Add Folios

The Folio Tab of each booking has an option to create multiple folios for the same guest.

When a new folio is created, it will still be linked to the same room number/reservation. It is simply an additional "bill" to apply charges and payments.

The transactions and balance in each folio are combined and totaled in the projected income, projected balance and folio balance in the header.

Note: when you go to the folio of the guest, the Primary folio will appear by default. To switch to another folio, simply select the corresponding folio from the "Choose Folio" drop down list.

Additional folios can be used for several purposes, but some common uses are:

- Printing/emailing specific transactions
- Recording commissions separately
- Separating transactions into different receipts for guests.

In this section

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To Add folios

- Go to the Folio Tab of the Booking.
- Click on "Add New Folio" (next to Choose Folio drop down list)

# Guests:1/0/0	Booking for:02-SEP-2014-03-SEP-2014		Room Type:Queen with a view	Room:104	Status:Confirmed
Projected Inc:$84.00	Projected Inc + Charges:$159.00		Projected Bal:$109.00	Folio Bal:$25.00	

Booking Data	Folio	Edit	Room Assignment	Guest History	Letters	Log

Choose Folio: Primary Folio: $25.00 | Add New Folio | Folio Setup

Primary Folio: $25.00   Email Folio | Print Folio | Folio to Excel

Folio #: 3025873 Primary Folio

	Date	Site Date	User	Type	Description	Qty	Charges	Payments		
☐	03-SEP-2014	28-AUG-2014	BC	Cash	Deposit Cash	1		$50.00	✏	🗑
☐	03-SEP-2014	28-AUG-2014	BC	Spa Treatment	Spa Treatment	1	$75.00		✏	🗑
	Transfer checked items to	Select From List ▾				Total:	$75.00	$50.00		
						Balance:	$25.00			

- Enter a Folio Name. This could be a guest name, date, type like "Spa Treatment" or "Incidentals",
- Choose any items that should automatically be charged to the new folio by default. These can always be transferred later. In this example, a folio is created for Spa Treatments and Spa Treatment charges will automatically charge to this folio for the guest.
- Note: The items shown in the list are created in your Inventory Items and also appear in the "Add Charge" list. To edit or add an inventory item, see Inventory Items

- Once the new folio is created, you will see it in the "Choose Folio" drop down list. To go to this folio, choose it from the list.
- To transfer transactions to another folio, select the transaction by clicking on the box on the left and choosing the new folio in the "Transfer items to" drop-down list at the bottom of the folio. See Transfer Folio Items