User Manual

Hotel Management System
v3.0

WinSaaS

Last Revision
2013-01-26

Table of Contents

1 INTRODUCTION 8

1.1 MANUAL STRUCTURE 10
1.2 WEB INTERFACE 11

2 SETUP HOTEL 17

2.1 SET HOTEL MAIN PROPERTIES 18
2.2 SET HOTEL BUILDINGS 21
2.3 SET BUILDING FLOORS 23
2.4 SET ROOM TYPES 24
2.5 SET ROOM STATUS 27
2.6 SET ROOM AMENITIES 29
2.7 SET ROOMS 30
2.8 SET TAXES 33
2.9 SET PRODUCT CATEGORIES 34
2.10 SET PRODUCTS AND SERVICES 36
2.11 SET PAYMENT TYPES 38
2.12 SET DEPARTMENTS 39
2.13 SET DOCUMENTS 40
2.14 SET EMAIL TEMPLATES 47
2.15 SET BOOKING TERMS AND CONDITIONS 53
2.16 SET PAYPAL INTEGRATION 54
2.17 SET CALENDAR COLORS 55
2.18 SET USERS 57
2.19 SET AUTHORIZATIONS 59

3 SETUP ROOM PRICING 65

3.1 SET ROOM RATES 67
3.2 SET AGENTS 69
3.3 SET ROOM PLANS 72
3.4 REVENUE MANAGEMENT 81

4 SETUP WEBSITE 84

4.1 HOTEL WEBSITE LAYOUTS 85
4.2 SET HOME PAGE - MAIN CONTENT 90
4.3 SET HOME PAGE - HEADER & FOOTER 92
4.4 SET HOME PAGE - PHOTOS 93
4.5 SET BOOKING PAGE - HEADER, FOOTER AND MIDDLE CONTENT 95

4.6 SET LOCATION PAGE 97
4.7 SET LOCATION PAGE – HEADER & FOOTER 99
4.8 SET PHOTOS PAGE 100
4.9 SET PHOTOS PAGE - HEADER & FOOTER 102
4.10 SET SEARCH ENGINE OPTIMIZATION 103
4.11 SET MASTER PAGE 104
4.12 SET DOMAIN NAME 108
4.13 SET CUSTOM WEBPAGES – ADD & EDIT 110
4.14 SET CUSTOM WEBPAGES – MOVE & DELETE 117
4.15 SET CULTURES & TIME ZONE 120
4.16 PUBLISH IN HOTELASP DIRECTORY 121
4.17 INTEGRATE BOOKING ENGINE IN EXTERNAL WEBSITE 124

5 HOTEL MARKETING & SALES 125

5.1 SET DISCOUNT PROMOTIONS 127
5.2 SET ADWORDS ACCOUNT 129
5.3 ADWORDS CAMPAIGNS 132
5.4 EMAIL CAMPAIGNS 143
5.5 GUEST CONTACTS & HISTORY 148
5.6 HOTEL WEBSITE BOOKINGS 150
5.7 CHANNEL MANAGER INTEGRATION 161

6 HOTEL OPERATIONS 165

6.1 ROOMSTAY MANAGEMENT 169
6.2 EXPRESS CHECK-IN & CHECK-OUT 183
6.3 VOUCHERS 185
6.4 CALENDAR VIEW 187
6.5 DAY VIEW AND HOUSEKEEPING 191
6.6 GUEST SEARCH 193
6.7 GUEST MANAGEMENT 197
6.8 POINT OF SALE 202
6.9 ACCOUNTING DOCUMENTS 218
6.10 ACCOUNTING PDF REPOSITORY 220
6.11 ACCOUNT MANAGEMENT 221
6.12 NIGHT AUDIT 226
6.13 INTERFACES WITH EXTERNAL DEVICES 228

7 HOTEL REPORTS 229

7.1 ACCOUNTING REPORTS 230
7.2 ROOMSTAY REPORTS 231
7.3 CHECK-INS & CHECK-OUTS REPORT 234

7.4 CHECK-INS REPORT 235
7.5 CHECK-OUTS REPORT 236
7.6 ACCOUNT REPORTS 237
7.7 TOTAL REVENUE PER DAY REPORT 243
7.8 TOTAL REVENUE PER MONTH REPORT 244
7.9 AGENT REVENUE PER MONTH REPORT 245
7.10 DUPLICATED GUESTS REPORT 246

8 CONFIGURE LOCAL VERSION 247

8.1 SET DATABASE SERVER 248
8.2 SET WEB SERVER 254
8.3 SET EMAIL SERVER 264
8.4 CONFIGURE XML FILES 268
8.5 CONFIGURE REPORT TEMPLATE FILES 272
8.6 CONFIGURE MULTI-ACCOUNTS 273

Table of Figures

FIGURE 1 – HOTELASP: HOTEL APPLICATION SERVICE PROVIDER 8
FIGURE 2 – HOTELASP: MARKETING, SALES AND OPERATIONS 8
FIGURE 3 - HOTELASP MAIN FEATURES 9
FIGURE 4 – HOTELASP CUSTOMERS: STAND-ALONE HOTELS, HOTEL CHAINS AND HOSPITALITY SERVICE PROVIDERS 9
FIGURE 5 – HOTELASP USER MANUAL: MAIN CHAPTERS 10
FIGURE 6 – HOTELASP STANDARD WEB PAGE LAYOUT 11
FIGURE 7 – WEB PAGE LAYOUT: FILTER AREA 12
FIGURE 8 – WEB PAGE LAYOUT: LIST AREA 12
FIGURE 9 – WEB PAGE LAYOUT: LIST AREA - SELECT ROW TO LOAD FORM DATA 12
FIGURE 10 – WEB PAGE LAYOUT: FORM AREA 13
FIGURE 11 – WEB PAGE LAYOUT: FORM AREA ORGANIZED BY BOXES 13
FIGURE 12 – REPORT AREA: HEADER CONTROLS 13
FIGURE 13 – REPORT LAYOUT 14
FIGURE 14 – SPECIAL FIELDS: LOOKUP 14
FIGURE 15 – SPECIAL FIELDS: CALENDAR 15
FIGURE 16 – SPECIAL FIELDS: COLOR SELECTOR 15
FIGURE 17 – SPECIAL FIELDS: POPUP 15

FIGURE 18 – SPECIAL FIELDS: HTML EDITOR 16
FIGURE 19 – SPECIAL FIELDS: PICTURE FILE MANAGEMENT 16
FIGURE 20 - SPECIAL FIELDS: UPLOAD PICTURE 16
FIGURE 21 – HOTEL SETUP: BASIC STEPS TO CONFIGURE THE HOTEL 17
FIGURE 22 – HOTEL WEBSITE: BOOKING PAGE EXAMPLE 19
FIGURE 23 – HOTEL ROOMS HIERARCHICAL STRUCTURE 21
FIGURE 24- ROOM TYPE IN THE HOTEL BOOKING PAGE 24
FIGURE 25 – ACCOUNTING DOCUMENT TEMPLATES 40
FIGURE 26 - DOCUMENT TEMPLATE: INVOICE AND CREDIT NOTE 44
FIGURE 27 – DOCUMENT TEMPLATE: RECEIPT AND REFUND NOTES 44
FIGURE 28 – DOCUMENT TEMPLATE: INVOICE AND RECEIPT 45
FIGURE 29 – DOCUMENT TEMPLATE: DOCUMENTS SUMMARY REPORT 45
FIGURE 30 – DOCUMENT TEMPLATE: CHECK-IN 46
FIGURE 31 - HOTELASP AUTHORIZATIONS: USERS ROLES VERSUS ACCESSES 59
FIGURE 32 - HOTELASP AUTHORIZATIONS: STANDARD USER ACCESSES 59
FIGURE 33 – USERS, ROLES AND AUTHORIZATIONS: ADVANCED SETTINGS 61
FIGURE 34 – ROOM PRICING: SETUP BASIC STEPS 65
FIGURE 35 - PRICING PLANS 65
FIGURE 36 – ROOM PRICING: DATA MODEL 66
FIGURE 37 – PRICING PLAN: EXAMPLE OF A PROBLEM IN THE AGENT PLANS OF A SPECIFIC ROOM RATE 66
FIGURE 38 - PRICING PLAN: STRUCTURE EXAMPLE 72
FIGURE 39 – PRICING PLAN: EXAMPLE OF AN AGENT PLAN 72
FIGURE 40 - REVENUE MANAGEMENT PAGE LAYOUT 81
FIGURE 41 - REVENUE MANAGEMENT PAGE EXAMPLE 81
FIGURE 42 – HOTEL WEBSITE: CONFIGURATION STEPS 84
FIGURE 43 – HOTEL WEBSITE: MAIN LINKS 84
FIGURE 44 - HOTEL WEBSITE: DEFAULT PAGES 85
FIGURE 45 - HOTEL WEBSITE: PAGE LAYOUTS 85
FIGURE 46 – HOTEL WEBSITE: HOME PAGE LAYOUT 86
FIGURE 47 - HOTEL WEBSITE: BOOKING PAGE LAYOUT 87
FIGURE 48 - HOTEL WEBSITE: LOCATION PAGE LAYOUT 88

FIGURE 49 - HOTEL WEBSITE: PHOTOS PAGE LAYOUT 89
FIGURE 50 - BOOKING PAGE LAYOUT 96
FIGURE 51 – HOTEL WEBSITE: MASTER PAGE LAYOUT 104
FIGURE 52 - MASTER PAGE EDIT AREA 104
FIGURE 53 - MASTER PAGE: WORKAREA MANAGEMENT OF THE CONTENT AREAS 105
FIGURE 54 - WORKAREA LAYOUT 110
FIGURE 55 - WORKAREA AUTHORIZATIONS 110
FIGURE 56 – MARKETING CAMPAIGN TYPES 125
FIGURE 57 – MARKETING CAMPAIGNS: BASIC STEPS 125
FIGURE 58 – GUEST LOYALTY LOOP 126
FIGURE 59 – ADWORDS CAMPAIGNS: GENERATE TRAFFIC TO YOUR WEBSITE 132
FIGURE 60 - ADWORDS CAMPAIGNS: PAGE LAYOUT 132
FIGURE 61 – ADWORDS CAMPAIGNS: SALES FUNNEL 133
FIGURE 62 – ADWORDS CAMPAIGN CYCLE 133
FIGURE 63 - EMAIL CAMPAIGNS 143
FIGURE 64 - EMAIL CAMPAIGNS: BASIC CONFIGURATION STEPS 143
FIGURE 65 - EMAIL CAMPAIGN LAYOUT 143
FIGURE 66 – HOTEL WEBSITE: FROM LOOK TO BOOK 150
FIGURE 67 – HOTEL WEBSITE: DIRECT BOOKING WORKFLOW 150
FIGURE 68 - GUEST PRIVATE SITE 151
FIGURE 69 – DIRECT BOOKING: A GUEST PERSPECTIVE EXAMPLE 154
FIGURE 70 - HOTELASP OPERATIONS 165
FIGURE 71 - ROOMSTAY LIFE CYCLE 165
FIGURE 72 - ROOMSTAY LIFE CYCLE: PAGE EXAMPLES 166
FIGURE 73 - OPERATIONS DATA MODEL 166
FIGURE 74 – HOTELASP OPERATIONS: MAIN REPORTS 167
FIGURE 75 – HOTEL OPERATIONS: FROM BOOKING TO CHECK-OUT AN EXAMPLE OF A ROOMSTAY LIFE CYCLE 168
FIGURE 76 - ROOMSTAY MODEL 169
FIGURE 77 – ROOMSTAY MAIN OPERATIONS 169
FIGURE 78 - ROOMSTAY MAIN OPERATIONS: EXAMPLES 176
FIGURE 79 – CALENDAR LAYOUT 187

FIGURE 80 - GUEST DASHBOARD 197

FIGURE 81 – POINT OF SALE PAGE LAYOUT 202

FIGURE 82 – POINT OF SALE PAGE DETAILED LAYOUT 203

FIGURE 83 – ACCOUNT PAGE: HOW TO USE EXAMPLES 208

FIGURE 84 – ACCOUNT TRANSACTION DATA MODEL 228

FIGURE 85 - MAIN REPORTS 229

FIGURE 86 – REPORT HEADER: PRINT AND EXPORT TO PDF, WORD AND EXCEL 229

FIGURE 87- CONFIGURE LOCAL VERSION: MAIN STEPS 247

1 INTRODUCTION

This document is the user manual of the HotelASP. The HotelASP provides hotel software services to improve the marketing, sales and operations of hotels and establishments offering accommodation or lodging. The HotelASP software can be used as a cloud service or can be downloaded and installed locally.

Figure 1 – HotelASP: Hotel Application Service Provider

The HotelASP cloud service is available online at www.hotelasp.com as a web based hotel management software service and as a hotel marketing software service to manage the hotel marketing, hotel front-office and back-office operations.

The HotelASP is available for download at the www.hotelmanagementsystem.com site and can be installed in your local computer or servers. The local version of HotelASP is called Hotel Management System v3.0 and is web based, internet host ready, scalable and ready for unlimited users, rooms and guests.

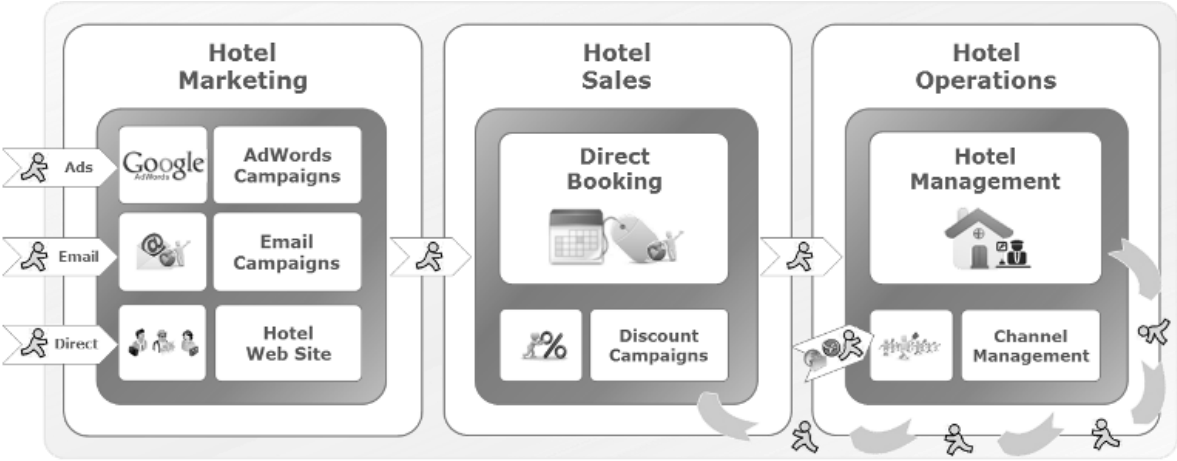


Figure 2 – HotelASP: Marketing, Sales and Operations

The hotel digital marketing features include a custom website with online booking, online advertisement campaigns and email marketing campaigns integrated with real-time bookings and operations.

The software main features include booking and room stay management, yield management, day rate management, booking calendar, guest relationship management, folio management and accounting documents such as invoices and receipts.

HotelASP offers cost reduction and increased revenue by better customer relationship management, hotel management operations and improved channel coverage. All these totally integrated with hotel front-office and back-office management.

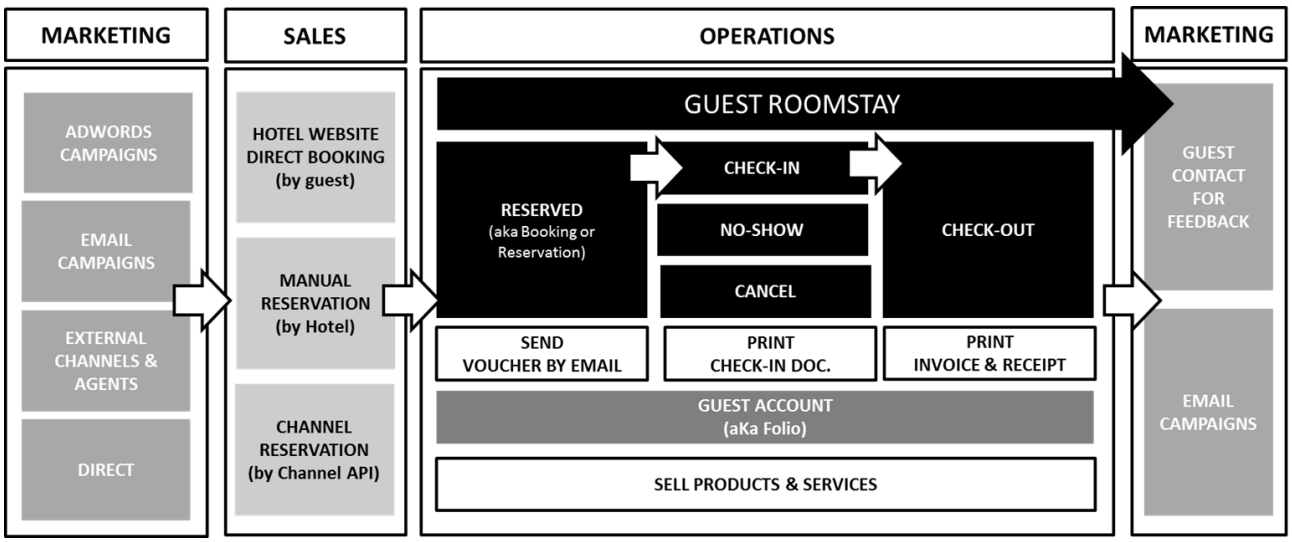


Figure 3 - HotelASP Main Features

The first steps after creating an online account in www.hotelasp.com or installing the local version in the hotel computer or server is to setup the hotel, the pricing and the website. These steps are described in chapter 2 - SETUP HOTEL, chapter 3- SETUP ROOM PRICING and chapter 4 - SETUP WEBSITE.

The chapter 5 - HOTEL MARKETING & SALES, chapter 6 - Hotel operations and chapter 7 - HOTEL REPORTS describes the hotel day to day operations. The hotel setup and operations features are common to the online and local versions.

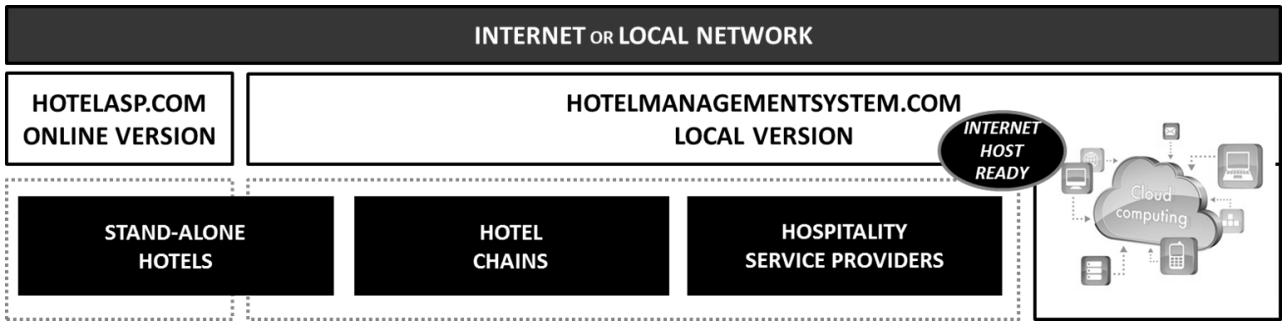


Figure 4 – HotelASP Customers: Stand-Alone Hotels, Hotel Chains and Hospitality Service Providers

The hotel can host the local version in a dedicated server with internet access and thus accessing to the benefits of the online version, such as for example the hotel website and the direct booking.

The local version is suitable to hotel chains that are managing groups of hotels and need a cloud service to integrate all the managed hotels in one system.

The local version is also suitable for companies that want to provide this kind of cloud services to hotels or customers with similar needs. The CONFIGURE MULTI-ACCOUNTS chapter explains how to configure the system for the multi-account service.

1.1 MANUAL STRUCTURE

The manual is organized in a top-down approach by first addressing the main aspects of the system setup and then addressing the hotel management operations.

Figure 5 – HotelASP User Manual: Main Chapters

Each main chapter starts with a brief introduction that includes an overview of the activities need to accomplish the task and for each activity there is a description of the web page (aka *Workarea*) associated with that activity.

The activity chapters are used to describe the web pages and include the following topics:

- ***Introduction*** – describes succinctly the web page.

- ***Page Location*** - the location of the page in the system by locating visually the page in the top navigation menu;
  Locate – the hand icon identifies the location of the page in the system.

- ***Page Description*** - a visual description of the page, including the use of the following objects:
  Tn Field – identifies a page field. These fields are described in the field's chapter.
  - ***T*** – Identifies the page section (e.g. *1, 2, 3, …*).
  - ***n*** – Identifies the field inside the page section (e.g. *a, b, c, d, …*).

  Fn Function – identifies a page function. The ***n*** identifies the function.

  Important Zone – identifies an important area or zone of the page.

  NOTE Note – a comment about a zone or an object of the page.

- ***Fields*** - describes the fields enumerated as ***Tn*** in the page description chapter;
  Required Required Field – this field is required to fulfill the page main functions.

  Read Only Read Only – this field cannot be updated by the hotel.

  Public Public – the content of this field is public and available in the internet.

- ***Functions*** – describes the functions enumerated as ***Fn*** in the page description chapter.

1.2 WEB INTERFACE

The HotelASP web user interface page is structured and divided in three main areas, namely:

- Header navigation zone;
- Page view;
- Bottom navigation zone.

This structure is common in all the standard pages and facilitates the user interaction with the system. The layout is show in the figure below.

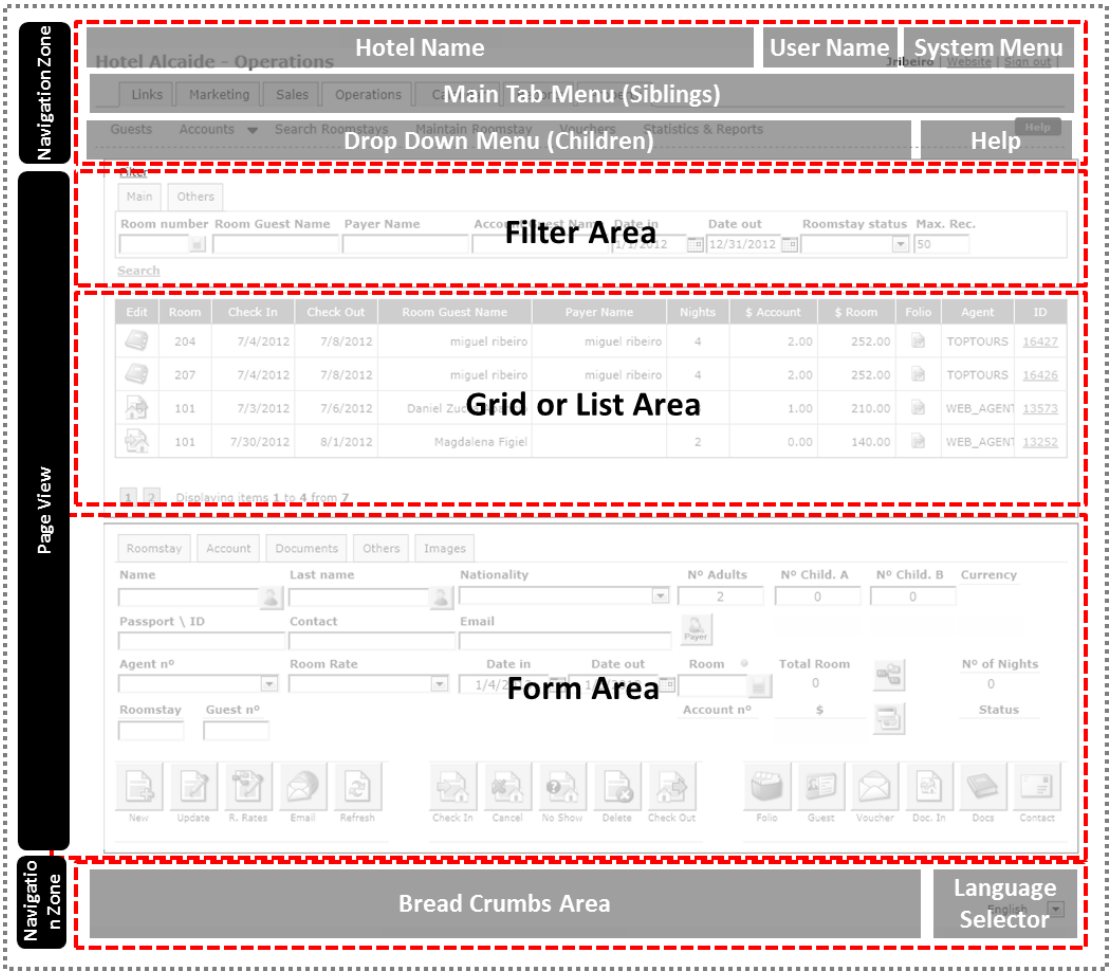


Figure 6 – HotelASP Standard Web Page Layout

The navigation is organized in a hierarchical tree where the tab menu shows the sibling's pages and parent's pages of the selected page and the drop down menu shows the children pages. Most of the pages have a filter area, a grid area and a form area.

