SR17 spreadsheet from the 1st year:
  - ◊ Copy all data in columns A through D
  - ◊ Paste the data into the columns A through D of the Master spreadsheet



- Repeat this process with the spreadsheets for the subsequent five years, but paste them to the right of the previous year in the Master Spreadsheet. The result should be a spreadsheet with all 6 years side by side from columns A though X.

- Look for discrepancies:
  - ◊ If the report finds discrepancies in the Open times across the 6 years, you will see **red** text
  - ◊ If the report finds discrepancies in the Close times across the 6 years, you will see **blue** text

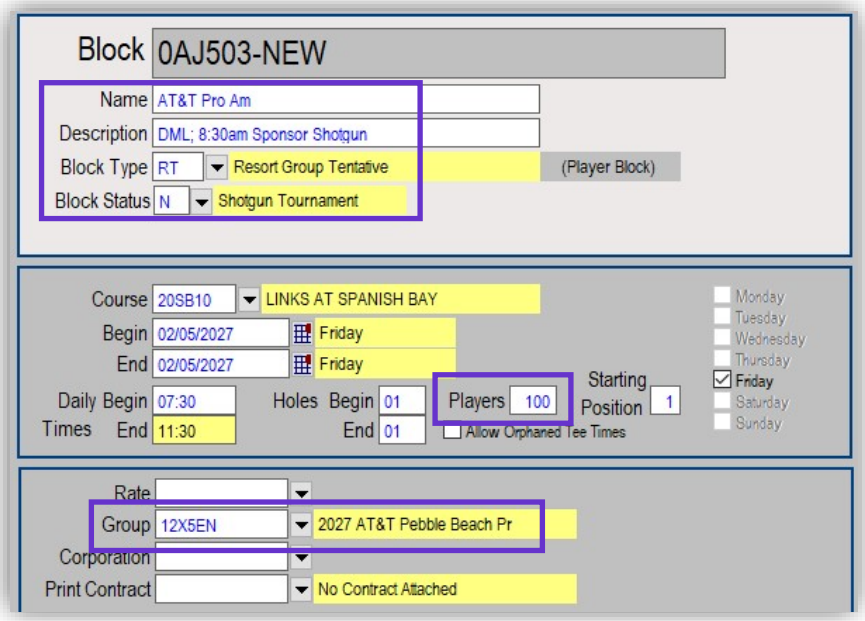
When you see this colored text, check the times across that row to locate the discrepancy.
Keep in mind that you should see 1 hour discrepancies around March and November during Daylight Savings Time.

66	3/6/2025	GTF 3 Nt Minimum	0700	1300	3/6/2026	GTF	0700	1300	3/6/2027
67	3/7/2025	GTF	0650	1300	3/7/2026	GTF	0650	1300	3/7/2027
68	3/8/2025	GTF 3 Nt Minimum	**0650**	**1300**	3/8/2026	GTF	0750	1400	3/8/2027
69	3/9/2025	GTF	**0750**	**1410**	3/9/2026	GTF	0750	1410	3/9/2027
70	3/10/2025	GTF 3 Nt Minimum	**0750**	**1410**	3/10/2026	GTF	0750	1410	3/10/202
71	3/11/2025	GTF 3 Nt Minimum	**0750**	**1410**	3/11/2026	GTF	0750	1410	3/11/202
72	3/12/2025	GTF 3 Nt Minimum	**0740**	**1410**	3/12/2026	GTF	0740	1410	3/12/202
73	3/13/2025	GTF 3 Nt Minimum	**0740**	**1410**	3/13/2026	GTF 3 Nt Minimum	0740	1410	3/13/202
74	3/14/2025	GTF 3 Nt Minimum	0740	1410	3/14/2026	GTF	0740	1410	3/14/202

Input Internal & Special Events

Create Shotgun Holds 5 years in advance per the schedule provide by Special Events:

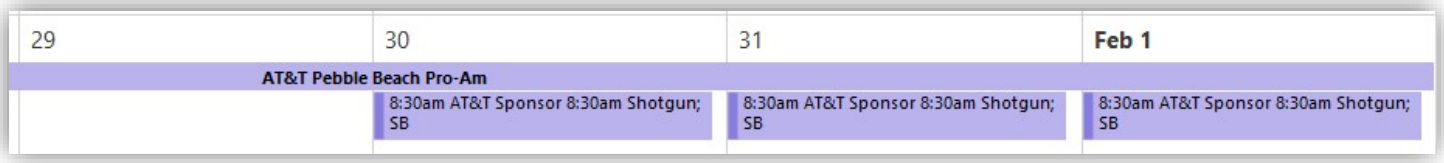
- Create the Shotgun Block
  - ◊ Name: Title of Event
  - ◊ Description: "SE" + shotgun start time + "Sponsor Shotgun"
    If the special event is managed by Donna Langley, write "DML"
  - ◊ Block Type: RT Resort Group Tentative
  - ◊ Block Status: N Shotgun Tournament (All AT&T Shotguns are marked Tentative)
  - ◊ Number of Players: 100
  - ◊ Group: Input the Res ID of that year's AT&T booking



- Create a second block to hold golf for the remainder of the tee sheet
  - ◊ Name: Title of Event + "Shotgun Hold"
  - ◊ Description: "SE" + shotgun start time + "Sponsor Shotgun"
    If the special event is managed by Donna Langley, write "DL"
  - ◊ Block Type: TN Tournament Non-Paid
  - ◊ Block Status: Z Comp Tournament
  - ◊ Number of Players: (remaining number of players on the tee sheet)
  - ◊ Group: Input the Res ID of that year's AT&T booking



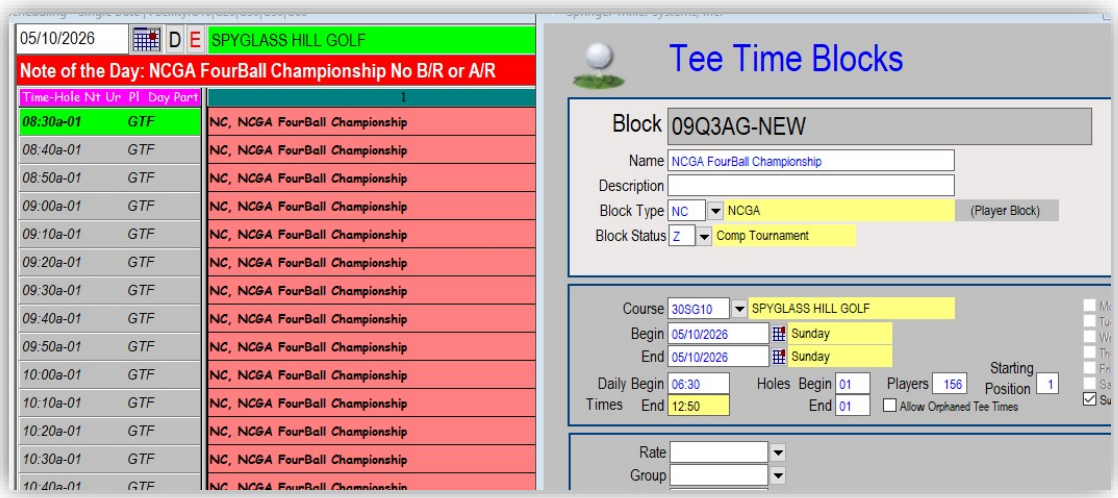
- These blocks are inputted onto the Golf Course Calendar



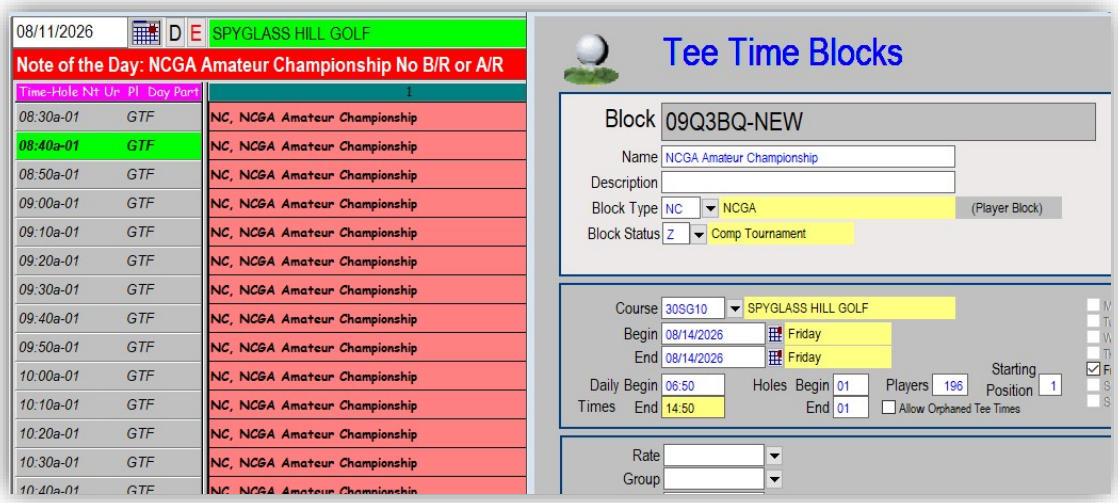
Input NCGA Events

The NCGA has 3 annual tournaments on Spyglass Hill Golf Course scheduled 5 years in advance:

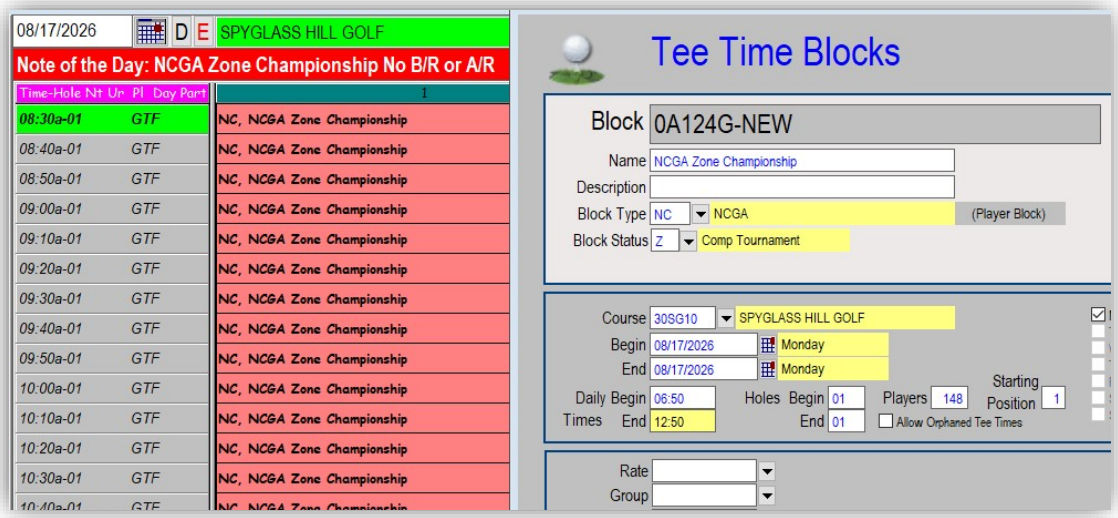
- Friday / Saturday / Sunday of Mother's Day weekend:



- Monday—Friday of Concours week:



- Monday—Tuesday after Concours D'Elegance:



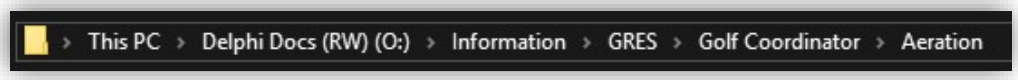
Aeration Schedule (1/2)

The Group Golf Coordinator inputs the Aeration Schedule 2-5 years in advance for all courses except the Del Monte Golf Course. Aeration for all 18 hole courses is done after play concludes for the day. Aeration on The Hay is done during the day.

Draft the Aeration Schedule

- The Group Golf Coordinator will receive the first draft of the Aeration Schedule via email in an Excel spreadsheet from Revenue Management

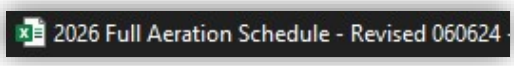
- Save this schedule to the Aeration folder in the O Drive under the appropriate year



- Add the Aeration Schedule to the Golf Course Calendar in Outlook

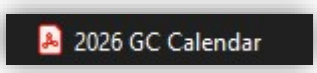


- Review the Golf Course Calendar for Conflicts
  - ◊ Work with the Group Reservations Manager to identify any aeration dates that would overlap with groups who may react poorly to overlapping aeration
  - ◊ Update the Excel Spreadsheet and the Golf Course Calendar with the new proposed schedule
    - Keep the original Excel Spreadsheet—Save your revision as a new document within the Aeration folder



- Reply to Revenue Management
  - ◊ Attach the original draft and your edited draft of the schedule
  - ◊ Explain any conflicts and what the effect it would have
  - ◊ Repeat this process until the full schedule is approved

- Once updates are approved
  - ◊ Update the Golf Course Calendar
  - ◊ Save to the Aeration Folder
    - A Final Revision of the Excel Spreadsheet
    - A PDF of the Golf Course Calendar of the year you are scheduling



  - ◊ Send both documents via email in PDF form to Revenue Management—They will send this to the Golf Division for input, then respond back to you when the schedule is ready to be input on the Tee Sheets

Aeration Schedule (2/2)

Update the Tee Sheets

- PB / SG / SB—Create Aeration Notes of the Day for all dates affected by aeration:

  Major Aeration
  - ◊ Dates in **bold** will have Tee Sheet Notes that states "(Day 1)" through "(Day 10)"
  - ◊ The Note Type will be "W" which will highlight the note in red for emphasis

PEBBLE BEACH	SPYGLASS HILL	SPANISH BAY
GREENS **Mar 31 thru Apr 9 (1/2")** May 20 (1/4" Solid) (A) Jul 7 thru Jul 8 (1/8") (A)	**GREENS** **Mar 31 thru Apr 9 (1/2")** May 20 (1/4" Solid) (A) Jul 7 thru Jul 8 (1/8") (A)	**GREENS** No aeration due to reno / closure; however, if project delayed, assume following schedule:

W	08/12/2026	08/12/2026	(Day 1) 5/8" Greens Aeration NO B/R A/R	10PB10	Y

  - ◊ "No B/R A/R" should only be stated for days 1-5; omit this for days 6 and beyond

W	04/03/2023	04/03/2023	(Day 8) 1/2" Greens Aeration	20SB10	Y

  Minor Aeration
  - ◊ All non-bold aeration dates will simply state "No A/R OR B/R"
  - ◊ They will also be coded as "E" instead of "W" which makes these notes appear white instead of red

E	07/07/2026	07/08/2026	NO B/R OR A/R	10PB10	Y
E	07/07/2026	07/08/2026	NO B/R OR A/R	30SG10	Y
E	07/08/2026	07/09/2026	NO B/R OR A/R	60PH10	Y

- The Hay
  - ◊ Create Aeration Notes of the Day for each day affected by aeration
  - ◊ For any dates marked with a (B) on the schedule, create a Maintenance Hold block on the first day of impact

THE HAY
GREENS
Mar 31 thru Apr 9 (1/2")
May 21 (1/4" Solid) (B)
Jul 8 thru Jul 9 (1/8") (B)

(A) Work performed behind GTF play the day prior to first day of guest impact. Please block N
(B) Maintenance holds until 10:30 AM; work performed in front of play on first day of impact.
(C) Notice and discount period reduced to 8 days (down from normal 10 days) due to solid tine
BOLD = Guests notified and discount provided

Note of the Day: NO B/R OR A/R

Time-Hole	Nt	Ur	Pl	Day Part	1
07:00a-01				GTF	MN, Maintenance Block, 1/4" Solid Greens Aeration
07:10a-01				GTF	MN, Maintenance Block, 1/4" Solid Greens Aeration
07:20a-01				GTF	MN, Maintenance Block, 1/4" Solid Greens Aeration

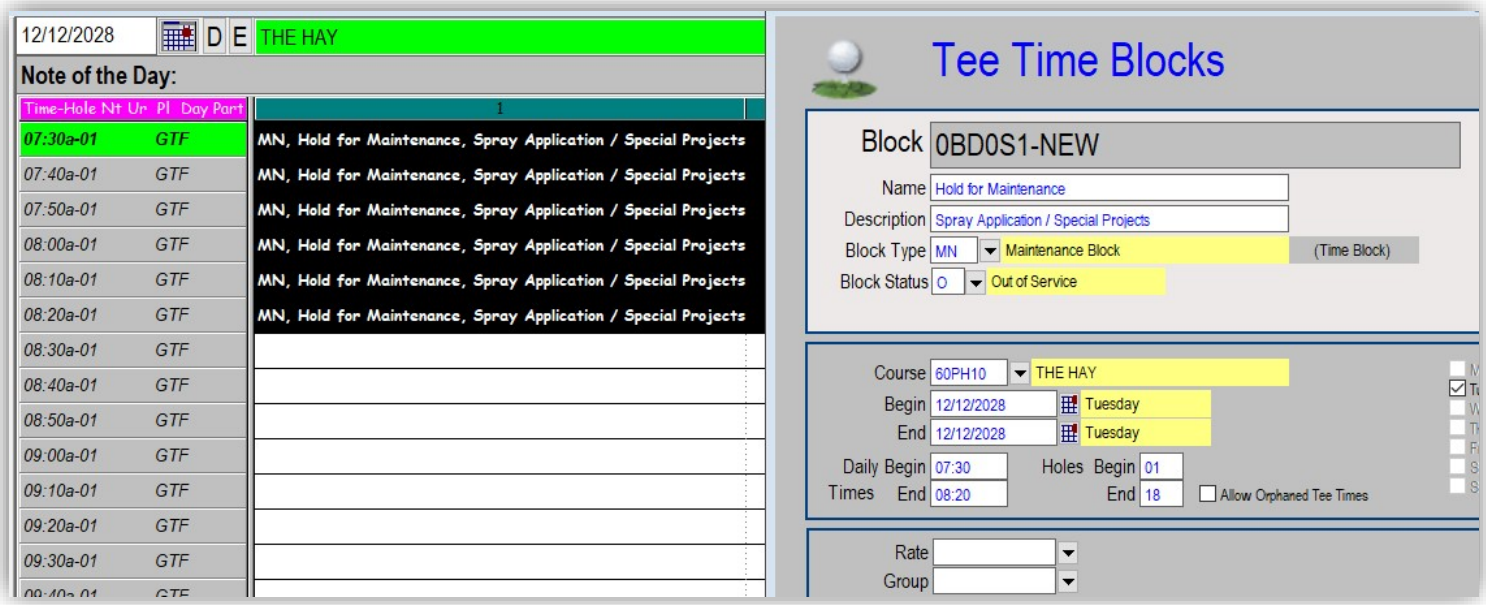
Block 0C68VT-NEW
Name: Maintenance Block
Description: 1/4" Solid Greens Aeration
Block Type: MN — Maintenance Block (Time Block)
Block Status: O — Out of Service

- Once the Tee Sheets have been updated
  - Email the Group Reservations Manager to do a final review
  - Email Revenue Management—Advise that the updates are done so they can release the Aeration Schedule company-wide

The Hay Maintenance Holds

Maintenance Holds are placed on The Hay 5 years in advance. The Hay is the only golf course that performs its maintenance during revenue hours.

They must be input for the first hour of the day (6 tee times) on every Tuesday of the year:

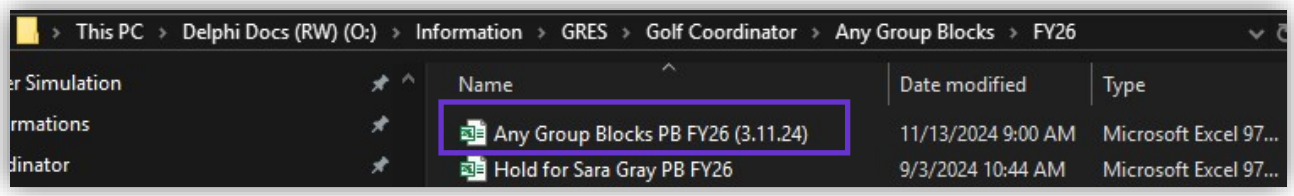


Any Group Blocks (1/3)

Each year, the Group Golf Coordinator creates "Any Group Blocks" on the tee sheet during peak season (September through November) to hold consecutive tee times on Pebble Beach Golf Links for the NSMs/PBP Managers to sell to groups.

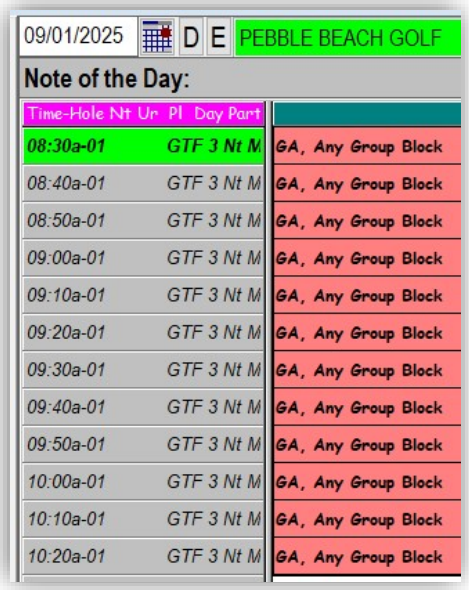
This is done every March for the following year, i.e. in March of 2025, the Golf Coordinator would create blocks for Sep-Nov of 2026. This ensures that the blocks are set before leisure guests begin booking 18 months in advance.

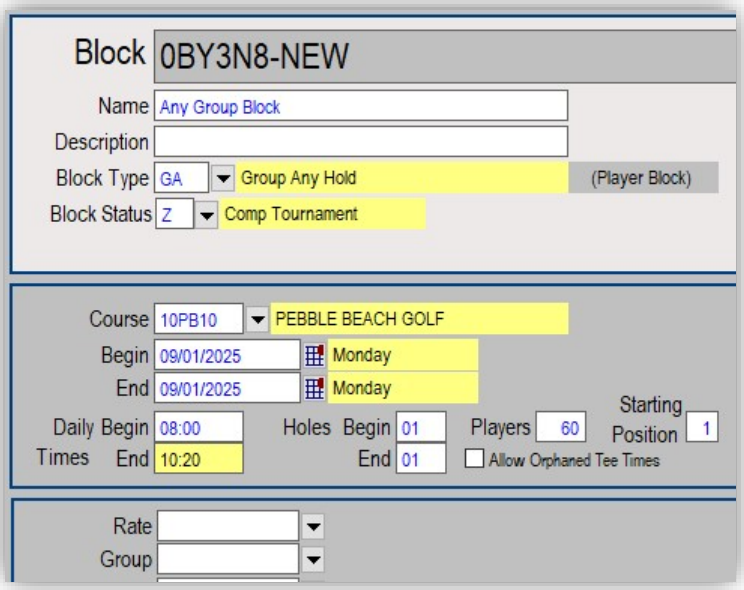
These blocks are tracked on a spreadsheet located within the O Drive:



How to Create Any Group Blocks

- Move day by day through the PBGL tee sheet from 9/1—11/30:
- The objective is to block 40% of the currently available time with Any Group Blocks
- Look for chunks of significant consecutive tee time space
    - ◊ Minimum block size—16 golfers (4 tee times)
    - ◊ Maximum block size—72 golfers (18 tee times)
- Try to reserve earlier tee times on Thursdays and Sundays (common departure days), and later on Mondays and Fridays (common arrival days)
- Do not create large blocks on dates during which we do not have significant rooms to sell
    - ◊ Reference the "Property Wide Availability" column of the spreadsheet to see how many rooms we have available each night
- As you create each block, simultaneously update the times on the spreadsheet





Any Group Blocks (2/3)

How to Update the Any Group Blocks Spreadsheet

Copy the folder from the previous fiscal year to create the new fiscal year



	Propert Wide Availability	Date	Day	Inventory	Available GTF	Recommended Group Block	Proposed Time Block	New Avail
	424	9/1/2025	Mon	184	164	**60**	8:00-10:20	104
0	419	9/2/2025	Tue	184	176	**64**	9:30-12:00	112
1	389	9/3/2025	Wed	180	68	**28**	12:30-1:30	40
2	369	9/4/2025	Thu	180	155	**40**	12:10-1:40	115

- **Property Wide Availability**
  - ◊ This column lists how many rooms we have available to sell on that night
  - ◊ Fill this in before you begin creating blocks
  - ◊ To get these numbers, in SMS Host:
    - F7 > G (General Availability > D (Date)
    - Set the date to 9/1/XXXX, then click OK
    - S (Summary)
    - Fill in the spreadsheet with the numbers from the "AVAIL" column

Date	NET	$OLD	%SLD	VACANT	%VAC	BOOKED	%BKD	AVAIL	%AVL	Day
09/01/2026	427	14	2.83	413	83.43	227	45.86	200	40.40	Tue
09/02/2026	427	14	2.83	413	83.43	227	45.86	200	40.40	Wed

- **Date**—This will remain the same
- **Day**—Must be updated to match the current year
- **Inventory**—This will remain the same
- **Available GTF**—Fill in this column with data from the DV Live Golf Availability spreadsheet

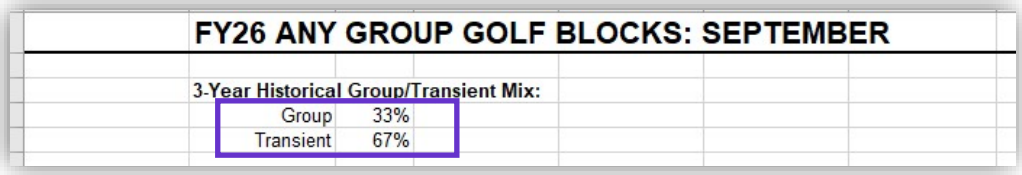
	Inventory	Paid Rounds	Available Rounds to Sell				
Day	Guaranteed	Total	Guaranteed	Maintenance	Non-Guaranteed	Twilight	Total
9/1/2025	184	112	20	0	0	0	20
9/2/2025	184	119	1	8	0	0	9

- **Recommended Group Block**—Update as you create your Any Group Blocks
- **Proposed Time Block**—Update as you create your Any Group Blocks
- **New Avail**—These cells are auto-updated by a formula
  - ◊ "Available GTF" - "Recommended Group Block" = "New Avail"

Any Group Blocks (3/3)

How to Update the Any Group Blocks Spreadsheet (continued)

- **3 Year Historical Group/Transient Mix**—Email Revenue Management for these numbers
  - ◊ Send an email with a snippet of this section of the spreadsheet

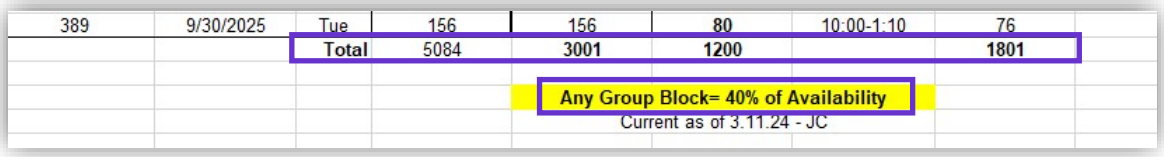


FY26 ANY GROUP GOLF BLOCKS: SEPTEMBER

3-Year Historical Group/Transient Mix:

Group	33%
Transient	67%

- **Any Group Block Percentage**—Update this when you are done creating your blocks
  - ◊ Percentage = Recommended Group Block Total / Available GTF Total
  - ◊ This is not calculated by formula because we need to round to the nearest foursome



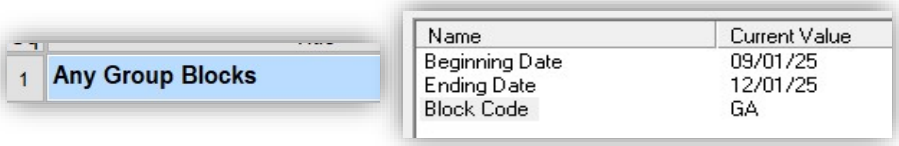
389	9/30/2025	Tue	156	156	80	10:00-1:10	76
		Total	5084	3001	1200		1801

Any Group Block= 40% of Availability

Current as of 3.11.24 - JC

Any Group Block Report

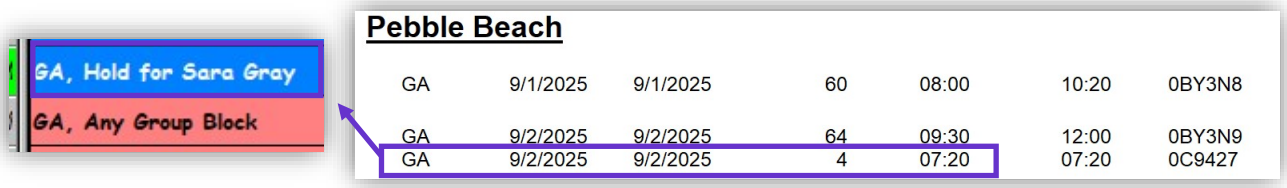
- This report allows you to see a list of all "Any Group Blocks" that you have created



	Any Group Blocks
1	

Name	Current Value
Beginning Date	09/01/25
Ending Date	12/01/25
Block Code	GA

Note—You may see other holds on this report (primarily "Hold for Sara Gray") for blocks that also used the GA Block Status. You can tell these apart from Any Group Blocks on the report because they are blocked as foursomes rather than large consecutive blocks.



GA, Hold for Sara Gray

GA, Any Group Block

Pebble Beach

GA	9/1/2025	9/1/2025	60	08:00	10:20	0BY3N8
GA	9/2/2025	9/2/2025	64	09:30	12:00	0BY3N9
GA	9/2/2025	9/2/2025	4	07:20	07:20	0C9427

Approval Process

- Once you have created all blocks and updated the spreadsheet, email the spreadsheet to the Group Reservations Manager
- The Group Reservations Manager will review it and forward it to Revenue Management for final approval
- Make adjustments as needed per Revenue Management

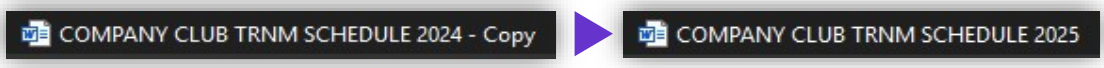
Internal Golf Club Schedules (1/4)

At the end of each year (November-December) the Group Golf Coordinator must create "proposed" schedules for the next year's Company Club, Stillwater Cove Golfing Society, and Bagpipers.



1.) Create A Document for the New Year's Schedule:

- ◊ Access the folder for each of the 3 clubs
- ◊ Copy the previous year's Word schedule and retitle it to the following year



2.) Use the DV Live Golf Availability Spreadsheet to find the most open dates to schedule golf:



Example: In the image below, 1/2/25 has 26 available rounds while 1/1 and 1/3 have 0 available, therefore, 1/2/29 is the best date of that week to schedule an internal club.

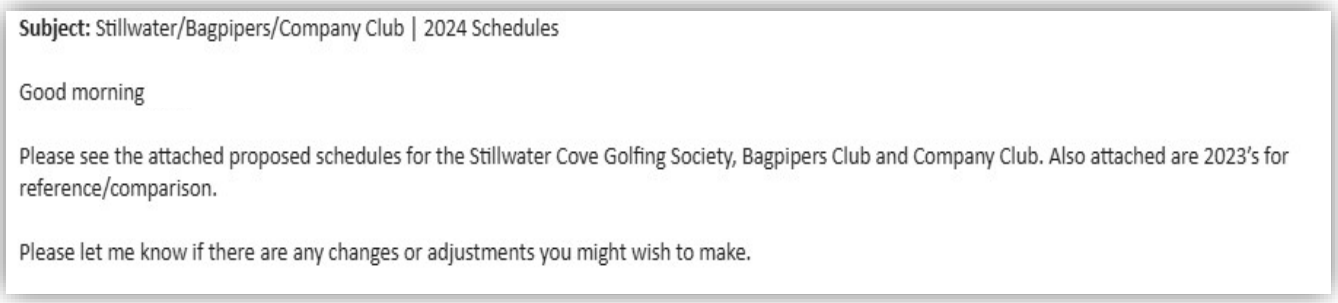
	Inventory	Paid Rounds	Available Rounds to Sell				
Day	Guaranteed	Total	Guaranteed	Maintenance	Non-Guaranteed	Twilight	Total
1/1/2025	108	108	0	0	0	0	0
1/2/2025	108	84	26	0	0	0	26
1/3/2025	108	108	0	0	0	0	0

3.) Update the schedules within the 3 club Word Documents

- We do not actually block the golf until the schedule is fully approved
- Exception—GTF Tournaments are blocked immediately to hold the space.

