ECMS Reservations and Payment

User Guide
<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Creating a Reservation for an Event</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>Checking a Reservation using EMS Client</td>
<td>7</td>
</tr>
<tr>
<td>3</td>
<td>Modifying a Reservation</td>
<td>9</td>
</tr>
<tr>
<td>4</td>
<td>Pricing a Room</td>
<td>10</td>
</tr>
<tr>
<td>5</td>
<td>Add Tax charges to a Pricing Plan</td>
<td>11</td>
</tr>
<tr>
<td>6</td>
<td>Applying a Discount to a Non-Invoiced items in a Reservation</td>
<td>12</td>
</tr>
<tr>
<td>7</td>
<td>Creating or Sending a Reminder</td>
<td>13</td>
</tr>
<tr>
<td>8</td>
<td>Making a Deposit</td>
<td>15</td>
</tr>
<tr>
<td>9</td>
<td>Creating an Invoice</td>
<td>16</td>
</tr>
<tr>
<td>10</td>
<td>Paying an Invoice</td>
<td>19</td>
</tr>
</tbody>
</table>
1. Creating a Reservation for an Event

Creating a Reservation using EMS Web App:

a. Login into the ECMS Web Application System using your UM Single Sign-On (CaneID) or using a guest account. https://miami.emscloudservice.com/web/Default.aspx

If you are using your CaneId, be aware that your name is in the right upper side of the system.
Under your account, you are going to be able to customize it, such as, configure favorite rooms, or your account details:

- In the main page, there are a group of “Reservation Templates” that help to do the complete process of a reservation.
- Select the template that adjusts your needs. For example:
  - If you need a room with parking security, or a specific equipment, you can use “Book an Event Space with Services”.
  - If you are a student, you can select “Book Student Org. Event at Student Center Complex.

- Select Date, Time, and the location for the Reservation, if you know the Room that you want to use, select it and put the audience expected in “Attendance” field
e. If your reservation requires some facilities, add them using “Services” button. When you are ready press “Next Step”.

e. Next, is the last step for your reservation, document all details about your event, then click “Create Reservation” button.
When the reservation has been created, you can check it or modify it using “My Events” button.
2. **How to Update a Reservation**

Click “My Events” button, and select the event that you want to update.

Click “Edit Reservation Details” to update general information about the event. Also, you can click “Add Services” if you need any other service. When you finish, click “Save Reservation Details” button.
3. Checking a Reservation using EMS Client

There are 3 ways you can check a reservation:

a. Using Dashboard, in this case you can also check “Guest Requests”.

b. Using Navigator button:

c. Using the Reservation Book:
   Select a Building and a date.
4. Modifying a Reservation

After a reservation has been created, you can modify, for example, you can add some Facilities as follows:

a. At the Booking Level, press New, and then select any facility from the list.

As an example, add “Parking and transportation” and “Room Charge”

b. At the Reservation Level, you can modify any detail about the reservation by clicking “Edit” Button.
5. Pricing a Room

If you want to charge for a room, and the reservation does not present it, you can add it:

a. Press “Update pricing” button at the reservation level, using “Reservation Summary” tab.

![Image of Update Pricing button]

b. Update Pricing Plan Wizard will shows up. Select “Room Charge” from Categories, and a “Pricing Plan” according to your needs. Click “Next”.

![Image of Update Pricing Plan Wizard]

c. Select the booking that you want to update and click “Finish”, the pricing will be updated.

![Image of Select Bookings]

The Room Charge will appear in the booking area.
A complete price of the room will be reflect once the invoice has been created.

6. **Add Tax charges to a Pricing Plan:**

   a. In EMS Client, go to Configuration tab, select Billing and Pricing Plans.

   ![EMS Client Configuration](image)

   b. Then, follow the following steps:

   1) In Pricing Plans Window, select the Pricing Plan that you want to add a tax payment. Click Edit.

   2) In “Pricing Plan” tab, select “In Addition to Host” option.

   3) In “Calculation Type” box, move “Sales Tax” from left side to right side. Click Ok.
Sales Tax appeared on the Invoice once “Updated Pricing” button is used, at the Reservation Level of the event.

7. **Applying a Discount to a Non-Invoiced items in a Reservation**

a. To apply a discount, follow next steps:

1) At the booking level click on the item you want to apply a discount and press Edit.
2) Put the desire discount percentage and click Ok.
3) The discount would be reflected on the reservation.