The filter zone in most pages is not selected and it is hidden. The hotel to make the filter zone visible must click in the link "Filter". The filter fields can be organized in tabs.

The rows in the list area can be selected, sorted and paged. The hotel to load data into the form area must select a row from the list area. The fields of the form area can be organized in tabs. The bottom part of the form area is used for functions (buttons or links). The HotelASP standard web page is also known as *WorkArea*.

1.2.1 FILTER AREA

The filter area is composed by fields and a "search" button. The "Max. Rec." field is present in some filter areas and allows to select the maximum number of rows that will be retrieved from the database.

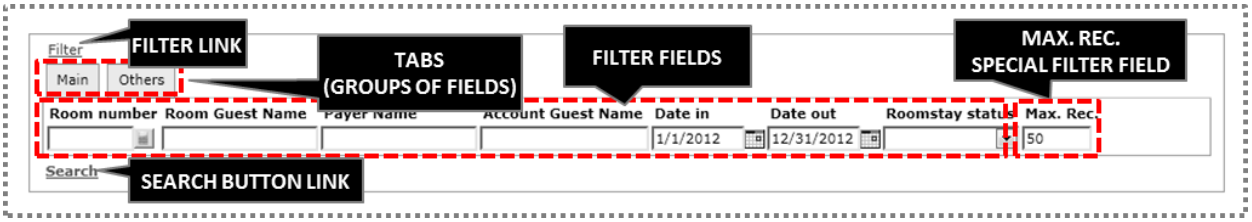


Figure 7 – Web Page Layout: Filter Area

The filter area determines what is displayed in the list area

1.2.2 LIST AREA

The information shown in the list depends of the criteria's selected in the filter area. The list or grid area allows the user to select the row to be loaded in the form area.

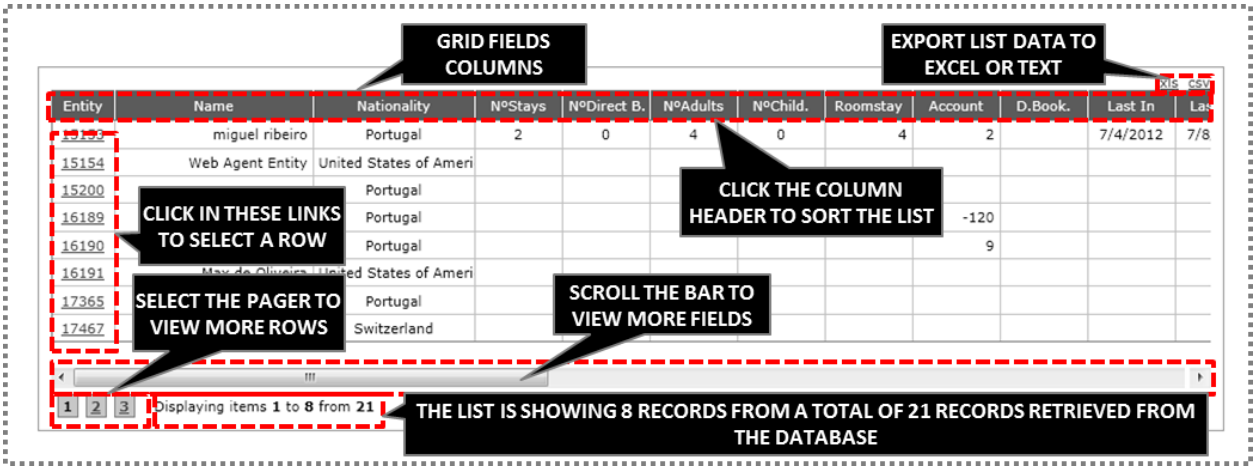


Figure 8 – Web Page Layout: List Area

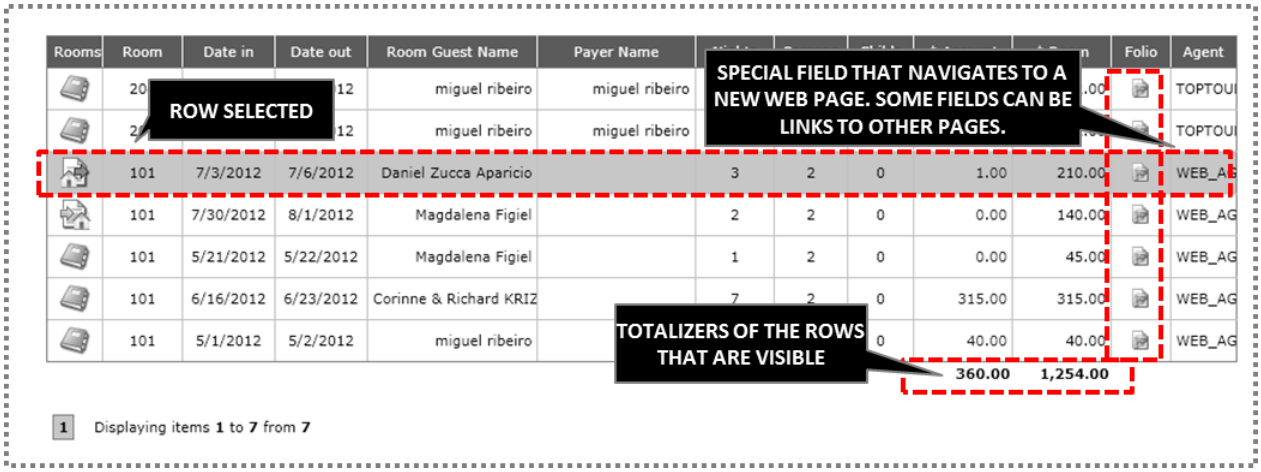


Figure 9 – Web Page Layout: List Area - Select Row to Load Form Data

1.2.3 FORM AREA

The user must first select a row in the list area to fill the form data. The form area allows the user to change the data and save it to the database.

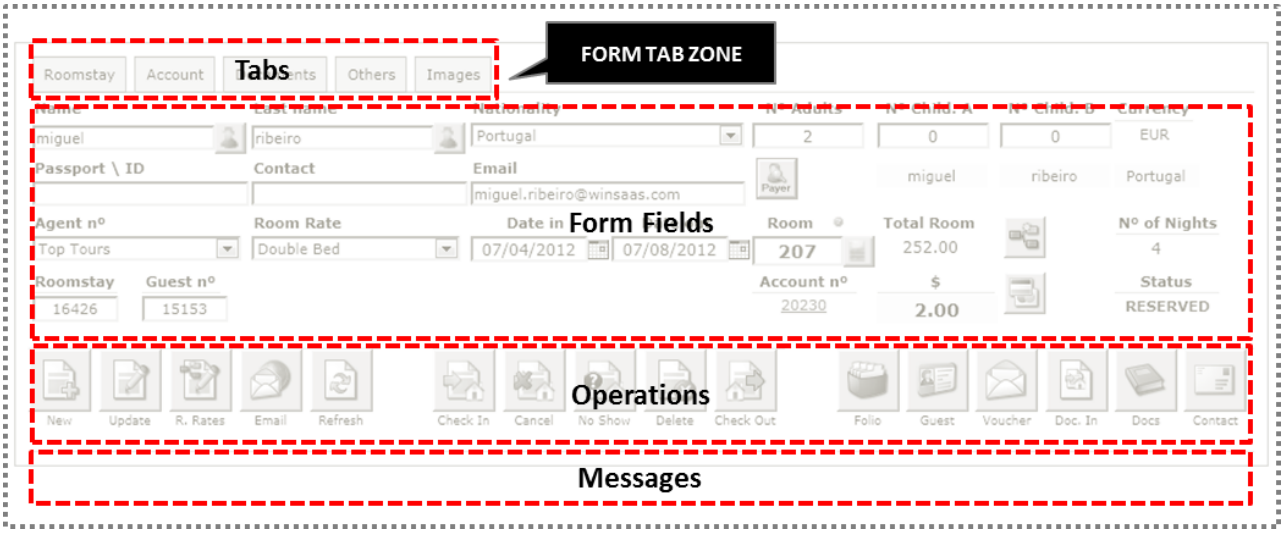


Figure 10 – Web Page Layout: Form Area

The form area can also be organized by box areas as shown in the figure below.

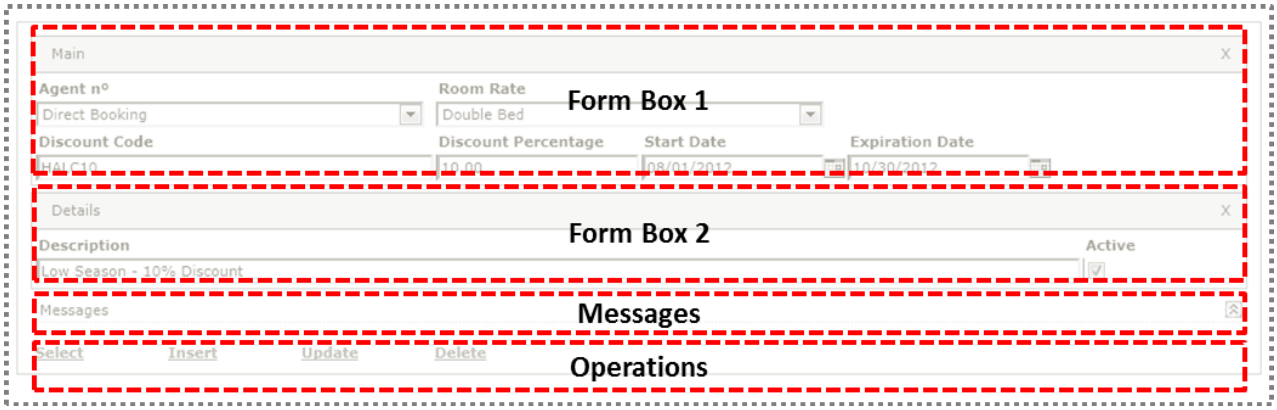


Figure 11 – Web Page Layout: Form Area Organized by Boxes

1.2.4 REPORT AREA

The report area is used to show, print and export documents. The report header bar is available in the top of the document and provides functions such as export to PDF, Excel or Word or print the document.

Figure 12 – Report Area: Header Controls

There are some situations where the browser chrome and Firefox don't show the "*Print*" button. In those cases the hotel needs to export the document to PDF and then print the document.

The report area has the following layout.

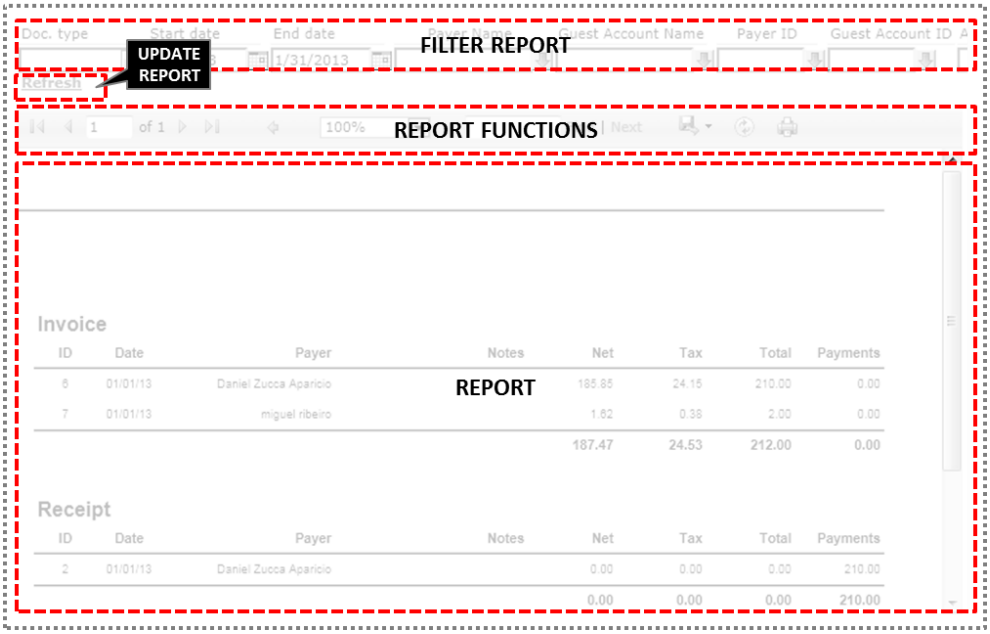


Figure 13 – Report Layout

1.2.5 SPECIAL FIELDS

The HotelASP interface uses several specific field and button types such as the lookup field or the popup button. The following chapters describe some of the most important fields used in the HotelASP interface.

1.2.5.1 LOOKUP FIELD

The lookup table is shown when the user starts filling the field text or clicks in the lookup button. The rows listed in the lookup table are filtered accordingly to the data filled. In this example if the user fills *10* then the lookup table will show all rooms that have numbers started with *10*.

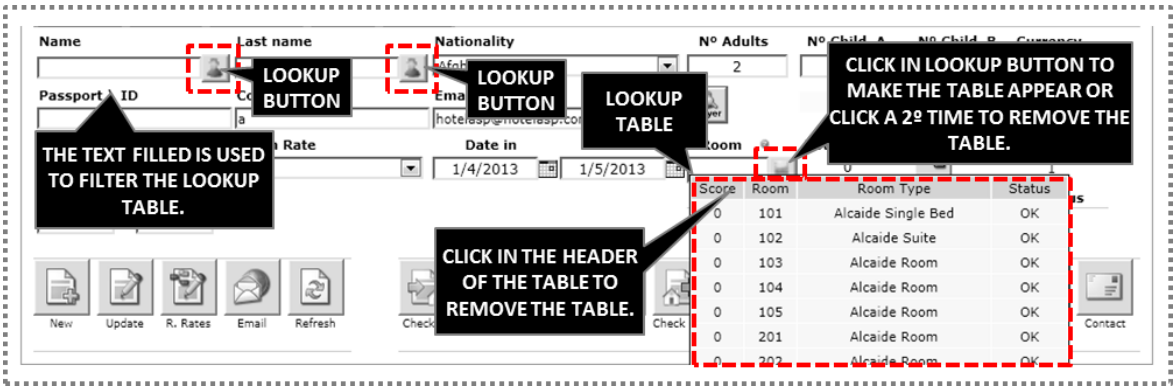


Figure 14 – Special Fields: Lookup

1.2.5.2 CALENDAR FIELD

The calendar field allows the user to select a date.

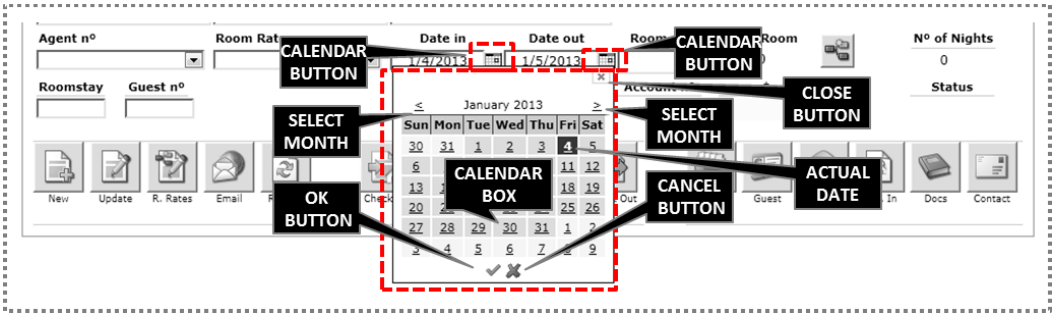


Figure 15 – Special Fields: Calendar

1.2.5.3 COLOR FIELD

The color field allows the user to select a color.

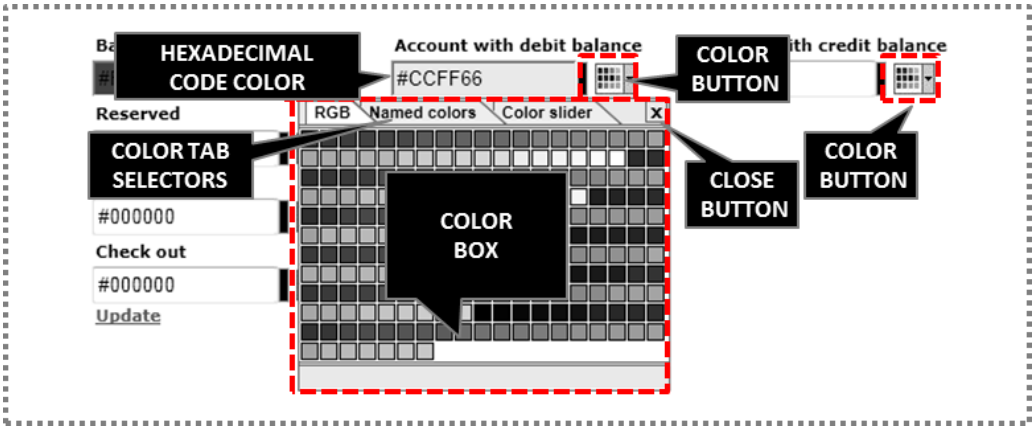


Figure 16 – Special Fields: Color Selector

1.2.5.4 POPUP BUTTON

The popup button launches a popup window. To close the user must click in the "close" button.

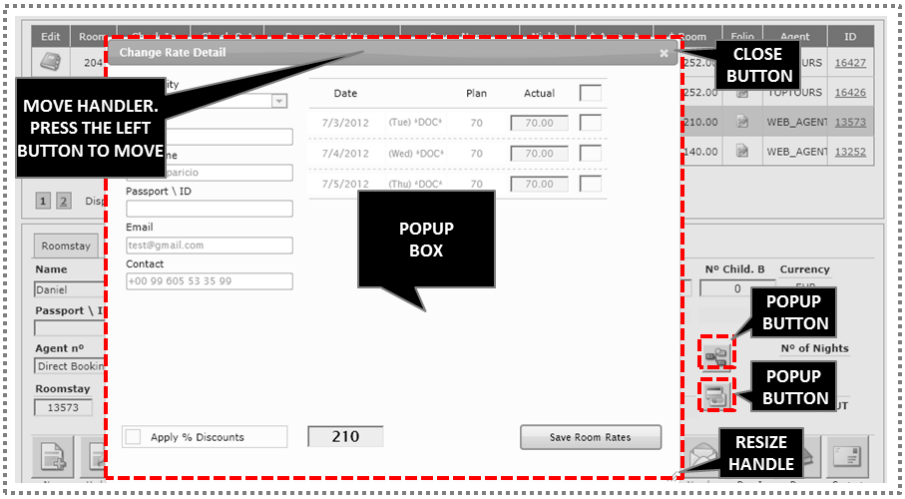


Figure 17 – Special Fields: Popup

1.2.5.5 HTML EDITOR & FILE MANAGEMENT FIELD

The html editor allows the hotel to edit HTML content and manage the pictures files.

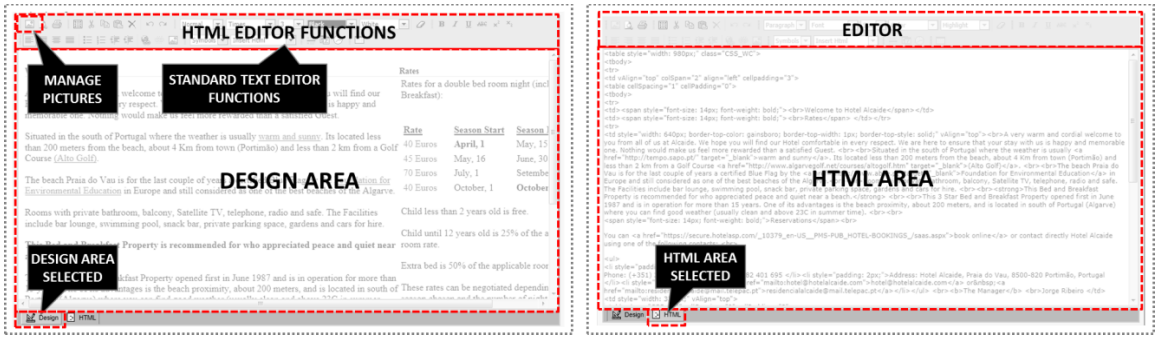


Figure 18 – Special Fields: Html Editor

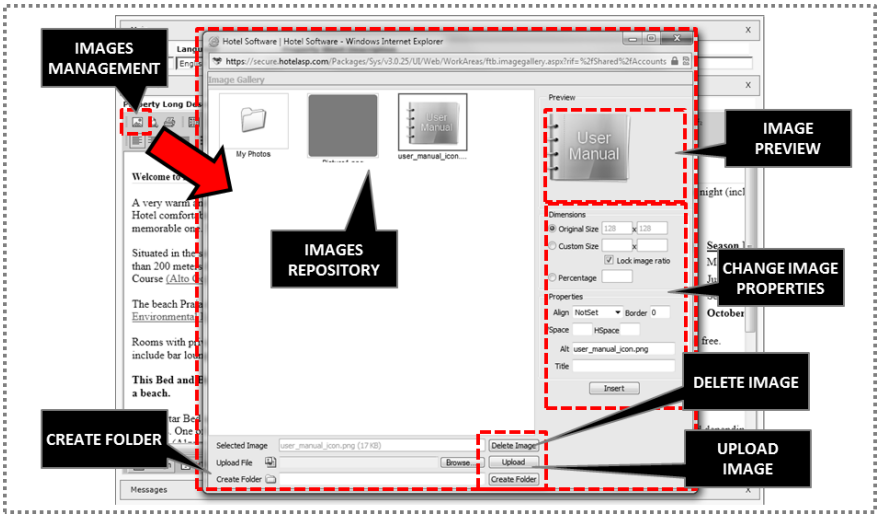


Figure 19 – Special Fields: Picture File Management

1.2.5.6 UPLOAD PICTURE FIELD

The upload picture field allows the user to upload a picture.