4.) Email the Schedule draft for Approval

- ◊ Draft an email to the Group Reservations Manager
- ◊ Attach your proposed schedules as well as the schedules from the previous year
- ◊ Approval Chain: The Group Reservations Manager > Revenue Management > Golf Division



Subject: Stillwater/Bagpipers/Company Club | 2024 Schedules

Good morning

Please see the attached proposed schedules for the Stillwater Cove Golfing Society, Bagpipers Club and Company Club. Also attached are 2023's for reference/comparison.

Please let me know if there are any changes or adjustments you might wish to make.

5.) Once the Golf Division gives the final approval, input all golf blocks onto the tee sheets

6.) Configuration—When the clubs (Bagpipers and SWCGS) send you pairings:

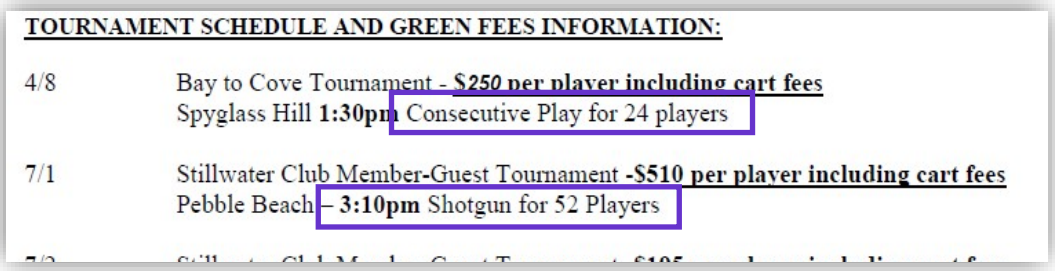
- Configure the blocks
- Release unused tee times

Note—The Company Club does not require configuring

Internal Golf Club Schedules (2/4)

GTF Tournaments

Only the Bagpipers and Stillwater Cove Golf Society have scheduled paid tournaments. These are listed below the consecutive tee time schedule. These need to be blocked first because they are GTF.



TOURNAMENT SCHEDULE AND GREEN FEES INFORMATION:

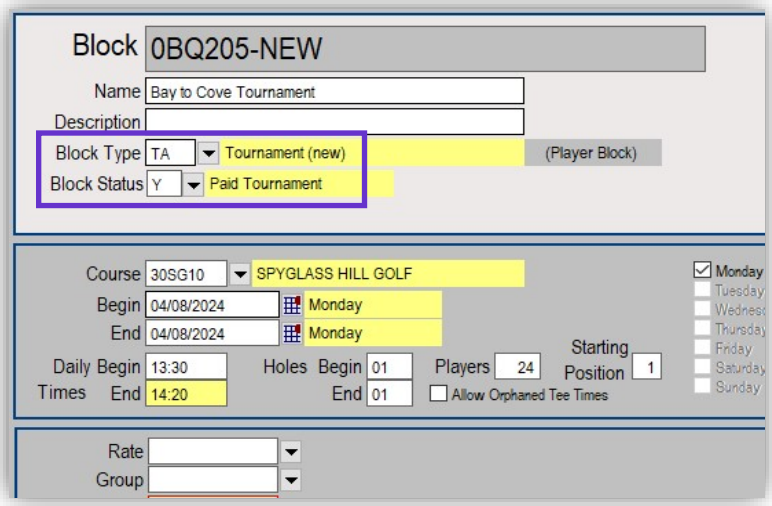
4/8 Bay to Cove Tournament - **$250 per player including cart fees**
Spyglass Hill **1:30pm** Consecutive Play for 24 players

7/1 Stillwater Club Member-Guest Tournament **-$510 per player including cart fees**
Pebble Beach – **3:10pm** Shotgun for 52 Players

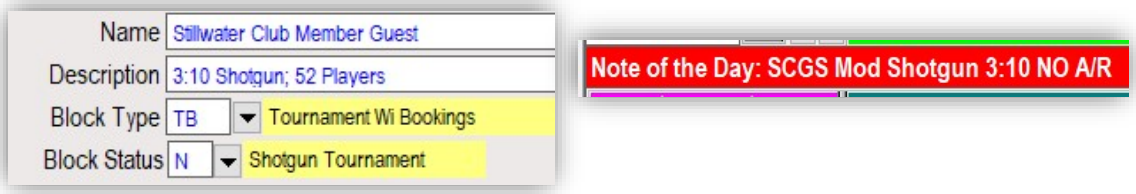
- Look at DV Live to find new dates with the most availability that are near the previous year's tournament dates

- Check the tee sheet to see if there is room to block the number of golfers in that tournament in one uninterrupted block

- Create a Paid Tournament block to hold the space
  - The name of the block should be the tournament name
  - Block Type TA / Block Status Y



- The Shotguns at the end of the day are MOD Shotguns
  - ◊ Schedule at the end of the day in the final GTF tee times
  - ◊ Block as Block Type TB / Black Status N
  - ◊ Create a Note of the Day with No A/R



- Update the Word document to match your new Tournament Golf Blocks

Internal Golf Club Schedules (3/4)

Company Club

All tee times on the Company Club schedule are 40-Player Modified Shotgun Tournaments.
We do not immediately create blocks for the Company Club—instead, we just find availability and notate the proposed schedule on the word document.

- Guidelines:
  - Proposed dates must be Monday—Thursday
  - NGTF golf cannot be scheduled on days with No A/R (check Note of the Day)
  - Make sure you do not overlap any of the three internal clubs at the same course on the same day
  - Schedule a variety of days of the week

- On the Word schedule, as you find new proposed dates:
  - ◊ Update "Date" to the new proposed date
  - ◊ Update "Day" to match the new proposed date
  - ◊ Update "Starting Time" to match the 10th NGTF time (the final time in 40 player block)

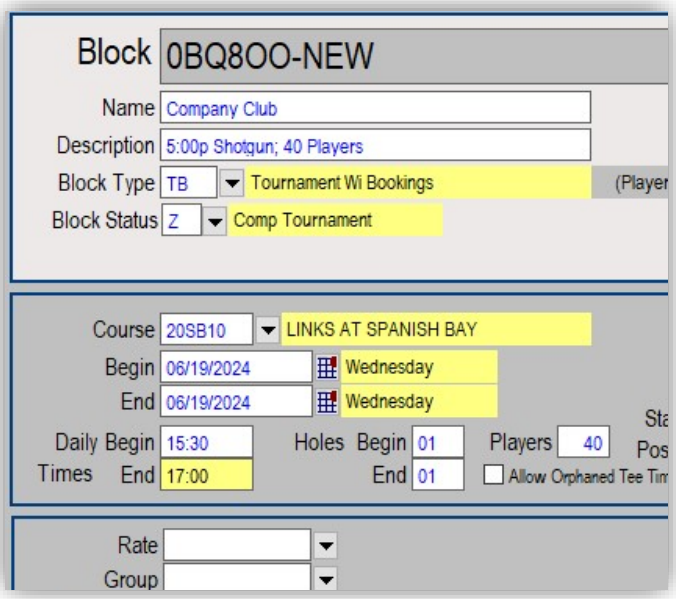
Date	Day	Course	Starting Time	Format	Registration Opens
2/12	MON	Pebble Beach	2:20	Individual Play	1/15
3/12	TUE	Del Monte	4:20	Individual / 4-Club	2/12
3/25	MON	The Hay	5:15	Individual Play	2/26
4/9	TUE	The Hay	5:30	Scramble	3/11

- Championship Rounds 1 and 2:
  - These championship rounds are blocked as 12 consecutive golfers
  - Schedule these in the 4th-6th NGTF tee times of the day
  - Note of the day states "COMPANY CLUB CHAMPIONSHIP 12:40 12pl"

After Schedule Is Approved:

- Add 10 NGTF tee times to each day's schedule
- Create a Non-Paid Tournament Block
- Create a Note of the Day



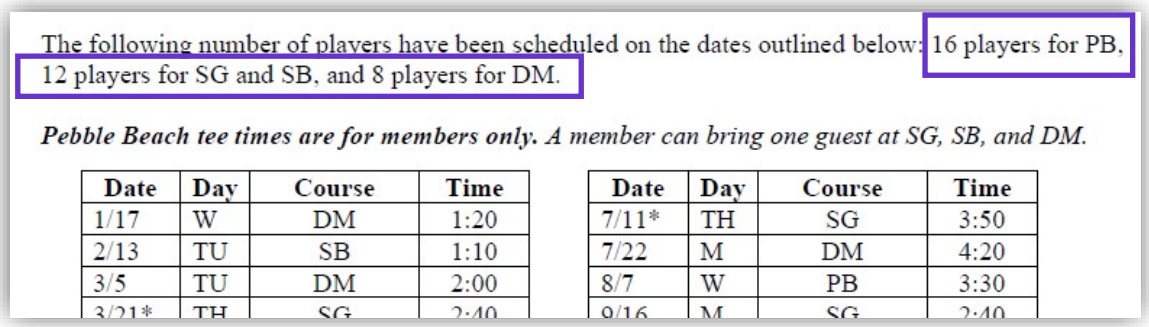


Internal Golf Club Schedules (4/4)

Stillwater Cove & Bagpipers

The non-tournament golf blocks for the Bagpipers and Stillwater Cove Golf Society are not blocked immediately on the tee sheets—instead, we just find availability and notate the proposed schedule on the word document.

These two internal golf clubs have varying numbers of golfers depending on the course, which are indicated at the top of the schedule. Unlike the Company Club, these are just consecutive tee times.



The following number of players have been scheduled on the dates outlined below: 16 players for PB, 12 players for SG and SB, and 8 players for DM.

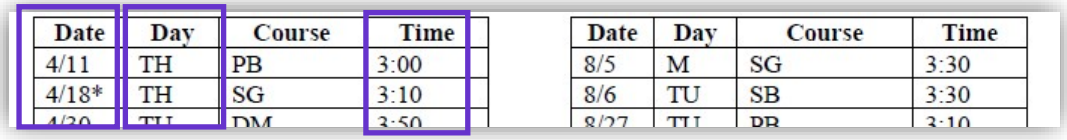
Pebble Beach tee times are for members only. A member can bring one guest at SG, SB, and DM.

Date	Day	Course	Time
1/17	W	DM	1:20
2/13	TU	SB	1:10
3/5	TU	DM	2:00
3/21*	TH	SG	2:40

Date	Day	Course	Time
7/11*	TH	SG	3:50
7/22	M	DM	4:20
8/7	W	PB	3:30
9/16	M	SG	2:40

- Guidelines:
  - Proposed dates must be Monday—Thursday
  - NGTF golf cannot be scheduled on days with No A/R (check Note of the Day)
  - Make sure you do not overlap any of the three internal clubs at the same course on the same day
  - Schedule a variety of days of the week
  - The start time should be the 3rd NGTF time slot (leaving 1 and 2 open for sale)

- Update the Date, Day, and Time on the Word schedule as you find new proposed dates:



Date	Day	Course	Time
4/11	TH	PB	3:00
4/18*	TH	SG	3:10
4/30	TU	DM	3:50

Date	Day	Course	Time
8/5	M	SG	3:30
8/6	TU	SB	3:30
8/27	TU	PB	3:10

After Schedule Is Approved:

- Add the appropriate number of NGTF tee times to each day to fit your block
- Create a Paid Tournament Block



Name: Spanish Bay Bagpipers
Description:
Block Type: TA — Tournament (new)
Block Status: Y — Paid Tournament



12:30p-01	NGTF	TA, Spanish Bay Bagpipers
12:40p-01	NGTF	TA, Spanish Bay Bagpipers

Employee Golf Schedule (1/6)

The Group Golf Coordinator is responsible for creating the monthly Employee Tee Times Schedule and sending it to the Senior Data Architect of IT.

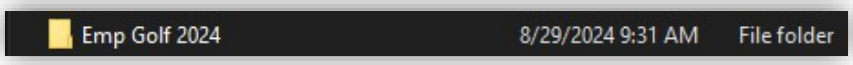
The Golf Coordinator must send this schedule to IT by the end of the month (deadline is the 28th), two months in advance. For example, if you are building the October Employee Golf Schedule, you must submit this final schedule to IT by August 28th.

Start A New Month's Schedule

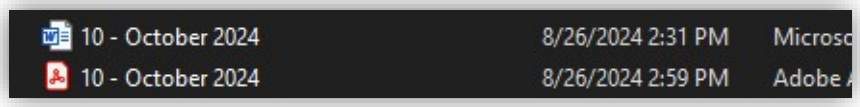
- Access the Employee Golf folder within the Z Drive



- Access the folder of the current year



- Open the Word Document of the month you need to schedule



- This Word Document is the copy of the previous year's Employee Golf Schedule (2023). We must now update the information for this month to reflect the current year (2024).

Clean Up the Schedule

Note—The Del Monte Golf Course is not on this schedule because the Del Monte Pro Shop builds their own schedule and manages their own Employee Golf Tee Time Golf Blocks

EMPLOYEE TEE TIMES
September 2024

DATE	PEBBLE BEACH	SPYGLASS HILL	SPANISH BAY	THE HAY
1	CLOSED	CLOSED	3:10 – 12	CLOSED
2	CLOSED	CLOSED	3:10 – 12	CLOSED
3	CLOSED	CLOSED	3:10 – 12	CLOSED
4	CLOSED	CLOSED	3:10 – 12	CLOSED

3:10—12
CLOSED
A
T
3:10—12
#3:10—12#

Start Time for the Employee Golf Block — Total # of Golfers for the day

This date is not offered to employees per Senior Management

No A/R usually due to Aeration, but sometimes unspecified

No A/R due to a Tournament/Group/Internal Club Booking

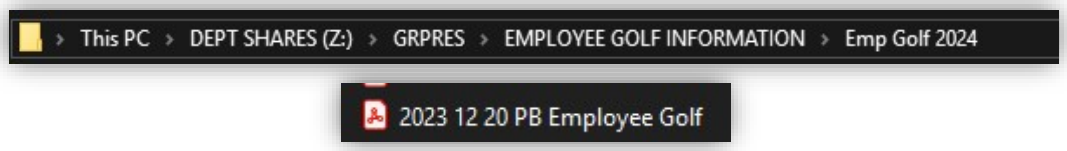
The start time for this Employee Golf Block has been edited

The number of golfers in this Employee Golf Block has been edited

Employee Golf Schedule (2/6)

Review the Employee Golf Recommendations

- This document is updated annually by Senior Management in December for the following year, and is stored within the current year's Employee Golf Folder



- This chart illustrates closures for Employee Golf due to various reasons indicated in the key below the chart—If you do not see updated information for your current year, you can assume that the rules from the previous year(s) still apply.

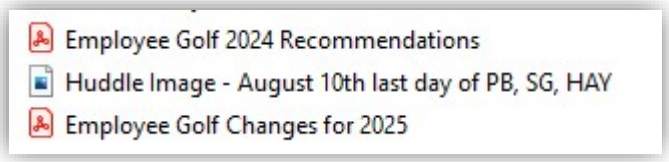
	2024 Jan	2024 Feb	2024 Mar	2024 Apr	2024 May	2024 Jun	2024 Jul	2024 Aug	2024 Sep	2024 Oct	2024 Nov	2024 Dec
PBGL	No (a)	Yes (b)	Yes	Yes	Yes	Yes	Yes	Yes (c)	No (d)	No (d)	Yes (e)	Yes (e)
SHGC	No (a)	Yes (b)	Yes	Yes	Yes	Yes	Yes	Yes (c)	No (d)	No (d)	Yes (e)	Yes (e)
LASB	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
DMGC	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
HAY	No (a)	Yes (b)	Yes	Yes	Yes	Yes	Yes	Yes	No (d)	Yes	Yes	Yes

(a) Closed due to AT&T preparation; (b) Employee golf starts Tuesday after AT&T

(c) Open only for first two weeks before Concours (d) Close due to "Peak" season, PURE

(e) Employee golf opens on 11/21/22 and continues through 12/31/22 (excluding black out dates)

- There may be additional guideline documents within the Employee Golf folder—be sure to review everything before proceeding to build the monthly schedule



- Make sure all closures are accurately reflected on the month's schedule you are building

DATE	PEBBLE BEACH	SPYGLASS HILL	SPANISH BAY	THE HAY
1	CLOSED	CLOSED	3:10 – 12	CLOSED

Note—In addition to Senior Management, HR or other members of senior staff may communicate rules to the Group Golf Coordinator regarding Employee Golf. The Employee Golf Recommendations chart should trump other requests. If you find a discrepancy, bring this to the attention of the Group Reservations Manager

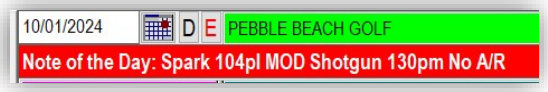
Employee Golf Schedule (3/6)

Open NGTF and Employee Golf Time Slots on the Tee Sheet

Even on days when the Senior Staff Employee Golf Recommendations spreadsheet says the course is closed to employee tee times, the Group Golf Coordinator must open all NGTF tee times—we would just create all time slots as NGTF without any PBC NGTF

⇒ Pebble Beach Golf Links: Open 5 NGTF followed by 2 PBC NGTF (7 total)
⇒ Spyglass Hill & Spanish Bay: Open 3 NGTF followed by 3 PBC NGTF (6 total)
⇒ We do not need to open NGTF on Del Monte Golf Course or The Hay

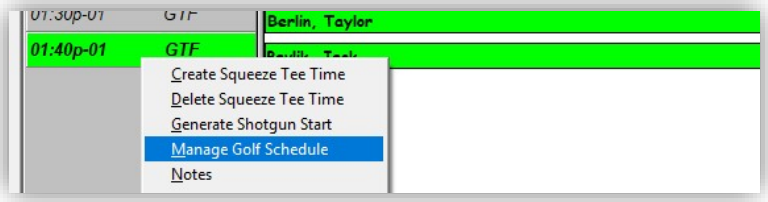
- Open the first day of the first course on the Tee Sheet and Check the Note of the Day—If you see "No A/R," do not open NGTF times on that day



- Scroll to the bottom of the tee sheet and make note of the last GTF of the day

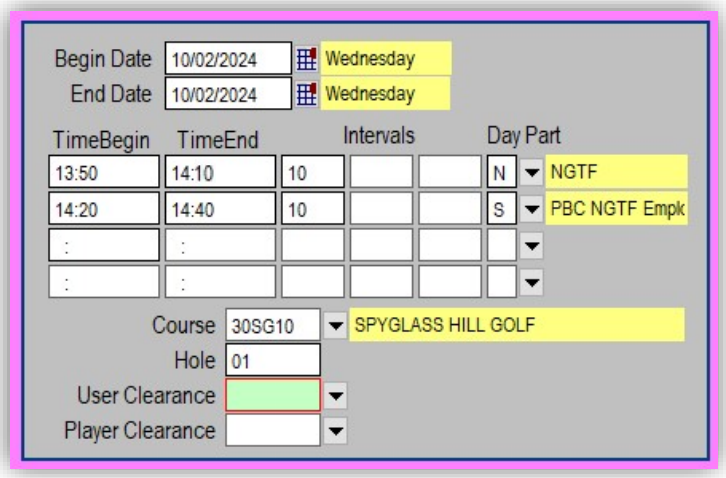


- Double click on the gray pane where times are listed and select "Manage Golf Schedule"



- The Tee Time Course Scheduling window will open—Click A for Add

- Input the following:
  - ◊ Dates
  - ◊ Start/End Times in <u>military time</u>
  - ◊ 10 Minute Intervals
  - ◊ Select N for NGTF
  - ◊ Select S for Employee Golf



- Page Down to Save

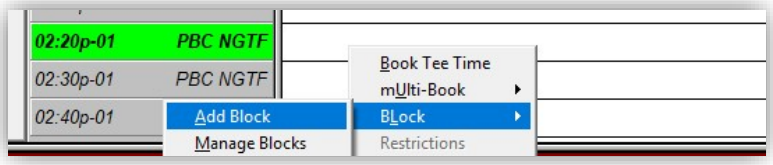
- Escape to see the times generate on the tee sheet

- If the start time or the number of golfers you were able to block does not match the Golf Schedule Word document, correct the Golf Schedule and add asterisks to indicate you have changed the information based on the tee sheet

Employee Golf Schedule (4/6)

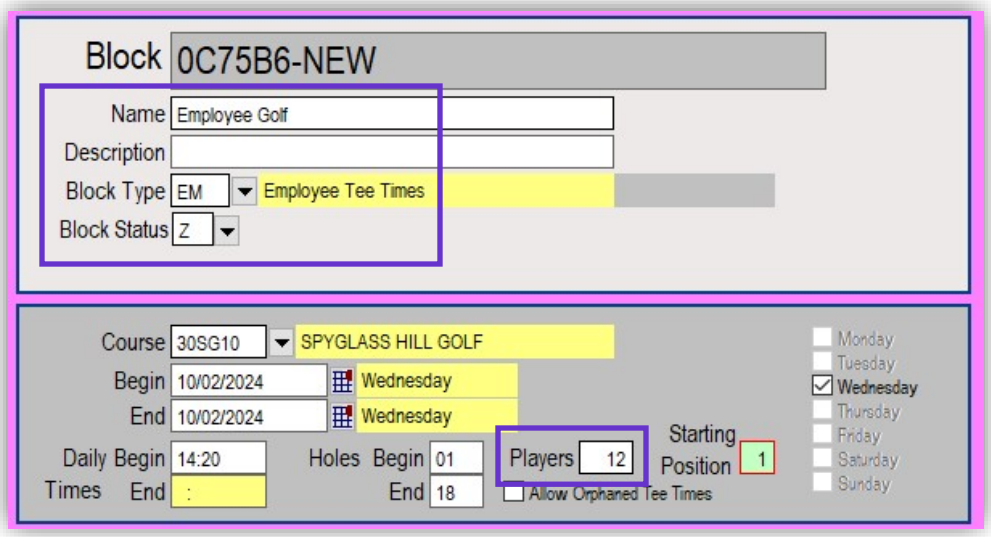
Add An Employee Golf Block to the Tee Sheet

- Once you have opened the appropriate NGTF / PBC NGTF time slots, double click on the white space within the first PBC NGTF time slot, click Block > Add Block

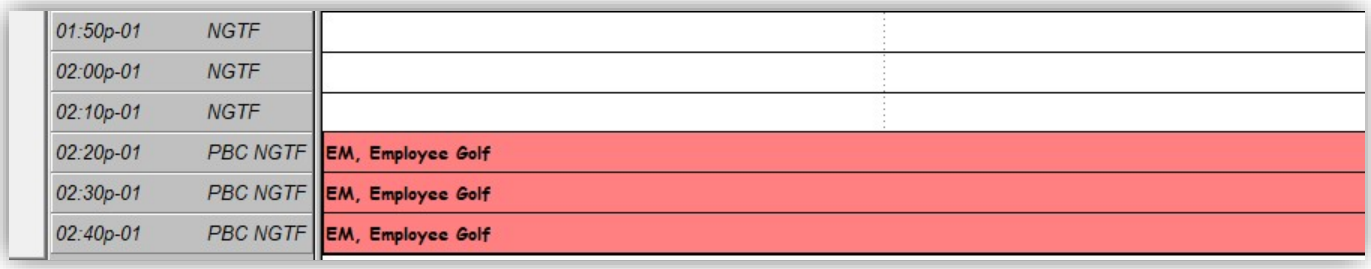


- "Are you certain?" - Select Yes

- Input the following:
  - ◊ Name—Employee Golf
  - ◊ Block Type—EM Employee Tee Times
  - ◊ Block Status—Z Comp
  - ◊ Edit the number of Players to the total number of the block
  - ◊ Page Down to Save



- Escape to see your block on the Tee Sheet



Employee Golf Schedule (5/6)

Input Employee Golf on The Hay

The Hay is the only course for which Employee Golf is GTF—This means that prior to setting up the Employee Golf, paying guests may have already booked the time slots:

⇒ Monday-Tuesday: 10:40am-11:00am
⇒ Wednesday-Sunday: 8:00am-8:20am *(As of 1/1/25)*

- Look up the first day of the Golf Schedule on Tee Sheet and see if any paying guests are booked into the designated Employee Golf time slots
  - ◊ If guests are occupying the times, we cannot schedule Employee Golf that day
  - ◊ Employee golf must be consecutive or nothing—so if 10:50pm is the only tee time booked by a paying guest, the entire day of Employee Golf is closed
  - ◊ Never combine a paying guest with Employee Golf in the same time slot

- If the time slots are open, double click on the gray pane where times are listed and select "Manage Golf Schedule"

- The Tee Time Course Scheduling window will open—Click E for Edit
  - ◊ Navigate to the time slots designated for Employee Golf
  - ◊ Change the Day Part Code from G (GTF) to D (PBC Employee Special)
  - ◊ Page Down to Save

Time	Hol	Us	Plr	Dpart	Time	Hol	Us	Plr	Dpart	Time	Hol	Us	Plr	Dpart	Time	Hol	Us	Plr	Dpart	Time
0700	01			G	1010	01			G	1320	01			G	1630	01			G	
0710	01			G	1020	01			G	1330	01			G	1640	01			G	
0720	01			G	1030	01			G	1340	01			G	1650	01			G	
0730	01			G	1040	01			D	1350	01			G	1700	01			G	
0740	01			G	1050	01			D	1400	01			G	1710	01			G	
0750	01			G	1100	01			D	1410	01			G	1720	01			G	
0800	01			G	1110	01			G	1420	01			G	1730	01			G	

- Add an Employee Golf Block per standard procedures

10:20a-01	GTF	Easley, Robert
10:30a-01	GTF	Lutz, Andrew
10:40a-01	PBC Employee Special	EM, Employee Golf
10:50a-01	PBC Employee Special	EM, Employee Golf
11:00a-01	PBC Employee Special	EM, Employee Golf
11:10a-01	GTF	Stansfield, Curtis / Bartholomew, Jamie

- If the start time or the number of golfers you were able to block does not match the Golf Schedule Word document, correct the Golf Schedule and add asterisks to indicate you have changed the information based on the tee sheet

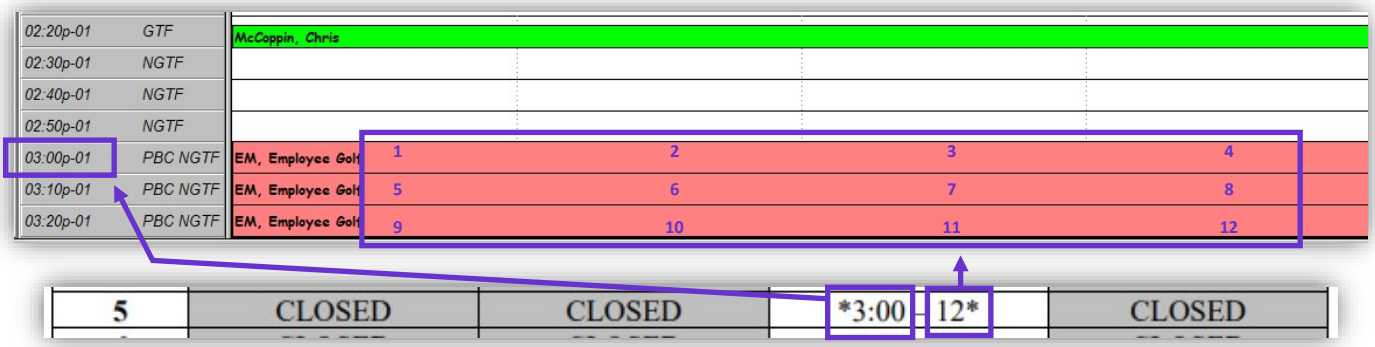
Employee Golf Schedule (6/6)

Compare the Tee Sheets to the Golf Schedule

Note—*This should be done as you are creating Employee Blocks on the tee sheet*

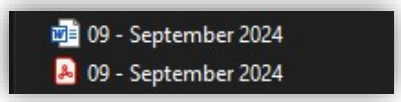
- Review the Tee Sheet for each day / course
  - ◊ Start Times—Ensure that the start time of the Employee Golf Block matches the time Golf Schedule
  - ◊ Number of Golfers—Ensure that the number of golfers matches the Golf Schedule

- If the start time or the number of golfers you were able to block does not match the Golf Schedule Word document, correct the Golf Schedule and add asterisks to indicate you have changed the information based on the tee sheet

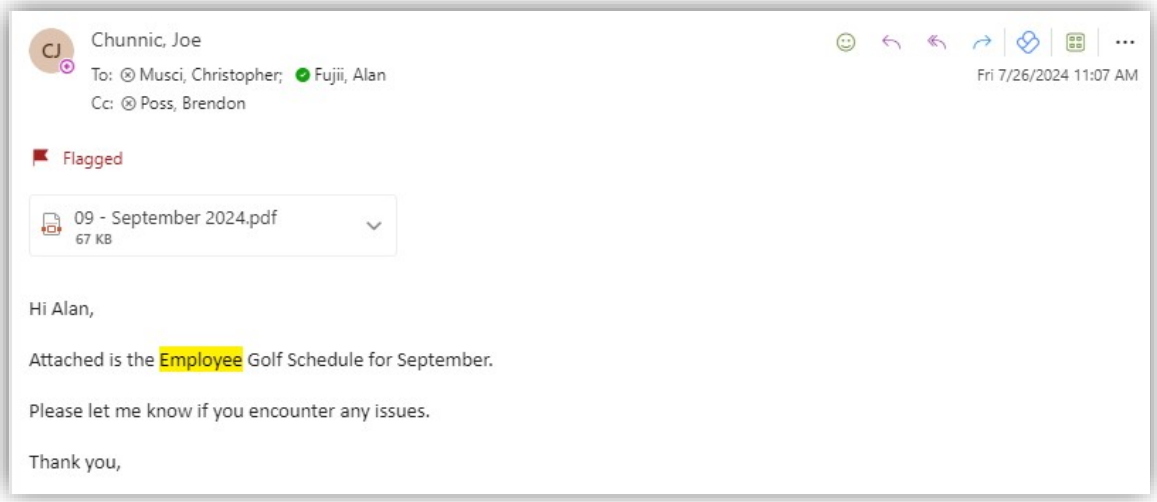


Finalize

- Once you have completed the schedule , Save your Word Doc, then Save As a PDF



- Email the Golf Schedule to IT and CC the Group Reservations Manager



- File the conversation into your Employee Golf Outlook folder

VIP Coordinator

Resort Reservations

2024 Training Binder



Role Overview

VIP Coordinators are responsible for managing reservations for special guests of Pebble Beach Resorts. These include long standing VIP guests, Executive Committee Members, Lone Cypress Partners and their guests, guests of the National Sales Managers, guests of Marketing Managers, and more.

VIP Coordinators also work with the Tournament Office and Executive Offices, acting as Group Rooms & Golf Coordinators for internal Pebble Beach Events.

While VIP Coordinators fall under the umbrella of Group Reservations, VIP Coordinators must be well versed in VIP Bookings, Group Bookings, and Transient Bookings.