**TIP**

To apply a discount to invoiced items, you must first void the invoice.
8. Creating or Sending a Reminder

A reminder is a comment that has a due date associated with it. Reminders are used in EMS to document deposits on your Event. You can add a reminder at Reservation Level and at Booking Level.

a. At the Reservation Level:

1) Click Reminders tab and click New

2) Select “Deposits” in the “Reminder Type”

3) Select “Due Date”

4) Write information about the reminder in “Notes”, and Click “Ok”

The reminder will be reflected at Reservation Level.
b. At the **Booking Level**:

1) Click Reminders tab and click New.

2) Follow the same procedure as in Reservation Level.

The reminder will be reflected at Booking Level.
9. Making a Deposit

If you want to make a deposit, follow the following steps:

1) At the **Reservation Level**, click “Transactions tab”, click “New” button and select “Payment”.

2) At the Payment entry, select the Department, Transaction Type, a Payment type and the amount. Then Click OK.

3) The deposit will appear at the Reservation.

4) Now, you can pay the deposit using 7 Point Solutions, followings the procedure explained in “Paying an Invoice” section.
9. **Creating an Invoice**

When you finish all changes and you are ready to create an Invoice, follow these steps:

1) **At the Reservation Level**, click “Transactions tab”, click “New” button and select “Invoice”.

2) Check all tabs and be sure everything is correct.

3) In the “Options” Tab, be sure that “Print Reminders” option is checked. Then, press “Generate” Button
4) Select the invoice generated and press Preview button to check it.

![Invoice Preview](image)

5) Invoice will be generated with:
   
a. No Invoice Number, because is an Invoice preview
b. At the Event Description, Reservation Level Reminder is shown.
c. At the Book Details, Book Level reminder is shown
d. Deposit is discounted from the total.
e. Information about payment is displayed.

---

**SCC Events & Reservations**

1330 Miller Drive  
Room 110.01  
Coral Gables FL 33146  
USA

305-284-4351 / 305-284-4599

---

**Invoice Preview**

<table>
<thead>
<tr>
<th>Host</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Gallo, Winston</td>
<td>Gables One Tower</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Invoice Number:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Date:</td>
<td>8/2/2019</td>
</tr>
<tr>
<td>Due Date:</td>
<td>9/2/2019</td>
</tr>
<tr>
<td>Event Name:</td>
<td>TEST No Services SCC</td>
</tr>
<tr>
<td>Reservation No.:</td>
<td>51181</td>
</tr>
<tr>
<td>Phone:</td>
<td>305-284-6876</td>
</tr>
<tr>
<td>Email Address:</td>
<td><a href="mailto:rm984@miami.edu">rm984@miami.edu</a></td>
</tr>
<tr>
<td>Event Type:</td>
<td>Conference/Seminar</td>
</tr>
</tbody>
</table>

---

<table>
<thead>
<tr>
<th>Bookings / Details</th>
<th>Quantity</th>
<th>Price</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay 20% of the invoice for this booking</td>
<td>1</td>
<td>$100.00</td>
<td>$100.00</td>
</tr>
<tr>
<td>Room Charge</td>
<td>$162.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less 10% Discount</td>
<td>$-18.20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parking and Transportation</td>
<td>$11.34</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subtotal</td>
<td>$162.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales Tax (7%)</td>
<td>$11.34</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less Deposits</td>
<td>$-20.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grand Total</td>
<td>$153.34</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please submit payment of your invoice here, [http://www.miami.edu/SCCPayments](http://www.miami.edu/SCCPayments)
You can reprice a room charge for a booking only if the room charge has not been invoiced.

To reprice a room charge that has been invoiced, you must first void the invoice.

When you are sure that no more changes has going to happen to the reservation, you can generate a Final Invoice.

All steps are the same, but at the moment to generate the invoice select “Final” instead of “Preview”.

A warning comes up. Click “Yes” to the warning.

A final Invoice will be generated with an Invoice Number.
10. Paying an Invoice

After invoice has been generated, you are ready to pay it. In order to do that, you have to access 7 Point Solutions Application through the link that is provided by the invoice. Please, follow the next steps:
a. Look for the link to 7 Points Solution.

b. Open an Internet browser and activate that link. In this case is

http://www.miami.edu/SCCpayments

In this case is

http://www.miami.edu/SCCpayments

c. A payment page will open. Put Invoice number and the last name of the person who made the reservation (Host), and press “Search”

d. The invoice will appear, then select, either “Pay the Invoice” or “Make a Deposit for a Future Event”
e. After that you may fill out a payment method. Click Continue and finish the payment.

Now, your reservation is paid and you will receive a confirmation.