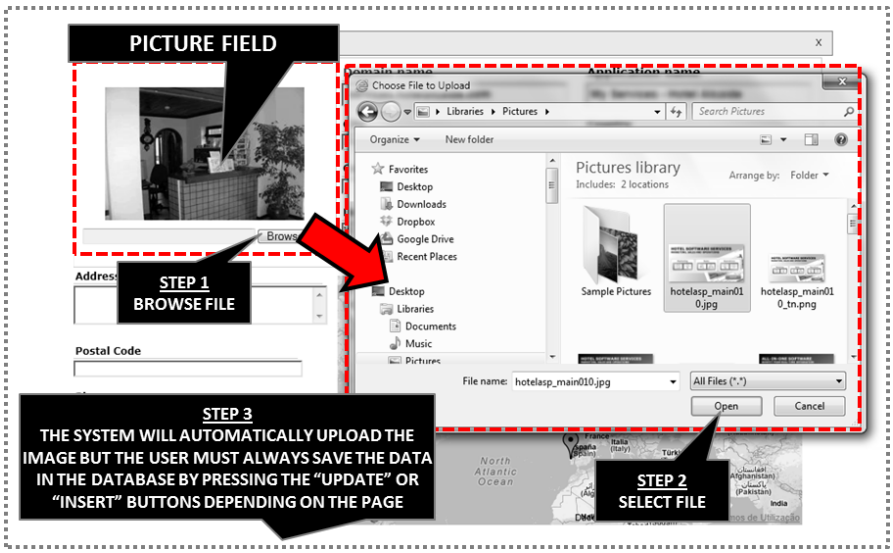


Figure 20 - Special Fields: Upload Picture

2 SETUP HOTEL

The first setup task is to configure the hotel and the rooms. The initial configuration is already configured with default buildings, floors and rooms. These objects should be replaced by the hotel own custom configuration. We recommend the hotel not to delete the already created objects but to reuse them with the hotel own information. The figure below illustrates the activities required to accomplish the hotel setup.

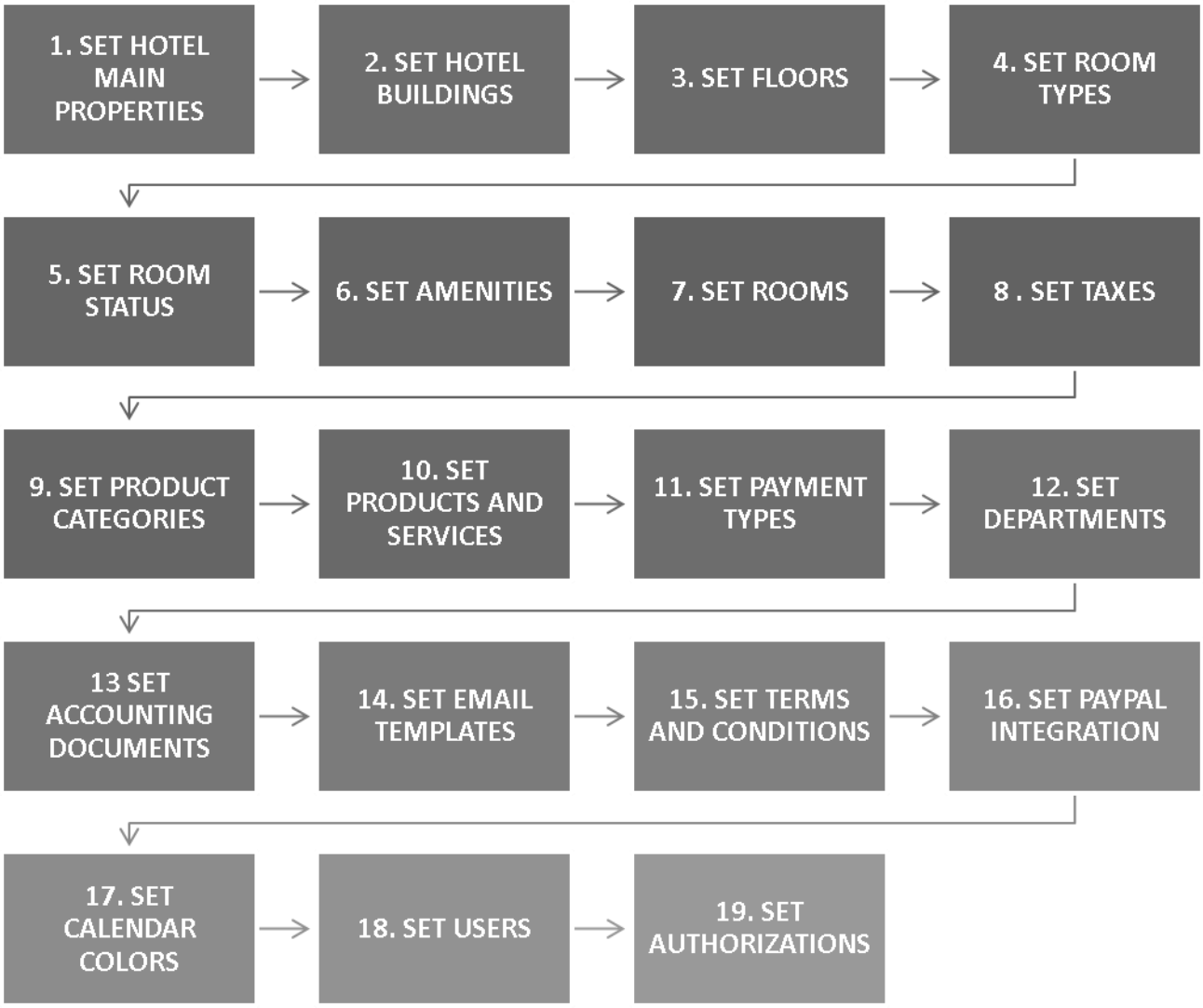


Figure 21 – Hotel Setup: Basic Steps to Configure the Hotel

The steps between 1 and 13 are required for the initial setup. The steps 14 to 17 are not required but are recommended.

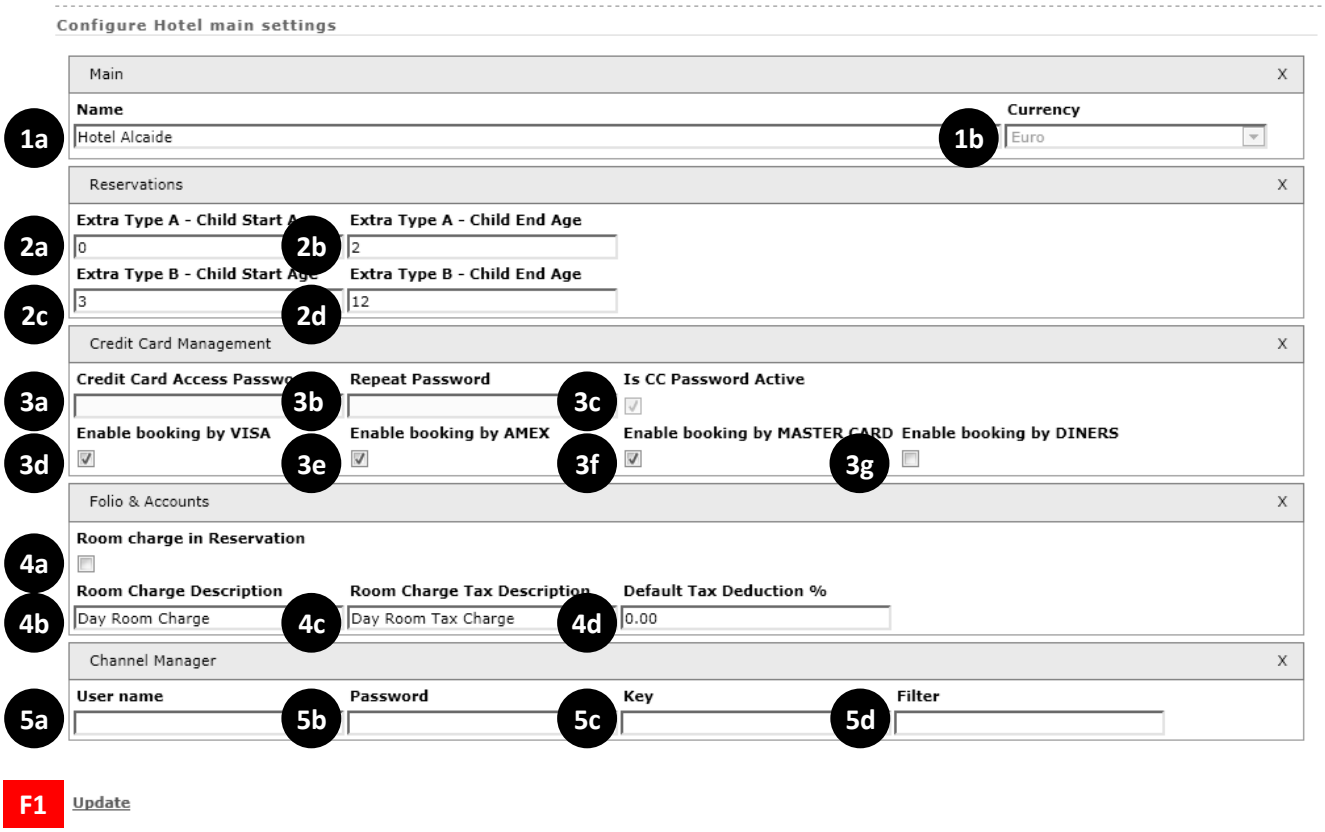
The hotel when setting up should take in consideration that the deletion of objects (for example: buildings, floors, rooms, room types, room status, etc.) can only be accomplished if the object to be deleted is not connected to any other objects. For example: if you try to delete a room that is connected with a booking object the system will warn of that situation and prevent the deletion.

2.1 SET HOTEL MAIN PROPERTIES

This page allows the hotel to set the main properties of the system.

Page Location

Page Description



2.1.1 FIELDS

1) Main

Required a. ***Name*** – the hotel name. It's used in the top page header, report headers and also used in some public site templates.

Required b. ***Currency*** – the hotel currency code.

2) Reservations

Public a. ***Extra Type A - child start age*** – the start age of children of group type A. This starting age is displayed in the booking page of the hotel website.

i. The booking requires the user to set the number of adults and the number of children. The children are divided in two generic groups, namely group A and group B. These groups exist to give the hotel more flexibility to set different prices

accordingly to the age of the children. For example: group A can be children from 0 to 2 years old and group B can be children from 3 to 12 years-old.

Public b. ***Extra Type A - child end age*** – the end age of children of group type A.

i. This ending age is displayed in the booking page of the hotel website.

Public c. ***Extra Type B - child start age*** – the start age of children of group type B.

i. This starting age is displayed in the booking page of the hotel website.

Public d. ***Extra Type B - child end age*** – the end age of children of group type B.

i. This ending age is displayed in the booking page of the hotel website.

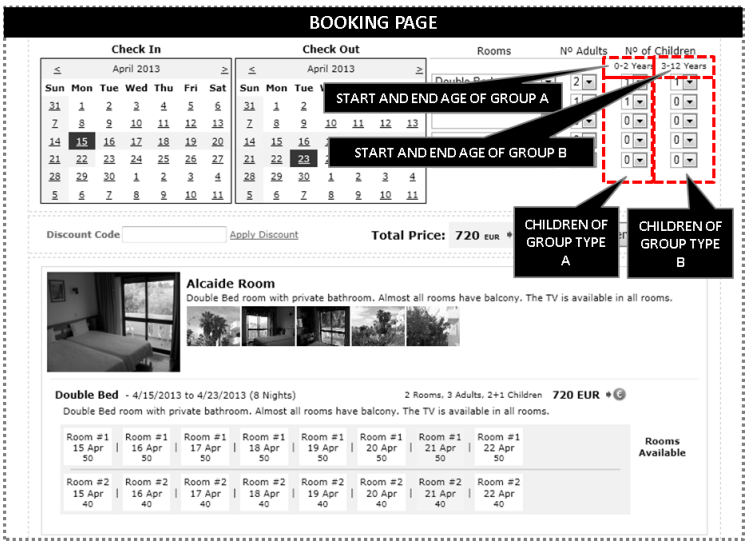


Figure 22 – Hotel Website: Booking Page Example

3) Credit Card Management

a. ***Credit Card Access password*** – the access password to protect the credit card information.

i. Fill the password to protect the access to the credit card information in the booking, reservations and folio pages.

ii. If "Is CC Password Active" field is checked then the password is already set and the credit card data is already being encrypted with the password.

iii. If the hotel changes the password then the data saved with the previous password will not be accessible anymore.

iv. This field is always blank even if the hotel already changed the password.

b. ***Repeat password*** – repeat the password filled in "access password" field.

c. ***Is CC Password Active*** – is checked if the credit card password is active.

i. This field is active if the hotel already saved an access password.

ii. After the hotel created an access password the system will encrypt the new credit card data with the new password.

iii. After setting a new password the hotel cannot access any more the card information saved with the previous password.

Public d. ***Enable VISA option*** – shows or hides the VISA option in the hotel public booking page.
   i. Use this to restrict the credit card types available to the online bookers.

Public e. ***Enable AMEX option*** – shows or hides the AMEX option in the hotel public booking page.
   i. Use this to restrict the credit card types available to the online bookers.

Public f. ***Enable MASTER CARD option*** – shows or hides the MASTER CARD option in the hotel public booking page.
   i. Use this to restrict the credit card types available to the online bookers.

Public g. ***Enable DINERS option*** – shows or hides the DINERS in the hotel public booking page.
   i. Use this to restrict the credit card types available to the online bookers.

4) Folio and Accounts

a. ***Room charge in Reservation*** – enables the system to process the room night charges in the guest folio when the booking is created.
   i. If disabled the system process the room night charges when the hotel does the check in.
   ii. A room night charge is an accounting transaction that is automatically launched by the system into the guest account and corresponds to a room night stay.

b. ***Room charge description*** – the description used in the room night charge transaction.
   i. This description appears in documents delivered to the guests, such as invoices.

c. ***Room charge tax description*** – the description used in the tax transactions associated with the room night charges.
   i. This description appears in documents delivered to the guests, such as invoices.

d. ***% of default tax deduction*** –a tax deduction to all tax calculations processed by the system.

5) Integration with external channel manager – these credentials are given by the external channel manager. Contact the system administrator at hotelasp@hotelasp.com for more information

a. ***User name*** – the user name provided by the external channel manager to access the external API. This is applicable only to the account that subscribed this service.

b. ***Password*** – the password provided by the external channel manager to access the external API. This is applicable only to the account that subscribed this service.

c. ***Key*** – the key provided by the external channel manager to access the external API.

d. ***Filter*** – the filter code provided by the external channel manager to access the external API.

2.1.2 FUNCTIONS

1) Update – saves the data in the database.

2.2 SET HOTEL BUILDINGS

This page allows the hotel to manage the buildings associated with the hotel. The hotel rooms are organized or grouped by in floors and the floors are grouped by in buildings.

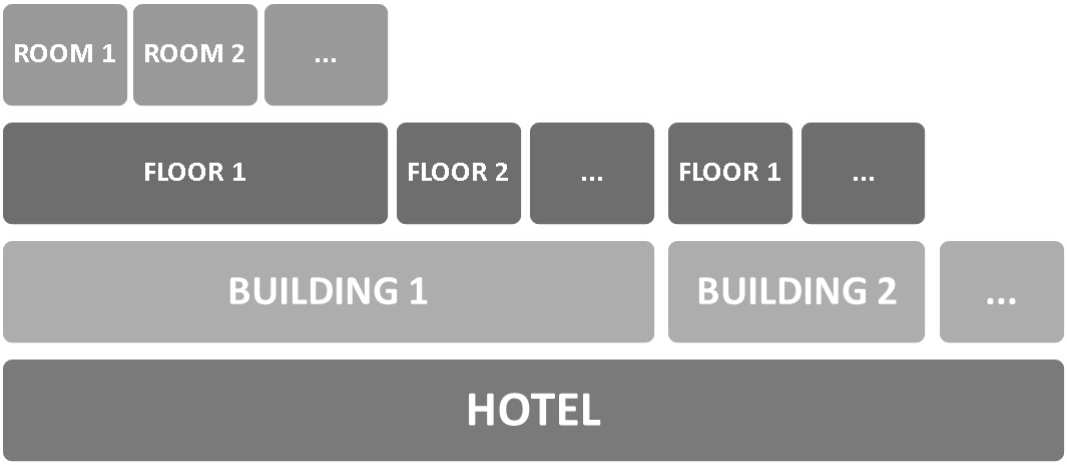
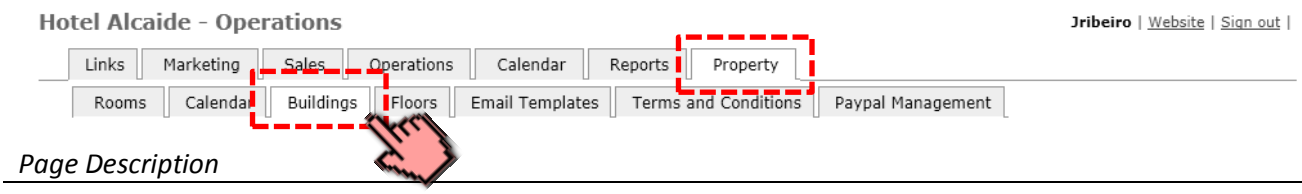


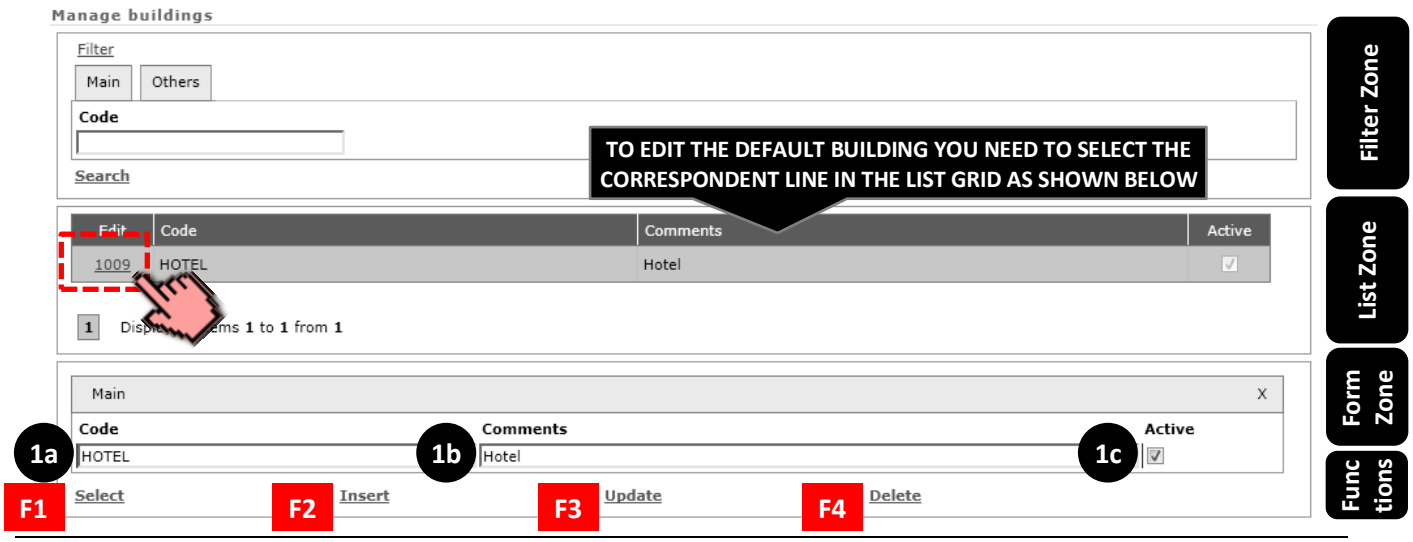
Figure 23 – Hotel Rooms Hierarchical Structure

The buildings and floors are used to organize the hotel rooms in a hierarchical structure, namely: the hotel has buildings, a building has floors and a floor has rooms. This hierarchical layout is used for example in the CALENDAR VIEW page.

Page Location



Page Description



2.2.1 FIELDS

1) **Main – Update the data associated with the selected row.**

Required a. ***Code*** – the code name of the building.

i. It should be human readable and easy to understand.

b. ***Comments*** – Comments about the building.

c. ***Active*** - to enable or disable the building from being used and shown by the system.

2.2.2 FUNCTIONS

1) ***Select*** – get the data from the database that is associated with the selected row.
   - **a.** It's used to refresh the data loaded into the form.
   - **b.** The same function can be accomplished by clicking in the "Edit" cell of the selected row.

2) ***Insert*** – creates a new building in the system and a new row appears in the list.

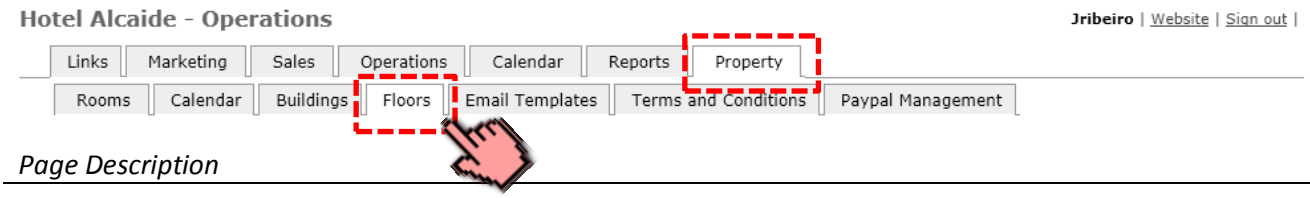
3) ***Update*** – saves the form data of the selected row in the database.

4) ***Delete*** – deletes the building from the system if the building is not connected to any floors.

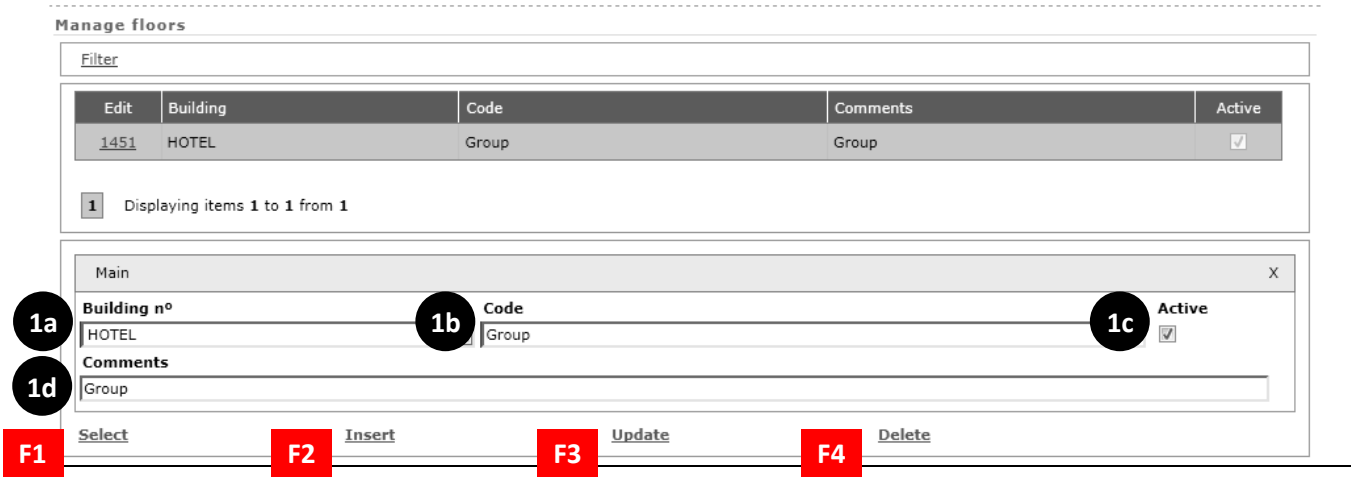
2.3 SET BUILDING FLOORS

Set the floors of the hotel buildings. The floors are used to organize the hotel rooms. A floor can also be considered as a zone or area of a hotel building.

Page Location



Page Description



2.3.1 FIELDS

1) **Main – Update the data associated with the selected row.**

Required a. ***Building*** – the building associated with the floor.

Required b. ***Code*** – the floor code.

i. A human readable code to identify the floor. It's used in the calendar view.

c. ***Active*** – shows or hides the floor.

d. ***Comments*** – comments about the floor.

2.3.2 FUNCTIONS

1) ***Select*** – get the data from the database that is associated with the selected row.

2) ***Insert*** – creates a new floor in the system.

3) ***Update*** – saves the form data in the database.

4) ***Delete*** – deletes the floor from the system if the floor is not connected to any rooms.

2.4 SET ROOM TYPES

This page allows the hotel to define the room types available. A hotel has rooms and each room belongs to a room type. The room type is also used and shown in the public booking page as shown in the figure below.