PEBBLE BEACH RESORTS RESERVATIONS

GROUP RESERVATIONS	LEISURE RESERVATIONS
GROUP RESERVATIONS MANAGER	RESERVATIONS MANAGER
GROUP ROOMS & GOLF COORDINATOR	ASSISTANT MANGER
GROUP GOLF COORDINATOR	SUPERVISORS
GROUP SPA COORDINATOR	TRAINING COORDINATORS
VIP COORDINATOR	AUDITORS
	E-DESK AGENTS
	RESORT SALES AGENTS
	DAY GUEST AGENTS

PRIMARY DUTIES:

- ◊ Create and maintain bookings for VIP guests
- ◊ Ensure that appropriate rate and guidelines approvals are received
- ◊ Ensure that appropriate rates and guidelines are applied to VIP reservations
- ◊ Maintain records for all approvals and guest benefits
- ◊ Maintain room blocks, golf blocks, and event schedules for internal events
- ◊ Handle contracts of internal PBC events
- ◊ Assist the Group Sales Coordinators, Group Spa Coordinator, and the Group Rooms & Golf Coordinators
- ◊ Assist with other tasks that may be assigned by the Group Reservations Manager

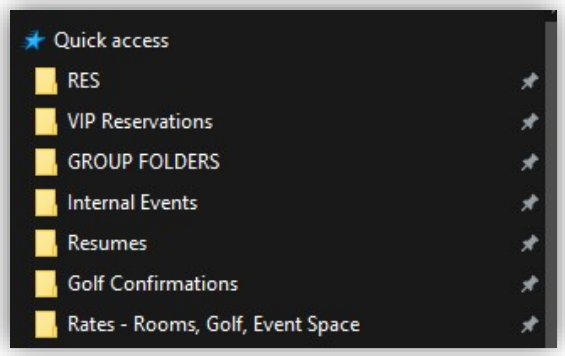
Programs & Resources

Outlook

- The VIP Inbox receives messages sent to VIPReservations@pebblebeach.com
- This inbox is where most VIP booking requests will be directed.
- Reply-All to VIP emails so everyone knows which emails have been addressed

File Explorer

Use this program to access documents save on our internal O and Z Drives



SMS Host

Use this program to create Room, Golf, and Dining Bookings for VIP Guests

REVINATE

Use this program to document bookings in order to track revenue

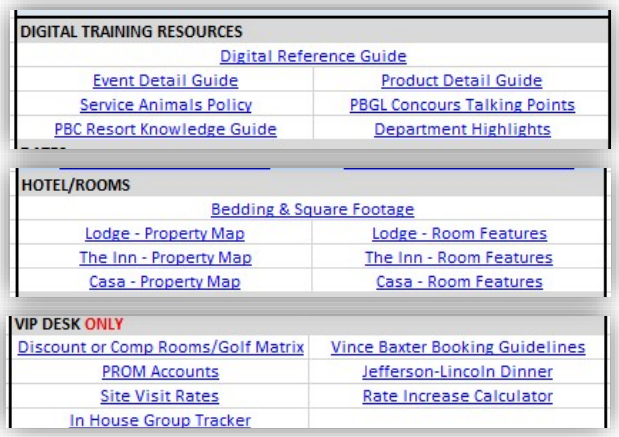
Sertifi

Use this program to send documents that require signatures to guests

Digital Binder

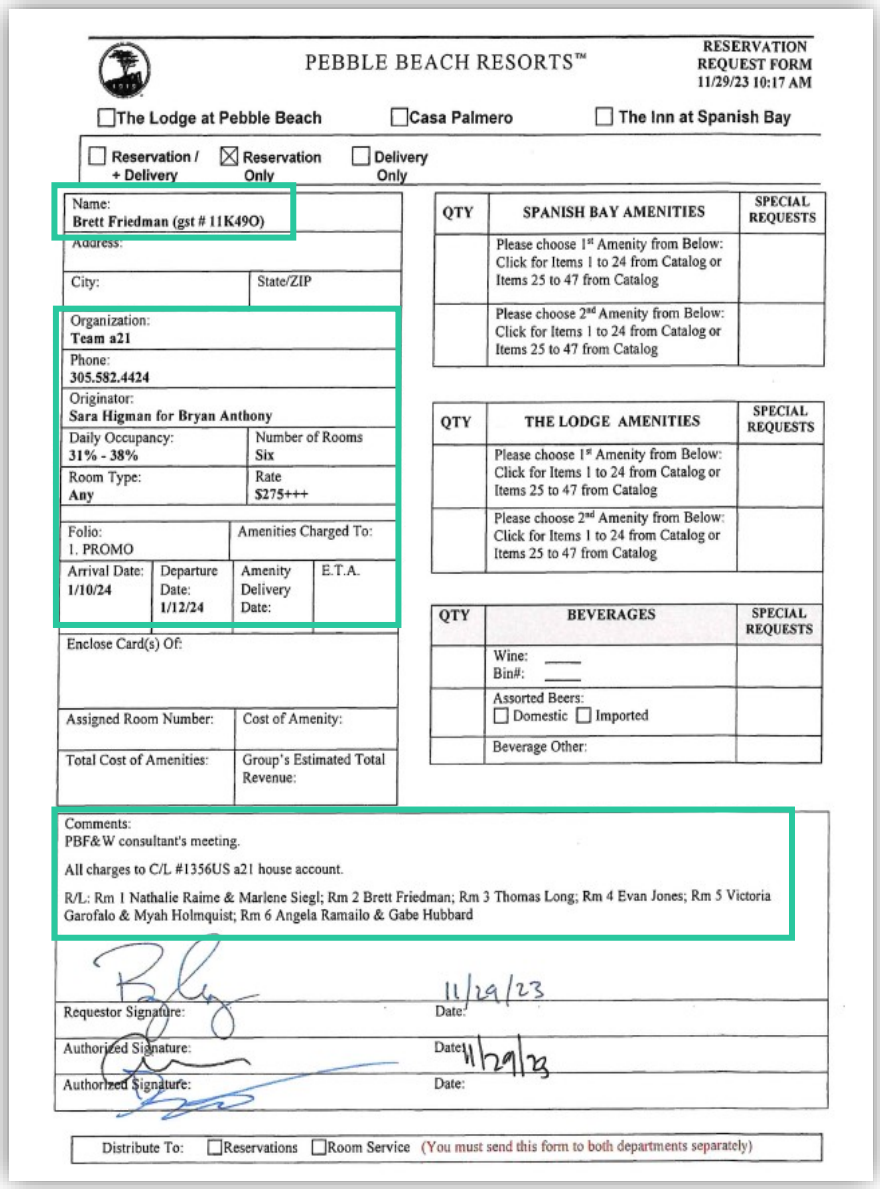
This is an Excel document that acts as a hub for documents we use every day

- Digital Reference Guide
- Resort Knowledge Documents
- Rates and Guidelines



	Type of VIP	Requestor(s)	Rate
V1	Owners	Executive Office Partner Services Manager	Rack
V2	Guests of Owners	Executive Office Partner Services Manager	Rack
V3	Special Guests / Guests of Senior Management	Assistants to Senior Executives	Rack Discount Complimentary
V4	Writer/Rater/Media	Marketing Sponsorships Various other departments	Discount per Site Visit Rates
V5	Site Inspection	Sales Conference Services	Discount per Site Visit Rates Complimentary per Contract
V5 TIRP	Travel Industry Rate Program	Leisure Travel Sales	Discount per Site Visit Rates Complimentary per Chart
V6	Dissatisfied Guests	Assistants to General Managers	Rack Rack with Upgrade Discount Complimentary
V7	Golf VIPs	Assistants to Golf Executives	Rack
V8	Brand Partners	Marketing Sponsorships Sales Conference Services	Rack Discount Complimentary
Jefferson/Lincoln	Jefferson/Lincoln Award Winners/ Attendees	Conference Services	Discount
Service/Maintenance	Service/Maintenance	Assistants to General Managers	Discount
Employee Candidates	Employee Candidates	Human Resources	Complimentary
Vice Baxter	Vice Baxter and Family	Baxter Family	Rack with Upgrade Discount per Baxter Rate Chart
Raffle Winners	PBC Raffle Winners	Contact on Certificate	Complimentary
RHA	Resort Hotel Association	Sales via StayRHA Program	Discount per StayRHA Program

VIP Reservation Requests



PEBBLE BEACH RESORTS™ — RESERVATION REQUEST FORM 11/29/23 10:17 AM

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

☐ Reservation / + Delivery ☒ Reservation Only ☐ Delivery Only

Name: Brett Friedman (gst # 11K49O)
Address:
City: State/ZIP
Organization: Team a21
Phone: 305.582.4424
Originator: Sara Higman for Bryan Anthony
Daily Occupancy: 31% - 38% Number of Rooms: Six
Room Type: Any Rate: $275+++
Folio: 1. PROMO Amenities Charged To:
Arrival Date: 1/10/24 Departure Date: 1/12/24 Amenity Delivery Date: E.T.A.
Enclose Card(s) Of:
Assigned Room Number: Cost of Amenity:
Total Cost of Amenities: Group's Estimated Total Revenue:

QTY	SPANISH BAY AMENITIES	SPECIAL REQUESTS
	Please choose 1st Amenity from Below: Click for Items 1 to 24 from Catalog or Items 25 to 47 from Catalog	
	Please choose 2nd Amenity from Below: Click for Items 1 to 24 from Catalog or Items 25 to 47 from Catalog	

QTY	THE LODGE AMENITIES	SPECIAL REQUESTS
	Please choose 1st Amenity from Below: Click for Items 1 to 24 from Catalog or Items 25 to 47 from Catalog	
	Please choose 2nd Amenity from Below: Click for Items 1 to 24 from Catalog or Items 25 to 47 from Catalog	

QTY	BEVERAGES	SPECIAL REQUESTS
	Wine: ____ Bin#: ____	
	Assorted Beers: ☐ Domestic ☐ Imported	
	Beverage Other:	

Comments:
PBF&W consultant's meeting.

All charges to C/L #1356US a21 house account.

R/L: Rm 1 Nathalie Raime & Marlene Siegl; Rm 2 Brett Friedman; Rm 3 Thomas Long; Rm 4 Evan Jones; Rm 5 Victoria Garofalo & Myah Holmquist; Rm 6 Angela Ramailo & Gabe Hubbard

Requestor Signature: Date: 11/29/23
Authorized Signature: Date: 11/29/23
Authorized Signature: Date:

Distribute To: ☐Reservations ☐Room Service (You must send this form to both departments separately)

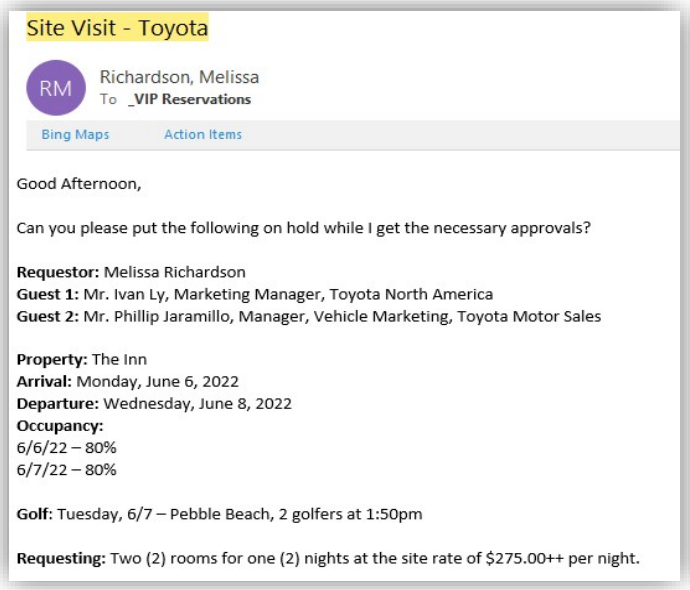
Requesters may E-mail the VIP Desk directly or they can fill out and scan a Reservation Request Form.

The Reservation Form must include:

- The Guest Name
- The Requestor's Name/Dept.
- Current Occupancy % (If requesting discount/comp)
- Requested Room Type / Rate
- Requested Dates
- The Rationale of the request
- The Signature of the Requestor and Approver

Email:
If the Requestor chooses to email, they will typically seek approval first, then forward the email with the attached necessary approval to the VIP Desk. They may, however, ask the VIP Desk to hold a booking until the approval is obtained. The VIP Desk will, in that case, create the booking, but wait to confirm.

Records:
If a comp room is requested, the comp approval paperwork should be saved in the "**VIP Paperwork Folder**" within the O Drive. If saving an email, choose



Site Visit - Toyota

RM Richardson, Melissa
To _VIP Reservations

Bing Maps Action Items

Good Afternoon,

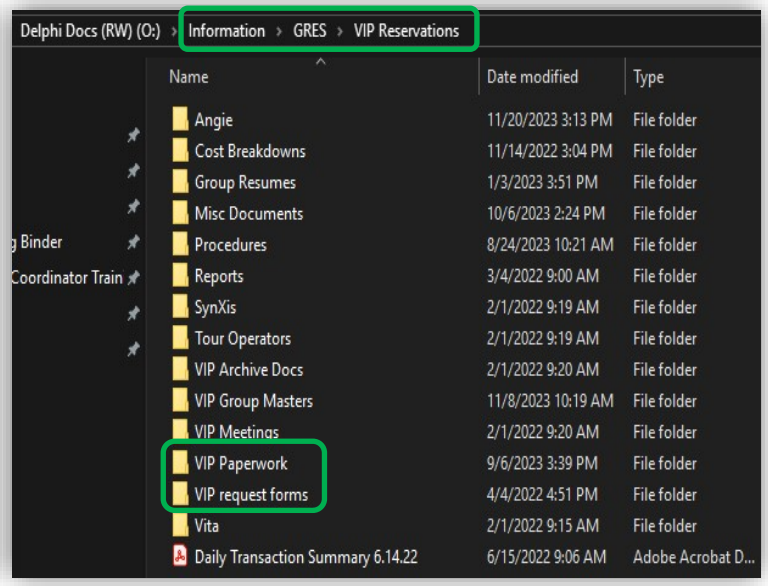
Can you please put the following on hold while I get the necessary approvals?

Requestor: Melissa Richardson
Guest 1: Mr. Ivan Ly, Marketing Manager, Toyota North America
Guest 2: Mr. Phillip Jaramillo, Manager, Vehicle Marketing, Toyota Motor Sales

Property: The Inn
Arrival: Monday, June 6, 2022
Departure: Wednesday, June 8, 2022
Occupancy:
6/6/22 – 80%
6/7/22 – 80%

Golf: Tuesday, 6/7 – Pebble Beach, 2 golfers at 1:50pm

Requesting: Two (2) rooms for one (2) nights at the site rate of $275.00++ per night.



Delphi Docs (RW) (O:) › Information › GRES › VIP Reservations

Name	Date modified	Type
Angie	11/20/2023 3:13 PM	File folder
Cost Breakdowns	11/14/2022 3:04 PM	File folder
Group Resumes	1/3/2023 3:51 PM	File folder
Misc Documents	10/6/2023 2:24 PM	File folder
Procedures	8/24/2023 10:21 AM	File folder
Reports	3/4/2022 9:00 AM	File folder
SynXis	2/1/2022 9:19 AM	File folder
Tour Operators	2/1/2022 9:19 AM	File folder
VIP Archive Docs	2/1/2022 9:20 AM	File folder
VIP Group Masters	11/8/2023 10:19 AM	File folder
VIP Meetings	2/1/2022 9:20 AM	File folder
VIP Paperwork	9/6/2023 3:39 PM	File folder
VIP request forms	4/4/2022 4:51 PM	File folder
Vita	2/1/2022 9:15 AM	File folder
Daily Transaction Summary 6.14.22	6/15/2022 9:06 AM	Adobe Acrobat D...

Complimentary and Discounted Matrix

The **Complimentary and Discounted Golf / Rooms Matrix** is a document that has been approved by senior management. It outlines who is authorized to approve discounted and complimentary stays and tee times based on the situation.

The current and most up to date version of this approval matrix is linked in the Digital Binder.
The example below is a guide to understand how to read this document.

Example: Marketing wants to invite a member of the media to The Lodge for a discounted stay. According to the matrix below, the person(s) who can approve the reduced room rate in this case either Aaron Flink (AF) or Ann McCauliffe (AM).

In most cases, the requestor will get approval first (like in the email example below), then that email chain will be forwarded to VIP Reservations for the booking to be created and confirmed.

The VIP Coordinator should not send a confirmation of the discounted booking until the approval is received via email.

From: Flink, Aaron <FlinkA@pebblebeach.com>

Approved.

From: Bertel, Marissa <bertelm@pebblebeach.com>

Requestor: Diane Stracuzzi

Guests:
Katie Mitchell – Chief Marketing Officer, Ralph Lauren
Kelly Broad – Head of Sports Marketing & Partnership
Kim Burt – VP of Sales and Marketing, Ralph Lauren

Property: The Lodge
Arrival – Monday, November 6, 2023
Departure – Wednesday, November 8, 2023
Occupancy – 73%, 92%

Requesting – Three (3) Ocean View Rooms at The Lod
Affairs – dept 960.
Rationale – Kate, Kelly, and Kim from Ralph Lauren wi

Marissa Bertel
Executive Assistant to
Aaron Flink, EVP & Chief Strategy Officer
Pebble Beach Company
P: 831.647.7449
www.pebblebeach.com

COMPLIMENTARY AND DISCOUNTED GOLF / ROOMS
(effective July 1, 2021)

The approval matrix for any discounted or complimentary golf or rooms is as follows:

	Golf		Rooms	
	Comp	Reduced Rate (b)	Comp	Reduced Rate (b)
All employees (a)	DS	DS	DS	DS
Guests	DS	DS	DS	DS
Sales / Sponsorship (per contract)	AF / AM	AF / AM	AF / AM	AF / AM
Sales (site visits)	DS	AF / AM	DS	AF / AM
Disgruntled guest	HEAD PRO	HEAD PRO	GM	GM
PGA Professionals	JS	JS	N/A	N/A
All Other (Golf Raters, Vendors, USGA etc)	DS	DS	DS	DS

Sale of PB Golf without rooms or with less than a two night stay requires DS approval unless sold through reservations and an exception is made as part of the normal process

***High season - need approval for 2nts when 3 nights is required. - ZE 5.6.22

(a) Excludes employee golf program administered by HR
(b) Other than preapproved packages or rates (Last Chance rates, Dukes, NCGA, Friends and Family, etc.).

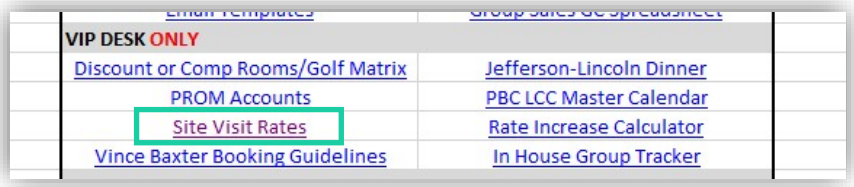
DS	David Stivers
AF	Aaron Flink
JS	John Sawin
AM	Ann McAuliffe

Site Visit Rate Approval

Discounted room rates for Site Visits are determined based on the occupancy of the requested dates. The requestor should be calculating occupancy before seeking approval.

The VIP Coordinator is responsible for verifying that the calculated occupancy is correct to ensure that the appropriate rate tier is approved.

This **Site Visit Rates** document is accessible from the VIP Desk section of the **Digital Binder**.



Site Visit Rates C9 | Effective 8.21.24

Sales - Site Visit

Inn at Spanish Bay:	Under 80%	81% - 95%	Above 95%
Garden View	$225.00	$325.00	Rack
Lodge at Pebble Beach:			
Garden View	$275.00	$375.00	Rack
Casa Palmero:			
Estate Room	$275.00	$375.00	Rack

Sales - Travel Agent

Inn at Spanish Bay:	Under 95%	Above 95%
Garden View	$275.00	Rack
Lodge at Pebble Beach:		
Garden View	$325.00	Rack
Casa Palmero:		
Estate Room	$325.00	Rack

Marketing - Media

Inn at Spanish Bay:	Under 85%	Above 85%
Garden View	$275.00	Rack
Lodge at Pebble Beach:		
Garden View	$325.00	Rack
Casa Palmero:		
Estate Room	$325.00	Rack

Good afternoon Ran,

Attached for your review is a Site request for the The Link presented by CapSource program (arrival May 4 - 10, 2024).

Requestor: Mary Robbins

Room #1, #2, #3 - Florence Nalepka - The Link presented by CapSource

Property: The Inn at Spanish Bay
Arrival: 1/22/24, Monday, January 22, 2024
Departure: 1/23/24, Tuesday, January 23, 2024
Occupancy: 1/22 – 34%

Requesting: Three (3) rooms for one (1) night (contracted as comp'd based on availability)

Please confirm if this has your approval.

F7 Calculate Occupancy

Set Your Dates in F7

1. F7—Availability Menu
2. G—General Availability
3. D—Dates
4. Set Date of Arrival using the Calendar
5. Enter

Check Notes for any Availability Restrictions

1. ! - Notes
2. Look for Notes that will prevent you from booking at said property—you will primarily look for Stop Sells (SS) - If you see a Stop Sell, email a screenshot to Revenue Management

Date	AVAILABILITY NOTES
05/01/2024	L/CP.SS(Leonard Green)
05/02/2024	PW.SS(Leonard Green/AT&T)
05/03/2024	B.SS(AT&T)

Example: Regardless of availability/ occupancy, we cannot book at The Lodge or Casa Palmero on 5/1/24

Check Property-Wide Availability

1. C—Consolidate
2. P—Property
3. Check how many rooms are available at each property to see if this booking would put us over capacity from a Property Wide standpoint

Date	L	B	P
05/14/2024	-4	-21	3
05/15/2024	-8	22	2
05/16/2024	-1	-11	7

Example: Despite having 3 rooms available at Casa Palmero, we are Property Wide at -22 rooms

Verify Occupancy % at the Specified Property

1. S—Summary
2. ^—MultProp
3. Select your property
4. K
5. Divide the number of Booked rooms by the number of Net rooms possible to reserve

Example: On 1/23/24, we have net 258 net rooms that are possible to reserve. Out of those 258, 118 rooms are booked. Divide 118 by 258 to find the Occupancy Percentage: **45.7%.**

Note—The Inn has 269 total rooms, but the "NET" number is 258 due to some rooms being OOO.

Date	NET	$OLD	%SLD	VACANT	%VAC	BOOKED	%BKD	AVAIL	%AVL	Day
01/23/2024	258	118	43.87	140	52.04	118	43.87	140	52.04	Tue
01/24/2024	253	157	58.36	96	35.69	157	58.36	96	35.69	Wed

Calculate Occupancy Manually

1. F7—Availability Menu
2. G—General Availability
3. D—Dates
4. Set Date of Arrival using the Calendar
5. Enter
6. C—Consolidate
7. P—Property
8. Use the following 2 equations to calculate occupancy

Equation #1
Total # of rooms at specified property
- # of Available Rooms on specified night
# of booked/non-reservable rooms

Equation #2
# of booked/non-reservable rooms
÷ Total # of rooms at specified property
Occupancy Percentage

Total Rooms at Each Property:
Spanish: **269**
Lodge: **202**
Casa: **24**

Example: The Inn at Spanish Bay has 22 rooms available on 5/15/24.

Equation #1
269
- 22
247

Equation #2
247
÷ 269
0.918 (**91.8%**)

Date	L	B	P
05/14/2024	-4	-21	3
05/15/2024	-8	22	2
05/16/2024	-1	-11	7

V1—Owners (1/2)

V1: Bookings for Pebble Beach Company Owners (Lone Cypress Partners)

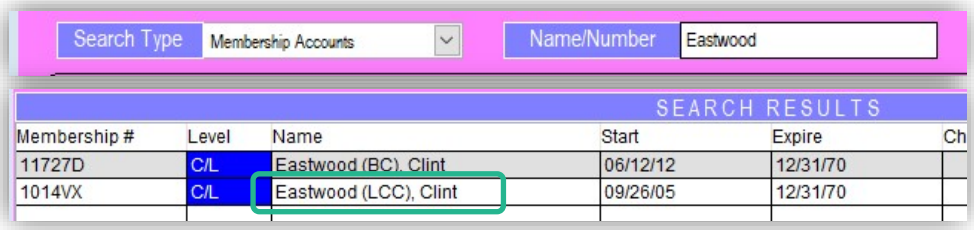
Requestor
- The Head Executive Office via the CEO's Executive Assistant (Sara Gray) or the Partner Services Manager (Mekayla Cooper)

Rates
- Rack Rate

Special Notes
- If requests come from the CEO's Executive Assistant, all approvals for special rates/guidelines can be assumed from David Stivers.
- Owners are not required to pay deposits at time of booking

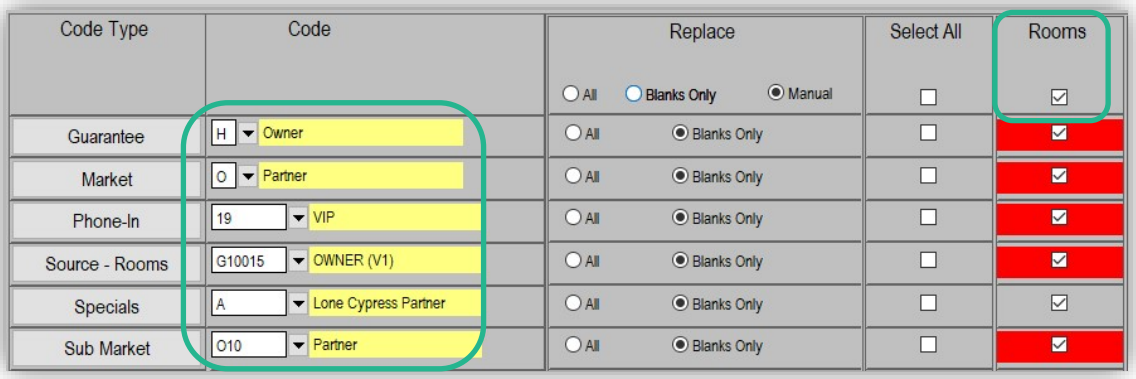
1. Use the Booking Center to secure all requested rooms and golf to a new Itinerary
   - Pull in room(s) at Rack Rate
   - Pull in tee times using the V1 Rate Code

2. Click the down arrow next to Guest to search for the existing Guest Tile of the owner
   - If you see multiple results, change your search type to "Memberships" and select the account with the LCC Membership (Lone Cypress Club)



3. Escape the Guest Tile to return to the Booking Center

4. Click Booking Settings and input the following:

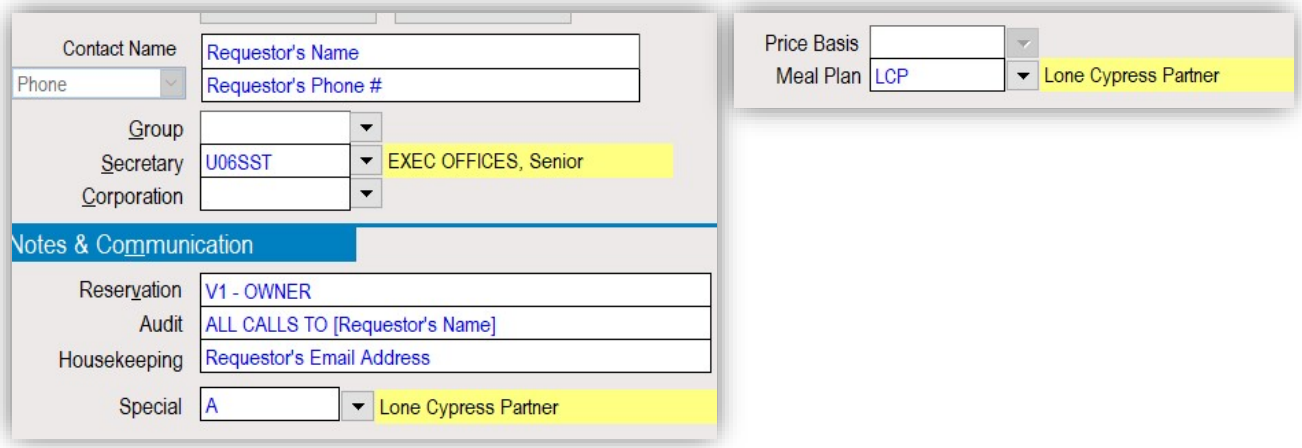


5. Page Down to "Apply Settings & Exit"

6. Complete / Confirm
   - Escape out of the Bills window
   - Click "Y" to confirm the booking without a deposit
   - Escape out of the Email Confirmation Window

V1—Owners (2/2)

7. Enter the Room Reservation and input the following:
    - The "requestor" will be the Executive Assistant or Partner Services Manager

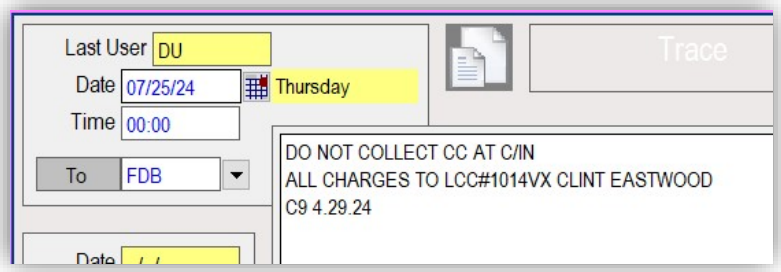


8. Page Down to save

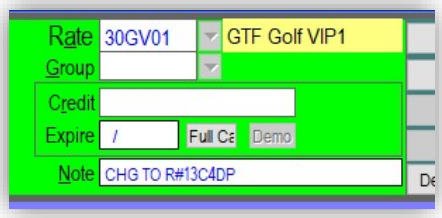
9. Select "No" to not update the Package

10. Enter Special Billing and clear out the Deposit Fields
    - D—Deposit
    - C—Clear
    - B—Both

11. If the owner wants charges billed to their Lone Cypress Membership, write an FDB Trace:



12. Write Chargeback Notes on all reserved tee times



13. Send an IEMAIL from the Room Reservation Tile

14. Create a Lead Form in REVINATE

V2—Guests of Owners (1/2)

V2: Bookings for guests of Pebble Beach Company Owners (Lone Cypress Partners)

Requestor
- The Head Executive Office via the CEO's Executive Assistant (Sara Gray) or the Partner Services Manager (Mekayla Cooper)

Rates
- Rack Rate

Special Notes
- If requests come from the CEO's Executive Assistant, all approvals for special rates/guidelines can be assumed from David Stivers.
- Guests of owners are not required to pay deposits at time of booking

1. Use the Booking Center to secure all requested rooms and golf to a new Itinerary
   - Pull in room(s) at Rack Rate
   - Pull in rack tee times using the V2 Rate Code

2. Click the down arrow next to Guest and create a V2 Guest Tile:
   - Name / Title
   - V2 in the Address Field
   - V2 in the Phone Field
   - Page Down to save
     - 19—VIP
     - 07—G1—Pebble Beach Company
     - 02—G10016—Guest of Owner (V2)
   - Access Profiles to verify/edit titles on each profile

3. Escape the Guest Tile to return to the Booking Center

4. Click Booking Settings and input the following:

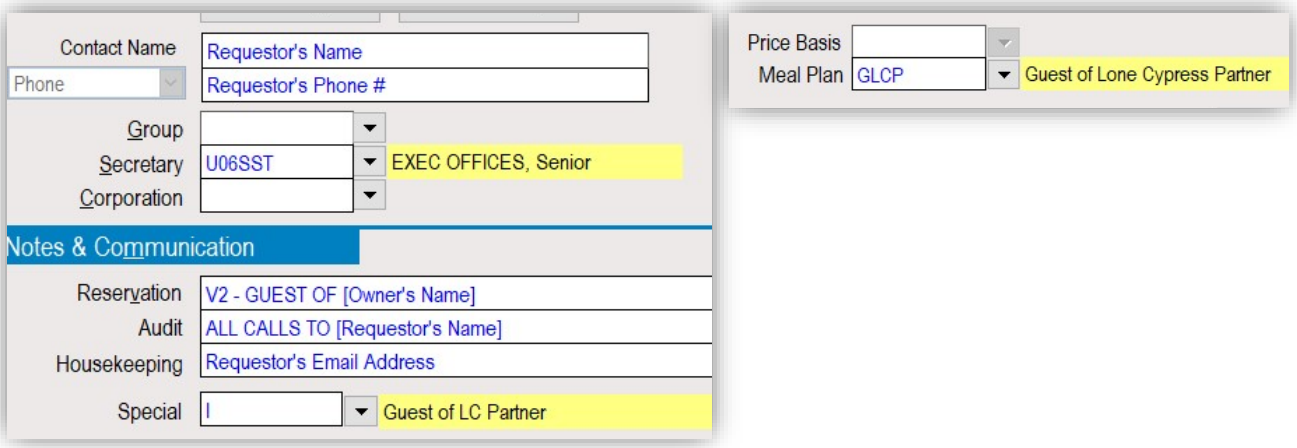
Code Type	Code	Replace (All / Blanks Only / Manual)	Select All	Rooms
Guarantee	V VIP Reservations	All / Blanks Only	☐	☑
Market	O Partner	All / Blanks Only	☐	☑
Phone-In	19 VIP	All / Blanks Only	☐	☑
Source - Rooms	G10016 GUEST OF OWNER (V2)	All / Blanks Only	☐	☑
Specials	I Guest of LC Partner	All / Blanks Only	☐	☑
Sub Market	O10 Partner	All / Blanks Only	☐	☑

5. Page Down to "Apply Settings & Exit"

6. Complete / Confirm
   - Escape out of the Bills window
   - Click "Y" to confirm the booking without a deposit
   - Escape out of the Email Confirmation Window

V2—Guests of Owners (2/2)

7. Enter the Room Reservation and input the following:
    - The "requestor" will be the Executive Assistant or Partner Services Manager



8. Page Down to save

9. Select "No" to not update the Package

10. Enter Special Billing and clear out the Deposit Fields
    - D—Deposit
    - C—Clear
    - B—Both

11. Send an IEMAIL from the Room Reservation Tile

12. Create a Lead Form in REVINATE

V3—Guests of Senior Executives (1/3)

V3: Bookings for guests of Senior Executives

Requestor	• The Senior Executives via their Executive Assistants
Rates	• Rack Rate, Discounted, or Complimentary
Special Notes	• Guests are required to pay a deposit if the rate is more than $350+++

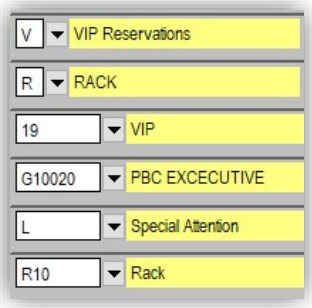
1. Use the Booking Center to secure all requested rooms and golf to a new Itinerary
   - Pull in room(s) at Rack Rate
   - Pull in tee times using the V3 Rack Rate Code, Other Comp, or Special Individual

