Meeting Room Quick Tips

Managing External Meeting Room Reservations

- Creating external meeting room reservations:
  - Guests can only book a room to use during the *current month* plus the *next month*
    - e.g., on March 1, a guest can reserve a room for use in March and April
  - Make the guest aware of our Meeting Room Terms and Conditions
    - e.g., only events free and open to the public, no selling or promoting products or services, etc.
  - Double check for potential conflicts with other event times, equipment numbers, etc.
  - When creating or copying a reservation (other than for exempt groups), make sure it's set to PENDING or PAYMENT PENDING – *not* APPROVED. If copying, remove payment information from notes.
  - If guest states they plan to pay in person, add a note in Internal Notes
- Accepting payment for reservations:
  - Make sure amount in POS matches amount due in Library Market
  - Enter amount paid, payment method and check # if applicable, date/time paid, ticket #, and initials/location into Additional Notes section *only* – leave Transaction ID slot blank
  - Email managers, librarians, and/or CIS so they can set the reservation to APPROVED
- Helping a group check in for their reservation:
  - Verify that the reservation has been paid (it should be set to APPROVED and have a record of payment [except for exempt groups])
- Cancelling reservations – by guest request or if we can't accommodate:
  - Click SET "CANCELLED" button and CONFIRM
  - Do *not* select DELETE – this deletes the record of the reservation
  - If paid and cancelling 48+ hours prior to meeting (or less under some circumstances), send refund request to CIS
- Marking "No Shows" (all staff):
  - Click SET "NO SHOW" and CONFIRM if the group has not paid and does not show
  - Do not mark "no show" for reservations that have been paid
  - If a group has two or more no shows, let CIS and management know, as an email may be required to educate the group on our policies

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- Make sure to add necessary amount of Setup and Teardown Time to your reservation
  - This helps prevent guests and other staff from booking times that may conflict
- Note the staff point-of-contact in the Internal Notes

Librarian/Manager/CIS Duties after POS Payment for a Meeting Room

- Once a reservation is paid, enter the *amount paid*, *date,* and *time* paid in the correct fields of the Administrative Settings (NOTE: this and the below are important for BUS in case of audit)
- If the amount paid differs from the Reservation Total Fee, enter in the Cost Offset field the amount and Cost Offset Behavior (usually "Subtract")
- Enter the Transaction ID in the Transaction ID field
- Set the status to APPROVED