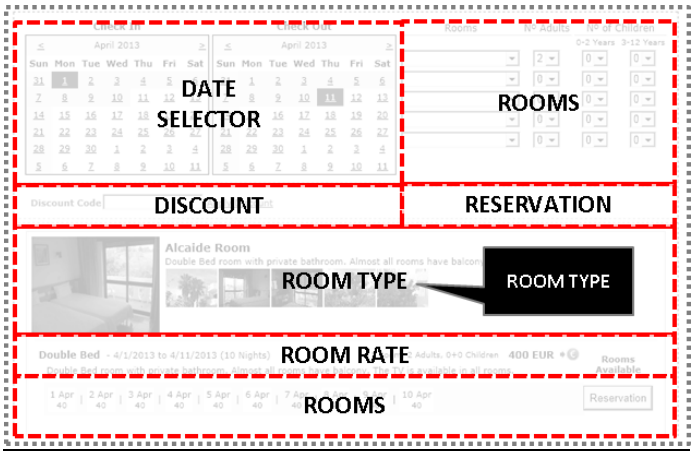
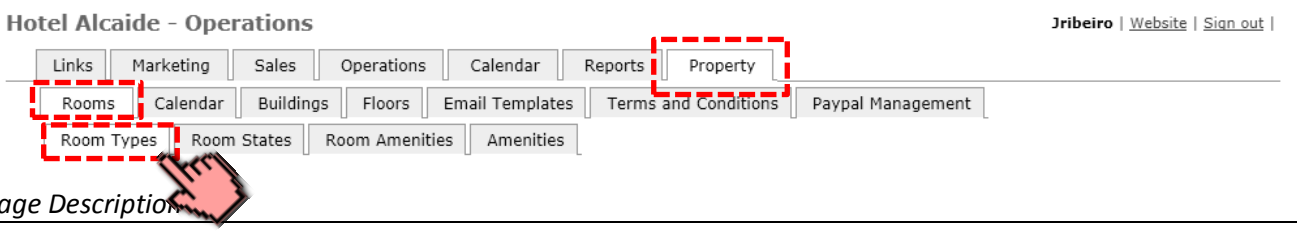
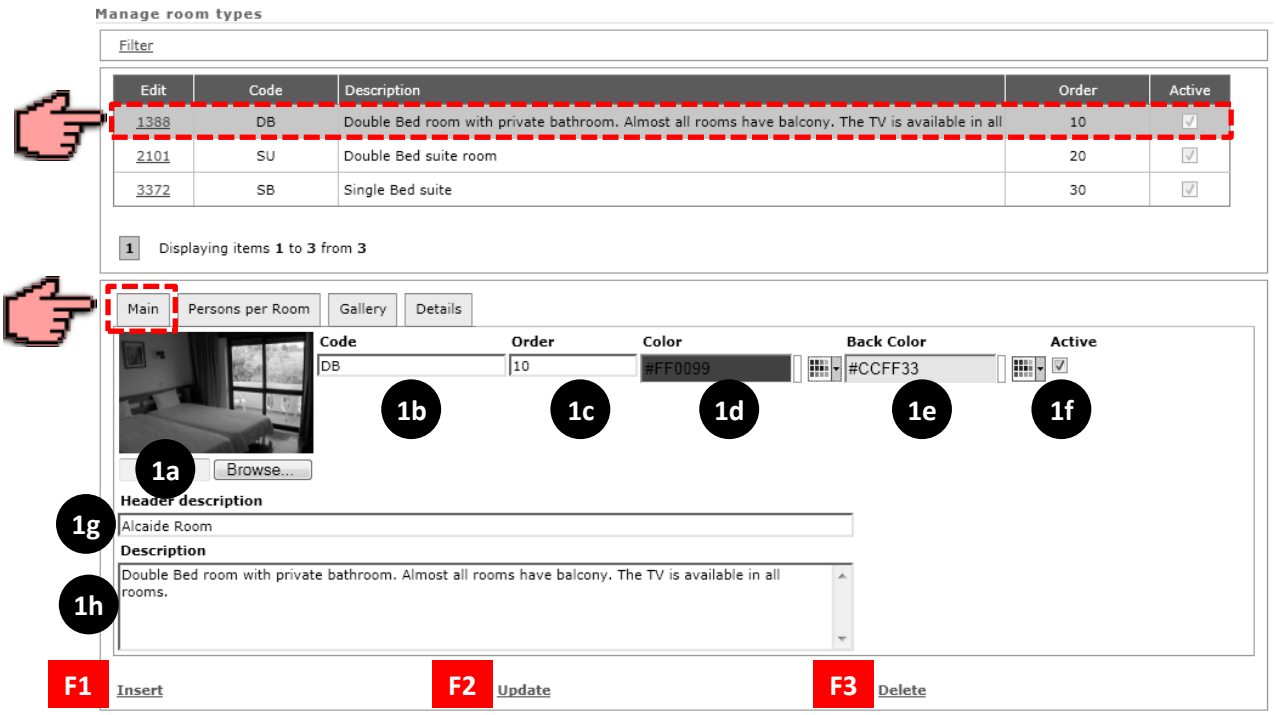


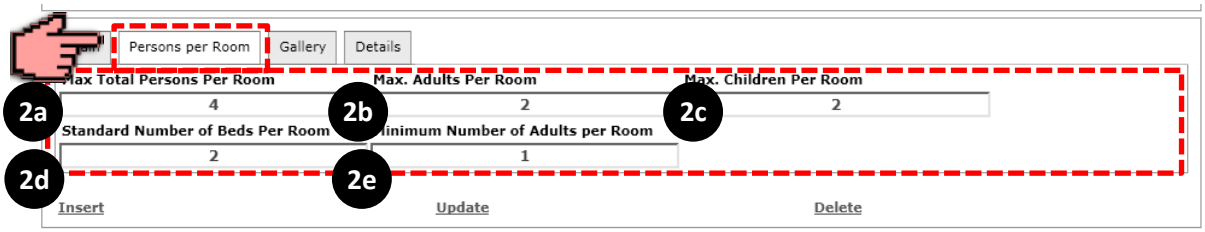
Figure 24- Room Type in the Hotel Booking Page

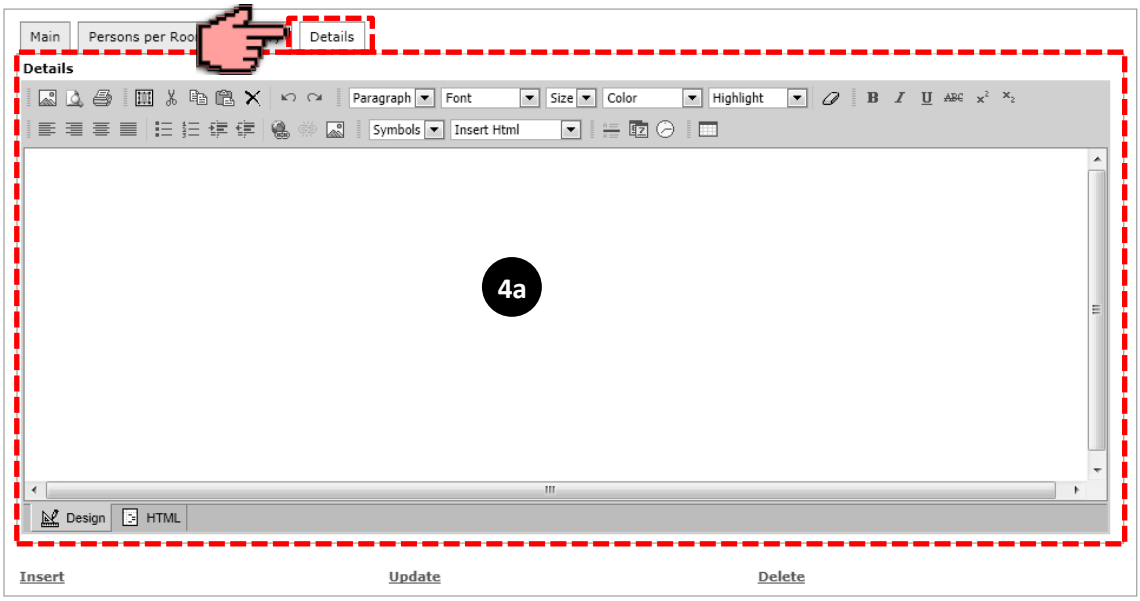
Page Location



Page Description







2.4.1 FIELDS

1) Main

Required Public a. ***Main Picture*** – the main picture associated with the room type.

i. This picture is shown in the public booking page.

Required b. ***Code*** – an internal code to identify the room type.

i. It's used in the calendar view.

Required c. ***Order*** – the room type order.

i. The room types with the highest order are shown first.

Public d. ***Color*** – The font color of the room type description used in the booking page.

Public e. ***Back color*** – the back color of the room type description used in the booking page.

f. ***Active*** – shows or hides the room type.

Required Public g. ***Header description*** – a short description of the room type.

i. It's used in the booking page.

Required Public h. ***Description*** – a long description of the room type.

i. This description is shown below the "header description" in the booking page. Also the "Color" and "Back color" are applied only to this data.

2) Persons per Room

TOTAL OF PERSONS = NUMBER OF ADULTS + NUMBER OF CHILDREN.
NUMBER OF CHILDREN = NUMBER OF CHILDREN OF GROUP TYPE A + NUMBER OF CHILDREN OF GROUP TYPE B

Required a. ***Max. Total Persons per Room*** – defines the maximum number of persons allowed per room, including adults and children.

Required b. ***Max. Adults Per Room*** – defines the maximum number of adults allowed per room.

Required c. ***Max. Children Per Room*** – defines the maximum number of children allowed per room.

i. This includes all type of children (group type A and group type B).

Required d. ***Standard Number of Beds Per Room*** – defines the number of beds per room and is used to understand the need of extra beds.

Required e. ***Min Number of Adults per Room*** – defines the minimum number of adults per room.

3) Gallery – Additional pictures associated with the room type.

Public a. ***Picture 1*** – an additional picture of the room type.

Public b. ***Picture 2*** – an additional picture of the room type.

Public c. ***Picture 3*** – an additional picture of the room type

Public d. ***Picture 4*** – an additional picture of the room type

Public e. ***Picture 5*** – an additional picture of the room type

Public f. ***Description 1*** – the description of the room type additional picture.

Public g. ***Description 2*** – the description of the room type additional picture.

Public h. ***Description 3*** – the description of the room type additional picture.

Public i. ***Description 4*** – the description of the room type additional picture.

Public j. ***Description 5*** – the description of the room type additional picture.

4) Details

Public a. ***Detail*** – More detailed information about the room type.

i. This information is accessible by the user by clicking in the "+ info" button that is located below the pictures gallery.

2.4.2 FUNCTIONS

1) ***Insert*** – creates a new room type.

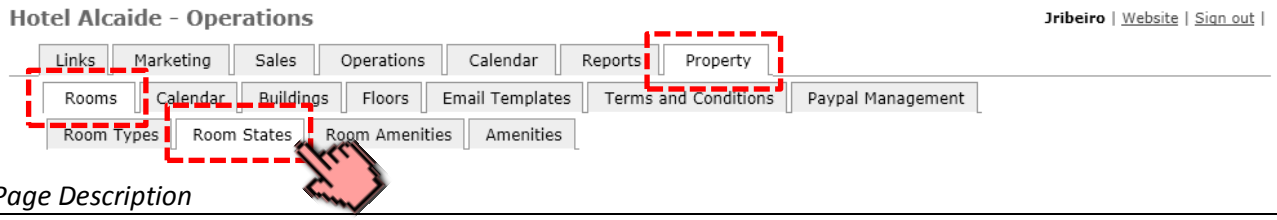
2) ***Update*** – saves the form data in the database.

3) ***Delete*** – deletes the record from the system if the room type is not connected to any rooms.

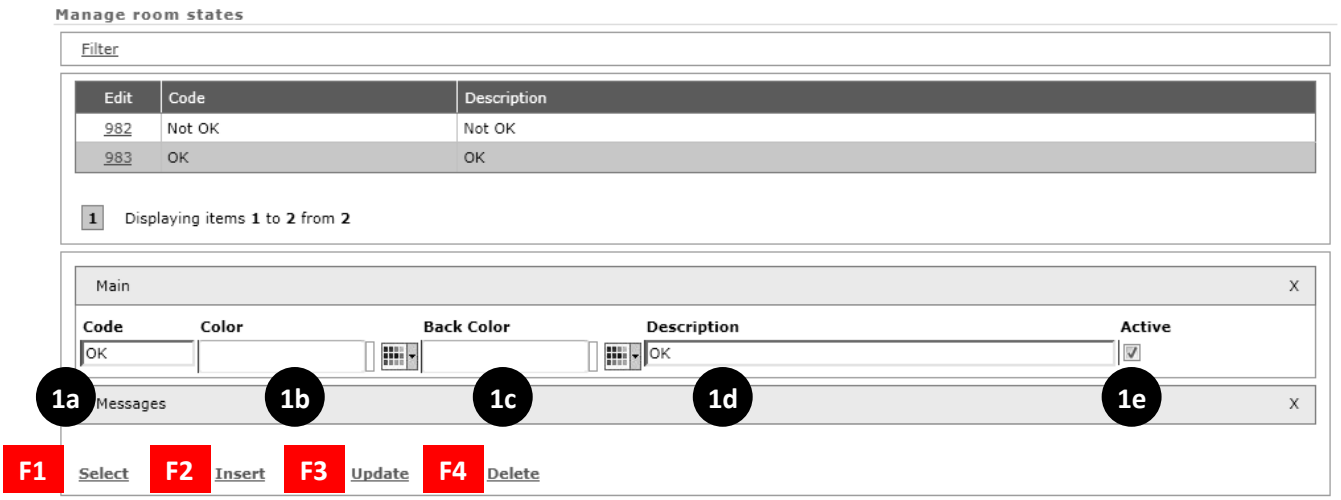
2.5 SET ROOM STATUS

The room status is used in the calendar day view and in reports to alert the hotel of the room operational state.

Page Location



Page Description



2.5.1 FIELDS

1) Main

Required a. ***Code*** – a short code to identify the room status.

i. It should not be more than 2 or 3 characters.

b. ***Color*** – the color to be applied to the room status code and description.

c. ***Back Color*** – the back color to be applied to the room status description.

Required d. ***Description*** – a short text describing the room status.

e. ***Active*** – enable or disable the room status.

2.5.2 FUNCTIONS

1) ***Select*** – get the data from the database that is associated with the selected row.

2) ***Insert*** – creates a new room status in the system.

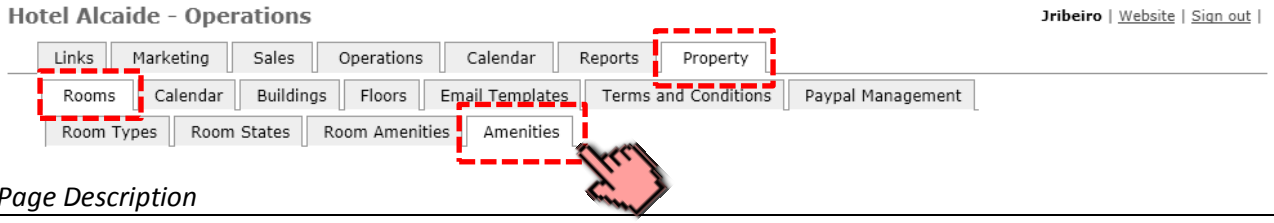
3) ***Update*** – saves the form data in the database.

4) ***Delete*** – deletes the record from the system if the room status is not connected to other objects.

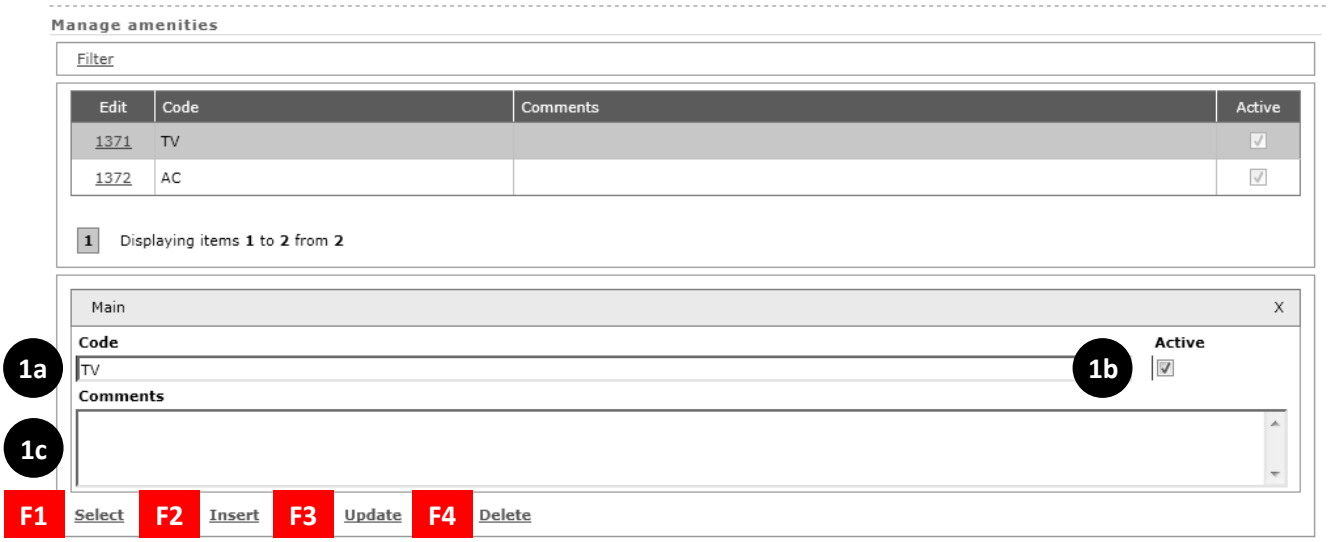
2.6 SET ROOM AMENITIES

This page allows the hotel to define the amenities or facilities present in the hotel rooms. This page only creates the amenity it does not associate to the room. The association is done in the SET ROOMS page or LINK AMENITIES TO ROOMS page.

Page Location



Page Description



2.6.1 FIELDS

1) Main

Required a. ***Code*** – a short code to identify the amenity.

b. ***Active*** – shows or hides the amenity.

c. ***Comments*** – comments about the amenity.

2.6.2 FUNCTIONS

1) ***Select*** – refresh the form data from the database.

2) ***Insert*** – creates a new record in the system.

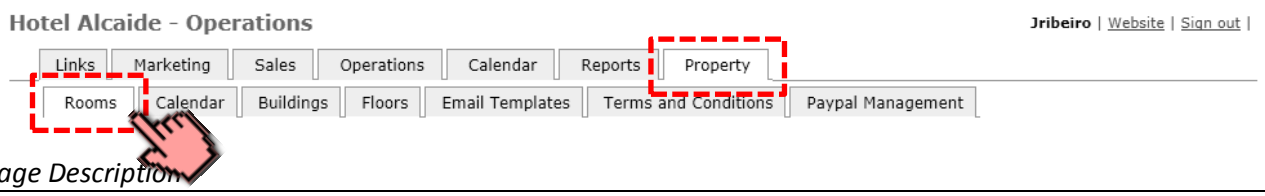
3) ***Update*** – saves the form data in the database.

4) ***Delete*** – deletes the record from the system if the record is not connected to other objects.

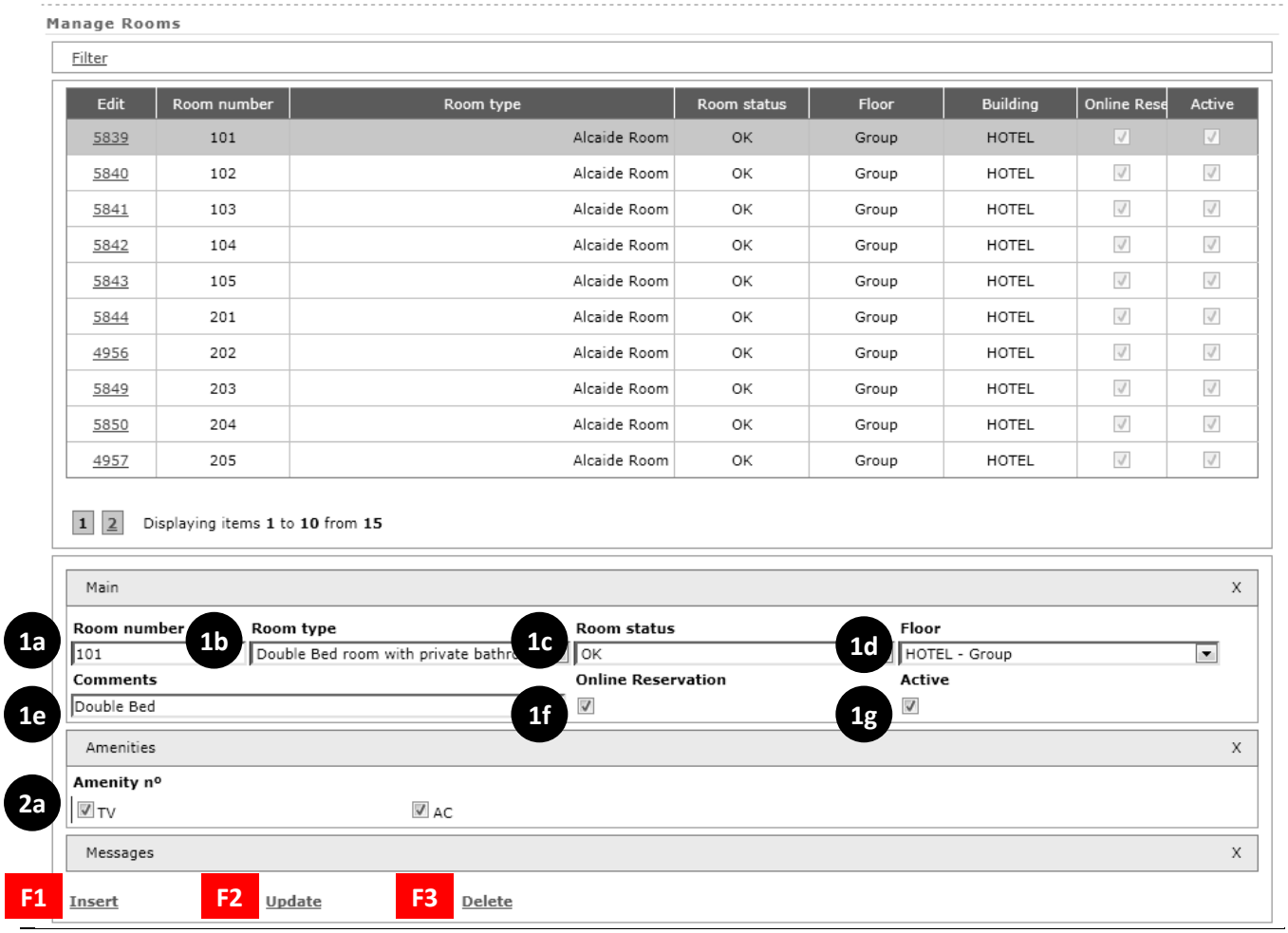
2.7 SET ROOMS

This page permits the hotel to create and manage rooms. The room must be associated with a room type and be located in a hotel floor. The rooms to be available for public booking must have the field "Online Reservation" selected.

Page Location



Page Description



2.7.1 FIELDS

1) Main

Required a. ***Room Number*** – the room number.

i. A human readable and easy to understand number or code that identifies uniquely the room in the hotel.

ii. This number is used in reports and in the accounting documents such as invoices or receipts.

Required b. ***Room Type*** – the room type connected with the room.

Required c. ***Room Status*** – the room status.

Required d. ***Floor*** – the floor associated with the room.

e. ***Comments*** – comments about the room.

f. ***Online Reservation*** – allow or disable the room to be booked via the hotel website.

g. ***Active*** – shows or hides the room.

2) Amenities

a. ***Amenity*** – the amenities associated with the room.