2. Click the down arrow next to Guest and create a V3 Guest Tile:
   - Name / Title
   - V3 in the Address Field
   - V3 in the Phone Field
   - Page Down to save
     - 19—VIP
     - 07—G1—Pebble Beach Company
     - 04—G10020—PBC Executive
   - Access Profiles to verify/edit titles on each profile

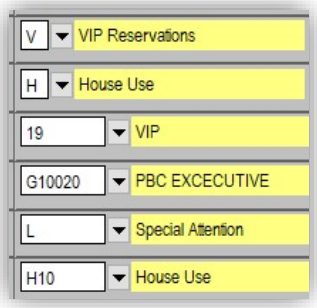
3. Escape the Guest Tile to return to the Booking Center

4. Click Booking Settings and input the following:

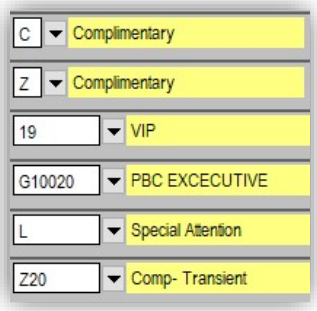
Rack Rate



Discount



Complimentary



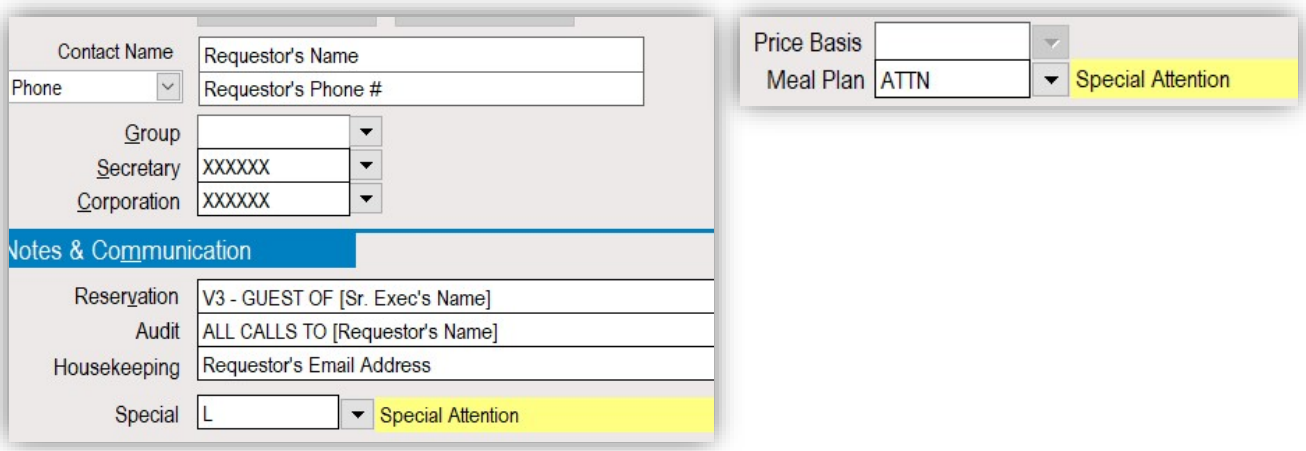


5. Page Down to "Apply Settings & Exit"

6. Complete / Confirm
   - Escape out of the Bills window
   - Click "Y" to confirm the booking without a deposit
   - Escape out of the Email Confirmation Window

V3—Guests of Senior Executives (2/3)

7. Enter the Room Reservation and input the following:
    - The "requestor" will be the Senior Executive's Executive Assistant
    - The Secretary field is the department of the Senior Executive
    - The Corporation field is where applicable PROM/House Accounts will be entered



8. Page Down to save

9. Select "No" to not update the Package

10. If the room rate is $350+++ or less, enter Special Billing and clear out the Deposit Fields
    - D—Deposit
    - C—Clear
    - B—Both

11. If the room rate is more than $350+++
    - Obtain the guest's CC and Billing Address via phone or Sertifi from the guest
    - Input that information on the Guest Tile
    - Click Bills on the Reservation Tile to charge the deposit

12. If the rate is discounted or complimentary, change the Package Code

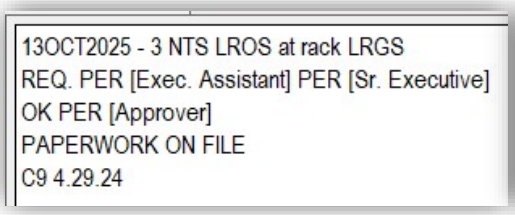
Discount:	Complimentary
VIPL	VPCOLR
VIPB	VPCOBR
VIPP	VPCOPR

13. If the rate is discounted, access Special Billing and add your Custom Rate
    - A to Add
    - Enter
    - 100000 (S) / 200000 (L) / 700000 (CP)
    - Input the nightly rate into "Amount Each"
    - Type N in the "Batch" field
    - Page Down to save

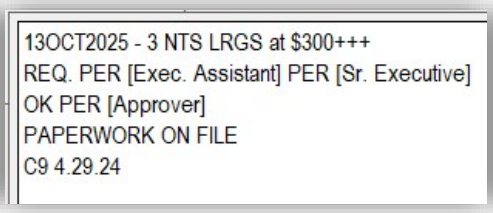
V3—Guests of Senior Executives (3/3)

14. If the reservation includes a room upgrade, a discounted rate, or a comp rate, leave a D Note:

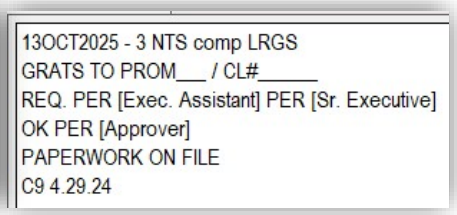
Upgrade



Discount



Complimentary



15. If any charges will be billed to a PROM or House Account, leave an FDB Trace
    - If the room is comp, your FDB can be a copy of your D Note

16. Send an IEMAIL from the Room Reservation Tile (If complimentary, send a DNDEMAIL)

17. Create a Lead Form in REVINATE

18. If the booking has a room upgrade, discounted rate, or complimentary booking, save the email conversation with the approval in the VIP Paperwork folder in the O Drive

V4—Writer, Rater, Media (1/2)

V4: A Writer, Rater, or member of the Media who is coming to evaluate and publish a review or article of some aspect of our resort properties or golf courses.

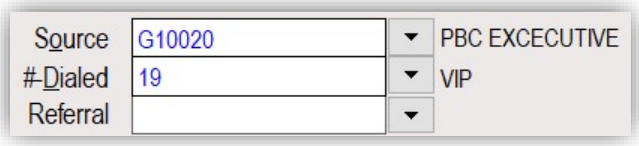
Requestor
- Marketing, Sponsorships, various other departments

Rates
- Discounted per Site Visit Rate Approval Chart

Special Notes
- Before booking, verify that the Occupancy % meets guidelines for the Media Rate on the Site Visit Rate Codes Chart
- Guests are required to pay a deposit if the rate is more than $350+++

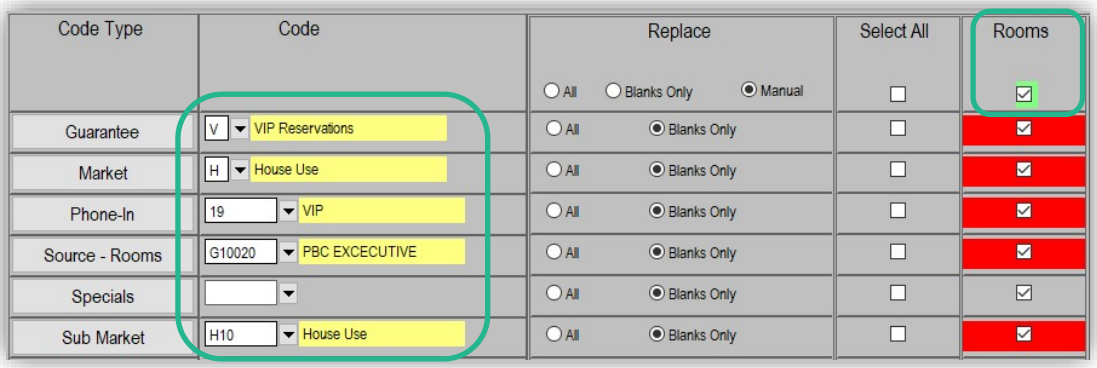
1. Use the Booking Center to secure all requested rooms and golf to a new Itinerary
   - Pull in room(s) at Rack Rate
   - Pull in tee times using the V4 Rate Code, Other Comp, or Special Individual

2. Click the down arrow next to Guest and create a V4 Guest Tile:
   - Name / Title
   - Input the guest's job title in the Position field
   - Input the company in the Company field
   - V4 in the Address Field
   - V4 in the Phone Field
   - Page Down to save
     - 19—VIP
     - 07—G1—Pebble Beach Company
     - 04—G10020—PBC Executive
   - Access Profiles to verify/edit titles on each profile



3. Escape the Guest Tile to return to the Booking Center

4. Click Booking Settings and input the following:

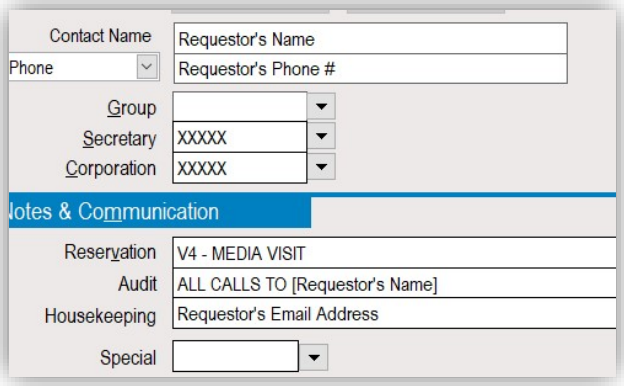


5. Page Down to "Apply Settings & Exit"

6. Complete / Confirm
   - Escape out of the Bills window
   - Click "Y" to confirm the booking without a deposit
   - Escape out of the Email Confirmation Window

V4—Writer, Rater, Media (2/2)

7. Enter the Room Reservation and input the following:
    - The Secretary field should be the department of the requestor
    - The Corporation field is required if charges will be billed to a House / PROM Account



8. Page Down to save

9. Select "No" to not update the Package

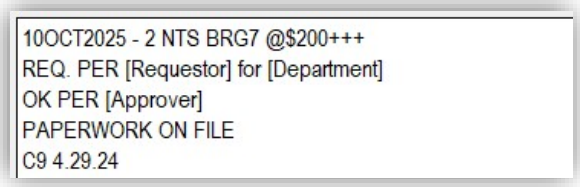
10. Enter Special Billing and clear out the Deposit Fields
    - D—Deposit
    - C—Clear
    - B—Both

    [If the nightly rate is more than $350+++, the guest must pay a deposit, and that deposit amount should be in Special Billing Deposit #1]

11. Change the Package Code to VIPL, VIPB, or VIPP

12. Access Special Billing and add your Custom Rate
    - A to Add
    - Enter
    - 100000 (S) / 200000 (L) / 700000 (CP)
    - Input the nightly rate into "Amount Each"
    - Type N in the "Batch" field
    - Page Down to save

13. Notate the custom rate approval in a D Note



14. If billing is <u>not</u> IPO; add FDB Trace for charges

15. Send an IEMAIL from the Room Reservation Tile

16. Create a Lead Form in REVINATE

17. If the booking has a room upgrade, discounted rate, or complimentary booking, save the email conversation with the approval in the VIP Paperwork folder in the O Drive

V5—Site Visit (1/2)

V5: A Site Visit is when a guest is visiting Pebble Beach Resorts to do a physical inspection or conduct research or observe an aspect or activity of the property.

Requestor
- Sales, Conference Services, Retail

Rates
- Discounted per Site Visit Rate Approval Chart
- Complimentary per Contract

Special Notes
- Before booking, verify that the Occupancy % meets guidelines on the Site Visit Rate Codes Chart
- Guests are required to pay a deposit if the rate is more than $350+++

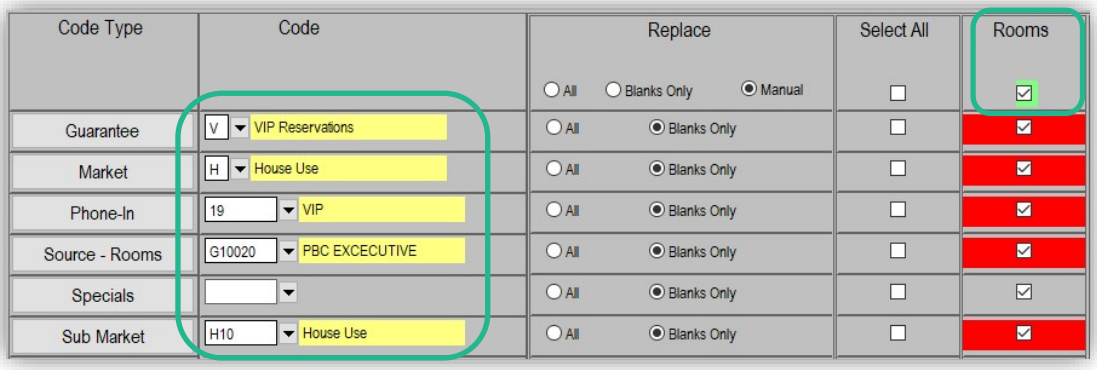
1. Use the Booking Center to secure all requested rooms and golf to a new Itinerary
   - Pull in room(s) at Rack Rate
   - Pull in tee times using the V5 Rate Code, Other Comp, or Special Individual

2. Click the down arrow next to Guest and create a V5 Guest Tile:
   - Name / Title
   - Input the guest's job title (if known) in the Position field
   - Input the company in the Company field
   - V5 in the Address Field
   - V5 in the Phone Field
   - Page Down to save
     - 19—VIP
     - 07—G1—Pebble Beach Company
     - 04—G10020—PBC Executive
   - Access Profiles to verify/edit titles on each profile



3. Escape the Guest Tile to return to the Booking Center

4. Click Booking Settings and input the following:

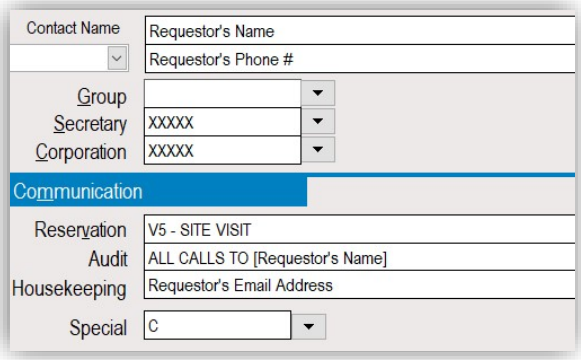


5. Page Down to "Apply Settings & Exit"

6. Complete / Confirm
   - Escape out of the Bills window
   - Click "Y" to confirm the booking without a deposit
   - Escape out of the Email Confirmation Window

V5—Site Visit (2/2)

7. Enter the Room Reservation and input the following:
    - The "requestor" will be the National Sales Manager or Conference Services Manager
    - The Secretary field should be the department of the requestor, if available
    - The Corporation field is where applicable PROM/House Accounts will be entered, if available



8. Page Down to save

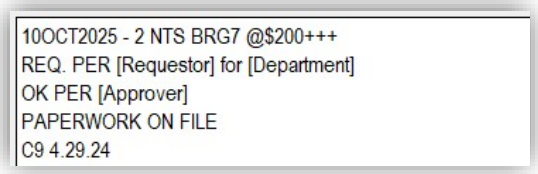
9. Select "No" to not update the Package

10. Enter Special Billing and clear out the Deposit Fields
    - D—Deposit
    - C—Clear
    - B—Both

11. Change the Package Code to VIPL, VIPB, or VIPP
    [If Comp per Contract, use Package Codes VPCOBR, VPCOLR, or VPCOPR]

12. Access Special Billing and add your Custom Rate
    - A to Add
    - Enter
    - 100000 (S) / 200000 (L) / 700000 (CP)
    - Input the nightly rate into "Amount Each"
    - Type N in the "Batch" field
    - Page Down to save

13. Notate the custom rate approval in a D Note



14. If Comp per Contract, leave an FDB Trace with instructions to charge gratuity to PROM Account

15. Send an IEMAIL from the Room Reservation Tile [If Comp per Contract, send DNDEMAIL]

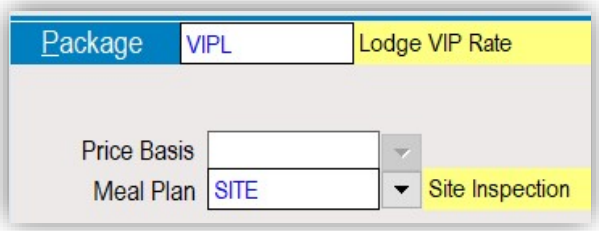
16. Create a Lead Form in REVINATE

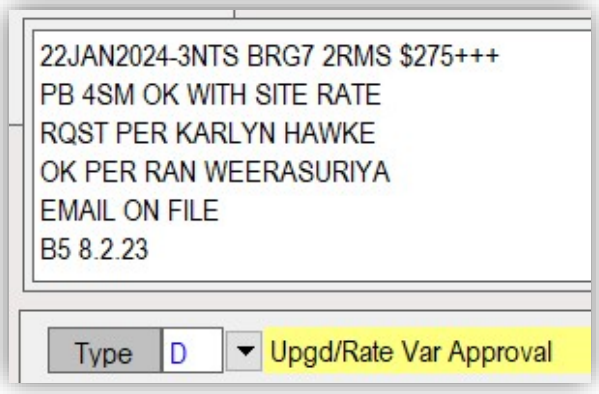
17. If the booking has a room upgrade, discounted rate, or complimentary booking, save the email conversation with the approval in the VIP Paperwork folder in the O Drive

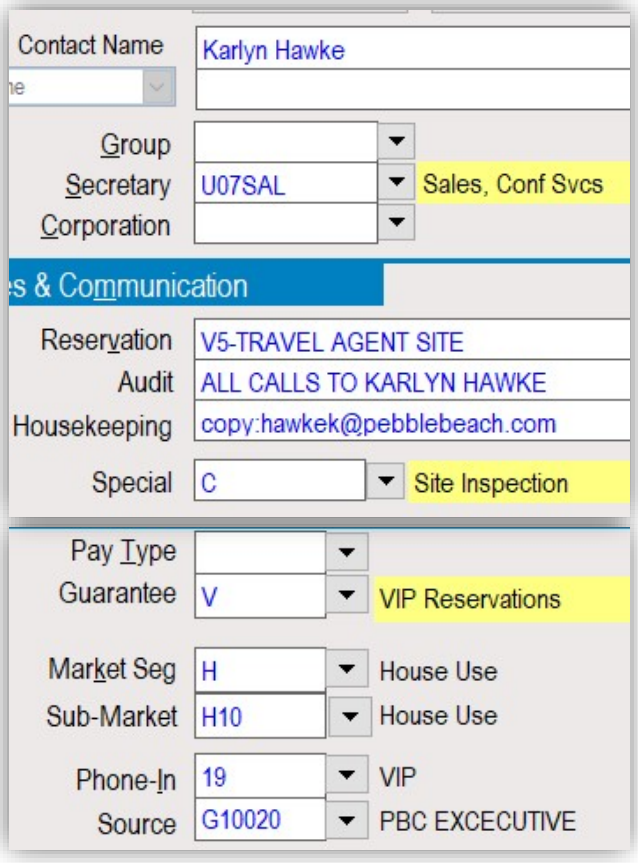
V5—Travel Industry Rate Program

V5: The Travel Industry Rate Program allows Travel Agents an opportunity to stay at our resort properties at a discounted rate so the agents can learn to sell to their clients.

Requestor	• Leisure Travel Sales (Karlyn Hawke)
Approval Requirement	• Complimentary or Discounted Room / Golf Matrix • Site Visit Rates Document
Rates & Guidelines	• Discounted rates based on the Site Visit Rate sheet—verify occupancy to ensure the correct Site Visit Rate tier is approved/applied • A 1 Night Deposit is required—VIP Coordinator sends the Travel Agent a TIRP Application to collect their CC before confirming the booking • 14 CXL Policy Applies– This is advised on the TIRP Application
Communication	• These guests confer directly with Leisure Travel Sales
Documentation	• Save a Revinate Lead Form
Booking Changes / Cancellations	• Any changes involving guideline exceptions, discounts, or comps will need to be re-approved before confirming
G Note Requirement	• If a special rate is approved for golf-only
D Note Requirement	• If a special room rate is approved
FDB Trace Requirement	• If any charges will not be IPO, are prepaid, or billed to a House Account/ PROM Account







Additional Requirements:

- Signed TIRP Application Form
- 1 Night Deposit

V6—Dissatisfied Guest / Special Attention (1/3)

V6: Guests under this code are most often dissatisfied guests who have been invited back for a special rate or exception.

Requestor	• Senior Executives or General Managers via their Executive Assistants
Rates	• Rack Rate, Upgrade, Discounted, or Complimentary
Special Notes	• Guests are required to pay a deposit if the rate is more than $350+++ • Deposit may be waived by requester on ad hoc basis • If deposit is required, the requestor will obtain CC information

1. Use the Booking Center to secure all requested rooms and golf to a new Itinerary
   - Pull in room(s) at Rack Rate
   - If you will be upgrading the guest, pull in the room that matches the rate the guest will pay
   - Pull in tee times using the V6 Rack Rate Code, Other Comp, or Special Individual

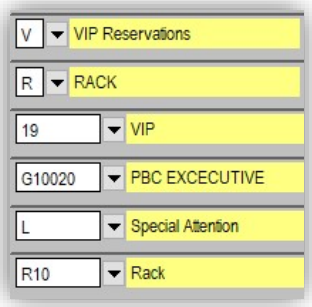
2. Click the down arrow next to Guest and create a V6 Guest Tile:
   - Name / Title
   - V6 in the Address Field
   - V6 in the Phone Field
   - Page Down to save
     - 19—VIP
     - 07—G1—Pebble Beach Company
     - 04—G10020—PBC Executive



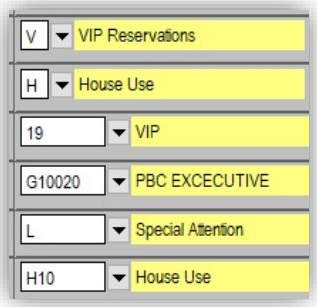
3. Escape the Guest Tile to return to the Booking Center

4. Click Booking Settings and input the following:

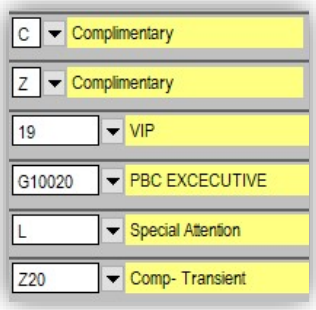
Rack Rate



Discount



Complimentary



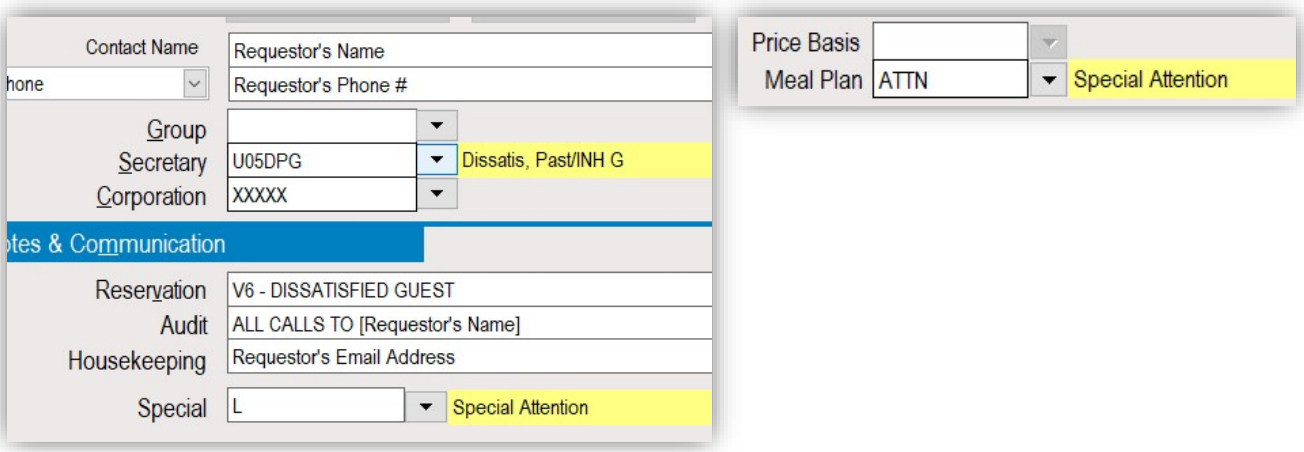


5. Page Down to "Apply Settings & Exit"

6. Complete / Confirm
   - Escape out of the Bills window
   - Click "Y" to confirm the booking without a deposit
   - Escape out of the Email Confirmation Window

V6—Dissatisfied Guest / Special Attention (2/3)

7. Enter the Room Reservation and input the following:
   - The Secretary field should be "U05DPG Dissatis, Past/INH G"
   - The Corporation field is required if charges will be billed to a House / PROM Account
     This is commonly the A&G Account of the hotel, i.e. "LODGE A&G"



8. Page Down to save

9. Select "No" to not update the Package

10. If the room rate is $350 or less, enter Special Billing and clear out the Deposit Fields
    - D—Deposit
    - C—Clear
    - B—Both

11. If the room rate is more than $350+++
    - V6—The requestor will obtain the CC and Billing Address from the guest
    - Input that information on the Guest Tile
    - Click Bills on the Reservation Tile to charge the deposit

12. If the guest is receiving a complimentary upgrade, edit the Package Code from the level they will pay to the level they will be staying in. (ex. Change LRGS to LROS)
    - Click "No" to update the Package Code
    - Click "Upgrade"
    - Select "Upgrade" from the menu

13. If the rate is discounted or complimentary, change the Package Code

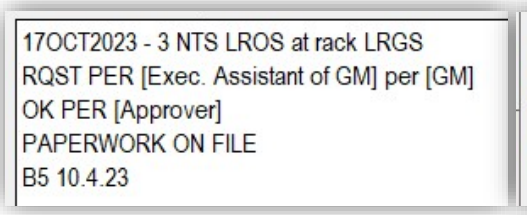
Discount:	Complimentary
VIPL	VPCOLR
VIPB	VPCOBR
VIPP	VPCOPR

V6—Dissatisfied Guest / Special Attention (3/3)

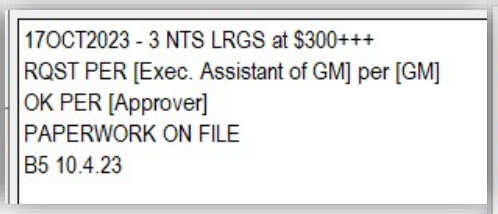
14. If the rate is discounted, access Special Billing and add your Custom Rate
    - A to Add
    - Enter
    - 100000 (S) / 200000 (L) / 700000 (CP)
    - Input the nightly rate into "Amount Each"
    - Type N in the "Batch" field
    - Page Down to save

15. If the reservation includes a room upgrade, a discounted rate, or a comp rate, leave a D Note:

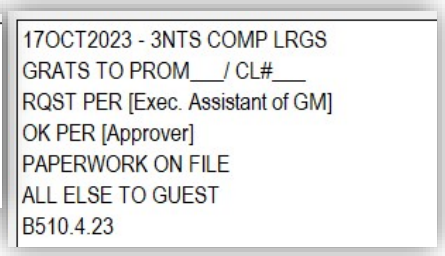
Upgrade



Discount

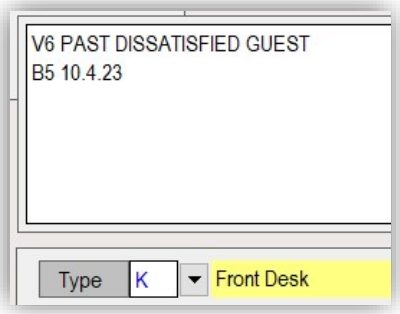


Complimentary



16. If any charges will be billed to a PROM or House Account, copy your D Note as an FDB Trace

17. Leave a K Note for the Front Desk



18. Send an IEMAIL from the Room Reservation Tile (If complimentary, send a DNDEMAIL)

19. Create a Lead Form in REVINATE

20. If the booking has a room upgrade, discounted rate, or complimentary booking, save the email conversation with the approval in the VIP Paperwork folder in the O Drive

V7—Golf VIPs (1/2)

V7: Guests of the Golf Executive Office

Requestor
- Golf Executive Office via Administrative Assistants

Rates
- Rack Rate—Often golf only

Special Notes
- Guests are required to pay a deposit if the rate is more than $350+++

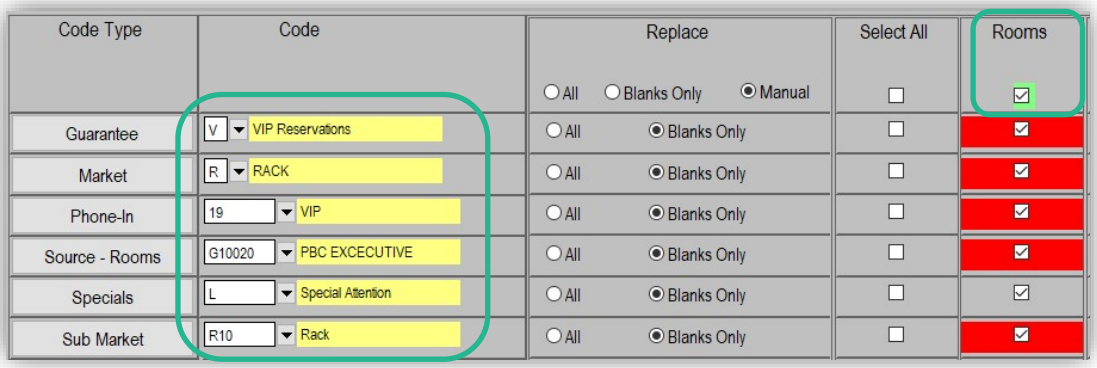
1. Use the Booking Center to secure all requested rooms and golf to a new Itinerary
   - Pull in room(s) at Rack Rate
   - Pull in tee times using the VIP7, Special Individual, or VIP7 Comp Rate Codes

2. Click the down arrow next to Guest and create a V7 Guest Tile:
   - Name / Title
   - V7 in the Address Field
   - V7 in the Phone Field
   - Page Down to save
     - 19—VIP
     - 07—G1—Pebble Beach Company
     - 02—G10020—PBC Executive
   - Access Profiles to verify/edit titles on each



3. Escape the Guest Tile to return to the Booking Center

4. Click Booking Settings and input the following:



5. Page Down to "Apply Settings & Exit"

6. Complete / Confirm
   - Escape out of the Bills window
   - Click "Y" to confirm the booking without a deposit
   - Escape out of the Email Confirmation Window

V7—Golf VIPs (1/2)

V7: Guests of the Golf Executive Office

Requestor
- Golf Executive Office via Administrative Assistants

Rates
- Rack Rate—Often golf only

Special Notes
- Guests are required to pay a deposit if the rate is more than $350+++

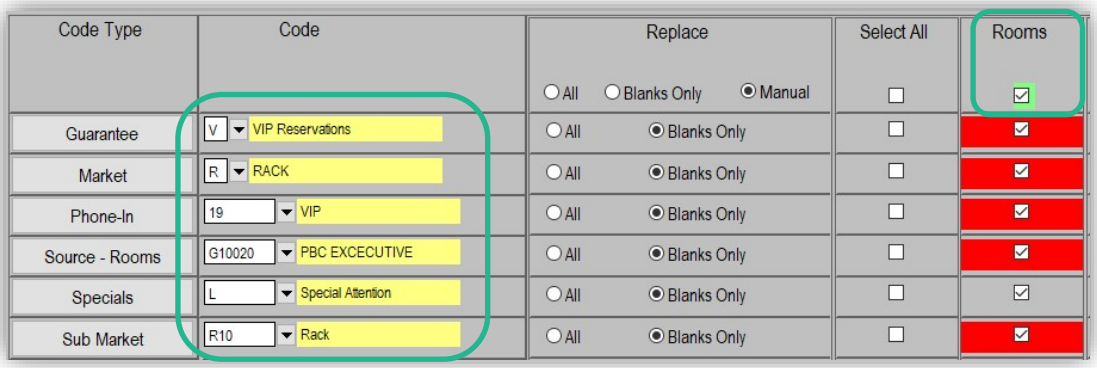
1. Use the Booking Center to secure all requested rooms and golf to a new Itinerary
   - Pull in room(s) at Rack Rate
   - Pull in tee times using the VIP7, Special Individual, or VIP7 Comp Rate Codes

2. Click the down arrow next to Guest and create a V7 Guest Tile:
   - Name / Title
   - V7 in the Address Field
   - V7 in the Phone Field
   - Page Down to save
     - 19—VIP
     - 07—G1—Pebble Beach Company
     - 02—G10020—PBC Executive
   - Access Profiles to verify/edit titles on each



3. Escape the Guest Tile to return to the Booking Center

4. Click Booking Settings and input the following:

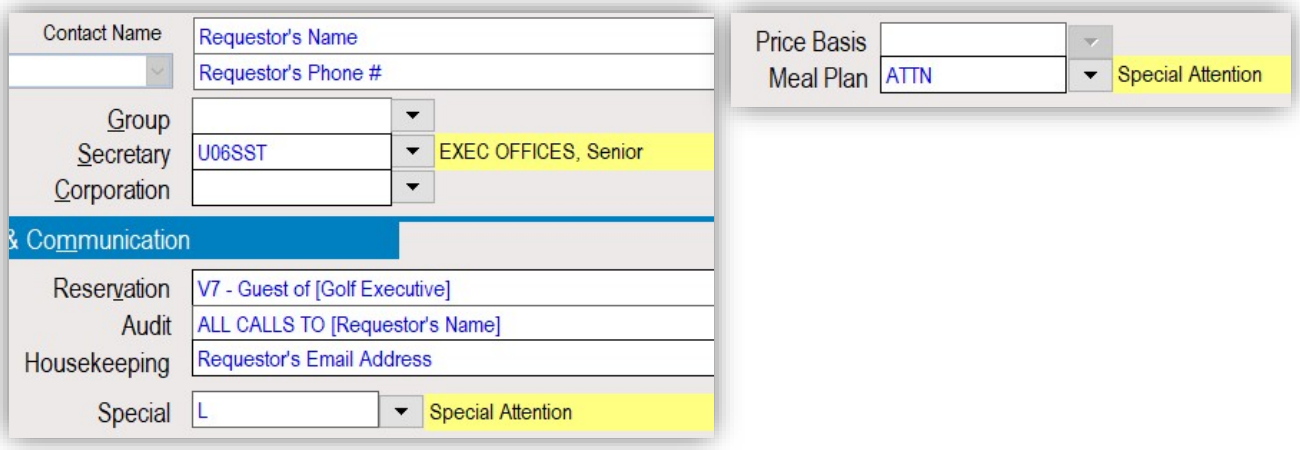


5. Page Down to "Apply Settings & Exit"

6. Complete / Confirm
   - Escape out of the Bills window
   - Click "Y" to confirm the booking without a deposit
   - Escape out of the Email Confirmation Window

V7—Golf VIPs (2/2)

7. Enter the Room Reservation and input the following:

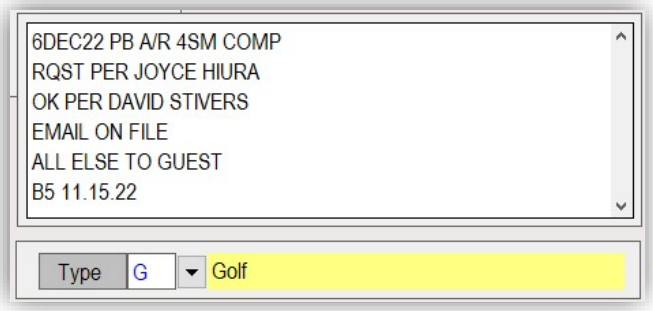


8. Page Down to save

9. Select "No" to not update the Package

10. Guests must pay deposits for rates $350+++:
    - Obtain the guest's CC and Billing Address via phone or Sertifi from the guest
    - Input that information on the Guest Tile
    - Click Bills on the Reservation Tile to charge the deposit

11. If your booking includes discounted or comp golf, leave a G Note:



12. Send an IEMAIL from the Room Reservation Tile

13. Create a Lead Form in REVINATE

V8—Brand Partners (1/3)

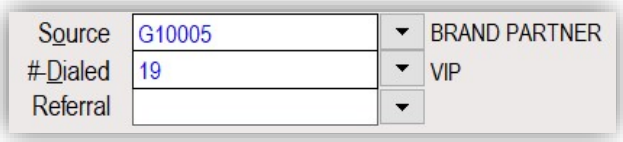
V8: Representatives of our Brand Partners or their guests. We classify trips as "Brand Partners" for all visits to Pebble Beach outside of their group stays (Site Visits).