2.7.2 FUNCTIONS

1) ***Select*** – refresh the form with data from the database.

2) ***Insert*** – creates a new record in the system.

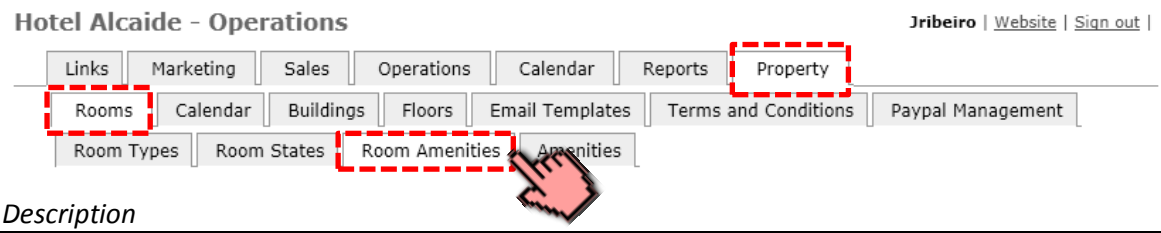
3) ***Update*** – saves the form data in the database.

4) ***Delete*** – deletes the record from the system if the record is not connected to other objects.

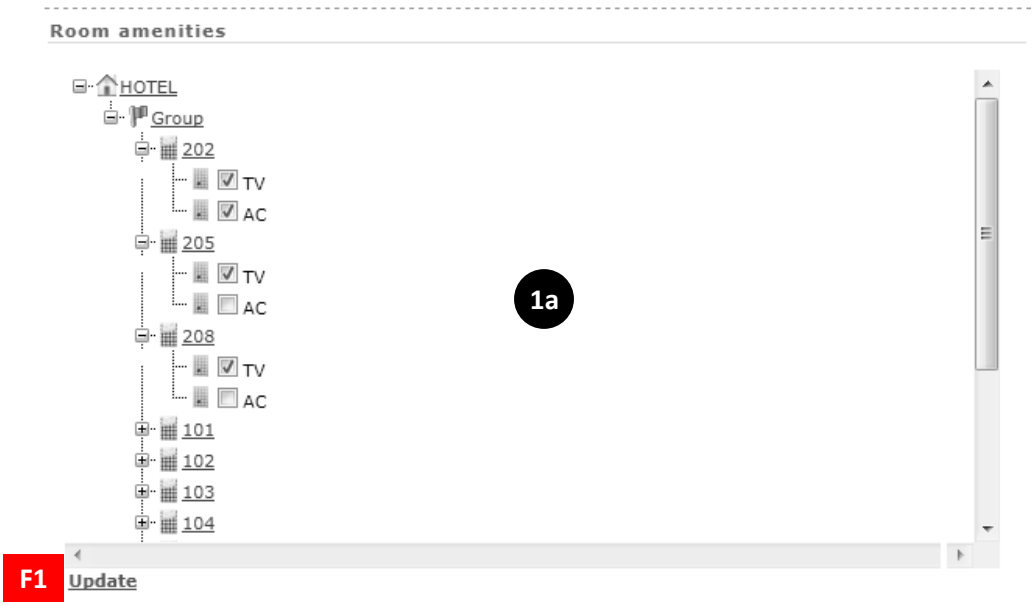
2.7.3 LINK AMENITIES TO ROOMS

The amenities can be associated to the room using this page or using the SET ROOMS page. This page offers a quick way to connect the rooms with amenities by selecting which amenities are linked to the room.

Page Location



Page Description



2.7.3.1 FIELDS

1) **Main**
   a. ***Room Amenities*** – link the amenity to the room by selecting the respective check box.

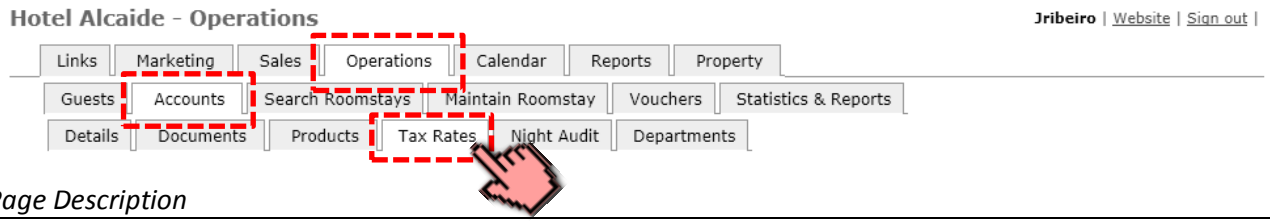
2.7.3.2 FUNCTIONS

1) **Update** – save the amenities to room associations in the database.

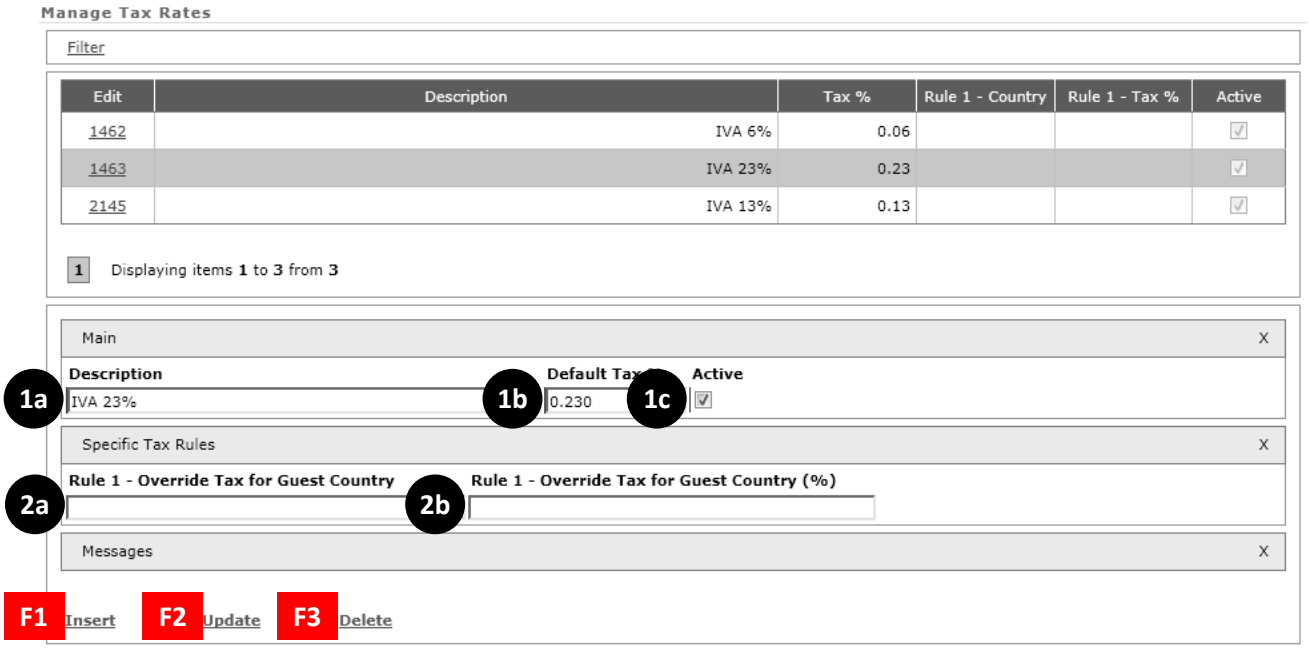
2.8 SET TAXES

This page allows the hotel to define the taxes. The taxes are associated with the products in the SET PRODUCTS AND SERVICES page.

Page Location



Page Description



2.8.1 FIELDS

1) Main

Required a. ***Description*** – a short description of the tax.

Required b. ***Default Tax %*** - the tax percentage to be applied to the amount.

i. The percentage amount is in centesimal, meaning that 1.000 is 100% tax, 0.250 is 25% tax and 0.125 is 12.5%.

c. ***Active*** – enables or disables the tax.

2) Specific Tax Rules

a. ***Rule 1 – override tax for guest country*** – defines a tax rule exception associated with the guest country.

i. For example: if the default tax is 23% and Rule 1 is configured that guests with Portuguese nationality have a tax of 10% then for those guests the system replaces the default tax (for example 23%) with the 10%.

b. ***Rule 1 – override tax for guest country (%)*** – defines the override tax to be applied in Rule 1.

2.8.2 FUNCTIONS

1) **Insert** – adds a new tax.

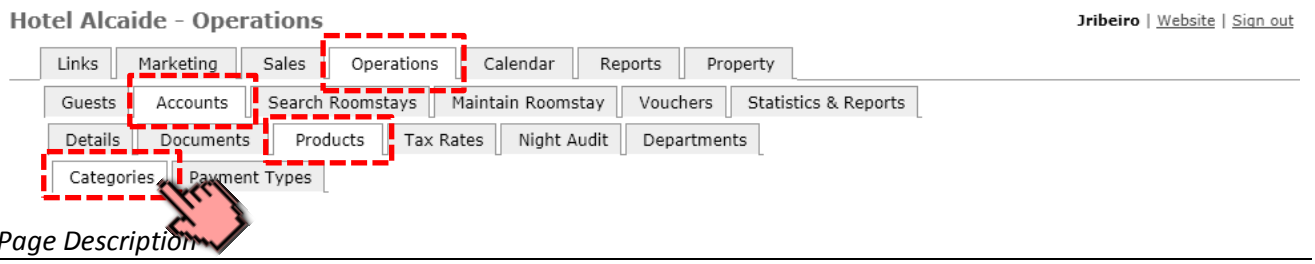
2) **Update** – saves the tax data in the database.

3) **Delete** – deletes the tax from the database. The tax cannot be connected to any other object.

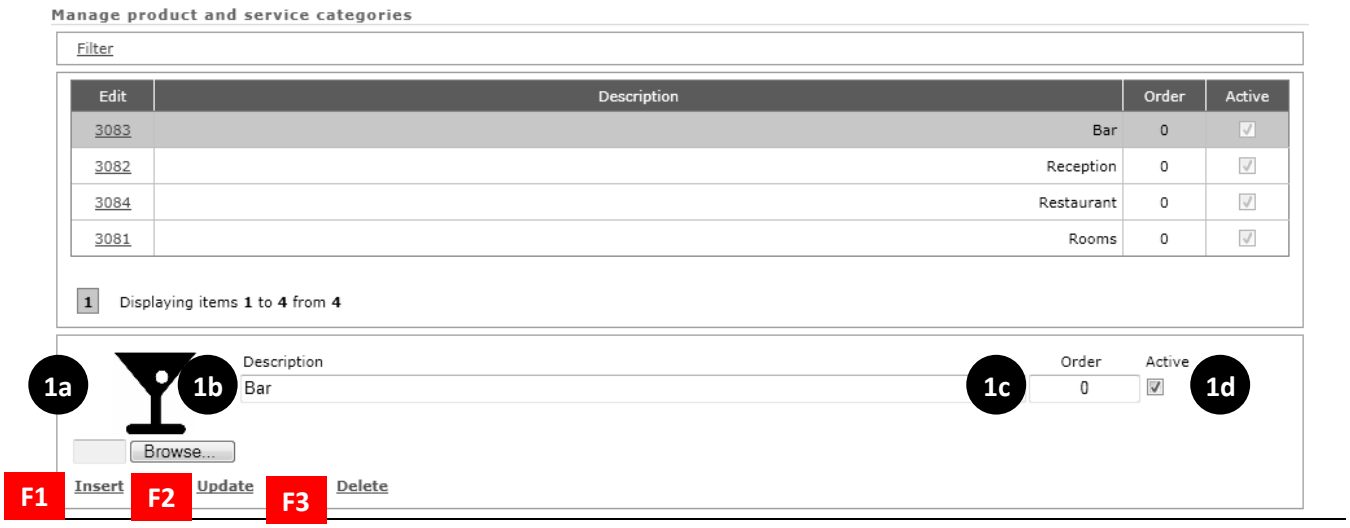
2.9 SET PRODUCT CATEGORIES

This page allows the hotel to define the product categories. The categories are associated with the products in the SET PRODUCTS AND SERVICES page. The POINT OF SALE page uses these categories to organize the products.

Page Location



Page Description



2.9.1 FIELDS

1) **Main**

Required a. ***Category Picture*** – the picture associated with the category.

i. It's used in the account page.

Required b. ***Description*** – a short description about the product category.

Required c. ***Order*** – the order in which the category will appear in the folio page.

i. The order is ascending meaning that the "1" appears first.

d. ***Active*** – shows or hides the product category.

2.9.2 FUNCTIONS

1) **Insert** – adds a new category.

2) **Update** – saves the category data in the database.

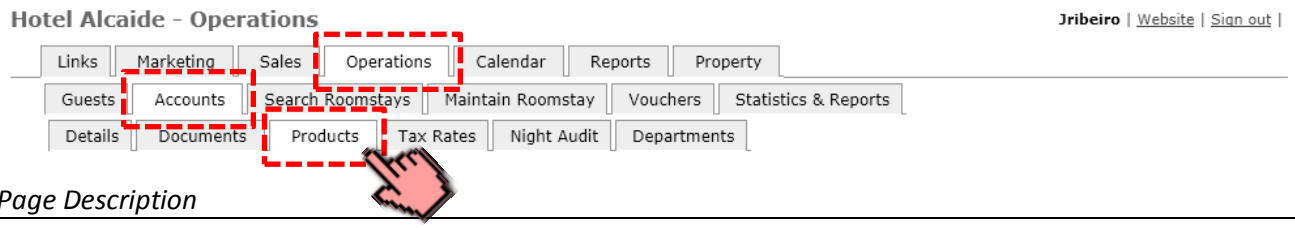
3) **Delete** – deletes the category from the database. The category cannot be connected to any other database object.

2.10 SET PRODUCTS AND SERVICES

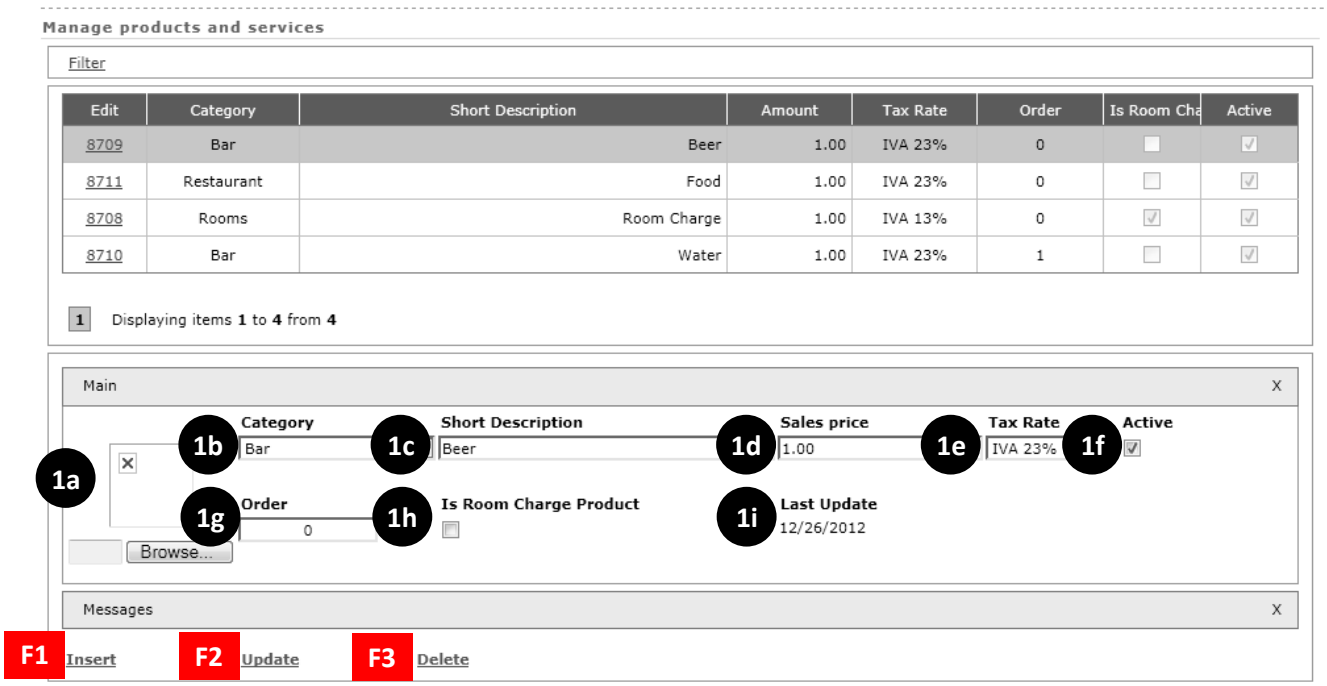
This page allows the hotel to create and manage the products and services used in the POINT OF SALE page.

The field "Is Room Charge Product" identifies the product associated with the room night stay service. The room night stay service is the main service provided by the hotel and the amount of this product is set by the pricing defined in SETUP ROOM PRICING chapter and not by what is defined in this page.

Page Location



Page Description



2.10.1 FIELDS

1) Main

Required a. ***Picture*** – the picture associated with the product.

i. It's used in the POINT OF SALE page.

Required b. ***Category*** – the category associated with the product.

Required c. ***Short description*** – a short description of the product.

i. Max. 20 characters.

Required d. ***Sales Price*** – the unit sales amount.

i. It's used as the selling price in the POINT OF SALE page.

Required e. ***Tax Rate*** – the tax rate associated with the product.

f. ***Active*** – shows or hides the product.

Required g. ***Order*** – the order which the product is shown in the POINT OF SALE page.

i. The lowest numbers show first.

h. ***Is room charge product*** – identifies the product as a room night stay service.

i. Applies only to one product.

i. ***Last update*** – the last saved date.

2.10.2 FUNCTIONS

1) **Insert** – adds a new product to the database.

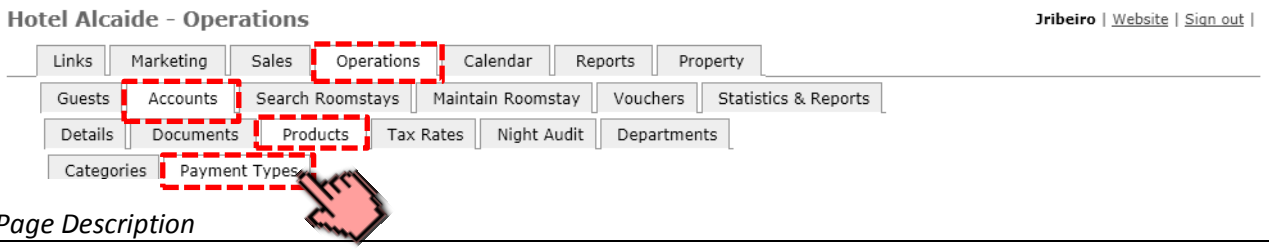
2) **Update** – saves the product data in the database.

3) **Delete** – Deletes the product from the database. The product cannot be connected to any other database object.

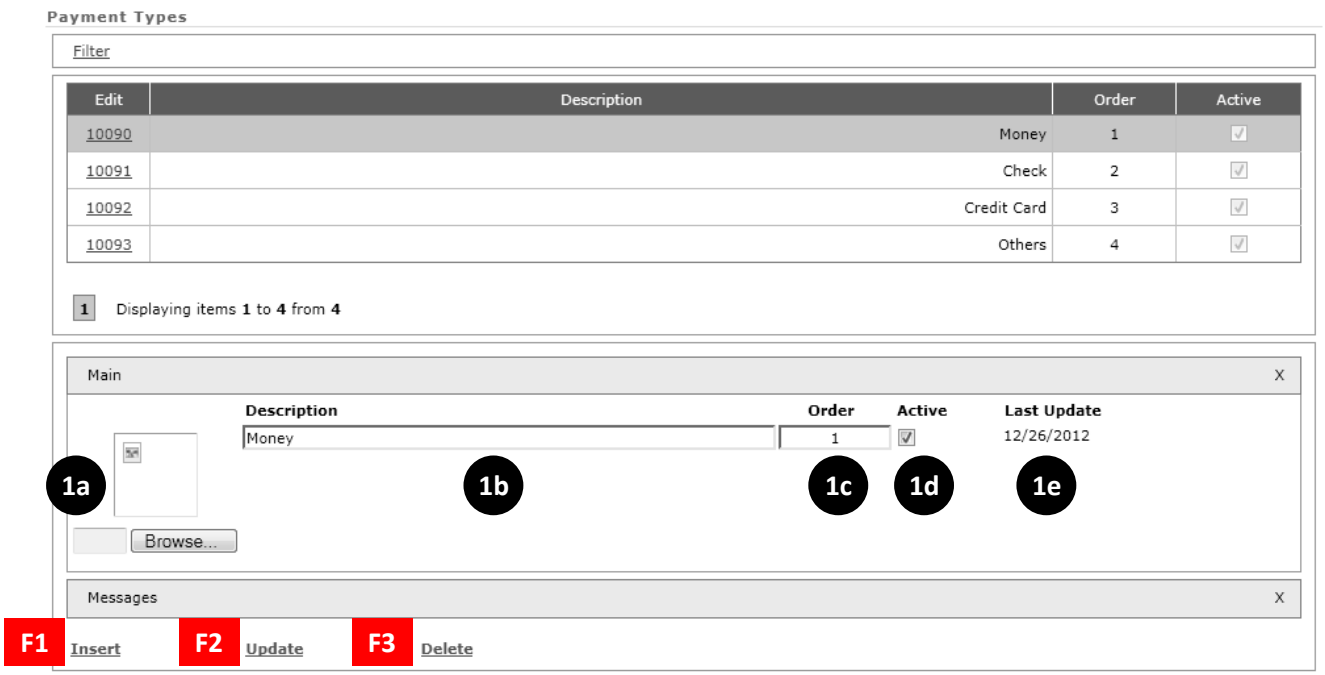
2.11 SET PAYMENT TYPES

This page allows the hotel to set the payment types available in the POINT OF SALE page.

Page Location



Page Description



2.11.1 FIELDS

1) Main

Required a. ***Picture*** – the picture associated with the payment.

i. It's used in the POINT OF SALE page.

Required b. ***Description*** – a short description of the payment type.

i. Max. 20 characters.

Required c. ***Order*** – the order which the payment type is shown in the POINT OF SALE page.

i. The lowest show first.

d. ***Active*** – shows or hides the payment.

e. ***Last update*** – the last saved date.

2.11.2 FUNCTIONS

1) **Insert** – adds a new payment type.

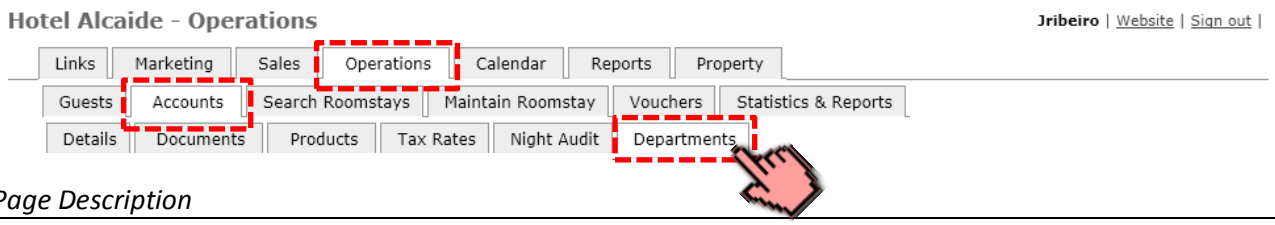
2) **Update** – saves the payment type data in the database.

3) **Delete** – deletes the payment type from the database.

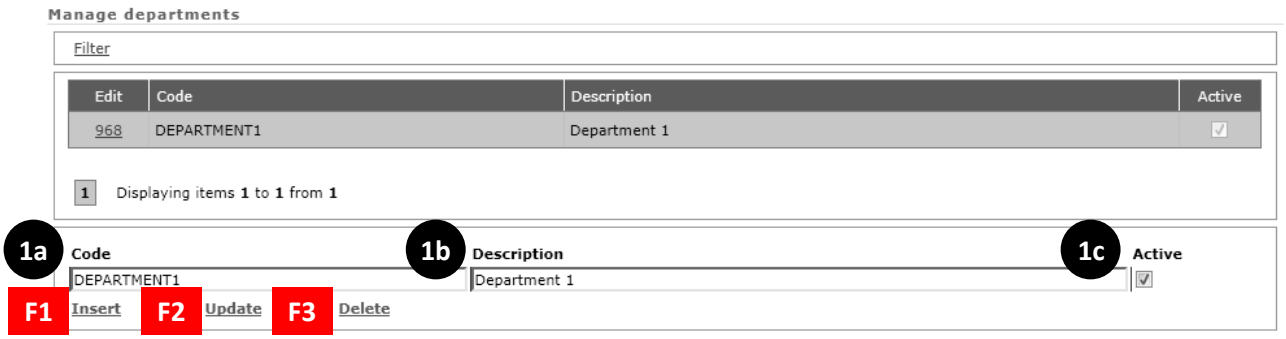
2.12 SET DEPARTMENTS

Define the departments of the hotel. The departments are cost\revenue centers used to impute costs or revenues occurred in the hotel. It allows the hotel to organize accounting information. The departments are used in the POINT OF SALE page.

Page Location



Page Description



2.12.1 FIELDS

1) **Main**

Required a. ***Code*** – a short code that identifies the department or cost center.

Required b. ***Description*** – a short description of the department.

c. ***Active*** – shows or hides the department.

2.12.2 FUNCTIONS

1) **Insert** – adds a new department.

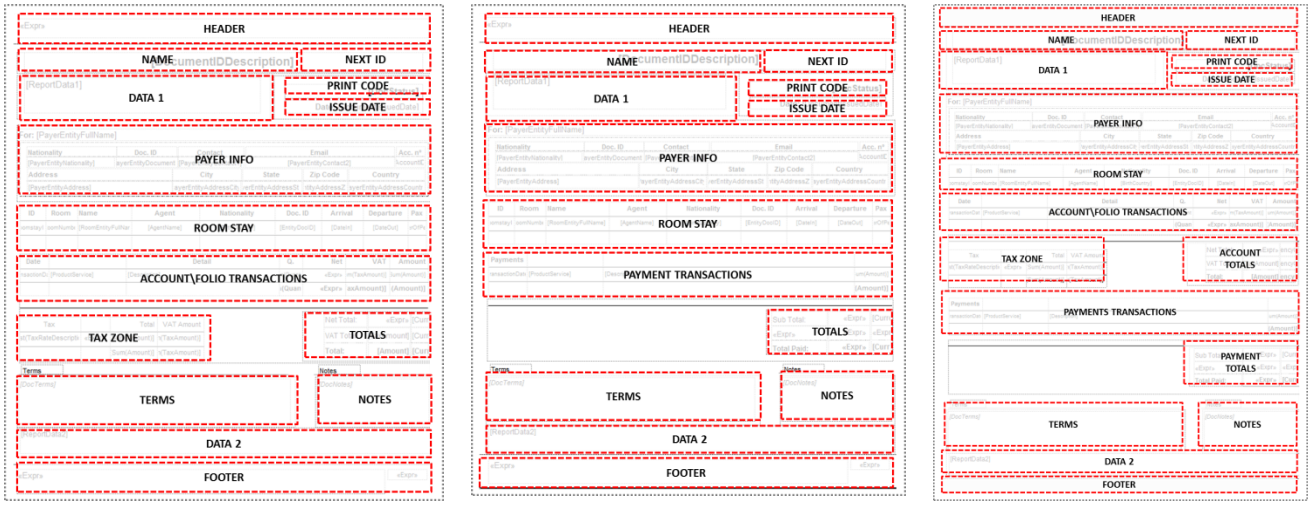
2) **Update** – saves the department data in the database.

3) **Delete** – deletes the department from the database.

2.13 SET DOCUMENTS

This page allows the hotel to define the document types. These document types provide metadata and templates for the system to create, print and export documents in PDF, Word and Excel formats.

The system has by default a set of accounting documents, namely: invoice, receipt, invoice and receipt, credit note, refund note and the credit and refund note. Also it includes the check-in report that can be given to the guest when he does the check in or the document summary report that has a review of the accounting documents generated by the system, typically used by the accounting department.



Invoice Template *Receipt Template* *Invoice & Receipt Template*

Figure 25 – Accounting Document Templates

This page defines important aspects related with the documents, such as for example: the accounting serial number, the name of the document or the notes that should be applied to all documents.

This page manages the templates that are used to generate the documents. The system provides by default the following templates:

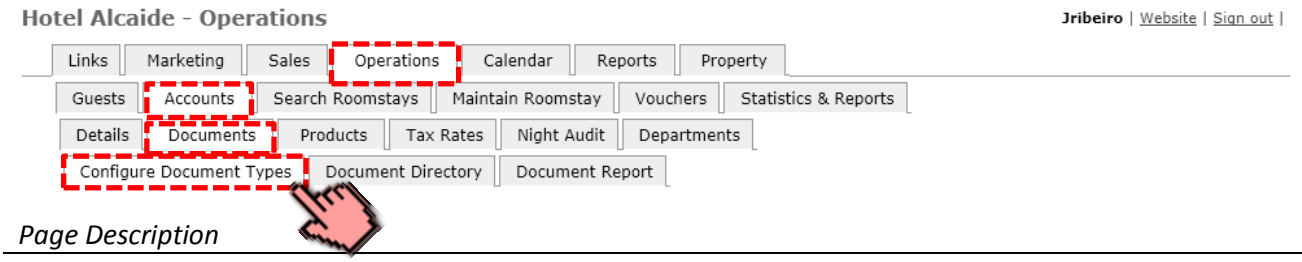
1) Invoice & Credit Note *(Accounting Document)*
2) Receipt & Refund Notre *(Accounting Document)*
3) Invoice\Receipt & Credit\Refund Note *(Accounting Document)*
4) Document Summary *(Accounting Document)*
5) Check In *(Operations Document)*

The document template layouts are illustrated and detailed in the STANDARD DOCUMENT TEMPLATE LAYOUTS chapter.

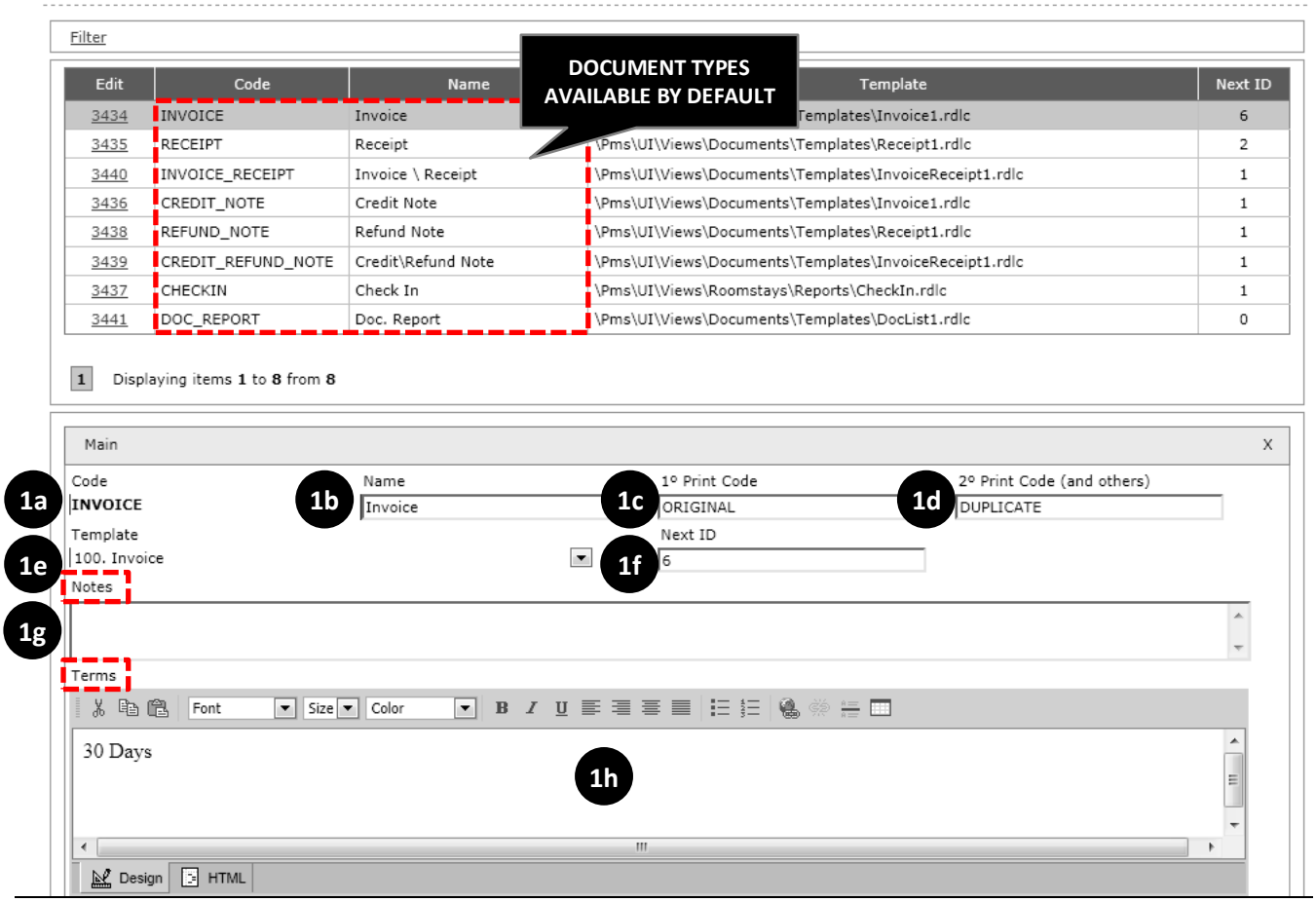
The hotel can change the file templates using the instructions in the CONFIGURE REPORT TEMPLATE FILES chapter. These changed templates can be uploaded and used as replacements of the standard templates.

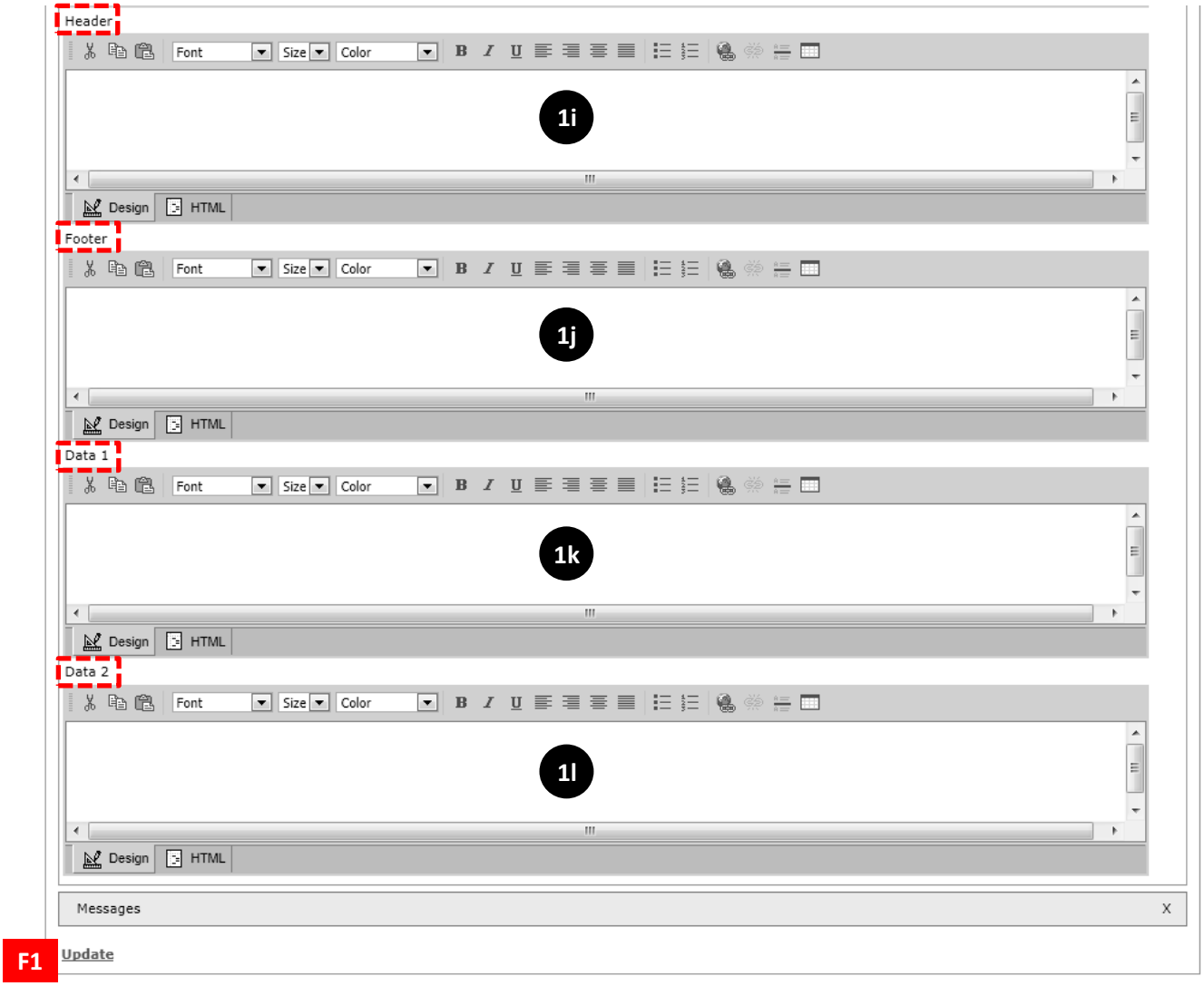
The hotel should use the local version to edit and test the new templates and after they are properly tested the hotel can request the new templates to be uploaded to the hotel online account.

Page Location



Page Description





2.13.1 FIELDS

1) **Main – The location of these fields in the templates can be viewed at the STANDARD DOCUMENT TEMPLATE LAYOUTS page.**

Required Read Only a. ***Code*** – the internal code that identifies the document.
   i. This code cannot be changed.

Required b. ***Name*** – the human readable name that identifies a document.

Required c. ***1º Print code*** – the code that is printed in the first print of the document.
   i. This code is used to identify the original document.
   ii. The following copies use the "2º print code".

Required d. ***2º Print Code (and others)*** – the code that is printed to identify a copy.
   i. It's used to identify the documents printed after the first copy.

Required e. ***Template*** – this is the template (.rdlc file type) that is used to print the document.

i. The template can be changed using the instructions defined in the CONFIGURE REPORT TEMPLATE FILES chapter.

ii. The default templates available are the following:

- ***100. Invoice*** - *.rdlc* definition file for invoice documents –
  - *Path:\Pms\UI\Views\Documents\Templates\Invoice1.rdlc*
- ***110. Invoice + Receipt*** - *.rdlc* definition file for invoice/receipt documents
  - *Path:\Pms\UI\Views\Documents\Templates\InvoiceReceipt1.rdlc*
- ***120. Receipt -*** *.rdlc* definition file for receipt documents
  - *Path:\Pms\UI\Views\Documents\Templates\Receipt1.rdlc*
- ***200. Doc. Report -*** *.rdlc* definition file for the document report
  - *Path:\Pms\UI\Views\Documents\Templates\DocList1.rdlc*
- ***500. Check In -*** *.rdlc* definition file for check-in documents
  - *Path:\Pms\UI\Views\Roomstays\Reports\CheckIn.rdlc*

Required f. ***Next ID*** – the accounting sequential ID assigned to the documents.

i. This is typical the number used by the accounting department.

g. ***Notes*** – a text field used to define notes.

i. The field is located in the template with the tag “NOTES”.

h. ***Terms*** – a text field used to define the terms and conditions of the document.

i. The field is located in the template with the tag “TERMS”.

i. ***Header*** – the header of the document.

i. The field is located in the template with the tag “HEADER”.

j. ***Footer*** – the footer of the document.

i. The field is located in the template with the tag “FOOTER”.

k. ***Data 1*** – a text field used to convey generic information to the guest.

i. The field is located in the template with the tag “DATA 1”.

l. ***Data 2*** – a text field used to convey generic information to the guest.

i. The field is located in the template with the tag “DATA 2”.

2.13.2 FUNCTIONS

1) **Update** – save the data in the database.

2.13.3 STANDARD DOCUMENT TEMPLATE LAYOUTS

The layouts used for the standard document templates are illustrated in the following pictures. The next figure defines the default layout of the invoice and credit note documents.

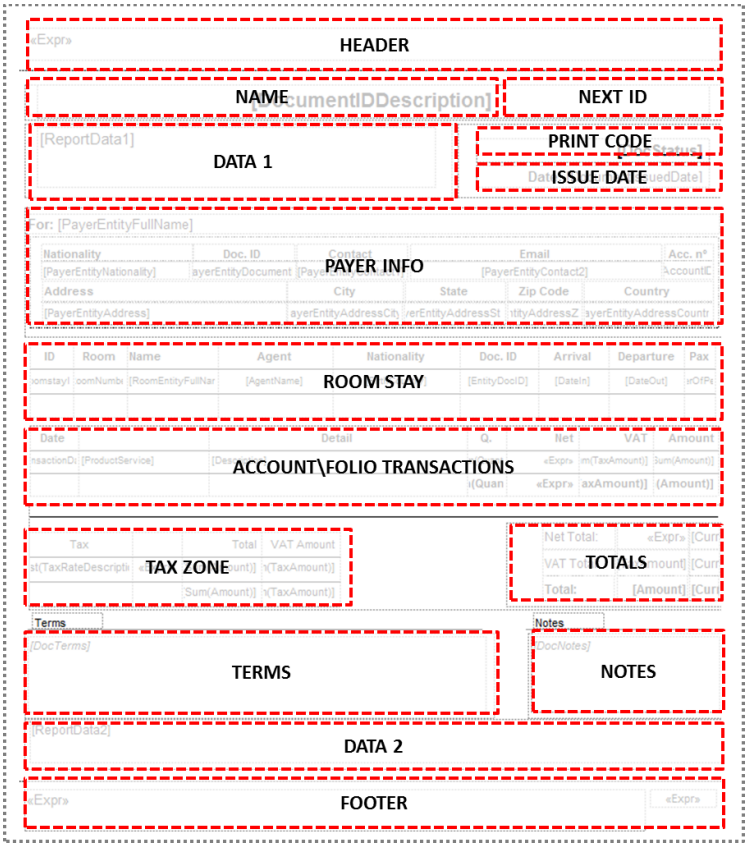


Figure 26 - Document Template: Invoice and Credit Note

The next figure defines the default layout of the receipt and refund documents.

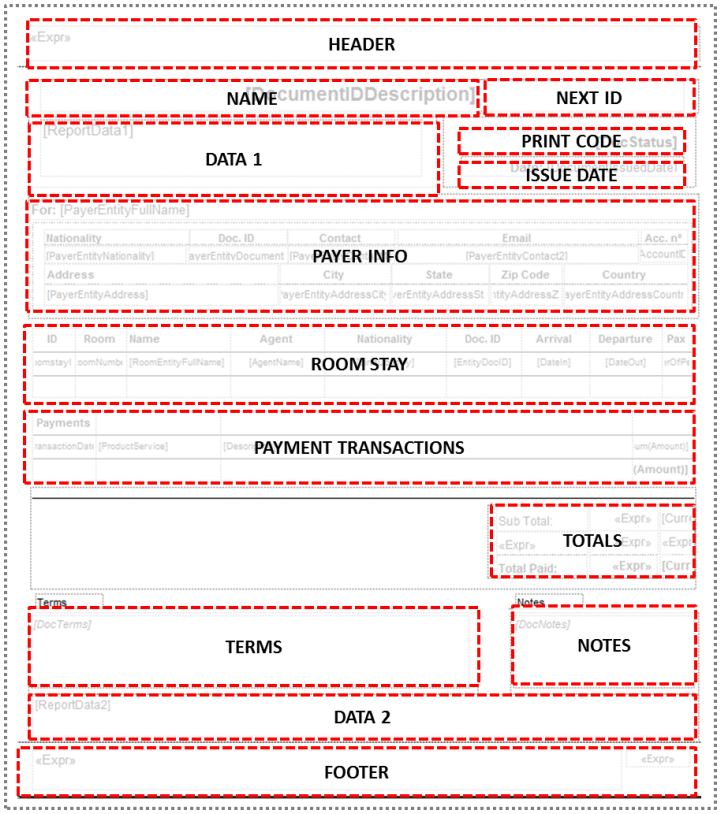


Figure 27 – Document Template: Receipt and Refund Notes

The next figure illustrates the default layout of the invoice\receipt and the credit\refund note documents.

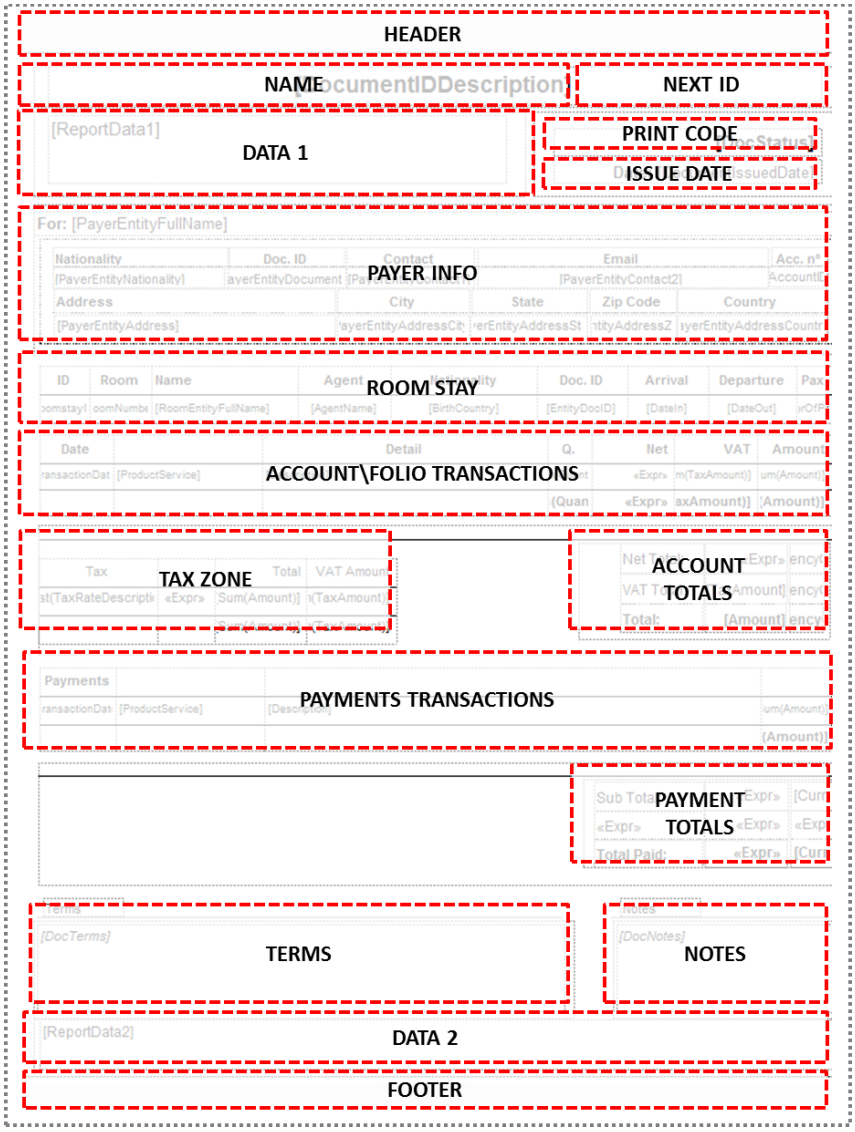


Figure 28 – Document Template: Invoice and Receipt

The next figure defines the default structure of document summary report.