Visit https://www.pebblebeach.com/brand-partners/ to see our current Brand Partners

Requestor	• Marketing (Sponsorships), Conference Services, Sales
Rates	• Rack Rate, Discounted, or Complimentary
Special Notes	• Guests are required to pay a deposit if the rate is more than $350+++ • Charges may be billed to the Brand Partner's House Account

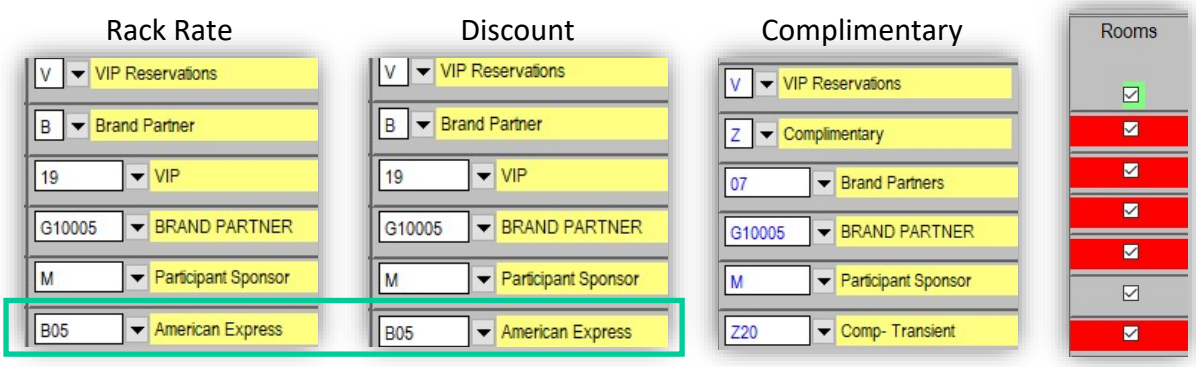
1. Use the Booking Center to secure all requested rooms and golf to a new Itinerary
   - Pull in room(s) at Rack Rate
   - Pull in tee times using the V8 Rack Rate Code, Other Comp, or Special Individual

2. Click the down arrow next to Guest and create a V8 Guest Tile:
   - Name / Title
   - Company Name in the Company Field
   - V6 in the Address Field
   - V6 in the Phone Field
   - Page Down to save
     - 19—VIP
     - 07—G1—Pebble Beach Company
     - 01—G10005—Brand Awareness
   - Access Profiles to verify/edit titles on each



3. Escape the Guest Tile to return to the Booking Center

4. Click Booking Settings and input the following:



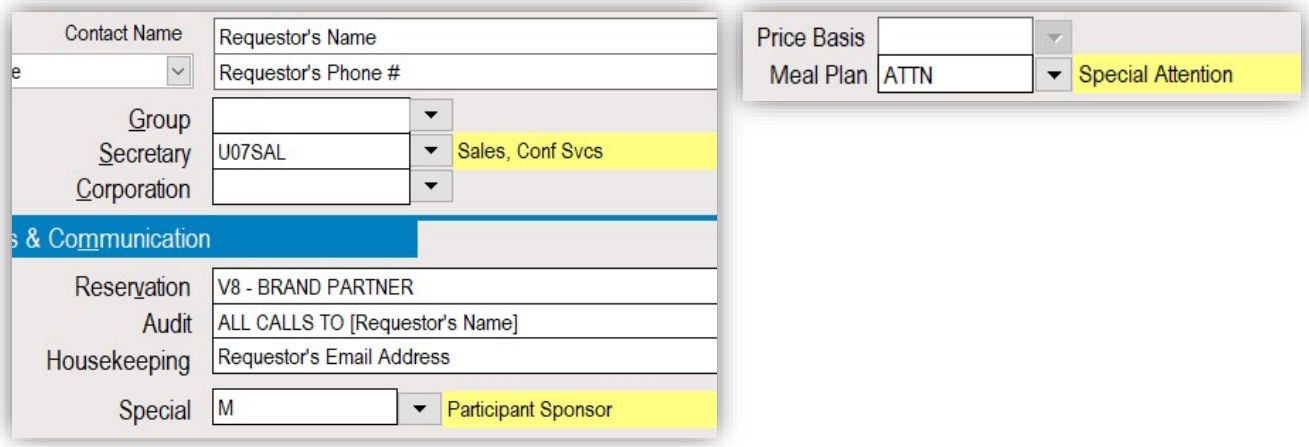
[Select specific sponsor from dropdown menu]

5. Page Down to "Apply Settings & Exit"

6. Complete / Confirm
   - Escape out of the Bills window
   - Click "Y" to confirm the booking without a deposit
   - Escape out of the Email Confirmation Window

V8—Brand Partners (2/3)

7. Enter the Room Reservation and input the following:
    - The Corporation field is required if charges will be billed to a House / PROM Account



8. Page Down to save

9. Select "No" to not update the Package

10. If the room rate is $350 or less, enter Special Billing and clear out the Deposit Fields
    - D—Deposit
    - C—Clear
    - B—Both

11. If the room rate is more than $350+++
    - Obtain the guest's CC and Billing Address via phone or Sertifi from the guest
    - Input that information on the Guest Tile
    - Click Bills on the Reservation Tile to charge the deposit

12. If the rate is discounted or complimentary, change the Package Code

Discount:	Complimentary
VIPL	VPCOLR
VIPB	VPCOBR
VIPP	VPCOPR

13. If the rate is discounted, access Special Billing and add your Custom Rate
    - A to Add
    - Enter
    - 100000 (S) / 200000 (L) / 700000 (CP)
    - Input the nightly rate into "Amount Each"
    - Type N in the "Batch" field
    - Page Down to save

V8—Brand Partners (3/3)

14. If the reservation includes a room upgrade, a discounted rate, or a comp rate, leave a D Note:

Upgrade

```
17OCT2023 - 3NTS LROS at rack LRGS
RQST PER [Requestor] for [Department Head]
OK PER [Approver]
PAPERWORK ON FILE
B510.4.23
```

Discount

```
17OCT2023 - 3 NTS @$600+++
RQST PER [Requestor] for [Department Head]
OK PER [Approver]
PAPERWORK ON FILE
B5 10.4.23
```

Complimentary

```
17OCT2023 - 3NTS COMP LRGS
GRATS TO PROM___/ CL#___
RQST PER [Requestor] for [Department Head]
OK PER [Approver]
PAPERWORK ON FILE
ALL ELSE TO GUEST
B510.4.23
```

15. If the Brand Partner has a House Account that they will use to cover their guest's charges, add that instruction into your D Note / FDB Trace:
    DO NOT COLLECT CC
    ALL CHARGES TO LEXUS CL#_____

16. If any charges will be billed to a PROM or House Account, copy your D Note as an FDB Trace

17. Send an IEMAIL from the Room Reservation Tile (If complimentary, send a DNDEMAIL)

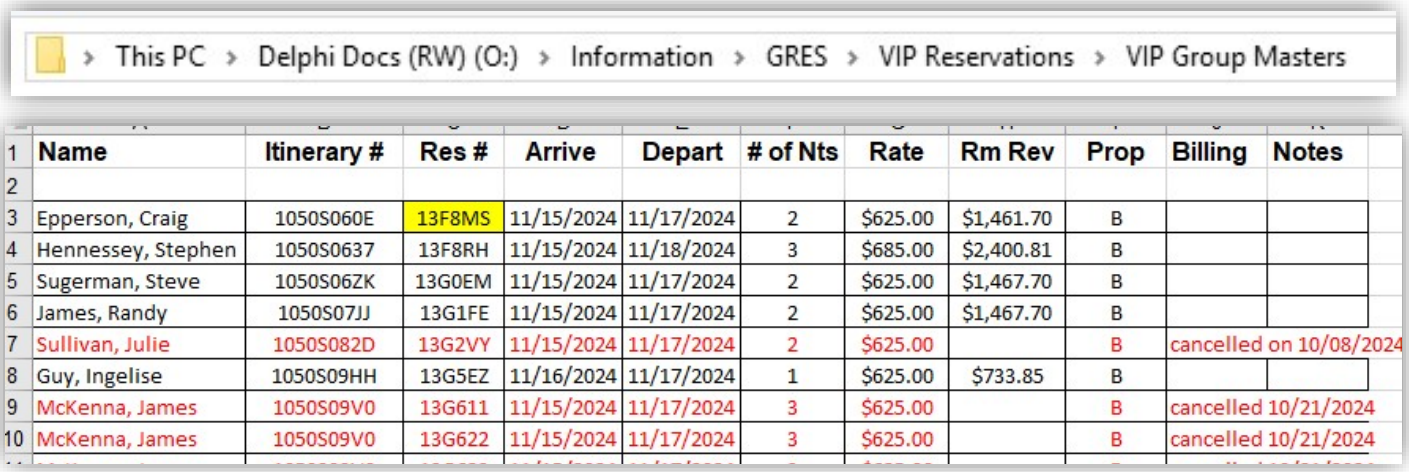
18. Create a Lead Form in REVINATE

19. If the booking has a room upgrade, discounted rate, or complimentary booking, save the email conversation with the approval in the VIP Paperwork folder in the O Drive

Jefferson-Lincoln Awards (1/2)

This is an annual November event also known as the Panetta Awards Dinner which honors those who represent principles of democracy and bipartisanship. Delegates—Attendees and Honorees—are offered special room rates.

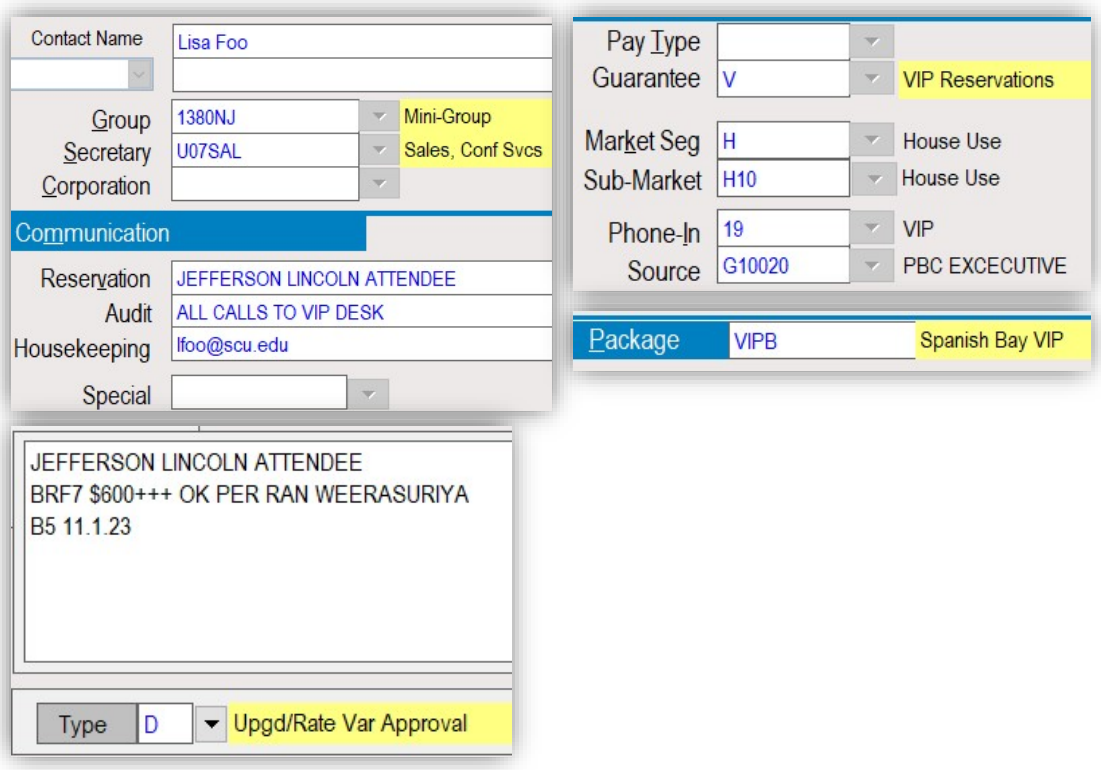
Requestor	• Conference Services
Approval Requirement	• Revenue Management (Ran Weerasuriya) on behalf of Aaron Flink
Rates & Guidelines	• Honorees receive a significant discount per Revenue Management • Attendees receive a discount approximately 50% off rack per Rev. Mgmt • Deposit is required for nightly rates $350+++ and up—VIP must send LOA • 14 day cancellation policy
Communication	• All delegates receive an invitation with instruction to contact the VIP Desk to reserve their rooms. • CCS will contact the VIP Desk to book Honorees • Hold any "*TBA Honoree" rooms under Sylvia Panetta's Guest Tile • VIP should ask guests if they will need rooms for staff or security, confirm any blocking configurations, and verify rates for staff/security with CCS, add FDB Traces on all staffer/security rooms to transfer charges to Primary
Documentation	• Save a Revinate Lead Form • Document each reservation onto the Jefferson-Lincoln Dinner Spreadsheet which is accessible within the Digital Binder
Booking Changes / Cancellations	• Anything outside of what is approved will be rack rate
Mini-Group	• All attendees must be mini-grouped together using the Reservation # of the first person to book
D Note Requirement	• Document approved room rate
FDB Trace Requirement	• FDB Required If any charges will not be IPO, are prepaid, or billed to a House Account/PROM Account



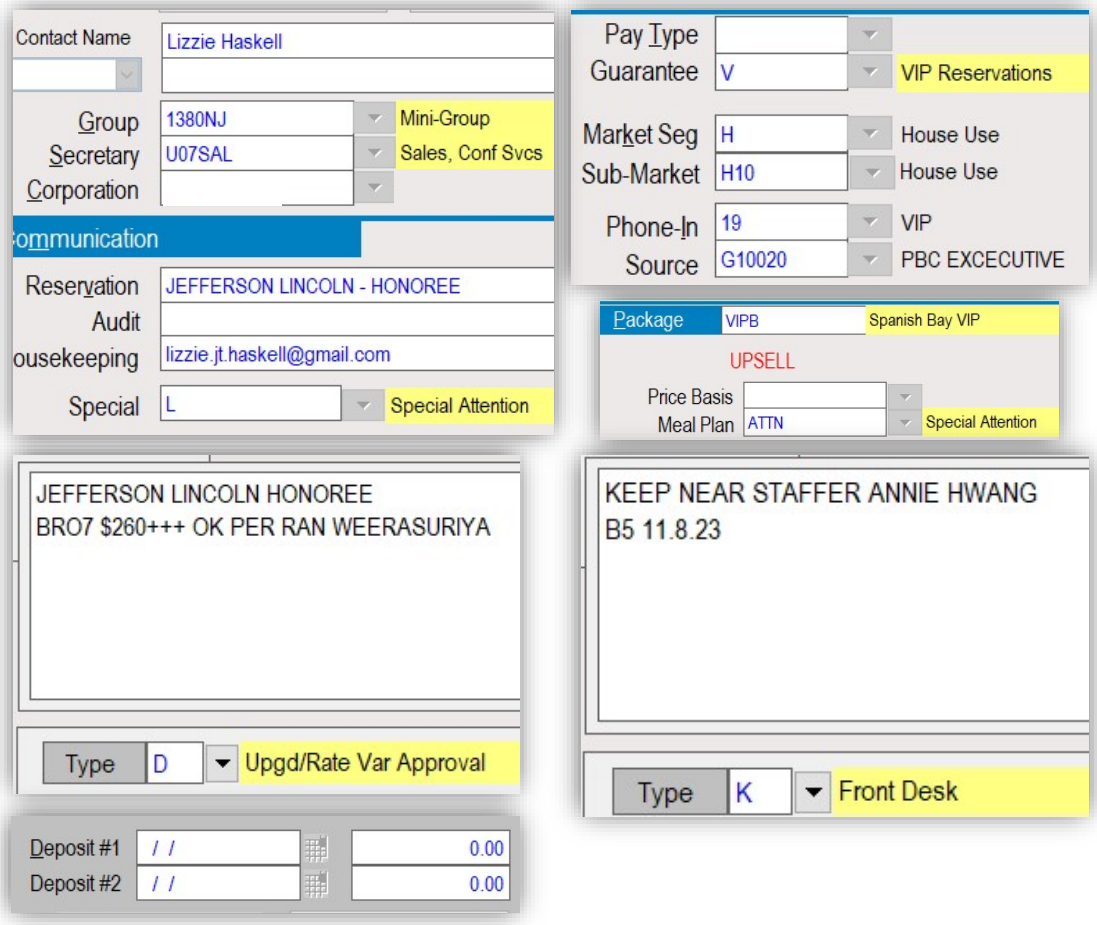
	Name	Itinerary #	Res #	Arrive	Depart	# of Nts	Rate	Rm Rev	Prop	Billing	Notes
2											
3	Epperson, Craig	1050S060E	13F8MS	11/15/2024	11/17/2024	2	$625.00	$1,461.70	B		
4	Hennessey, Stephen	1050S0637	13F8RH	11/15/2024	11/18/2024	3	$685.00	$2,400.81	B		
5	Sugerman, Steve	1050S06ZK	13G0EM	11/15/2024	11/17/2024	2	$625.00	$1,467.70	B		
6	James, Randy	1050S07JJ	13G1FE	11/15/2024	11/17/2024	2	$625.00	$1,467.70	B		
7	Sullivan, Julie	1050S082D	13G2VY	11/15/2024	11/17/2024	2	$625.00		B	cancelled on 10/08/2024	
8	Guy, Ingelise	1050S09HH	13G5EZ	11/16/2024	11/17/2024	1	$625.00	$733.85	B		
9	McKenna, James	1050S09V0	13G611	11/15/2024	11/17/2024	3	$625.00		B	cancelled 10/21/2024	
10	McKenna, James	1050S09V0	13G622	11/15/2024	11/17/2024	3	$625.00		B	cancelled 10/21/2024	

Jefferson-Lincoln Awards (2/2)

Award Attendee



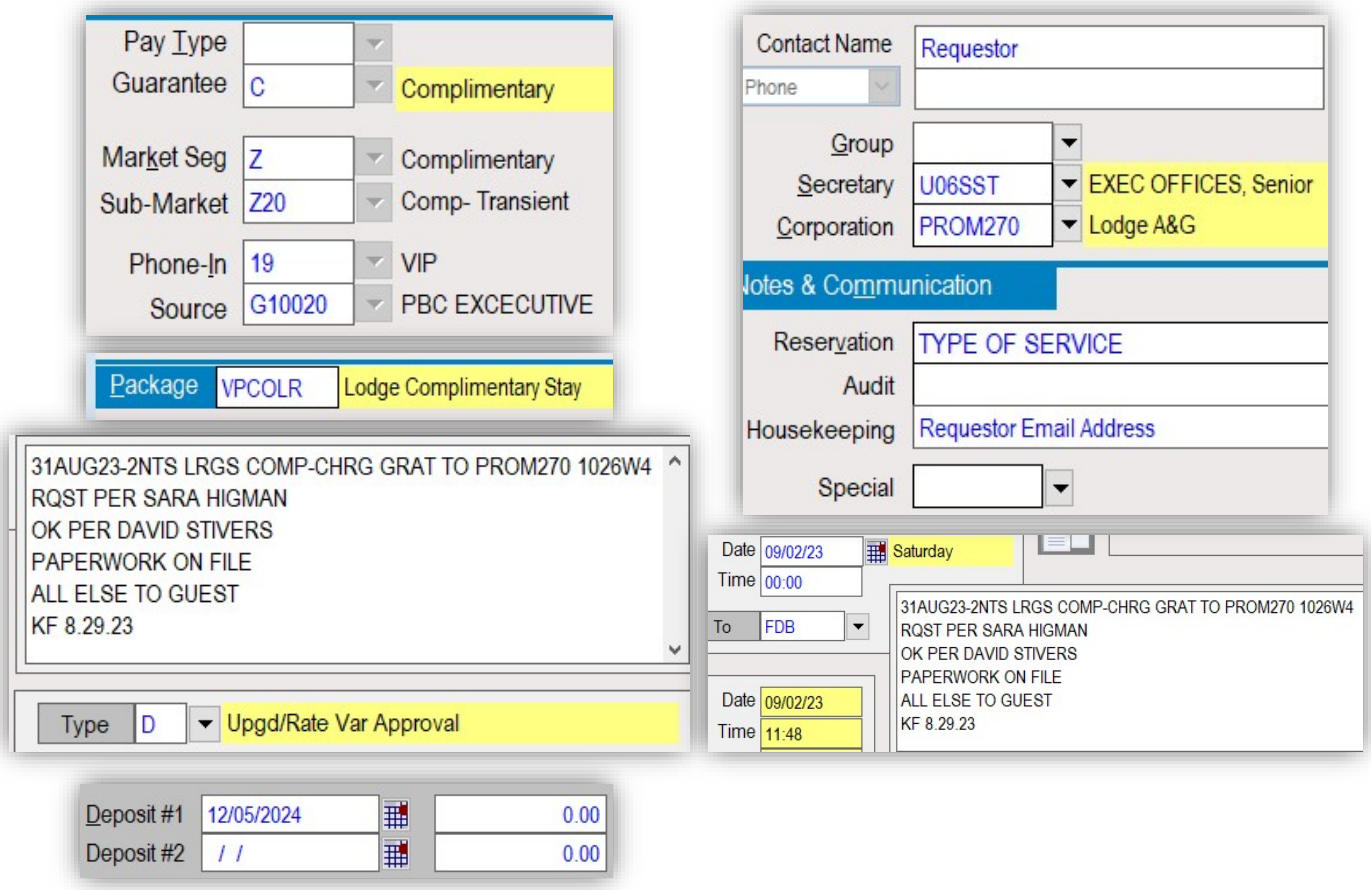
Award Honoree



Service Providers / Maintenance

Pebble Beach Resorts will book VIP rooms for providers who come to our resort properties to perform various services such as Bird Abatement, Renovations, Forbes Training, and more.

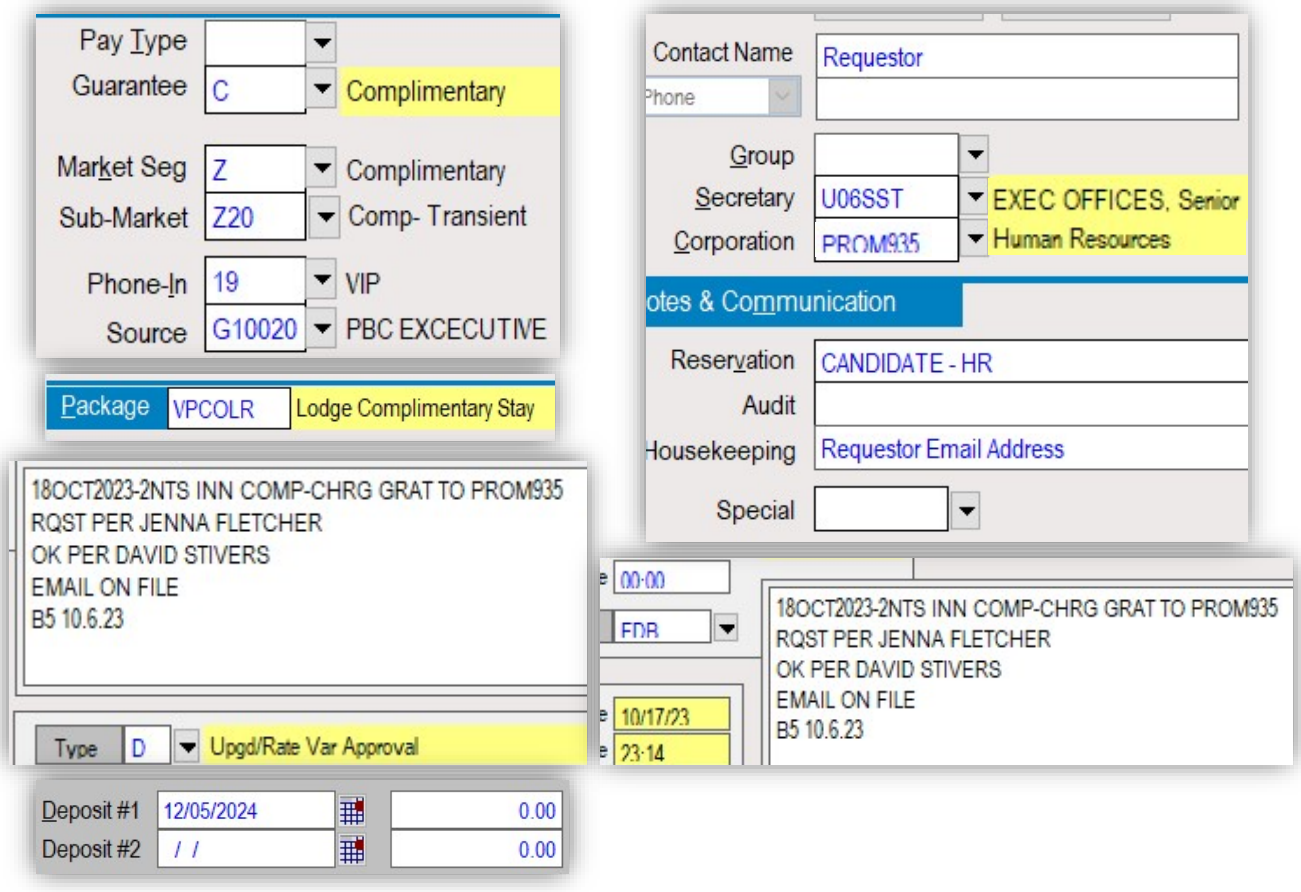
Requestor	• Administrative Assistants to General Managers • Often Sara Gray, Sara Higman, Trisha Cox, Capitol Services
Approval Requirement	• Complimentary or Discounted Room / Golf Matrix
Rates & Guidelines	• Bookings are typically complimentary
Communication	• Guest communication is between the service provider and the Executive Assistants.
Documentation	• Save a Revinate Lead Form • Save the complimentary room approval email or request form in the VIP Paperwork folder within the O Drive
Booking Changes / Cancellations	• Any changes involving guideline exceptions, discounts, or comps will need to be re-approved before confirming
D Note Requirement	• If a special room rate is approved
FDB Trace Requirement	• Document comp approval and to whom gratuity will be billed



Employee Candidates

Complimentary stays for certain employee candidates to allow the potential employees to visit the resort, interview for the position, and gain a deeper understanding of the company.

Requestor	• Human Resources
Approval Requirement	• Complimentary or Discounted Room / Golf Matrix
Rates & Guidelines	• Rooms will be complimentary with gratuity charged to the department of the prospective employee or the HR Prom Account
Communication	• These guests confer directly with HR and the Executive Assistants • Email requests may come from the Executive Office - they will CC the Human Resources Recruiter; in those cases, the recruiter should be notated as the contact on the booking
Documentation	• Save a Revinate Lead Form • Save the complimentary room approval email or request form in the VIP Paperwork folder within the O Drive
Booking Changes / Cancellations	• Any changes involving guideline exceptions, discounts, or comps will need to be re-approved before confirming • Ok to make rack rate room/golf changes within day guest guidelines, and add dining—always inform the requestor of these modifications
D Note Requirement	• Required to document comp approval
FDB Trace Requirement	• Document comp approval and to whom gratuity will be billed



Vince Baxter (1/2)

Vince Baxter Jr. and his family are long standing guests of Pebble Beach Resorts. All of Vince Baxter's family reservations are paid via Direct Billing.