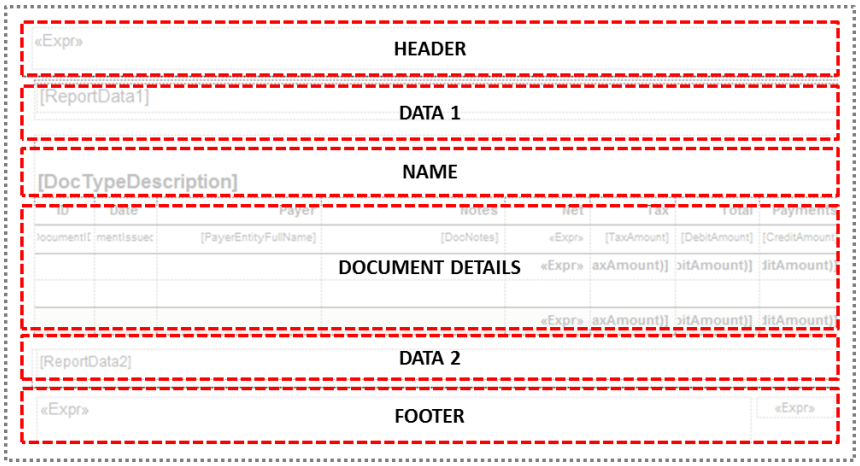


Figure 29 – Document Template: Documents Summary Report

The next figure defines the default structure of the check-in document.

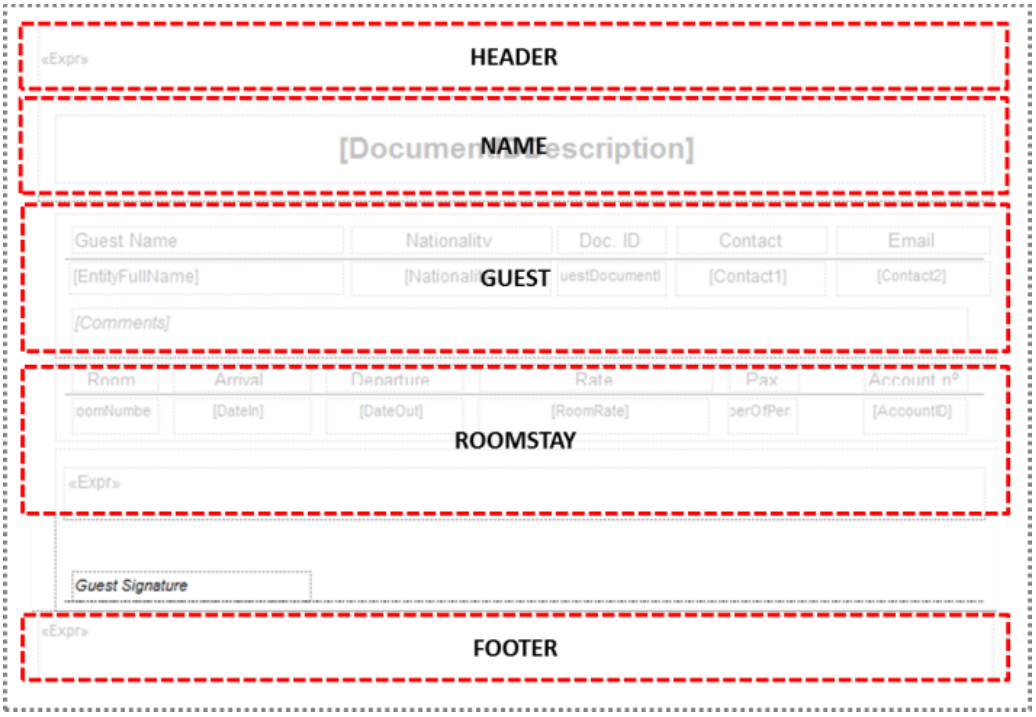


Figure 30 – Document Template: Check-in

These templates can be changed using the instructions defined in the CONFIGURE REPORT TEMPLATE FILES chapter.

2.14 SET EMAIL TEMPLATES

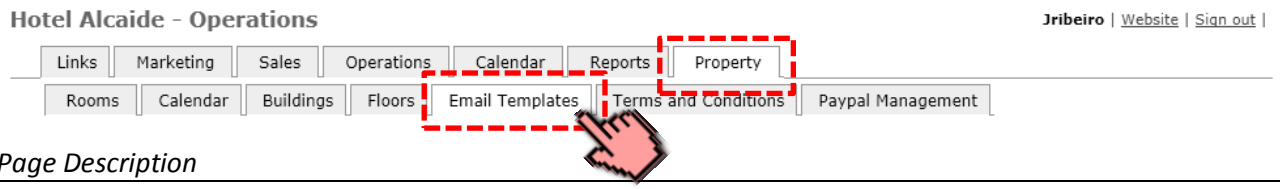
The system can send an email to the guest in certain situations, namely when the hotel creates a new booking, when the user books in the hotel website, when the hotel creates a new invoice or receipt or simply when the hotel decides to contact the guest to ask for feedback or information.

Also the system saves all the emails and interactions between the hotel and the guest. This page enables the hotel to edit the email templates used by the system.

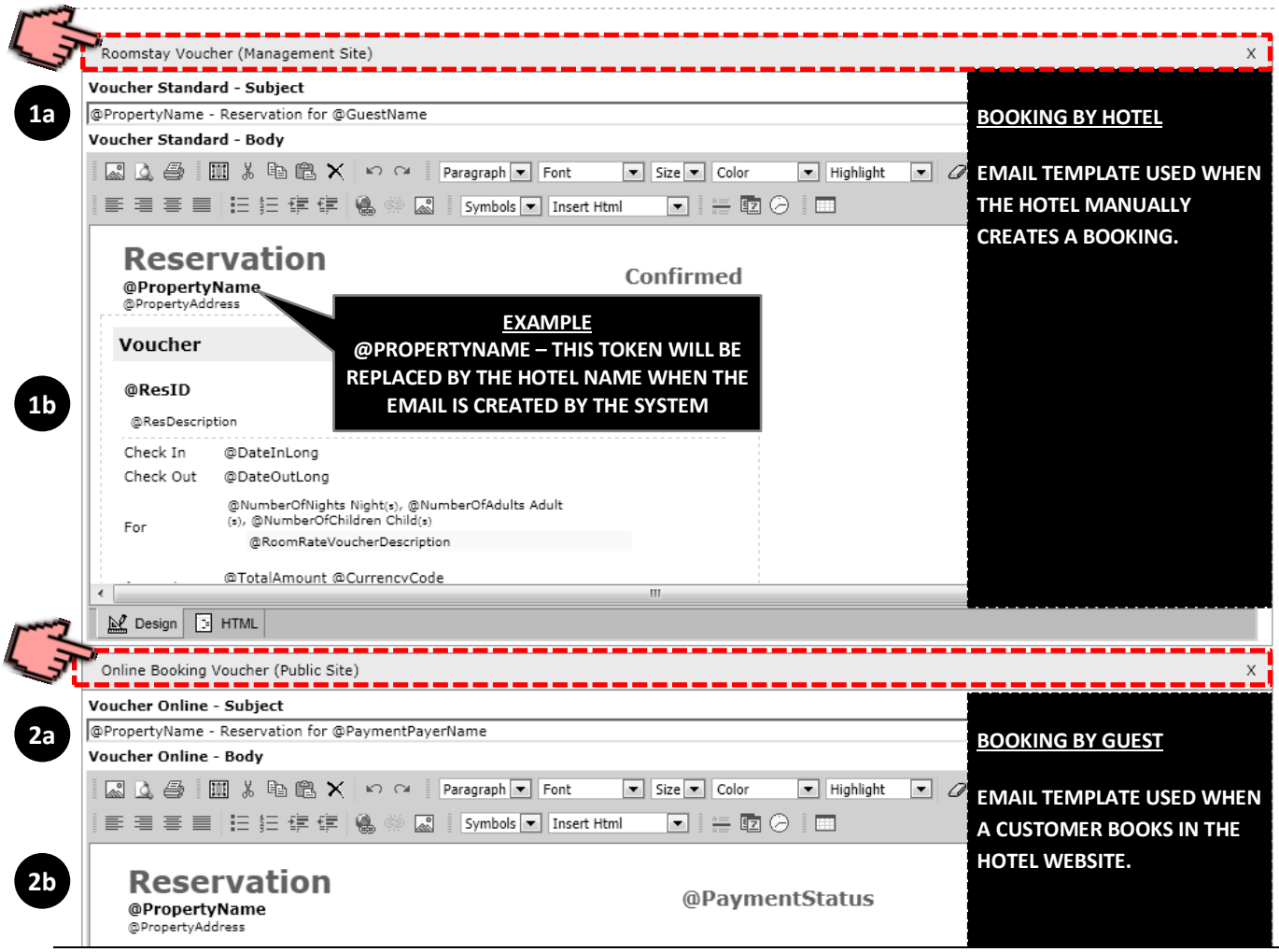
The templates use specific tokens (***@TOKEN***), as explained below, that are replaced by real data when the email is created and sent.

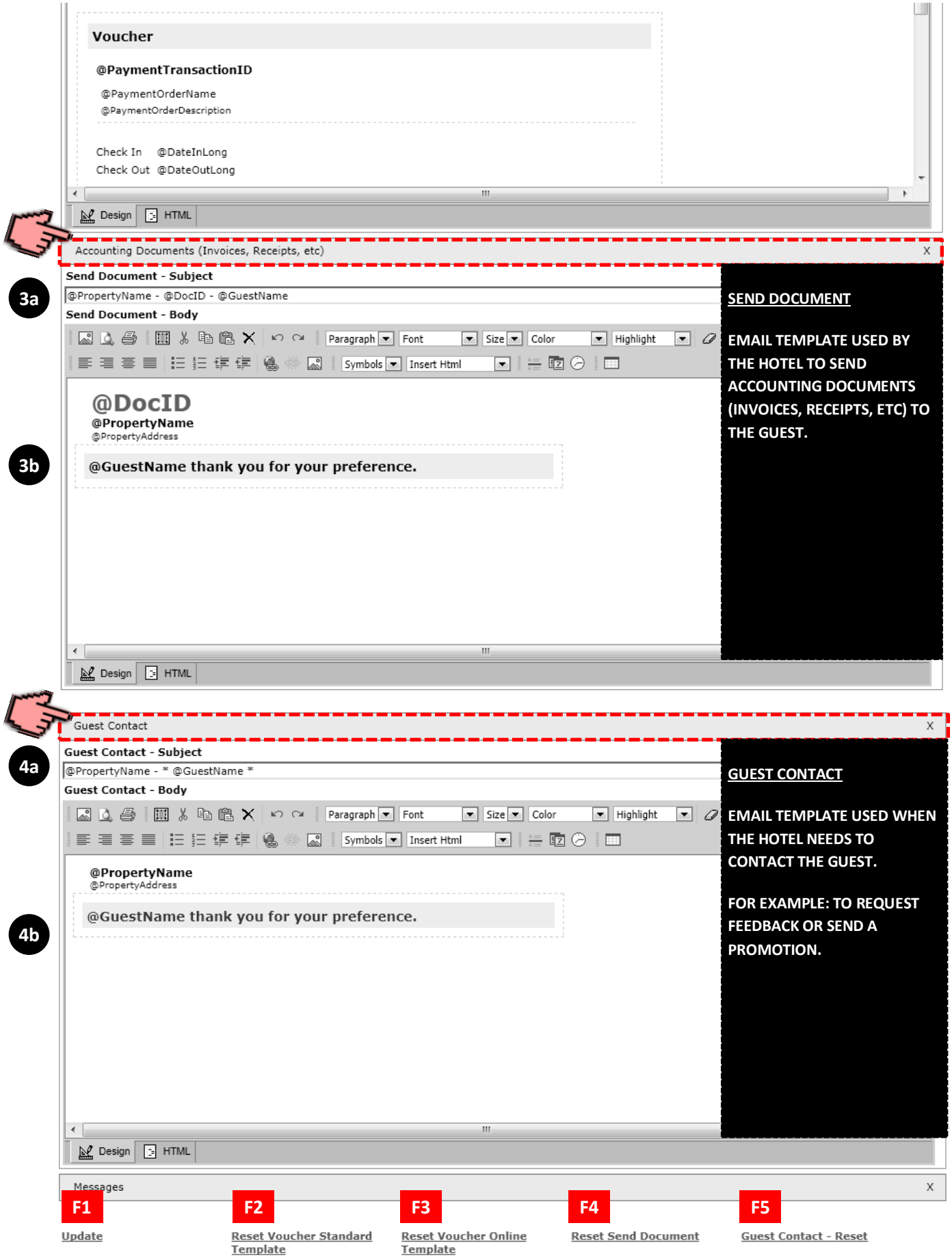
The local version requires the hotel to read the SET EMAIL SERVER chapter to properly set the system email features.

Page Location



Page Description





SEND DOCUMENT

EMAIL TEMPLATE USED BY THE HOTEL TO SEND ACCOUNTING DOCUMENTS (INVOICES, RECEIPTS, ETC) TO THE GUEST.

GUEST CONTACT

EMAIL TEMPLATE USED WHEN THE HOTEL NEEDS TO CONTACT THE GUEST.

FOR EXAMPLE: TO REQUEST FEEDBACK OR SEND A PROMOTION.

2.14.1 FIELDS

1) **Booking by hotel template – Used in bookings manually created by hotel.**
   a. ***Email Subject*** – the subject of the email. The tokens available are the following:
      i. **@PropertyName** – the hotel name.

      ii. **@GuestName** – the guest name.

   b. ***Email Body*** – The body of the email. The tokens available are the following:
      i. **@PropertyName** – the hotel name.

      ii. **@PropertyAddress** – the hotel address.

      iii. **@ResID** - the room stay id associated with the booking. This id is internal and is generated by the system. It is prefixed with an "R".

      iv. **@ResDescription** – a short description of the room type associated and between parenthesis the number of rooms booked and the room rate associated.
         1. The structure is "*ROOM_TYPE_DESCRIPTION* (*Nº_OF_ROOMS ROOM_RATE_DESCRIPTION*)".

      v. **@RoomRateVoucherDescription** – the room rate description.

      vi. **@DateInLong** – the check-in date of the booking.

      vii. **@DateOutLong** - the check-out date of the booking.

      viii. **@NumberOfNights** – the number of nights.

      ix. **@NumberOfAdults** – the number of adults.

      x. **@NumberOfChildren** – the number of children.

      xi. **@RoomRateVoucherDescription** - the room rate description associated with the field "Voucher Description" in the SET ROOM RATES page.

      xii. **@TotalAmount** - the total amount of the booking.

      xiii. **@AccountAmount** – the balance or account amount.

      xiv. **@CurrencyCode** – the currency code.

      xv. **@Notes** – the comments associated with the roomstay.

2) **Booking by guest – Used in bookings created in the hotel website. This is the voucher template that is sent to the guest when the guest does a booking in the hotel website.**

a. ***Email Subject*** – the subject of the email. The tokens available are the following:
   i. **@PropertyName** – the hotel name.

   ii. **@PaymentPayerName** – the guest name.

b. ***Email Body*** – the body of the email. The tokens available are the following:
   i. **@PropertyName** – the hotel name.

   ii. **@PropertyAddress** – the hotel address.

   iii. **@PaymentStatus** – the payment status can be:
      1. "*Completed*" – the booking was successful completed;
      2. "*Complete (PayPal)*" – the booking was successful completed using PayPal;
      3. "*Incomplete*" - the booking was successful saved but the payment was not fully completed because of the situation defined at the token @PaymentErrorCode.

   iv. **@PaymentTransactionID** – this is a unique transaction non numerical code that identifies the booking.

   v. **@PaymentOrderName** – the order name is equivalent to "*PROPERTY_NAME* – Res. #*RESERVATION_ID*".
      1. The *RESERVATION_ID* is an internal numeric code that identifies a reservation done via the hotel web site.

   vi. **@PaymentOrderDescription** – the order description is equivalent to "Reservation #*RESERVATION_ID* – *DATE_IN* to *DATE_OUT*".

   vii. **@DateInLong** – the check-in date.

   viii. **@DateOutLong** – the check-out date.

   ix. **@NumberOfNights** – the number of nights.

   x. **@NumberOfRooms** – the number of rooms booked.

   xi. **@NumberOfAdults** – the number of adults.

   xii. **@NumberOfChildren** – the number of children.

   xiii. **@RoomDetail** – for each room type booked:
      1. Room type header
         a. "Room #*ORDER* – *Nº_OF_ROOMS*, *Nº_OF_ADULTS* Adults, *Nº_OF_CHILDREN_TYPE_A* + *Nº_OF_CHILDREN_TYPE_B* Children".
      2. Room type body
         a. The "Description" of the room type associated.

xiv. **@TotalAmount** – the total amount booked.

xv. **@CurrencyCode** – the currency code.

xvi. **@Comments** – comments created by the guest.

xvii. **@PaymentPayerName** – the guest name.

xviii. **@PaymentPayerEmail** – the guest email.

xix. **@UserName** – the username created by the system to access the guest private area.

xx. **@Password** - the password created by the system to access the guest private area.

xxi. **@VoucherTermsAndConditions** – the "Online Booking Terms & Conditions" that are defined in the terms and conditions page.

xxii. **@PaymentInvoiceID** - is an internal numeric code that identifies a reservation done via the hotel web site.

xxiii. **@PaymentErrorCode** – payment error description. If there is an error this token identifies the type of error occurred.

3) **Send Document – Used when the hotel sends the accounting documents (invoices, receipts, etc) to the guest.**

   a. ***Email Subject*** – the subject of the email. The tokens available are the following:
      i. @PropertyName – the hotel name.

      ii. @DocID – the accounting document ID.

      iii. @GuestName – the guest name.

   b. ***Email Body*** – the body of the email. The tokens available are the following:
      i. @PropertyName – the hotel name.

      ii. @PropertyAddress – the hotel address.

      iii. @GuestName – the guest name

4) **Guest Contact – This template is used when the hotel sends an email via the guest contact feature.**
   a. ***Email Subject*** – the subject of the email. The tokens available are the following:
      i. @PropertyName – the hotel name.

      ii. @GuestName – the guest name

b. ***Email Body*** – the body of the email. The tokens available are the following:
   i. @GuestName – the guest name

2.14.2 FUNCTIONS

1) ***Update*** – saves the template data in the database.

2) ***Reset Voucher Standard Template*** – replaces the actual roomstay template with the default system template for standard vouchers.

3) ***Reset Voucher Online Template*** – replaces the actual website guest booking template with the default system template for online booking vouchers.

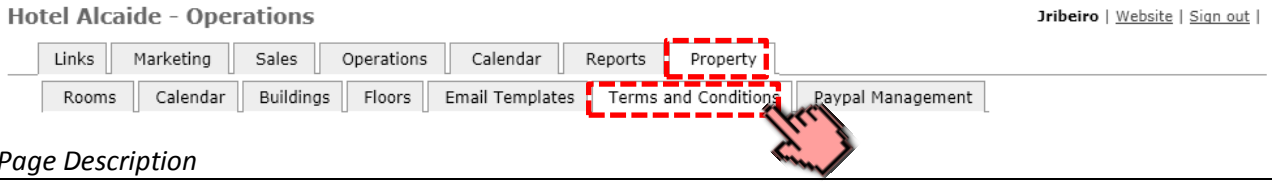
4) ***Reset Send Document*** – replaces the actual send document template with the default system template for sending documents.

5) ***Reset Guest Contact*** – replaces the actual guest contact template with the default system template for the guest contacts.

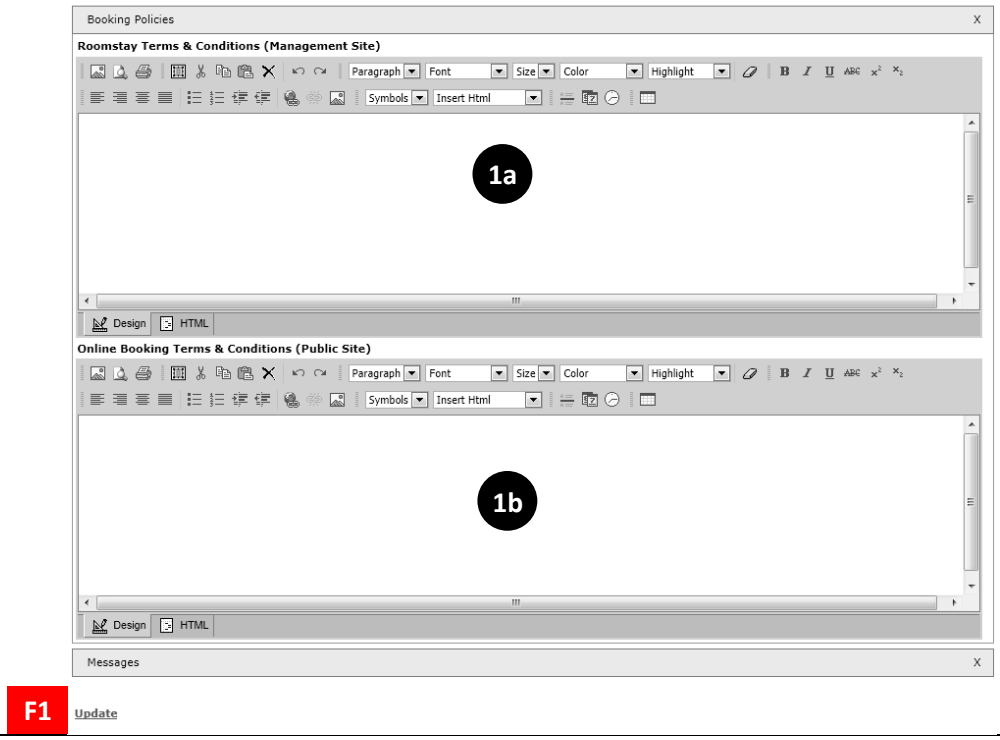
2.15 SET BOOKING TERMS AND CONDITIONS

This page allows the hotel to set the booking terms and conditions. The booking terms and conditions are used in the HOTEL WEBSITE BOOKINGS and are also used in specific SET EMAIL TEMPLATES that use the token ***@VoucherTermsAndConditions***.

Page Location



Page Description



2.15.1 FIELDS

1) **Booking Policies**
   a. ***Roomstay terms & conditions (management site)*** – the terms and conditions used in the email templates that use the token ***@VoucherTermsAndConditions***.

   b. ***Online booking terms & conditions (public site)*** – the terms and conditions that are used in the booking page of the hotel web site.
      i. These terms are located before the payment button.

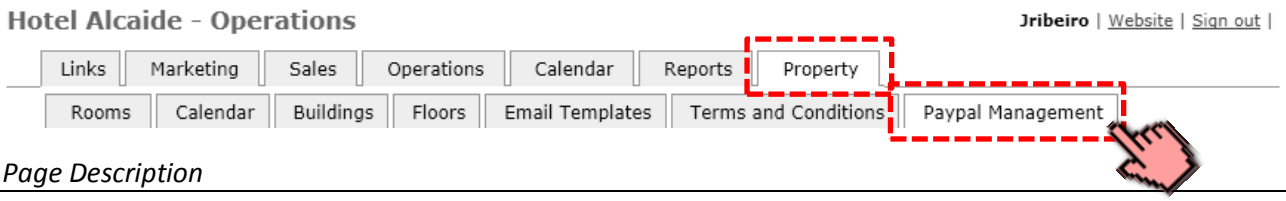
2.15.2 FUNCTIONS

1) **Update** – saves the data in the database.