Requestor	• Direct to VIP
Approval Requirement	• The Vince Baxter Booking Guidelines document is pre-approved
Rates & Guidelines	• Rates/Upgrades are pre-approved via the Vince Baxter Booking Guidelines—All else at rack/within standard guidelines • All charges for rooms are billed to City Ledger #1013WR
Communication	• Vince Baxter makes all reservations for himself and his family directly with the VIP Desk
Documentation	• Save a Revinate Lead Form
Booking Changes / Cancellations	• Rates/Upgrades are pre-approved via the Vince Baxter Booking Guidelines—All else at rack/within standard guidelines
D Note Requirement	• If applying a special rate/upgrade from the Vince Baxter Booking Guidelines—document as "Approved per Ran Weerasuriya"
FDB Trace Requirement	• Notate that all charges must be billed to the Vince Baxter Account • It is ok to have charges billed to a CC at checkout if Vince Baxter requests this (C/L is the default)

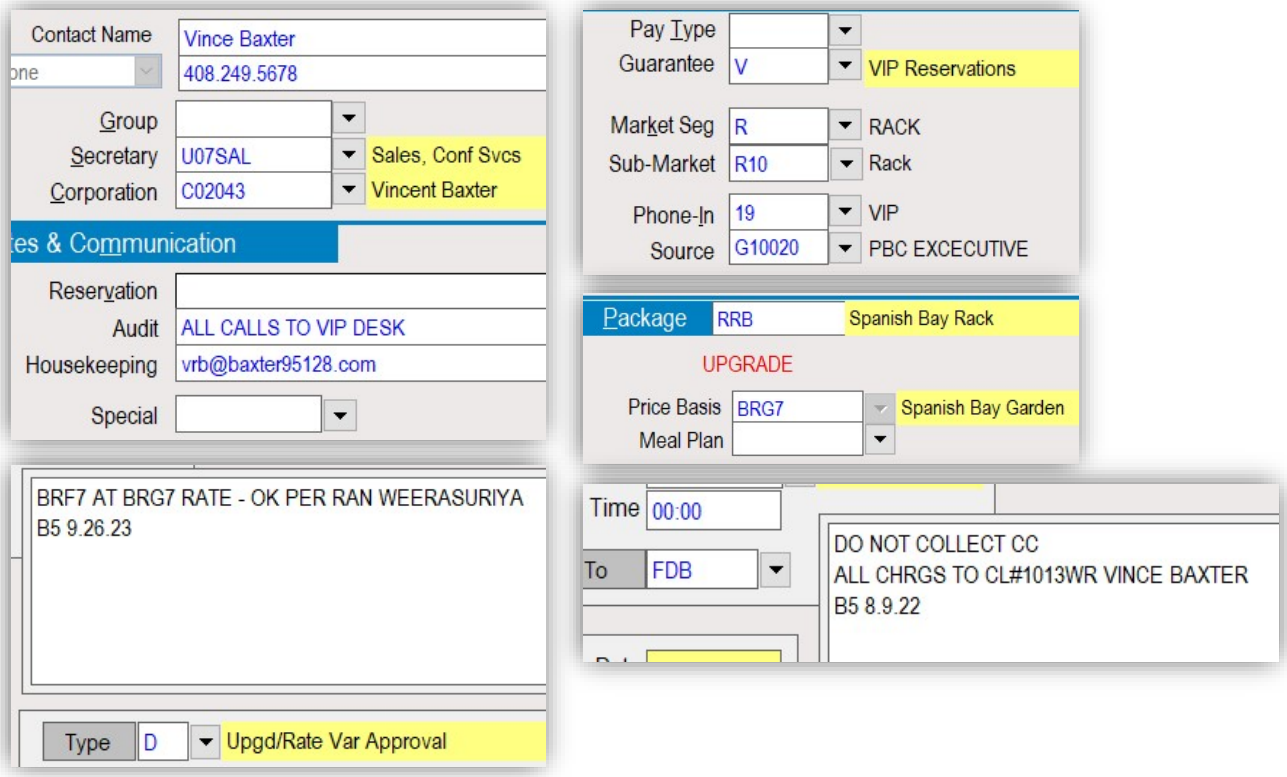
Vince Baxter - Booking Guidelines **Revised 4.7.17**

Contact	Vince Baxter Jr.	408.249.5678	CL#1013WR
Inn at Spanish Bay:			
Who is Eligible?	***Relationship***	***Offer***	
Vince Baxter Sr. & Claire Baxter	Father	FV Exec for OV Winter Rate	
		FV for GV Winter Rate	
		Room Preference: 2 BDRM FV Exec (1016/1014)	
Vince Baxter Jr. & Lorraine	**Son**	**FV for GV Winter Rate**	
Nicolas Baxter	Son	FV for GV Winter Rate	
Lisa Baxter-Corbler	Daughter	FV for GV Winter Rate	
Lodge at Pebble Beach:			
Who is Eligible?	***Relationship***	***Offer***	
Vince Baxter Sr.	Father	$200 off Rack Rate	
Vince Baxter Jr.	Son	$200 off Rack Rate	
Nicolas Baxter	Son	$200 off Rack Rate	
Lisa Baxter-Corbler	Daughter	$200 off Rack Rate	
Marylyn/Frank Dorsa	In-Laws	$200 off Rack Rate	
		Any upgrade based on avail at check-in	

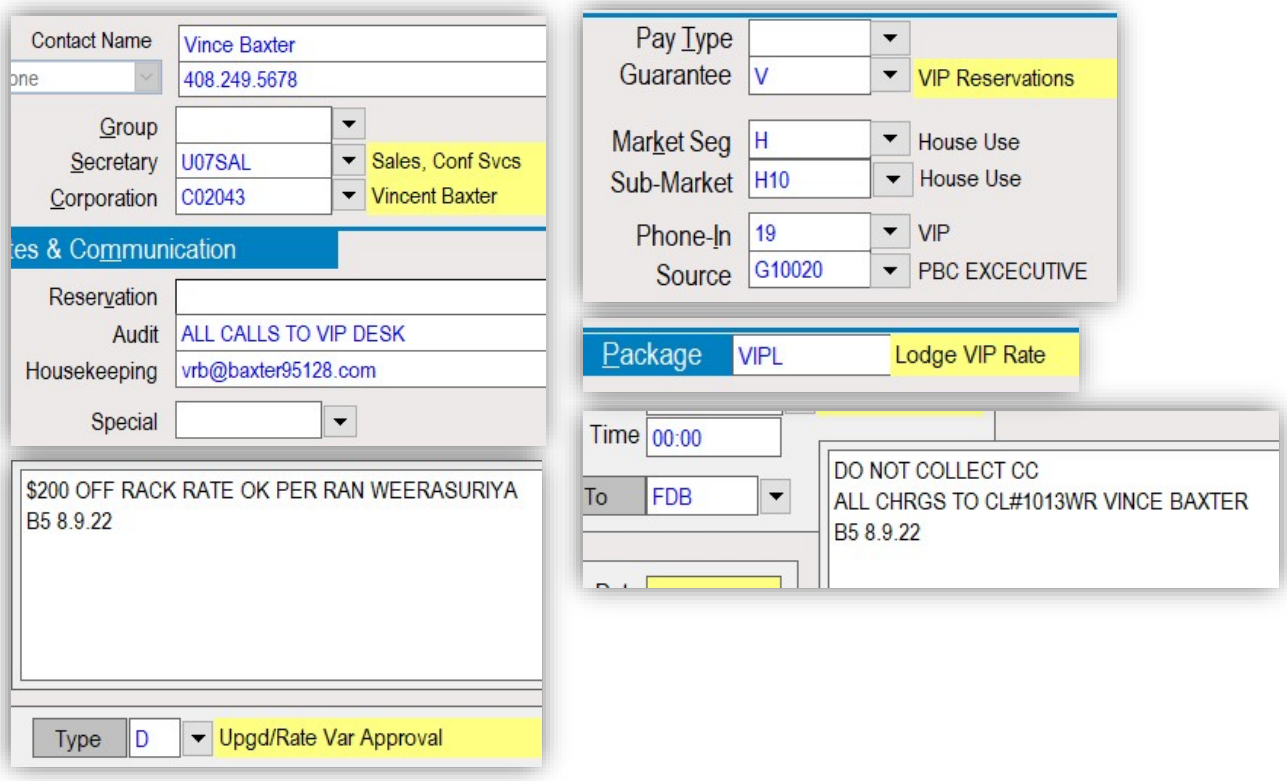
This document is also accessible within the VIP Desk section of the Digital Binder

Vince Baxter (2/2)

Vince Baxter Rack with Room Upgrade



Vince Baxter Discount

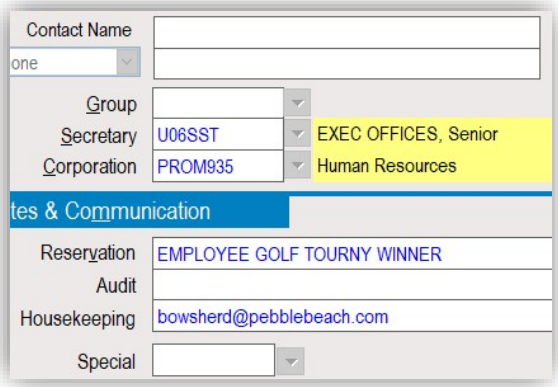


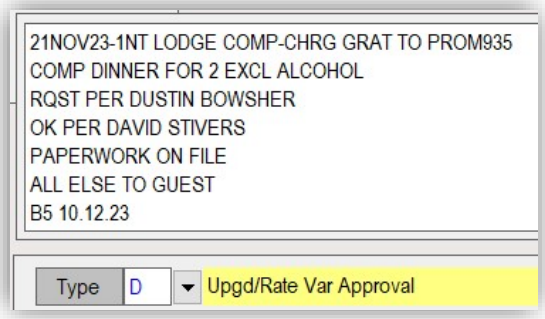
Raffle Winners

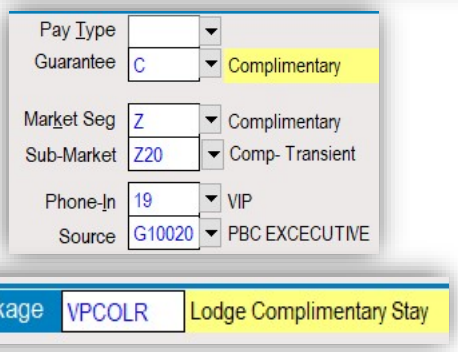
Complimentary stays for employees who have won internal raffles or contests hosted by Pebble Beach Company.

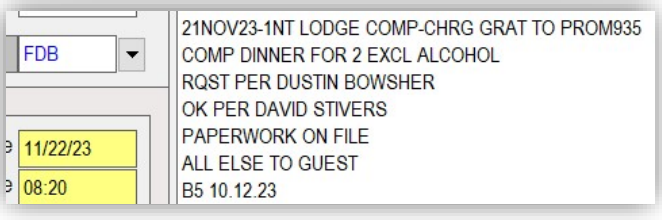
Requestor	• Contact listed on the certificate (Typically Sara Higman or Trisha Cox)
Approval Requirement	• Complimentary or Discounted Room / Golf Matrix • The certificate constitutes approval for the complimentary stay, but the requestor must obtain approval for the dates of stay
Rates & Guidelines	• Rooms will be complimentary with gratuity charged to the PROM Account indicated on the certificate
Communication	• These guests confer with the contact listed on the gift certificate • Guests may contact the VIP Desk directly, but must provide an image of the certificate, and VIP Desk must obtain date approval prior to booking
Documentation	• Save a Revinate Lead Form • Save the complimentary room approval email or request form in the VIP Paperwork folder within the O Drive
Booking Changes / Cancellations	• Ok to add Day Guest Golf and dining
D Note Requirement	• Document comp approval and to whom gratuity will be billed
FDB Trace Requirement	• Document comp approval and to whom gratuity will be billed











Resort Hotel Association (1/2)

The Resort Hotel Association's STAYRHA Program allows hospitality workers from other resorts/hotels to reserve rooms at Pebble Beach at discounted rates.

Requestor
- Bookings arrive via Automated emails from noreply@stayrha.com

Rates
- Discounted rates per RHA Program as approved by Sales

Special Notes
- VIP Desk must reach out to the guest to:
  - ◊ Collect CC for Deposit via Sertifi or by phone
  - ◊ Book Rack Rate golf per Resort Guest Guidelines
- Bookings may only be made 60 days in advance per RHA rules

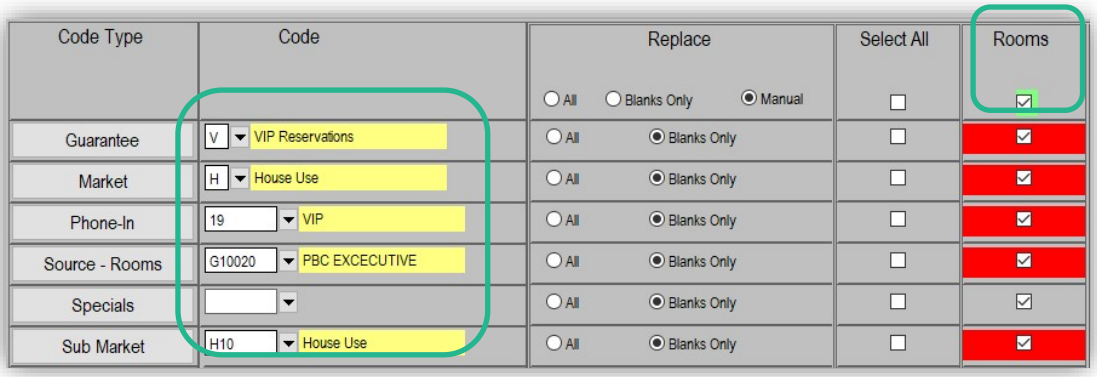
1. Use the Booking Center to secure all requested rooms and golf to a new Itinerary
   - Pull in a Spanish Bay Garden View room(s) at Rack Rate
   - Pull in tee times at Rack Rate per Resort Guest Guidelines

2. Click the down arrow next to Guest and locate existing Guest Tile or create a an RHA Guest Tile
   ** Once VIP obtains billing information, input all guest contact info into the Guest Tile*
   - Name / Title
   - RHA in the Address Field
   - RHA in the Phone Field
   - Input the guest's email address from the StayRHA email
   - Page Down to save
     - 19—VIP
     - 07—G1—Pebble Beach Company
     - 04—G10020—PBC Executive
   - Access Profiles to verify/edit titles on each profile



3. Escape the Guest Tile to return to the Booking Center

4. Click Booking Settings and input the following:
   Note—If you have not yet collected the CC, set the Guarantee Code to S.
   Change the Guarantee Code to V once the deposit is charged.

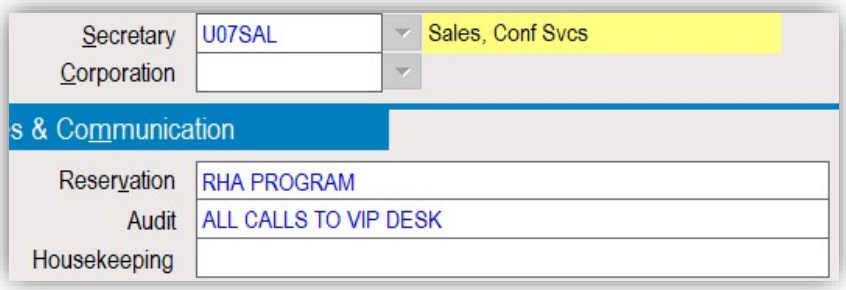


5. Page Down to "Apply Settings & Exit"

6. Complete / Confirm
   - Escape out of the Bills window
   - Click "Y" to confirm the booking without a deposit
   - Escape out of the Email Confirmation Window

Resort Hotel Association (2/2)

7. Enter the Room Reservation and input the following:
    - The Secretary field should be set to UO7SAL Sales, Conf Svcs



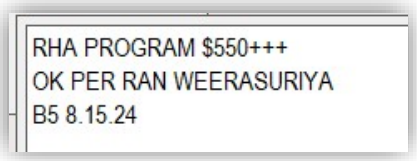
8. Page Down to save

9. Select "No" to not update the Package

10. Use Bills to charge the standard 2 Night Deposit

11. Change the Package Code to RHAB

13. Notate the RHA Program rate approval in a D Note



14. Send an IEMAIL from the Room Reservation Tile

15. Create a Lead Form in REVINATE

VIP Golf Rate Codes

Golf VIP 1 — Owners

Golf VIP 2 — Guests of Owners

Golf VIP 3 — Special Guests, Senior Staff Guests

Golf VIP 4 — Writer, Rater, Media
*If the request comes from the Golf Executive office, use the "Golf VIP 7" code, but notate "V4" in the babynotes

Golf VIP 5 — Site Visits

Golf VIP 6 — Dissatisfied Guests

Golf VIP 7 — Golf Executive Office Guests—These rate codes appear on a report that the Executive Office uses to plan Meet & Greets

VIP 7 Comp — Complimentary golf for Golf Executive Office Guests—These rate codes appear on a report that the Executive Office uses to plan Meet & Greets

Golf VIP 8 — Brand Partners

Golf VIP 13 — No longer utilized

Golf Rater — No longer utilized

Special Individual — Any time a special golf rate is approved
*If there is no "special individual" code that matches the approved rate, book to hold, then ask Revenue Mgmt. to create a code

Other Comp — Generic Complimentary Rate—ok to use for any VIP type
*Notate the VIP level in the babynotes
*Use this code for employee comp requests—notate approval in babynotes

VIP Golf Paperwork Pending — Used to hold a requested VIP tee time while awaiting approval

M VIP — Any VIP Maintenance Times
Notate the VIP level in the babynotes

Rate Description	Per Player
GTF Resort Guest	625.00
GTF Golf VIP1	625.00
GTF Golf VIP2	625.00
GTF Golf VIP3	625.00
GTF Golf VIP4	625.00
GTF Golf VIP5	625.00
GTF Golf VIP6	625.00
GTF Golf VIP7	625.00
GTF Golf VIP8	625.00
GTF Golf VIP13	625.00
VIP Golf Paperwork Pendi	625.00

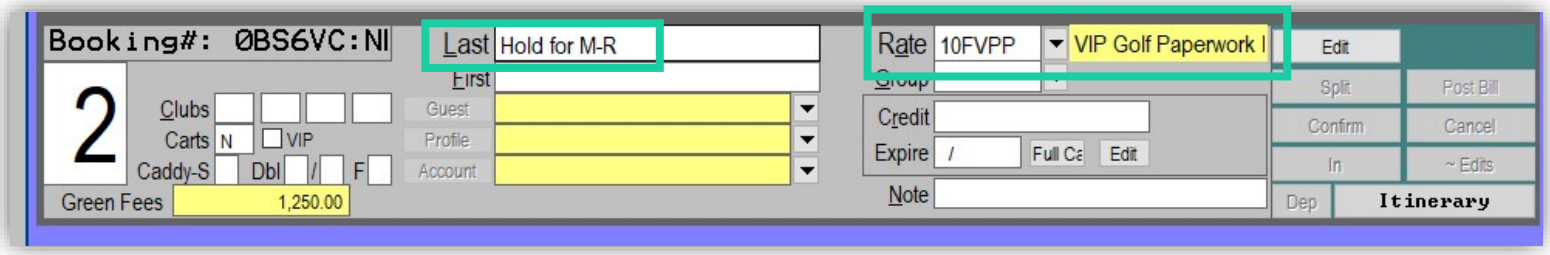
GTF Golf Rater	375.00
GTF VIP7 Comp	0.00
GTF Other Comp	0.00

MAINT VIP	625.00

GTF $110 Special Individ	110.00
GTF $175 Special Individ	175.00
GTF $250 Special Individ	250.00

NGTF VIP 7 Comp	0.00
NGTF Other Comp	0.00

Example of Hold Pending Approval:



VIP Golf-Only

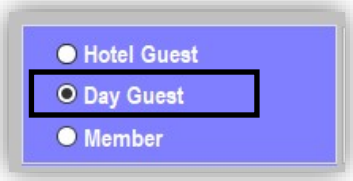
Hello all,

It's time to rebook the following rounds for a disgruntled guest. He cancelled due to injury. John did the initial approval for a 4sm at PBGL. Per guest request, he wanted 2sm at PBGL and 2sm at LASB. The rounds are held under "Hold for Golf Exec". Guest tile is #11C7GL.

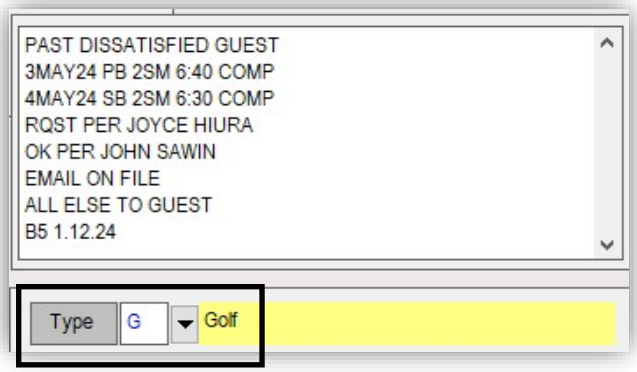
Pebble Beach Golf Links
Friday, May 3. 2024
6:40am
Erick Pringle (2sm)
Comp

How to Book VIP Golf-Only

1. Book the Tee Time
   - Use the **Day Guest** golf search (Approved VIP Golf does not require a room stay)
   - Select the **rate code** that matches the VIP type
   - Whose to the correct Guest Tile
2. If golf is on hold:
   - Locate the booking on the **Tee Sheets**
   - Edit the **rate code** to match the type of VIP
   - Click the **Itinerary** button so we can utilize the Booking Center
   - **Whose** the booking to the correct Guest Tile
3. Input the type of VIP into the **babynotes**
4. Leave a **G Note** on the Guest Tile:
   - The type of VIP
   - What has been approved
   - The Requester
   - The Approver
   - Billing information
5. Send a **VEMAIL** or **DNDEMAIL** **(comps)**
   - If using the requestor's email address, set a reminder for at least 1 hour from the time you send the VEMAIL to **remove the requestor's email address** from the Guest Tile



GTF Golf VIP1	350.00
GTF Golf VIP2	350.00
GTF Golf VIP3	350.00
GTF Golf VIP4	350.00
GTF Golf VIP5	350.00
GTF Golf VIP6	350.00
GTF Golf VIP7	350.00
GTF Golf VIP8	350.00
GTF $95 RATE	95.00
VIP 7 Comp	0.00
GTF Other Comp	0.00





Add BR/AR to the Tee Sheet (1/2)

You must have approval from the Golf Executive and the Superintendent before adding BR/AR.

BEFORE REVENUE (B/R)

- Before Revenue tee times are inputted as "Maintenance" times, since golfers will be directly behind the morning maintenance crew as they play.
- If you are adding less than 4 golfers, ask if the remaining player spots should be marked as "DNS" or be left open for others to book.
- These tee times will have either an "M" or "B" Day Part Code.

AFTER REVENUE (A/R)

- After Revenue tee times are inputted as Not Guaranteed to Finish (NGTF) times wince the sun will set within less than 5 hours of their start time.
- These tee times will have an "N" Day Part Code

1. Pre-load your Guest Tile or Reservation into the Find Tree

2. Access the SMS Host Tee Sheet via the golf ball icon



3. Set the Date and Facility to the appropriate day/course

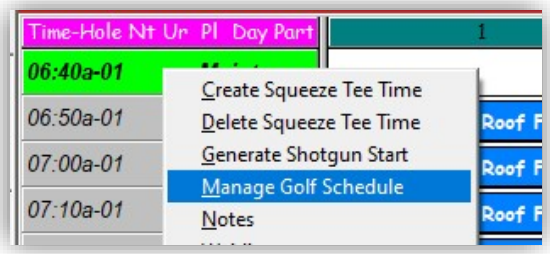


4. Check for a red "Note of the Day" at the top of the tee sheet
   - Do not add Maintenance or NGTF tee times if you see the message "No BR/AR"



5. Scroll to the first (for Maint) or last (for NGTF) tee time of that day

6. Double click on that time and select "Manage Golf Schedule"

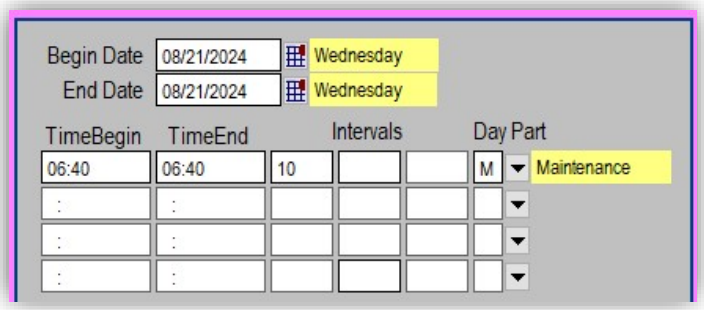


7. In the new window, click "Add"



Add BR/AR to the Tee Sheet (2/2)

8. Input the following:
    - Begin and End Date—Both should be set to the day you are working on
    - Time Begin—10 minutes before (Maint) or after (NGTF) the time you initially selected
    - Time End—Same as "Time Begin"
    - Intervals—"10" to indicate 10 minutes
    - Day Part
        - N—NGTF
        - M—Maintenance
        - B—Maintenance on a PBGL 3 Night Minimum required day



9. Page Down to save

10. Your added tee time will now be available to reserve—Double click to reserve this tee time to the Guest Tile or Reservation you pre-loaded at the beginning of this process.

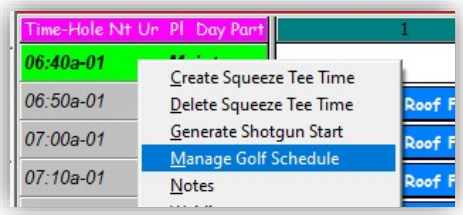


Delete A Tee Time From the Tee Sheet

The Executive Office will ask you to delete tee times that are no longer required.
Use caution when deleting tee times because this can easily cause errors on the tee sheet.

1. Double click on the time slot you wish to delete
   Note—You can only delete a blank tee time. If there is a booking in the time slot you wish to delete, you must first cancel the tee time.

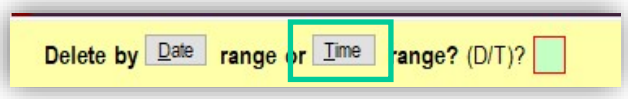
2. Select "Manage Golf Schedule"



3. In the new window, click "Delete"

4. Select to delete by "Time"

> Warning: If you select "Date," you will delete the entire schedule for that day



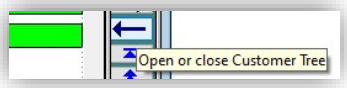
5. Type the Begin Time and End Time into the new window—both times should be the same



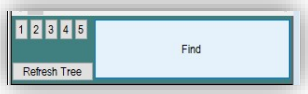
6. Page Down to save

Book VIP Golf on the Tee Sheet

1. Click the arrow on the right side of the Tee Sheet to open the "Customer Tree"

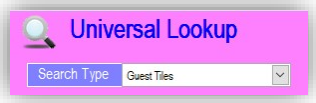


2. Click Find



3. Universal Lookup will open
   - If the guest has a room Reservation, leave the search type on "All Reservations"
   - If the guest does not have a room reservation, change the search type to "Guest Tiles"





   - If you do not see any results, click "Add New Guest Tile" in the bottom right corner of the window—Proceed to create a new Guest Tile per standard procedures

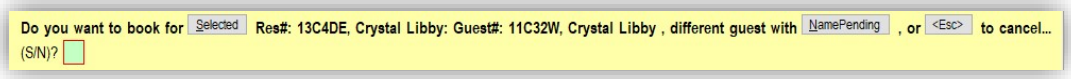
4. Once your Guest Tile or Room Reservation is created/selected, click the arrow on the Tee Sheet again to close the "Customer Tree"



5. Double click on the white space of your time slot and select "Book Tee Time"



6. When prompted with the following question. Type "S" for "Selected"



7. The Golf Rates menu will open—select the appropriate Rate Code

8. The Profiles menu will open—select the profile of the guest who will be golfing

9. The Golf Tile will open—Enter any caddie/rental club requests, then Page Down to save

10. Click the Itinerary button
    - If this is a golf only booking, you must click "Create" when prompted to Create or Add

11. The Booking Center will open—Click Confirm

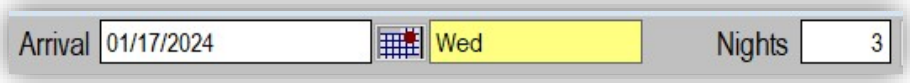
12. Send A Confirmation Email
    - If they are a Resort Guest, send an IEMAIL from the Room Reservation Tile
    - If they are an Outside Guest, send a VEMAIL from the Guest Tile
    - If the booking is complimentary, send a DNDEMAIL from the Guest or Res. Tile

13. Create a REVINATE Lead Form

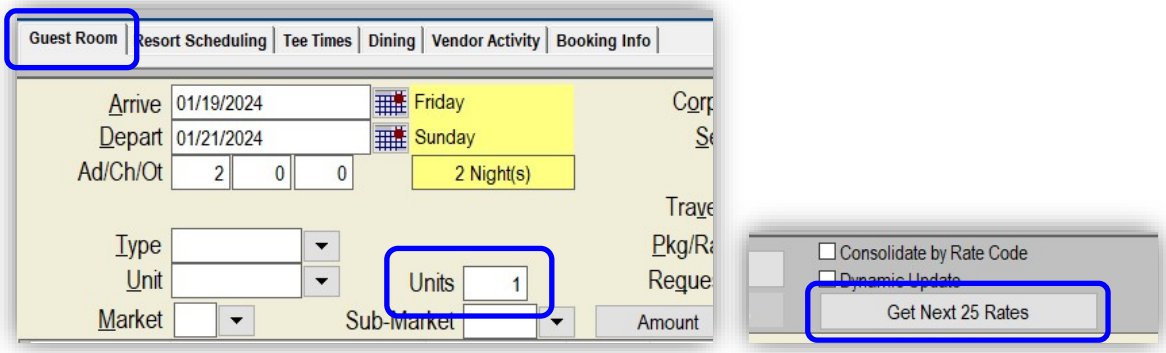
Book A Rack Rate VIP Room (1/2)

1) Open SMS and access the Booking Center

2) Use the Master Calendar to set your date range:
   - Input the date of arrival with the calendar feature
   - Enter the number of nights you wish to search into the Nights field



3) Access the Guest Rooms tab of the Booking Center to search for Room Availability:
   - If searching for more than 1 unit, edit the Units
   - Click Get Next 25 Rates to initiate your search



4) Choose your room category from the RRB/RRL/RRP rate codes

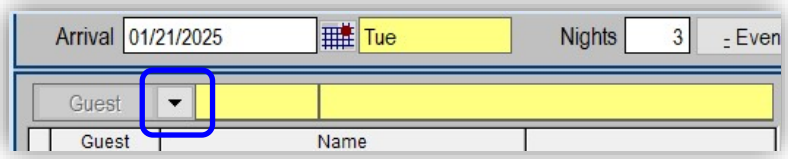
Rate Code	Description	Room Type	Vac	Avl	Grp	Unit Description
RRL	Lodge Rack	LSO7	2	2	0	Vizcaino Suite
RRL	Lodge Rack	LROD	18	18	0	Lodge Ocean Deluxe
IRRL	Lodge - IAGTO Net Rate	LROS	8	7	0	Lodge Ocean
IRRL	Lodge - IAGTO Net Rate	LRCS	4	3	0	Lodge Partial Ocean
IRRL	Lodge - IAGTO Net Rate	LRGS	13	11	0	Lodge Garden

5) Double click on the room you wish to reserve—This will pull that room into the Itinerary Details section of the Booking Center

Itinerary # 1050RX5U6

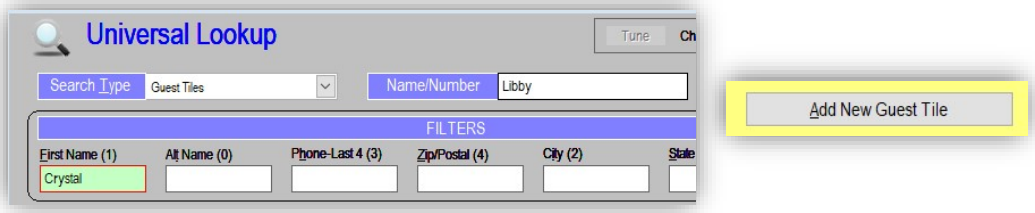
Ty	Gst	Prf	Res	Lev	Code	Description	Date	Time	Ppl	Location	Amount	Duration	Booking#	Er
R			13B5TV	NEW	RRB	Spanish Bay R...	01/21/25-01/24/25		2	BRF7	3,886.17	0		

6) Click the down arrow next to the Guest button

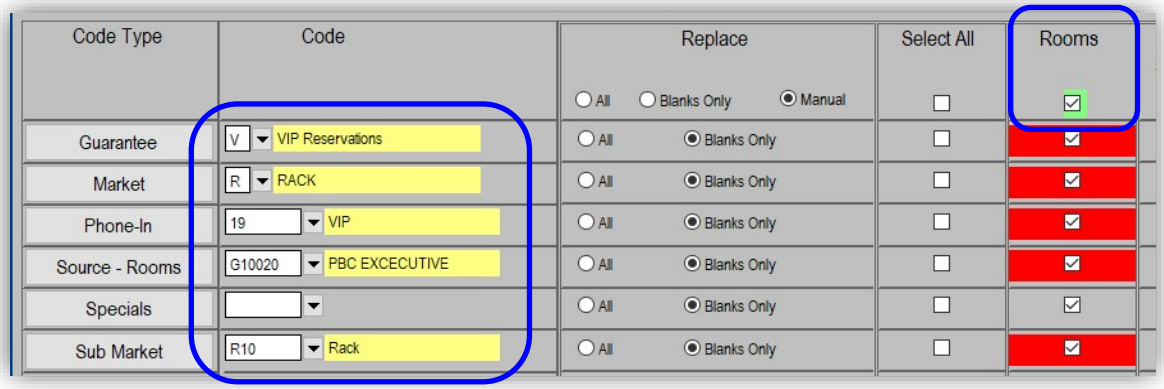


Book A Rack Rate VIP Room (2/2)

7) The Universal Lookup window will open with the Search Type set to Guest Tiles
   - Search for an existing Guest Tile by name
   - Or, if none exists yet, click Add New Guest Tile

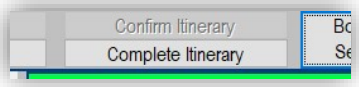


8) In the Booking Center, click Booking Settings and set the following codes and check the top box of the Rooms column to apply settings to all rooms



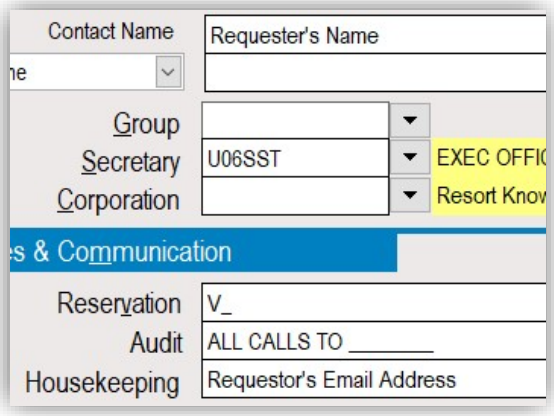
9) Page Down to save and exit the window

10) Click Complete and Confirm (Escape all popup windows)



11) Double click on the room to enter the Reservation Tile

12) Fill out the following areas of the Reservation Tile
   - Contact = Requestor's Name
   - Secretary = Requestor's Department
   - Reservation = Type of VIP Guest
   - Audit Line = Notate where to direct calls
   - Housekeeping = Requestor's Email



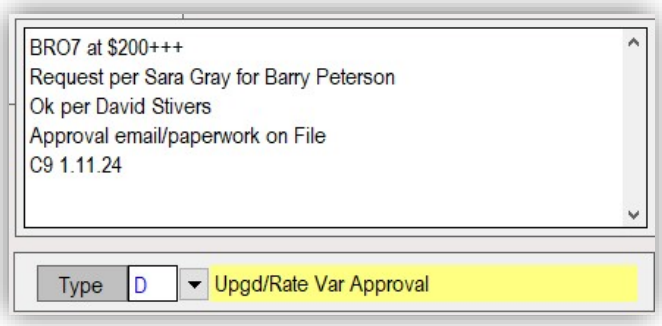
13) Send a confirmation email
   - L > A > Tab > IEMAIL > Enter > 01 > Alt+L > Escape

14) Create a Booked Lead Form in REVINATE (See REVINATE instructions)

VIP Notes

D Note—Discounts/Upgrades

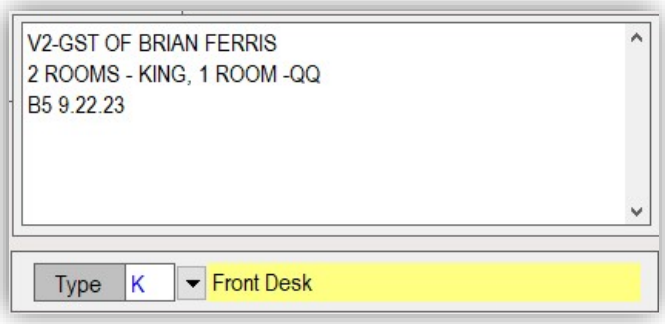
Document the details of a room discount or upgrade as well as who approved it



K Note—Front Desk

If there is no D Note, VIP adds a K Note to explain who a guest is to the Front Desk

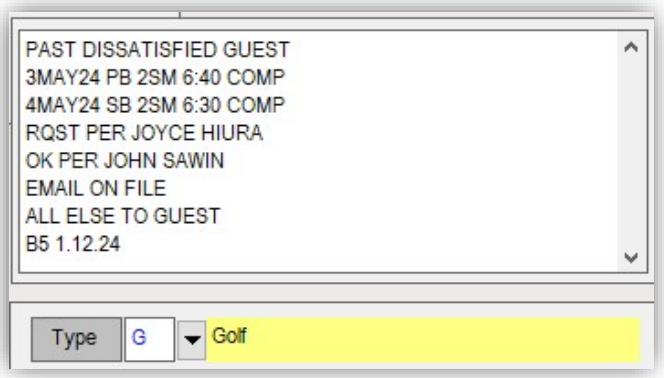
Most commonly used for dissatisfied guests or guests of owners/Senior Management



G Note—Golf

Document the details of a golf-only discount or upgrade as well as who approved it

These notes must be left on the Guest Tile since there is no Reservation Tile



VIP FDB Traces

The purpose of the FDB Trace is to explain where to direct billing. Charges may be directed to City Ledgers belonging to guests or companies, or they can be directed to internal PROM Accounts that will come out of the budget for that department.

IPO Charges

- No approval required
- Input the PROM Account into Corporation field when available
- Specify “All Charges” vs. “All Else to Guest”

Lone Cypress Partner	Personal City Ledger	IPO to Another Guest
DO NOT COLLECT CC ALL CHARGES TO CLINT EAST-WOOD LCC#1014VX C9 1.8.25	DO NOT COLLECT CC ALL CHARGES TO VINCE BAXTER CL#1013WR C9 1.8.25	RTSA FOR 2 NTS TO CLINT EAST-WOOD LCC#1014VX ALL ELSE TO GUEST C9 1.8.25

Non-IPO Charges

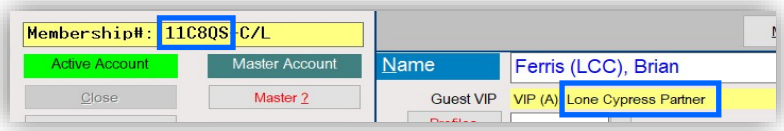
- Approval required on FDB Trace and D Note
- Input PROM into Corporation field when available
- Specify “All Charges” vs. “All else to guest”

Complimentary Room	Comp Room + Dining
01JAN2025—2 NTS COMP LRGS GRATS TO PROM__/CL#__ RQST PER (Requester) for (Department Head) OK PER (Approver) PAPERWORK ON FILE ALL ELSE TO GUEST C9 1.8.25	01JAN2025—2 NTS COMP LRGS GRATS TO PROM__/CL#__ COMP DINNER FOR 2 EXCL ALCOHOL RQST PER (Requester) for (Department Head) OK PER (Approver) PAPERWORK ON FILE ALL ELSE TO GUEST C9 1.8.25

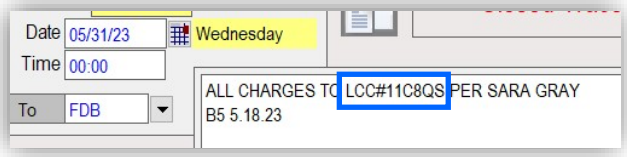
House / Prom Accounts

House Accounts

A House Account is a City Ledger/Membership Account that belongs to one specific person.
These accounts are identified by their City Ledger or Membership number.
Room charges may be billed to these City Ledger accounts in lieu of a credit card. It is common for PBC Owners to bill their room charges to their Lone Cypress Partner membership.

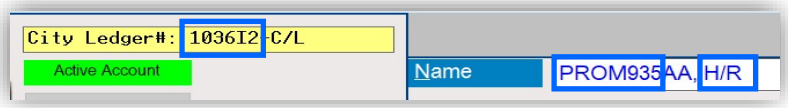


To bill room charges to a House Account, the VIP Coordinator must write an FDB Trace that includes the City Ledger number and an explanation of what charges are to be directed to the account.

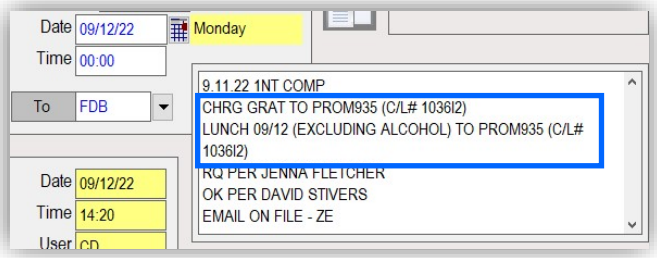


PROM Accounts

A PROM Account is a City Ledger that belongs to a department such as Sales or Reservations
PROM Accounts are labeled PROM + [Department #] Example: PROM935. Each PROM Account will have a City Ledger # that is used to identify the account. In the example below, you can see that PROM935 belongs to the Human Resources department.



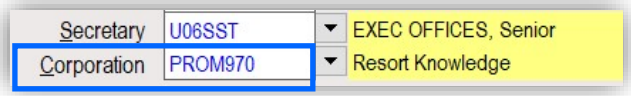
Room charges may be billed to these City Ledger Accounts. The most common instance to bill a PROM Account is for a complimentary VIP room. In these instances, while the room charges are complimentary, the nightly gratuities are billed to the requesting department.
The VIP Coordinator must leave an FDB Trace with the PROM Account name and City Ledger number and an explanation of what charges are to be directed to the account.



A spreadsheet listing all PROM Account numbers is linked in the Digital Binder

Corporation Field

Whenever possible, if charges are being billed to a PROM or House Account, we want to enter that account into the Corporation Field of the Reservation Tile. Not all City Ledgers are loaded as options in this field, so it is important to always include the CL number in your FDB Trace.



VIP Package Codes & Booking Settings

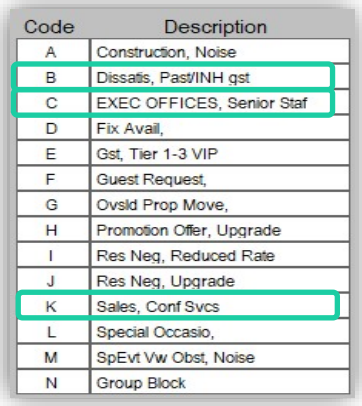
RACK RATE		
RRB **RRL** **RRP**	Rack Rate Bay/Lodge/Palmero	Guarantee—V VIP Reservations Market Segment—R Rack Sub–Market—R10 Rack
COMPLIMENTARY		
VPCOBR **VPCOLR** **VPCOPR**	Inn/Lodge/Casa Complimentary Stay Send a DNDEMAIL	Guarantee—C Complimentary Market Segment—Z Complimentary Sub–Market—Z20 Complimentary Transient
VIP CUSTOM RATE		
VIPB **VIPL** **VIPP**	Spanish /Lodge/Casa VIP (Special Bill Custom Rate)	Guarantee—V VIP Reservations Market Segment—H House Use Sub–Market—H10 House Use
SPECIAL BILLED RATE(S)		
SPBILL	Rate in Special Billing (Used when multiple Package Codes are needed for 1 Reservation Tile	Guarantee—V VIP Reservations Market Segment—H House Use Sub–Market—H10 House Use
EXCEPTIONS		
V1 **V2**	Owners and Guests of Owners	Guarantee—H Owner Market Segment—O Partner Sub–Market—010 Partner
V8	Rate in Special Billing (Used when multiple Package Codes are needed for 1 Reservation Tile	Guarantee—P Brand Partner Market Segment—B Brand Partner Sub–Market—[Select Specific Brand Partner]
S Holds	Approval Paperwork Pending Hold (Temporarily notate “Paperwork Pending” on the D Note/G Note/FDB Trace	Guarantee—S Paperwork Pending

Rack Rate with Room Upgrade

1. Book the room in SMS at the room category the guest will be paying
2. Edit the room category within the Reservation Tile by typing the new room code over the original
3. Page Down
4. N—decline to update the Package
5. G—Upgrade

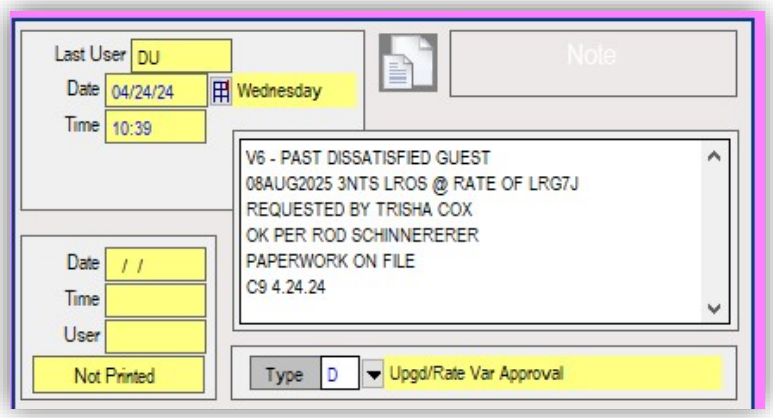


6. Select the appropriate description

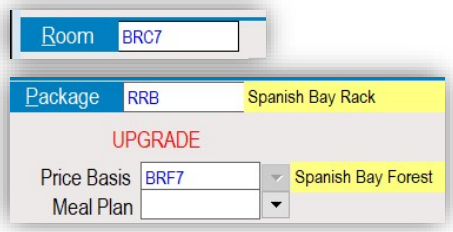


Code	Description
A	Construction, Noise
B	Dissatis, Past/INH gst
C	EXEC OFFICES, Senior Staf
D	Fix Avail,
E	Gst, Tier 1-3 VIP
F	Guest Request,
G	Ovsld Prop Move,
H	Promotion Offer, Upgrade
I	Res Neg, Reduced Rate
J	Res Neg, Upgrade
K	Sales, Conf Svcs
L	Special Occasio,
M	SpEvt Vw Obst, Noise
N	Group Block

7. Leave a D Note explaining who approved the upgrade

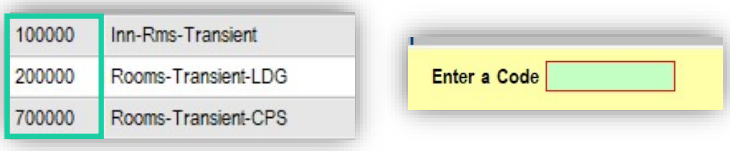


Once saved, you will see the UPGRADE flag, and the room category that the guest is paying will be listed under “Price Basis”

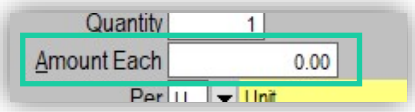


Discounted Rooms

1. Book the room and apply the VIP Custom Rate Package Codes:
    - VIPB (Inn)
    - VIPL (Lodge)
    - VIPP (Casa)
3. Set the Booking Settings as follows:
    - Guarantee—V VIP Reservations
    - Market Segment—H House Use
    - Sub–Market—H10 House Use
4. Special Bill the approved rate:
    - Access Special Billing
    - A—Add Charge
    - Enter
    - Type the Transient Room Code for the appropriate category:



    - Enter the approved nightly rate into the "Amount Each" field



    - Page Down to save
    - Escape to return to Special Billing
4. Write a D Note that explains the discounted rate and approval

    11.6.23 2NTS BRO7 6RMS @ $200+++
    ALL CHARGES TO EACH GUEST
    REQUEST PER DIANE STRACUZZI
    OK PER AARON FLINK
    EMAIL ON FILE
    C9 1.11.23
5. If available, enter the PROM Account into the Corporation field
6. Send an IEMAIL
7. Follow all other instruction as indicated on the SOP for the appropriate VIP type

Complimentary Rooms

All requests for complimentary rooms must be approved via the Comp & Discounted Room / Golf Matrix.

Requestor Responsibility

Ask for approval by providing the following:

1. Which department is requesting the room(s)
2. The rationale for the request
3. The current occupancy percentage for the requested nights
    - Include both the Lodge and Spanish Bay occupancy, but indicate the preferred property
4. Which department will be covering the gratuities (if different from the requesting department)
    - Even though the room nights are complimentary, the requesting department must pay for the nightly gratuities for the staff.

VIP Coordinator Booking Duties

1. Verify the accuracy of the occupancy percentages in the request
2. Book the room and apply the VIP Complimentary Stay Package Codes:
    - VPCOBR (Inn)
    - VPCOLR (Lodge)
    - VPCOPR (Casa)
3. Set the Booking Settings as follows:
    - Guarantee—C Complimentary
    - Market Segment—Z Complimentary
    - Sub–Market—Z20 Complimentary Transient
4. Set an FDB Trace for date of arrival that explains which department will cover gratuities

    17OCT2023—1NT LODGE x 2RMS
    COMP—CHRG GRAT TO PROM270
    RQST PER SARA HIGMAN
    OK PER DAVID STIVERS
    PAPERWORK ON FILE
    B5 10.4.23
5. Copy the FDB Trace to a D Note
6. If available, enter the PROM Account into the Corporation field
7. Send a DNDEMAIL
8. Follow all other instruction as indicated on the SOP for the appropriate VIP type

Special Bill Multiple Room Rates

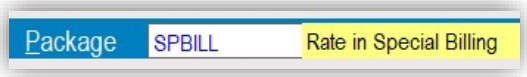
VIP Coordinators will use the **SPBILL Package Code** any time a guest needs to have multiple package codes applied on the same Reservation Tile.

Example: The booking below is a service provider who will be paying a custom rate of $295 for the first two nights of their stay, then will have the next 3 nights complimentary.

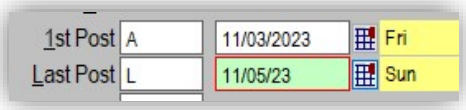
This booking requires two Package Codes:
1. VIPL (Lodge VIP Custom)
2. VPCOLR (Lodge Complimentary Stay)

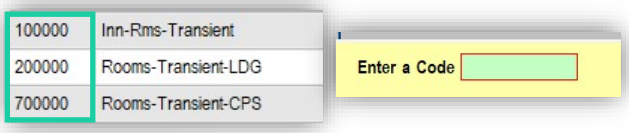


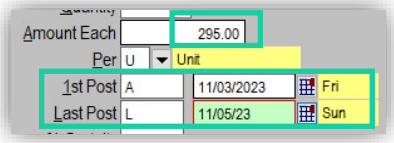
HOW TO SPECIAL BILL MULTIPLE RATES

1. Book the room for the entire span of the stay on one Reservation Tile
2. Enter SPBILL into the Package Code field → 

3. Enter Special Billing
4. Special Bill all Package Codes for the appropriate nights:
   - A—Add
   - P—Package
   - Type in the first Package Code → 

   - Enter
   - Set the date range to all applicable nights → 

   - Page Down
5. Special Bill any Custom Rates for the appropriate nights
   - A—Add
   - Enter
   - Type the appropriate Transient Code → 

   - Edit the Rate and Dates → 

   - Page Down

Note—It is not necessary to Special Bill $0 Rates

Sq	Pst	Typ	Code	Desc	Qy	Amt	Per	1st Post	Last Post	% Grats
1			**200000**	**Rooms-Transient-LDG**	**1**	**295.00**	**U**	**11/03/202**	**11/04/202**	**0.00**
2		P	VIPL	Lodge VIP Rate	1			11/03/202	11/04/202	0.00
3		P	VPCOLR	Lodge Complimentary Stay	1			11/05/202	11/07/202	0.00

VIP Prepare for Arrival

At Time of Booking:

- Keep all Room Reservations Consolidated (unless they require Preblocking)
- Keep all Golf Bookings in groups of 4
- All bookings should be connected to the Primary's Guest Tile
- Write the Rooming List in a Y Note
- Write the Billing Instructions in an FDB Trace

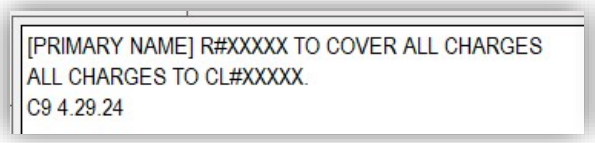
Prepare for Arrival:

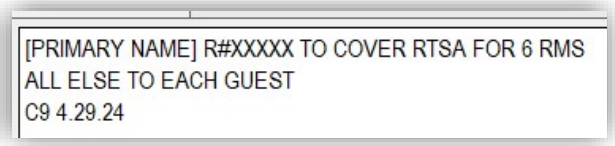
Always

- Duplicate All Rooms
- Rename All Rooms according to the Y Note Rooming List
- Whose a VIP Guest Tile to each room regardless of billing (this ensures booking history per guest)

Primary Room FDB Trace:

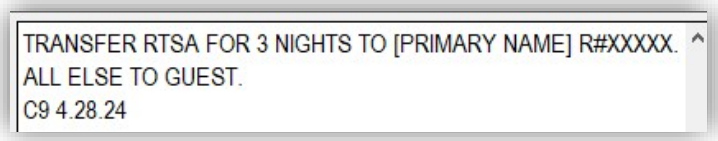
- Explain which charges the primary will be covering
- Explain where to direct charges that should be billed to PROM/House Accounts

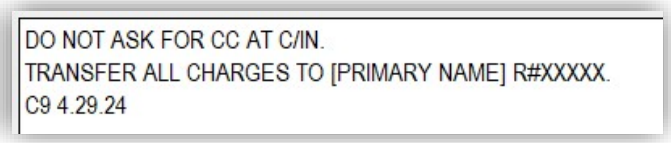




Secondary Room(s) FDB Trace:

- If the guest will not be covering any charges themselves, state "Do not collect CC at c/in"
- Any charges that will be paid by the primary should be transferred to the Primary's Reservation Tile
- If the guest is covering anything themselves, state "All else to guest"





Golf Tiles

- If the Primary is covering all golf charges:
  - ◊ Do not split—Keep all tee times connected to the Primary's Room Reservation Tile
  - ◊ Leave chargeback notes on the Golf Tile to charge golf to the Primary's Reservation Tile





- If each guest is covering their own golf charges, split golf and connect each tee time to the room of the guest who will be paying for it—See "Split and Whose Golf" SOP

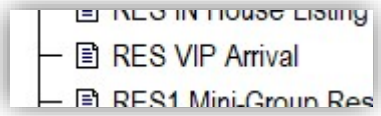
Arrival Report

The VIP Arrival Report must be manually run by VIP Coordinators—Auditors will not be monitoring these bookings.

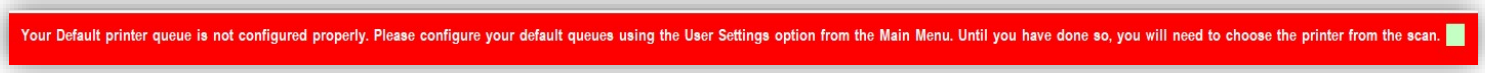
How to Run A VIP Arrival Report

Start from the SMS Homepage

Hot Key	Action
Q	Main Menu
R	Reports
R	Reports Menu
Z	Property Custom
	Scroll down and select **Res VIP Arrival**



If you receive the red printer message, click **Enter** to bypass



Select **PDF**, **Disk**, or **Print** to a specific printer

Enter Default to 1 copy

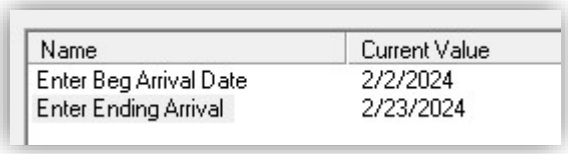


Set the Beginning Arrival Date to **Today**

Accept

Set the Ending Arrival Date to **3 weeks in the future**

Accept



Name	Current Value
Enter Beg Arrival Date	2/2/2024
Enter Ending Arrival	2/23/2024

Enter Click **OK** to initiate your search

Allow several minutes for the report to run

S Report

The S Report will list all future reservations with an S Guarantee Code—VIP Pending Signature

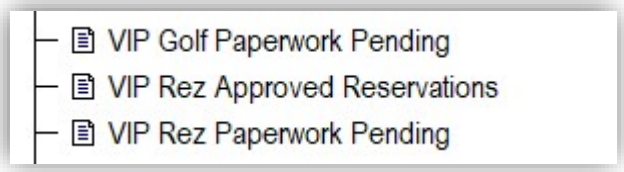
This guarantee code is used when the VIP Desk receives a request to create and hold a booking before the required approval has been granted.

S	VIP Pending Signature

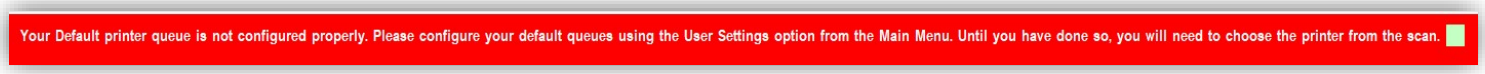
How to Run An S Report

Start from the SMS Homepage

Hot Key	Action
Q	Main Menu
R	Reports
R	Reports Menu
Z	Property Custom
	Scroll down and select **VIP Rez Paperwork Pending (rooms)** or **VIP Golf Paperwork Pending (Golf-Only)**



If you receive the red printer message, click **Enter** to bypass



Select **PDF**, **Disk**, or **Print** to a specific printer

Enter Default to **1** copy

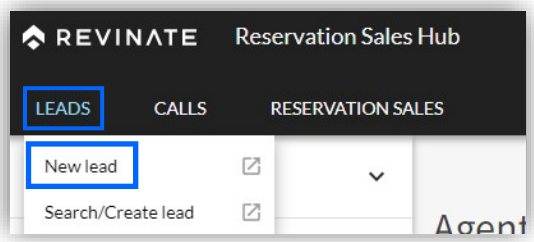


Enter Initiate your search

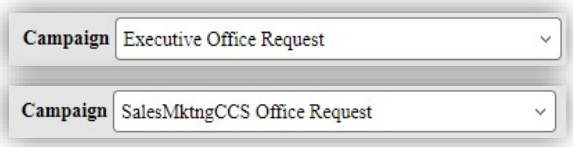
Allow several minutes for the report to run

Create A VIP Lead Form

1) Click Leads, then select New Lead



2) Set your Campaign with the dropdown menu to one of the following:

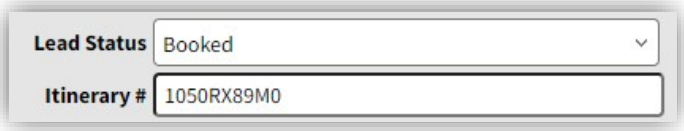


3) Set the Country field appropriately



4) Set the Lead Status to Booked

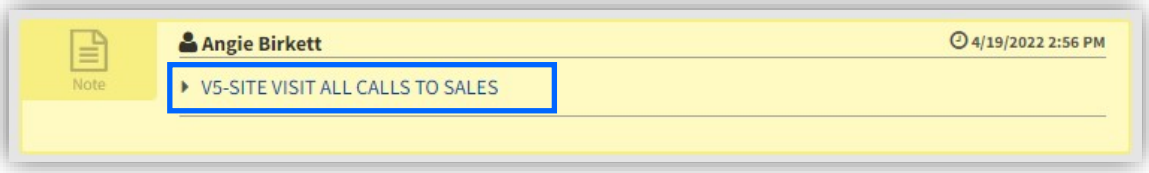
5) Input the Itinerary #



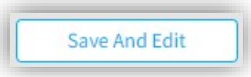
6) Click the RTG checkbox next to the email address field



7) Write a note that instructs others to the appropriate contact should this guest call into the Reservations Department



8) Click Save and Edit



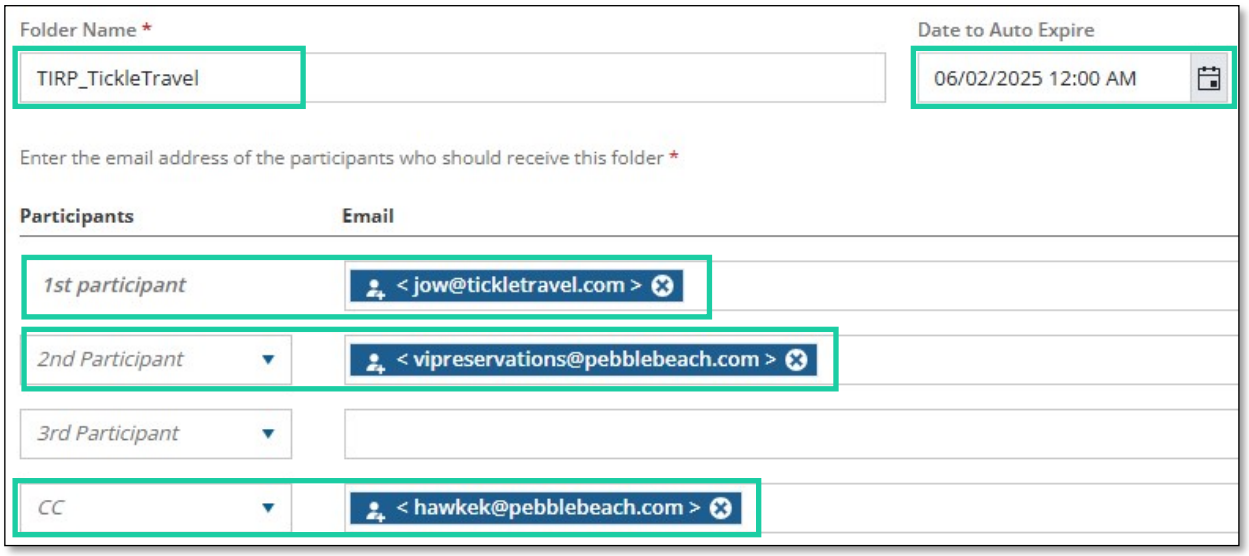
Once REVINATE syncs with SMS, all remaining guest and booking information will auto-populate into your Lead Form.

Sertifi | Send A TIRP Form

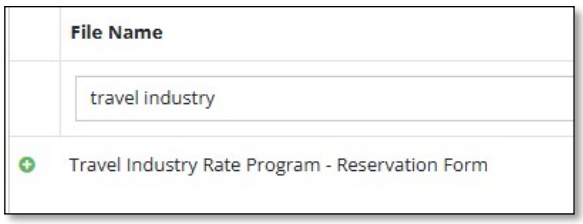
1. Access Sertifi
2. Click Create New



3. Fill out the file details:
    - File Name: TIRP_[Agency Name]
    - 1st Level Signer: [Travel Agent's Email Address]
    - 2nd Level Signer: VIPReservations@pebblebeach.com
    - CC (Non-Signer): HawkeK@pebblebeach.com
    - Expiration Date: Date of Arrival



4. Next
5. Click Add Document From Library
    - Type 'Travel Industry' into the search bar & Click on the form you want to send & Click add/ remove

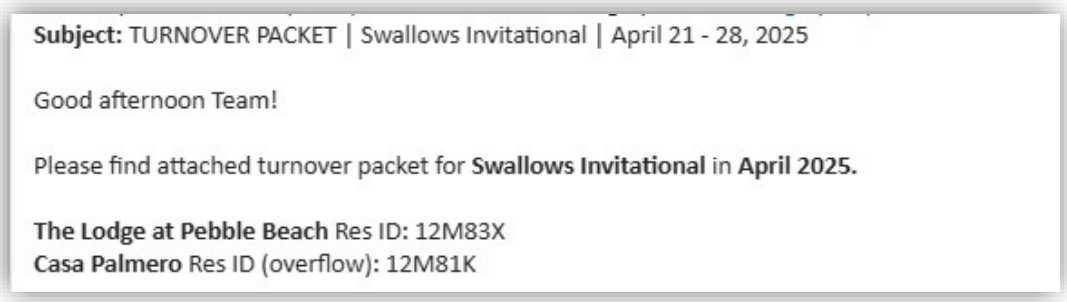


6. Click Next then Send Now



Turnover A Group Booking (1/2)

When a group booking needs to be "turned," Sales will email the Turnover Packet to the _Group Turnovers email distribution:


Subject: TURNOVER PACKET | Swallows Invitational | April 21 - 28, 2025

Good afternoon Team!

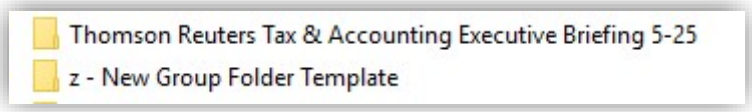
Please find attached turnover packet for **Swallows Invitational** in **April 2025.**

The Lodge at Pebble Beach Res ID: 12M83X
Casa Palmero Res ID (overflow): 12M81K

- In GROUP FOLDERS, open the Unassigned folder of the appropriate year



  - ◊ Create a new folder for the group you are turning
    - Copy the "z-New Group Folder Template"
    - Title the new folder [Post As] Month-Year



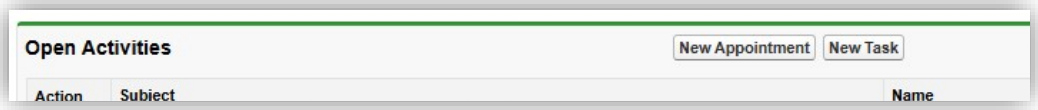
- Save the following documents in the newly created Group Folder:

Documents to Save	Where to Find Documents	Sub-Folder to Save Within
Booking Recap	Attached to the Turnover request email	Turnover Notes Folder
Golf History	Scan documents from the physical folder within the Golf Coordinator cabinet	Turnover Notes Folder
Allotment Report	Run Allotment Report in SMS Host *If ROH, verify the ROH percentages are accurate*	Allotment Report Folder
SR18 Golf Exhibit	Run SR18 in SMS Host *Verify that the SR18 matches the Golf Confirmation*	SR18—Golf Schedule
Contract Countersigned Contract Contract Addendums	User Merge Docs > (NSM/PBP's folder) > Contracts *Save a copy of both PDF and Word*	Contracts Folder
Delegates List	Information > GRES > Delegate Lists *This doc will only exist if suites are picked up*	Delegates List Folder
Golf Confirmation	Information > GRES > Golf Confirmations *Cut and Paste PDF and Word out of these folders into the Group Folder*	Golf Confirmation Folder

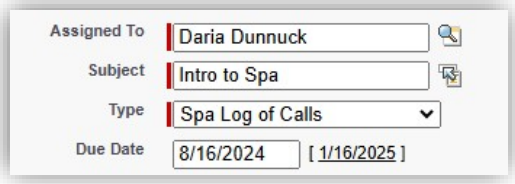
Turnover A Group Booking (2/2)

- Edit the group within SMS Host *(Repeat for any Overflow Bookings)*
  - ◊ Guest Tile
    - ◊ Edit the Source Code and Dialed
      - ◊ Source—Group
      - ◊ Dialed—Sales
    - ◊ Move the email address to "Remarks & Communication"
    - ◊ In Profiles, navigate to the Recreation Tab and check "Guest may multi-book services"
  - ◊ Group Management Window
    - ◊ Add a Billing Profile
      - Click Billing Profile Schedules
      - A (Add)
      - 1
    - ◊ Edit the Reservations Template
      - Active = Y
      - Adults = 2
      - Ph#Dialed = Sales
      - Source: Group (or Special Event)
      - Guarantee Code = G
      - Pay Type = P
      - Suppress Rate = Y
      - Input IATA number when applicable

- Set up the "Intro to Spa" task in Amadeus *(Only required on primary booking)*
  - ◊ On the Booking, scroll to Activities and click "New Appointment"



  - ◊ Edit the Task Information
    - Assigned To—[Spa Coordinator's Name]
    - Subject—Intro to Spa
    - Type—Spa Log of Calls
    - Due Date—Set to 6 months prior to arrival (if within 6 months, set to today)
    - Save



Note—If an "Intro to Spa" activity already exists, edit that activity per the above instructions rather than creating a new one

- Forward the email to the GRES Manager and GRES Supervisor.
  Confirm that the Turnover is Complete

Pick Up Suites (1/2)

When Suites need to be picked up for a Group, Sales will email the request to _VIP Reservations and attach the contract.

Hi Team,

Please pickup suites for:
Post As: Captains Club LLC
Res ID: 13G9AW
Note: (1) Governors Suite

- Review the Contract attached to the email to see how the picked up suites should be named.
  - ◊ Example: "*Suite Upgrade," "*Suite," "Courtyard Suite"

	Monday 3/28/16	Tuesday 3/29/16	Wednesday 3/30/16
Run of House	25	190	190
Suites (10)	0	10	10
Total Rooms	25	200	200

	Wednesday 10/4/2023	Thursday 10/5/2023	Friday 10/6/2023
Run of House	32	32	32
Suite Upgrades (1)	1	1	1
Total Rooms	33	33	33

- In SMS Host, run an Allotment Report to see which specific suites are included in the block
  - ◊ The "Bedding & Square Footage" doc in the Digital Binder has a key to all room codes

Unit Type	Cur Blk	Cur PkUp	Cur Blk	Cur PkUp	Cur Blk	Cur PkUp
BRO7	0	0	0	0	1	0
BRL7	0	0	0	0	0	0
BRC7	0	0	0	0	1	0
BRG7	0	0	0	0	2	0
BRE7	0	0	0	0	3	0
BSF3	0	0	0	0	1	1
TOTALS	0	0	0	0	8	1

HOTEL/ROOMS

Bedding & Square Footage

BSF1	*Presidential Suite*	1	1	1650
BSF3	*Governor's Suite*	1	1	1650

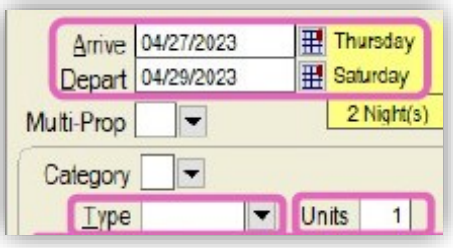
- From the Group Management window, add a Billing Profile
  - Click Billing Profile Schedules
  - A for Add
  - 1

- From the Group Management window, et the Reservation Template
  - ◊ Click T for Reservations Template, then edit the following fields
    - Contract Status—T
    - Adults—2
    - Active—Y
    - Market Segment—C
    - Ph# Dialed—05
    - Source—G1005
    - Guarantee Code—G
    - Pay Type—P
    - Suppress Rate—Y
  - ◊ Page Down to Save

See "SMS Host | Reservations Template" SOP for more detailed instructions and screenshots

Pick Up Suites (2/2)

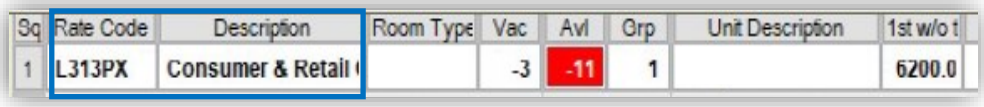
- Access the Group Guest Tile and hit F5 to run the Rate Calculator
  - ◊ Input the following:
    - ◊ Arrival / Departure Date
    - ◊ Room Type
    - ◊ Number of Units



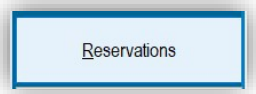
  - ◊ Change "Restrictions" to "Restrictions Off" to initiate the search



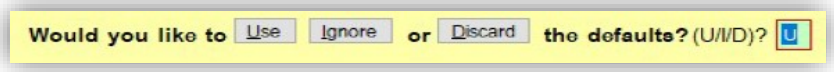
  - ◊ In the new window, select the Rate Code that matches your group



- Return to the Guest Tile and click "Reservations"



  - ◊ You will see a blue window appear
    - If the group already has picked up rooms, you will need to click "A" for Add to see the blue window
  - ◊ Select "U" for "Use" to the use the reservation defaults

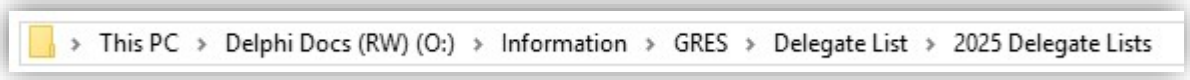


  - ◊ Page Down to save

- On each Reservation Tile:
  - ◊ Use F4 to Pre-Block each Suite (See SOPs for 2-Bedroom Suites and Cottages)
  - ◊ Re-title the name field per the contract, starting with an asterisk



- Run an SR9 Delegates List report and save it to the Delegate List folder



- Reply to the Suite Pickup Request email
  - ◊ State in your email that the suite pickup is complete
  - ◊ Attach the Delegate List

GRES Coverage Cheat Sheet

Billing Disputes/Inquiries:

- Review Billing Instructions on the Resume
- Review the Rooming List within the Group Folder for special billing notations
  See "Resumes" SOP in Digital Reference Guide

Golf Pairings/Add-Ons:

- Forward Pairings and Rental Club information to the appropriate Pro Shop
- Forward Caddie Requests to Caddie Masters

Golf Billing or Resell:

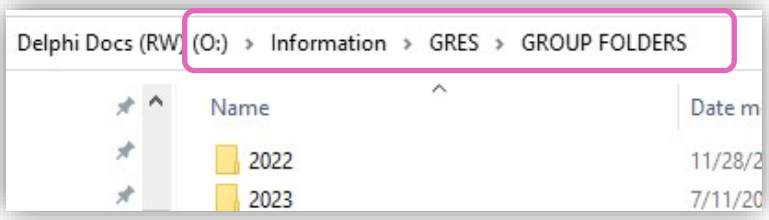
- Add Golf Billing Tee Sheet Notes based on the Resume
  See "Golf Billing" SOP in Digital Reference Guide

Golf Resell:

- Cancel the tee times and Reduce the Block according to the resell request
- Add A Resell Tee Sheet Note to the now available tee times
  See "Edit A Golf Block" and "Golf Resell" SOPs in Digital Reference Guide

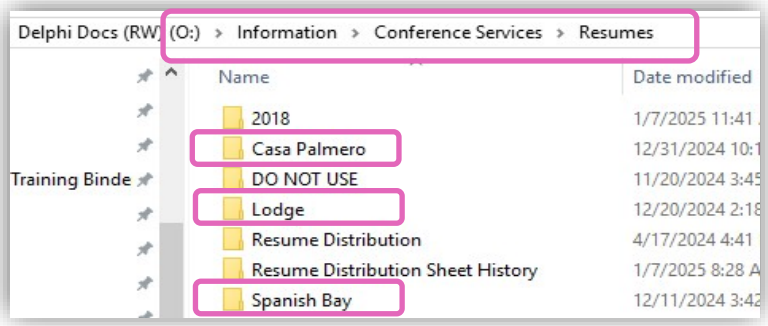
Update 2 Notes Upon Arrival:

- If 2 Notes are missing, update 2 Notes based on the Block to Actual in the Group Folder
- If Updating 2 Notes due to a change:
  - ◊ Groups may always increase room nights
    - ◊ Verify on the Block to Actual that the group is not exceeded their contracted number of Staff rooms per night
  - ◊ Groups may make lateral date shifts that do not change the totals
  - ◊ Groups may only decrease room nights if there are extenuating circumstances
    - ◊ Internal group decreases are permitted since there is no financial liability
- The "Group Variance Report" will not be accurate if the group is Obligated to pay for more rooms than they are occupying.
  - ◊ If the Front Desk asks us to increase the 2 Notes per the Group Variance Report, you can do this as the omission of rooms was likely a mistake.
  - ◊ If the Front Desk asks us to decrease the 2 Notes based on the Group Variance Report, check the Block to Actual to see if the group has a higher obligation than their current block.



GROUP FOLDERS contains

- Block to Actuals
- Rooming Lists



RESUMES contains Resumes for all groups stored in 3 separate folders, one for each property.

Block to Actual / 2 Notes Examples

GROUP'S OBLIGATION **MATCHES** THEIR BLOCK

GROUP ROOM BLOCK/OBLIGATION

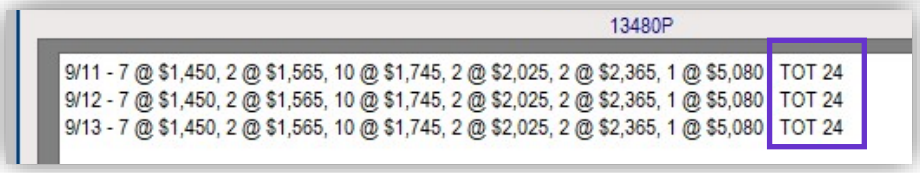
Casa Palmero

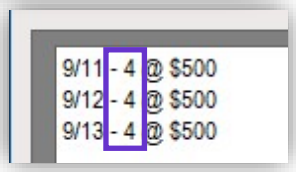
*Rate	Service Charge	Total	Room Type	Wednesday 9/11/2024	Thursday 9/12/2024	Friday 9/13/2024
$1,450.00	$30.00	$1,480.00	Estate Rooms	7	7	7
$1,565.00	$30.00	$1,595.00	Estate Studios	2	2	2
$1,745.00	$30.00	$1,775.00	Spa Rooms	10	10	10
$2,025.00	$30.00	$2,055.00	Deluxe Spa Rooms	2	2	2
$2,365.00	$30.00	$2,395.00	Courtyard Suites	2	2	2
$5,080.00	$30.00	$5,110.00	Palmero Suite	1	1	1
			Booking Total	24	24	24

The Lodge at Pebble Beach

*Rate	Service Charge	Total	Room Type	Wednesday 9/11/2024	Thursday 9/12/2024	Friday 9/13/2024
$500.00	$28.00	$528.00	Staff Rooms	4	4	4
			Booking Total	4	4	4

** Rate is exclusive of the **10.5%** per night county occupancy tax and a **0.195%** per night California Tourism Assessment. In addition, the county charges **$7.00** per occupied room night for the County Tourism Assessment.*





GROUP'S OBLIGATION IS **HIGHER** THAN THEIR BLOCK

GROUP ROOM BLOCK

Rate	Room Type	Wed 6/19	Thu 6/20	Fri 6/21	Sat 6/22	Sun 6/23	Mon 6/24	Total
$950.00	Run of House	4	39	79	89	68	5	284
$950.00	Suite Upgrade (1)	0	1	1	1	0	0	3
	Booking Total	4	40	80	90	68	5	287

Should you require additional guestrooms, they will be confirmed on a space available basis and added to your contracted nightly group room block.

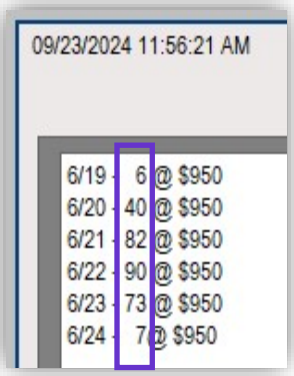
After **Monday, May 20, 2024,** any reduction to the Group Room Block will be assessed a cancellation fee equal to the group room rate multiplied by the number of guestrooms for each night.

Per your group's room reduction schedule, your nightly room obligation is:

GROUP ROOM BLOCK OBLIGATION

Rate	Room Type	Wed 6/19	Thu 6/20	Fri 6/21	Sat 6/22	Sun 6/23	Mon 6/24	Total
$950.00	Run of House	6	39	81	89	73	7	295
$950.00	Suite Upgrade (1)	0	1	1	1	0	0	3
	Booking Total	6	40	82	90	73	7	298

A refund will be made for any rooms that are resold, however, these must be the last rooms sold in order for the Hotel to achieve 100% occupancy. Due to day-to-day variations in Hotel occupancy, room block obligations are figured on a per night basis, rather than cumulatively over the group's meeting dates.

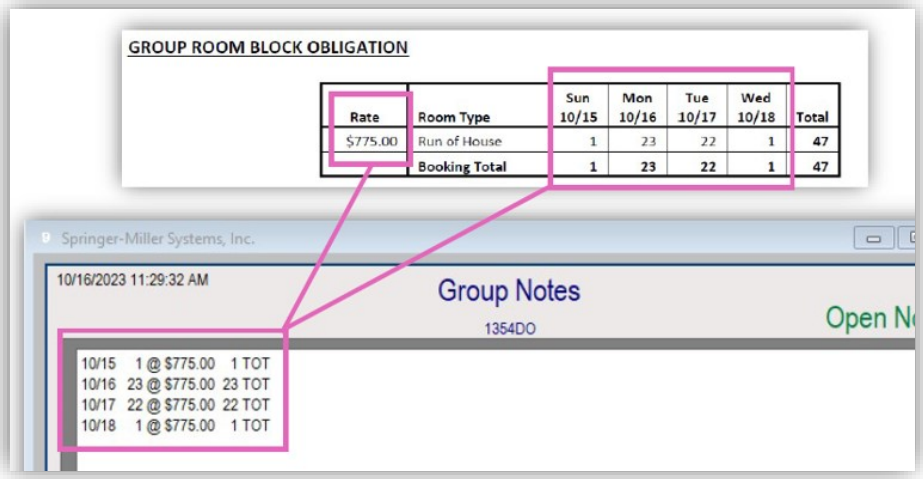


Update 2 Notes (1/2)

2 Notes are input based off of the Room Obligation chart within the Block to Actual

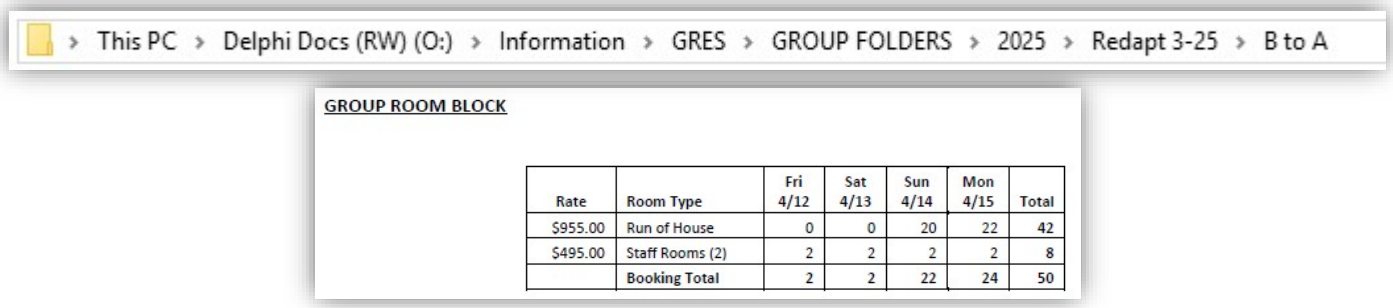
Access 2 Notes

- Access the SMS Homescreen
- W (Workslate)
- R + [Res ID]
- Page Down
- Escape
- G (Group Management)
- 2 (2 Notes)



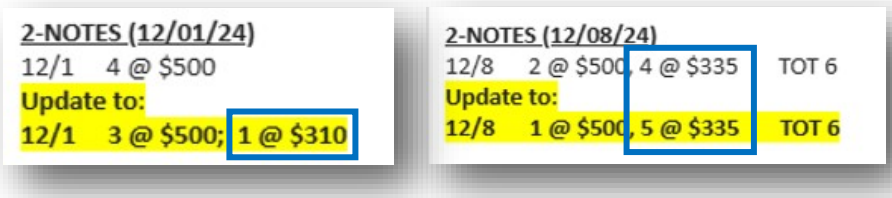
2 Notes Increase

- **General Rule**—Groups can always increase their number of rooms/nights
- **Staff Rooms Exception**—Groups cannot increase Staff Rooms per night above the contracted number
- **Verification**—Always check the current Block to Actual before making increases to ensure the nightly Staff Room limit is not exceeded.



Lateral 2 Notes Update

- **General Rule**—Groups can make changes that do not affect the overall room/nights totals, such as:
  - ◊ Date Shifts—Guests who are shifting their trip dates without decreasing the overall number of rooms/nights
  - ◊ Rate Changes—Requests to decrease the number of rooms at 1 rate while simultaneously increasing the number of rooms at another rate
- **Staff Rooms Exception:** Groups cannot increase Staff Rooms per night above the contracted number
- **Verification:** Always check the current Block to Actual before making increases to ensure the nightly Staff Room limit is not exceeded.



Update 2 Notes (2/2)

2 Notes Decrease

General Rule—Groups can only decrease rooms/nights without obligation if there are extenuating circumstances.

Good morning,

Can we please get the 2notes updated for yesterday. It should read 73 @ 685. We were ok'd to shorten as Gary Klasse could not make it due to medical complications. His replacement was only able to stay up to the 3rd. Thank you.

Exceptions— Internal (a PBC/LCC event) do not have a financial obligation when decreasing, so no extenuating circumstance is needed.

Subject: 2notes PB Team Championship #12L3SV

Good evening,

Can we please update the 2notes for the PB Team Championship? They should be updated to what is below:

*12/20 78 @ $641.00, 32 @ $894.00, 3 @ $1,260.00, 1 @ $380.00, TOT 114
*12/21 78 @ $641.00, 32 @ $894.00, 3 @ $1,260.00, 1 @ $380.00, TOT 114

We had a guest checkout early Margo and Brittany are aware. Thank you!

Group Rate Variance Report—
If the request to decrease is due to a difference in the Group Rate Variance Report, you must check the Block to Actual to see if the group is obligated to pay for more rooms than they are occupying.

Good morning Group Reservations,

Per attached Resume Change #1 (dated 11.25.24) and as per the Group Rate Variance Report dated Friday, December 6th 2024), can you please update the 2-NOTES for Lathrop Construction Associates Holiday Party (# 13E666) per below?

2-NOTES (12/06/24)
12/6 - 63 @ $450.00
Update to:
12/6 - 62 @ $450.00

If a group decreased their room block beyond allowable attrition or after their cut-off date:

- The Block to Actual will show two charts: the block of occupied rooms vs. the block of rooms the group is obligated to pay for
- 2 Notes should always be updated based off of the Obligation Chart

GROUP ROOM BLOCK

Rate	Room Type	Wed 6/19	Thu 6/20	Fr 6/
$950.00	Run of House	4	39	
$950.00	Suite Upgrade (1)	0	1	
	Booking Total	4	40	

GROUP ROOM BLOCK OBLIGATION

Rate	Room Type	Wed 6/19	Thu 6/20	Fri 6/21	Sat 6/22	Sun 6/23	Mon 6/24	Total
$950.00	Run of House	6	39	81	89	73	7	295
$950.00	Suite Upgrade (1)	0	1	1	1	0	0	3
	Booking Total	6	40	82	90	73	7	298

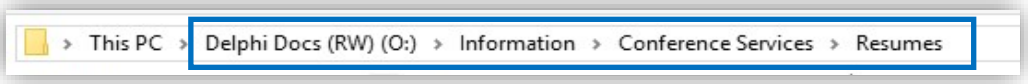
Billing Disputes/Inquiries

There are two resources you can use to verify billing for a Group:

- The Resume—Where all official billing instructions should be notated
- The Rooming List—Where planners will write billing instructions that do not always make it to the Resumes

Locate Billing on the Resume

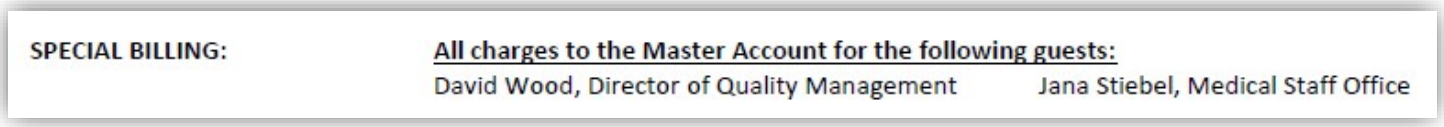
- Access the Resume:



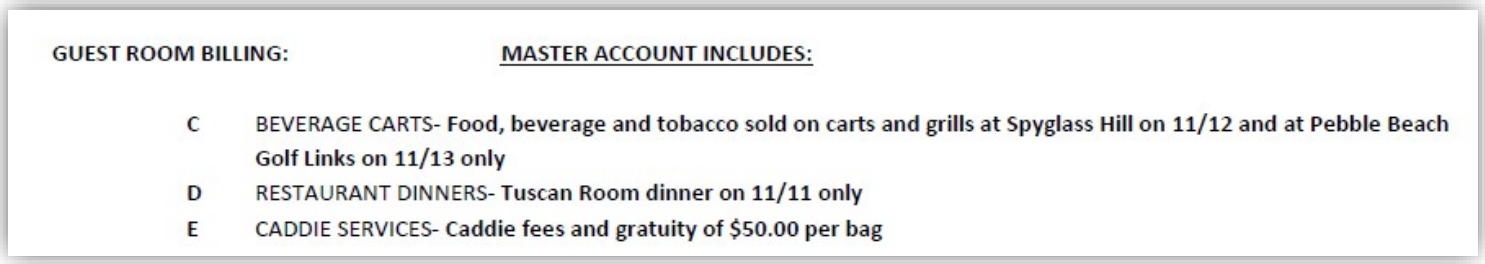
- Verify Billing
  - ◊ Authorized Signatures—The Planners as well as anyone indicated as an "Authorized Signature" are allowed to make changes to the billing for a group. Planners do not need to be listed as an Authorized Signature to make changes.



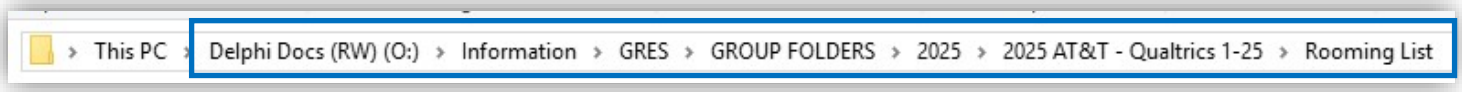
  - ◊ Special Billing—Anyone listed under "Special Billing" will have special instructions as to how their charges should be handled that differ from the majority of group guests.



  - ◊ Guest Room Billing—Will outline what charges are designated to be covered by the group vs. what will be paid for by each individual attendee.



Locate Billing on the Rooming Lists



1	First	Last	Lodge	ISB	Arrival Date	Departure Date	Payment	Room Type
2	Heidi	Shaffer	1		14-Aug	19-Aug	Guest Presents Own Credit Card	
3	John	Clinard	1		15-Aug	19-Aug	All Charges to Master Account	Suite 144
4	Mark	Truby	1		14-Aug	19-Aug	All Charges to Master Account	

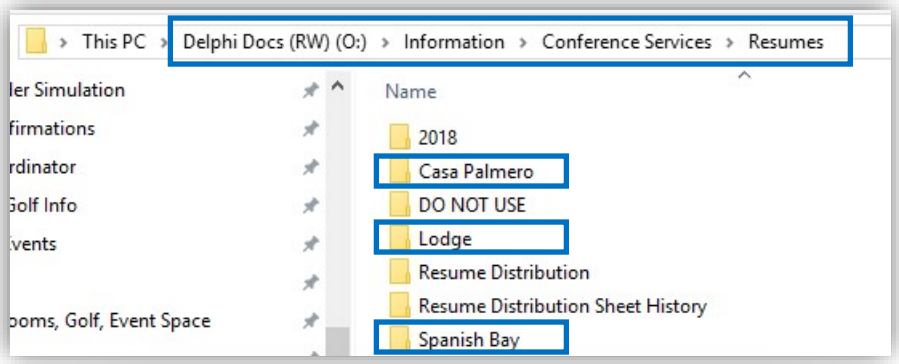
Group Golf Inquiries (1/2)

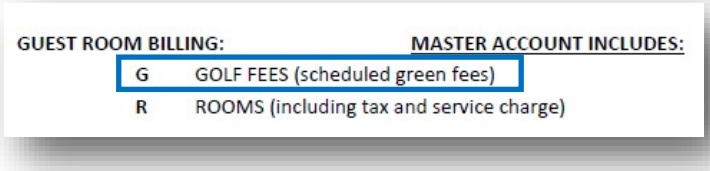
Golf Pairings/Add-Ons:

- Forward Pairings and Rental Club information to the appropriate Pro Shop
- Forward Caddie Requests to Caddie Masters

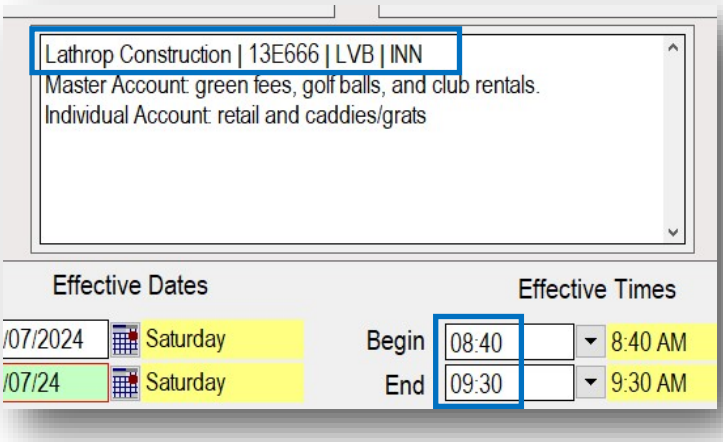
Input Golf Billing Note:

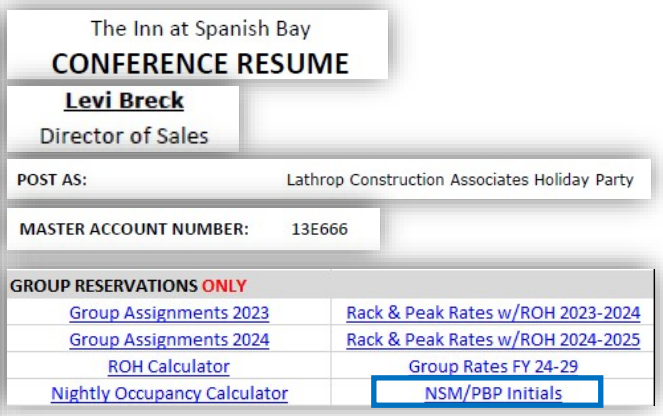
- Access the Resume and review the billing instructions for golf





- Locate the group's block on the tee sheet
- Input a Tee Sheet Note that outlines what charges will go to the Master vs. the Individual
    - ◊ The first line of the note must be Post As| Res ID | NSM/PBP Initials | Property
        - The Post As, Res ID, Property, and NSM/PBP name can be found on the Resume
        - Initials can be found on the "NSM/PBP Initials" document in the Digital Binder
    - ◊ The time span of the note must span the entire timeframe of the group's golf block



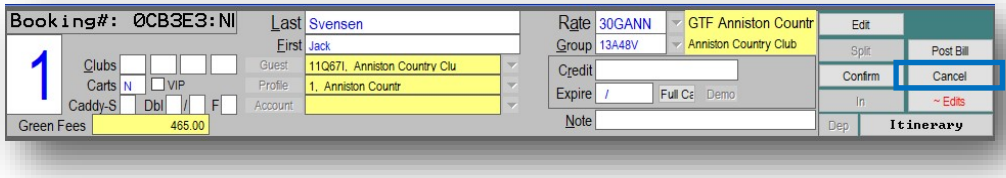


Group Golf Inquiries (2/2)

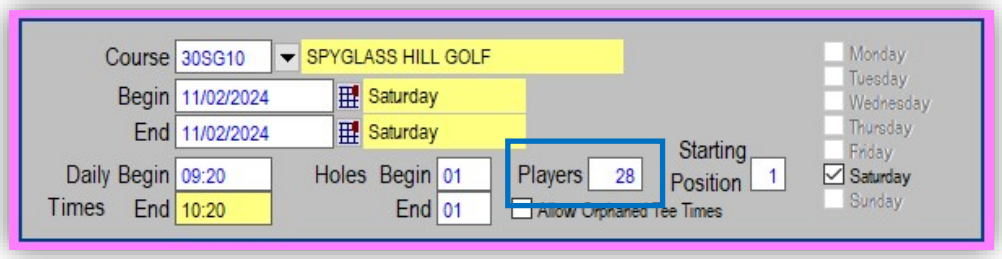
Golf Resell:

- Locate the group's block on the tee sheet

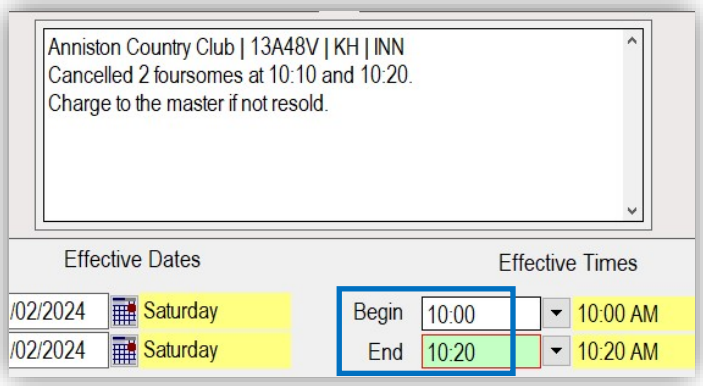
- Cancel the tee times that will be resold



- Reduce the Group's Block to open those time slots to leisure guests
  - ◊ Right click on the blue block and select "Manage Block"
  - ◊ Click Edit and reduce the "Players" in the block according to what you cancelled—Example: If you cancelled 2 foursomes, reduce the "Players" by 8
  - ◊ Page Down and Escape



- Leave a Resell Tee Sheet Note that explains to charge to the Master if not resold



  - ◊ The first line of the note must be Post As| Res ID | NSM/PBP Initials | Property
    - The Post As, Res ID, Property, and NSM/PBP name can be found on the Resume
    - Initials can be found on the "NSM/PBP Initials" document in the Digital Binder
  - ◊ The time span of the note must span the start and end time of tee times up for resell

Note—It is ok to combine this resell note with the existing Tee Sheet Billing Note:
- Leave the time span as the entire block including the time slots up for resell
- Specifically state which times and how many golfers are up for resell