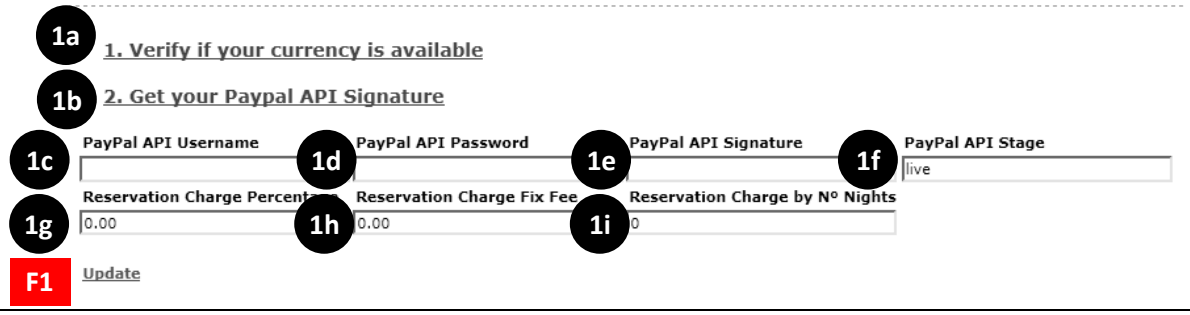
2.16 SET PAYPAL INTEGRATION

This page allows the hotel to set the PayPal credentials and authorize the HotelASP to integrate with the hotel PayPal account. This page should be used only if you want to have PayPal payments in the hotel website booking page. Also the room rate must have the field "Enable PayPal Payment" selected to enable the customer to use this payment option. Check the SET ROOM RATES chapter for additional information.

Page Location



Page Description



2.16.1 FIELDS

1) **Main**
   a. ***Verify if your currency is available*** – check this link for additional information.
      i. PayPal only processes same currencies.
      ii. Use this link to check if PayPal accepts your currency.

   b. ***Get your PayPal API signature*** – check this link for additional information.
      i. To integrate with PayPal you need to create a PayPal account.
      ii. This link explains how to get the API data from your PayPal account that is needed to make the integration.

   c. ***PayPal API username*** – the username given by PayPal to access your account via API (Application Programmable Interface).

   d. ***PayPal API password*** – the password given by PayPal to access your account via API.

   e. ***PayPal API signature*** – the signature given by PayPal to access your account via API.

   f. ***PayPal API stage*** – the stage given by PayPal to access your account via API.
      i. This should be by default equal to "live".

   g. ***Reservation Charge Percent*** – this field is not available in the actual version.

h. ***Reservation Charge Fix Fee*** – this field is not available in the actual version.

i. ***Reservation Charge by Nº Nights*** – this field is not available in the actual version.

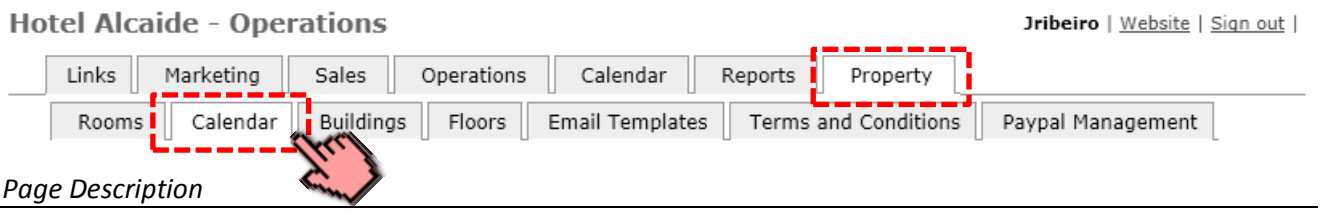
2.16.2 FUNCTIONS

1) **Update** – save the PayPal credentials in the database.

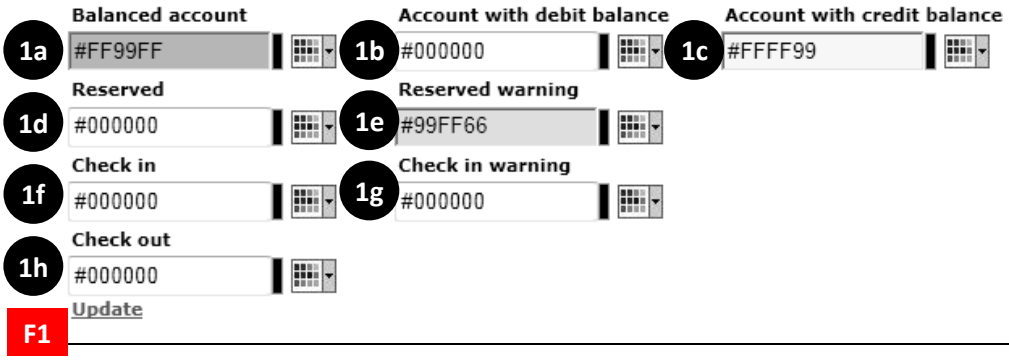
2.17 SET CALENDAR COLORS

This page allows the hotel to set the colors used in the CALENDAR VIEW page.

Page Location



Page Description



2.17.1 FIELDS

1) Main

a. ***Balanced Account*** – the font color used if the guest account is balanced.
   i. This means that the amount of the account associated with the roomstay is zero.

b. ***Account with debit balance*** – the font color used if the guest owes money to the hotel.

c. ***Account with credit balance*** – the font color used if the hotel owes money to the guest.

d. ***Reserved*** – the background color used if the roomstay status is "reserved".

e. ***Reserved warning*** – the background color used if the roomstay status is "reserved" and the "actual date" is equal or higher that the roomstay start date (guest check in date).
   i. The objective is to warn the hotel of missing check-ins.

f. ***Check in*** – the background color used if the roomstay status is “check in”.

g. ***Check in warning*** – the background color used if the roomstay status is “check in” and the “actual date” is equal or higher that the roomstay end date (guest check out date).
   i. The objective is to warn the hotel of missing check-outs.

h. ***Check out*** – the background color used if the roomstay status is “check out”.

2.17.2 FUNCTIONS

1) **Update** – saves the calendar color configurations in the database.

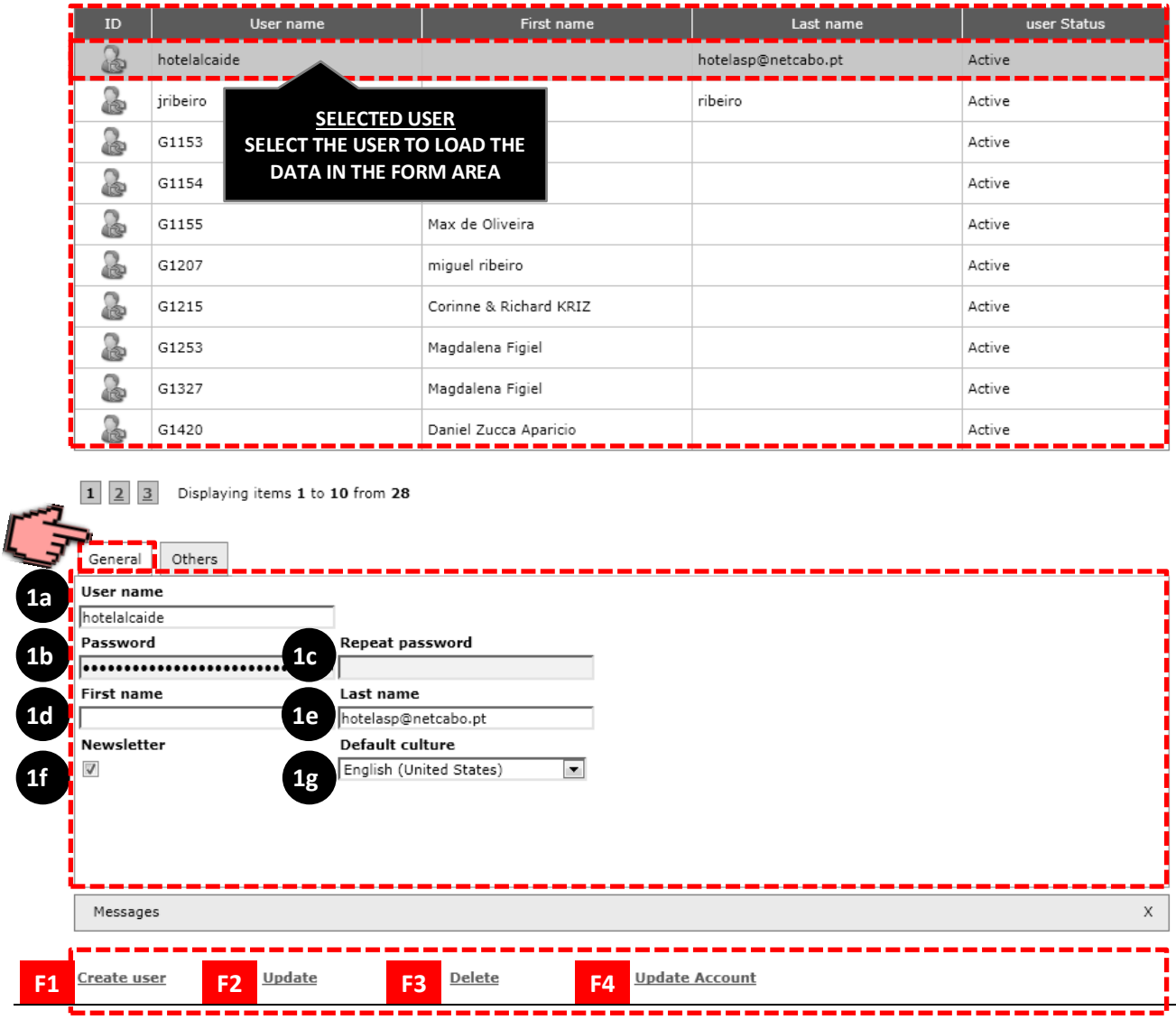
2.18 SET USERS

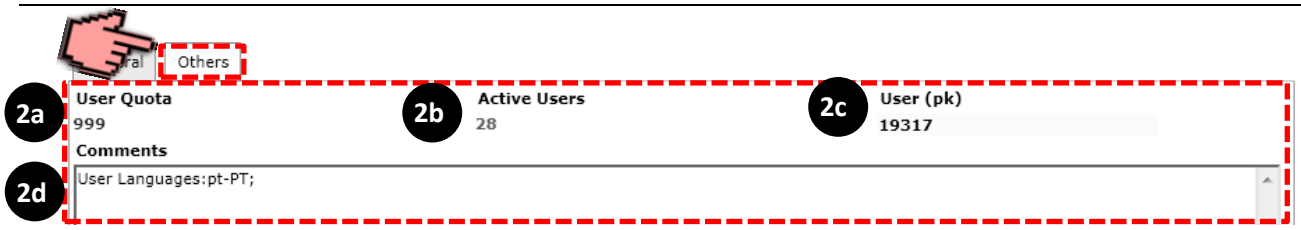
This page allows the hotel to add and manage users. The authorizations should be set in SET AUTHORIZATIONS page. The account user management for the local version can be reached at:

- URL: http://localhost:8325/_***APPLICATIONID***_en-US__SYS-ACC_USERS-MANAGEMENT_/saas.aspx
  - The ***APPLICATIONID*** must be replaced by your account console application ID;
  - For example: The local version 3.0.7 has ***APPLICATIONID*** = 18479, which is equivalent of having http://localhost:8325/_18479_en-US__SYS-ACC_USERS-MANAGEMENT_/saas.aspx .

Page Location

Page Description





2.18.1 FIELDS

1) Application Settings

Required a. ***Username*** – the user name.

Required b. ***Password*** – the password associated with the user name.

Required c. ***Repeat password*** – repeat the password filled in the field "Password".

Required d. ***First name*** – the first name of the user.

Required e. ***Last name*** – the last name of the user.

f. ***Newsletter*** – checked if the user wants to receive the newsletter.

g. ***Default Culture*** – the default language of the user.

2) Others.

Read Only a. ***User quota*** – the maximum number of users allowed in the account.

Read Only b. ***Active users*** – the number of users created in the account.

Read Only c. ***User (pk)*** – the user internal ID.

d. ***Comments*** – comments about the user.

2.18.2 FUNCTIONS

1) Create user – creates a new default user in the database.

2) Update – saves the user data, including the password, in the database.

3) Delete – deletes the user from the database.

4) Update Account – navigates to the "Update Account" page.

2.19 SET AUTHORIZATIONS

The online version of the HotelASP does not permit to change the authorizations assigned to the user roles but the local version does allow the hotel to change the authorizations as explained in the last paragraph.

The online HotelASP account includes 4 sites and 4 specific user roles as described below. In the present version the "Account" user assumes the role of the "Hotel Manager". The "Account" user can create only "Hotel Standard" users. The creations of "Hotel Manager" users are not available in the online version.

	HOTELASP ACCOUNT			
	ACCOUNT SITE	HOTEL PUBLIC SITE	HOTEL MANAGEMENT SITE	GUEST SITE
ACCOUNT USER	FULL ACCESS	FULL ACCESS	FULL ACCESS	
HOTEL MANAGER USER		FULL ACCESS	FULL ACCESS	
HOTEL STANDARD USER			LIMITED ACCESS	
GUEST USER				FULL ACCESS

Figure 31 - HotelASP Authorizations: Users Roles versus Accesses

As referred before the online HotelASP version does not allow the hotel to create custom user roles and authorizations by account. The "Hotel Standard" user has limited access to the hotel management site as described in figure below.

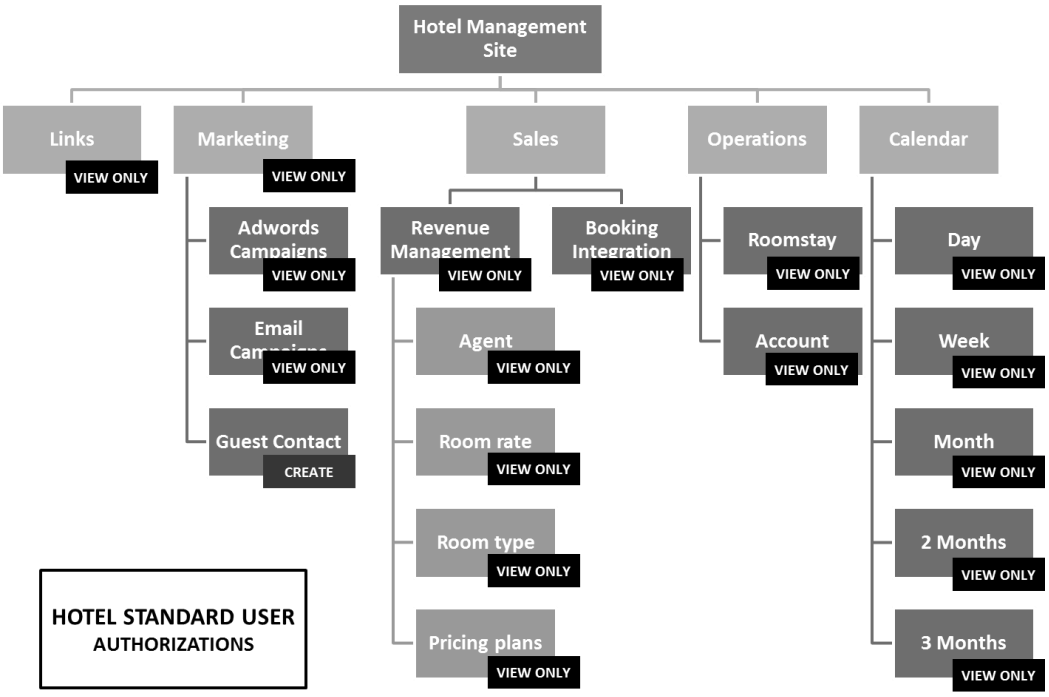


Figure 32 - HotelASP Authorizations: Standard User Accesses

As shown in the figure above, the online hotel standard user has only read access to specific system pages.

Regarding the custom pages they can be configured for public access, only authenticated access or private access.

The SET CUSTOM WEBPAGES – ADD & EDIT, WORKAREA MANAGEMENT and VIEW MANAGEMENT chapters explains how to set the custom webpage authorizations.

Regarding the local version the hotel can change the workarea and view authorizations of all user roles by executing the steps below:

- Navigate to property management system administration application at
  - ***http://localhost:8325/_0_en-US_1___/saas.aspx***
  - using the credentials:
    - ***username***: admin
    - ***password***: admin
- Set workarea and view authorizations using the instructions defined at SET CUSTOM WEBPAGES – ADD & EDIT page.
- After setting the authorizations in the local version the hotel should clear the cache by
  - executing the link "Clear Cache" in the top right of the page
  - or executing the link **http://localhost:8325/Packages/Sys/v3.0.25/UI/Web/WorkAreas/Administration/ClearCache.aspx**

The hotel can also set additional and advanced system configurations at **http://localhost:8325/_0_en-US_22739___/saas.aspx** using the administrator credentials referred above.

The local version is configured to automatically login with the credentials:

- ***username***: manager
- ***password***: manager

The hotel to remove the auto login must go the file **web.config** located at "**C:\Program Files (x86)\Hotel Management System X.X.X**" and change the **WinSaaS.AutoLogin** setting from ***true*** to ***false***.

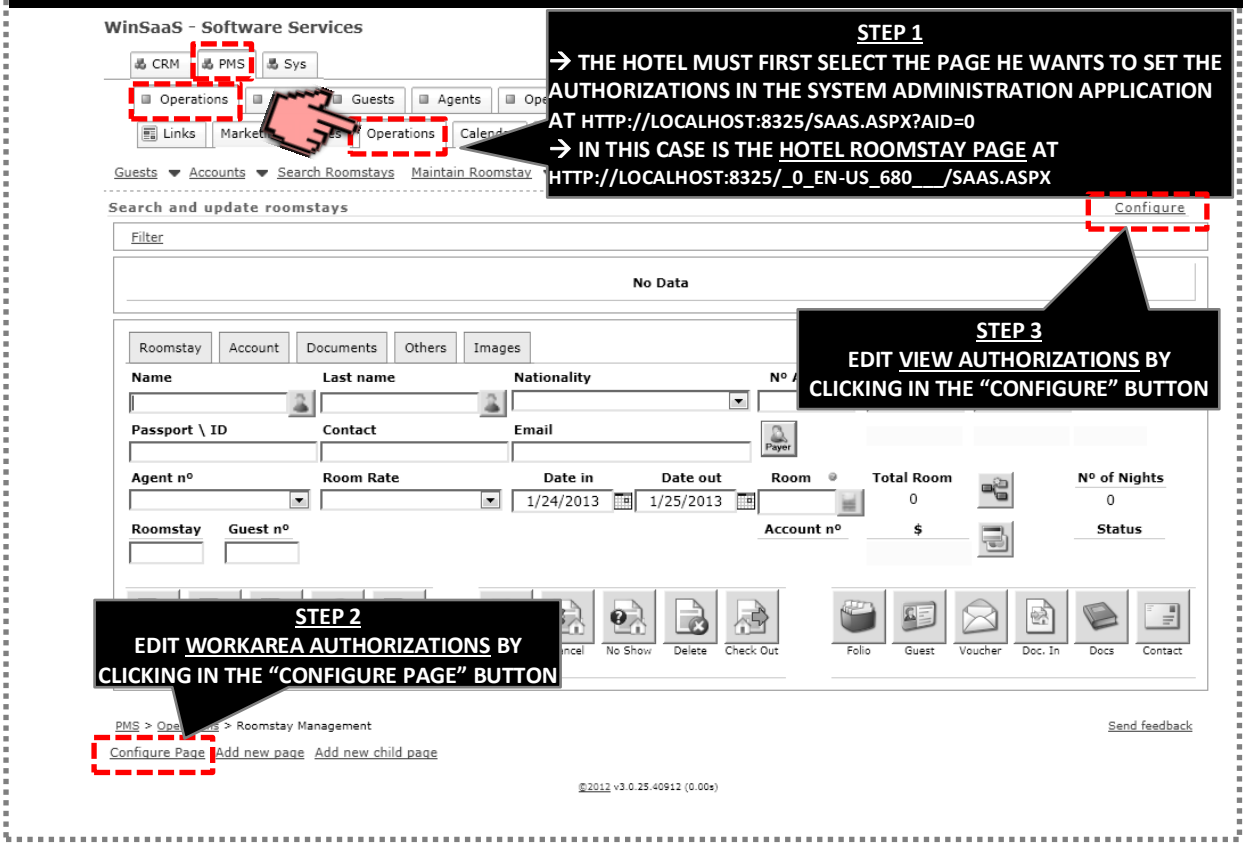
2.19.1 ADVANCED SETTINGS

The following examples illustrate advanced configuration steps. These features are available only to the local version.

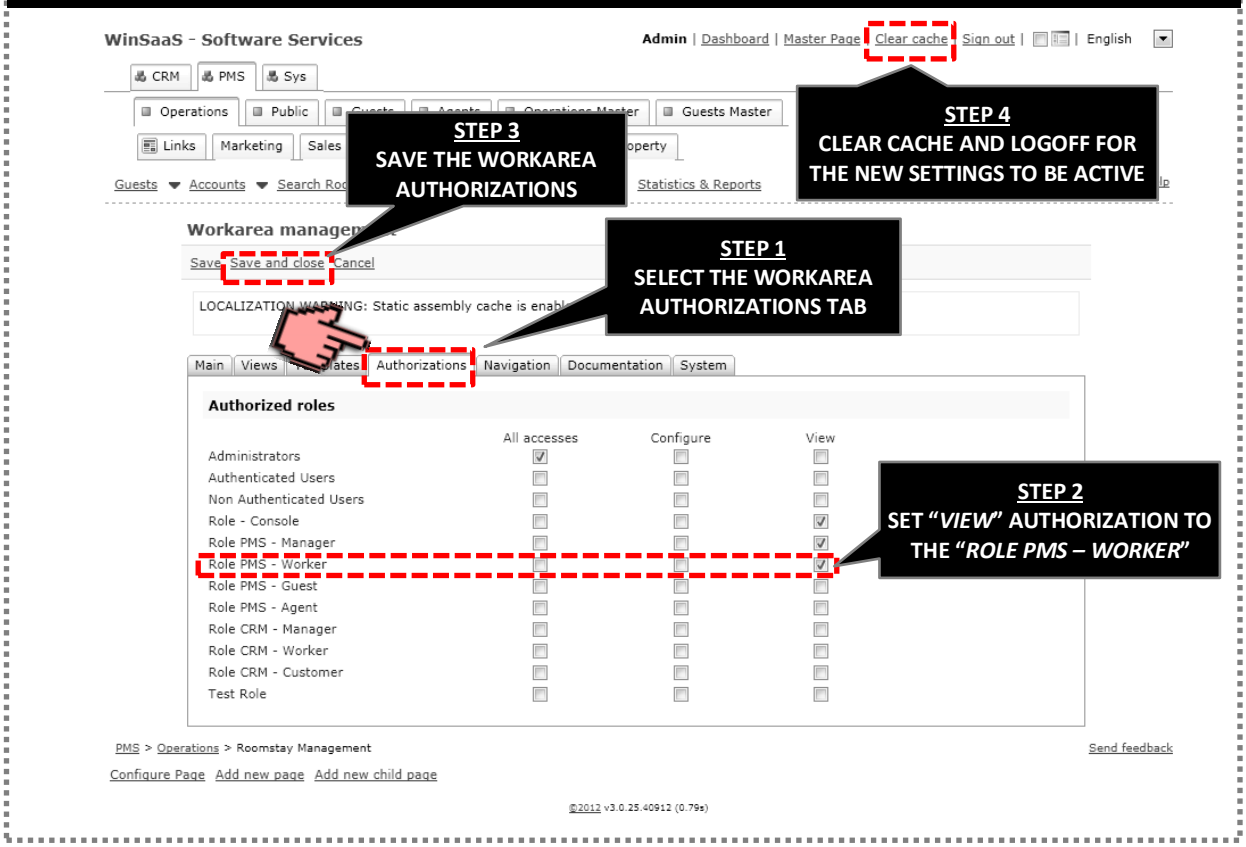
The system webpages can be configured using the information defined in the SET CUSTOM WEBPAGES – ADD & EDIT, WORKAREA MANAGEMENT and VIEW MANAGEMENT chapters.

Figure 33 – Users, Roles and Authorizations: Advanced Settings

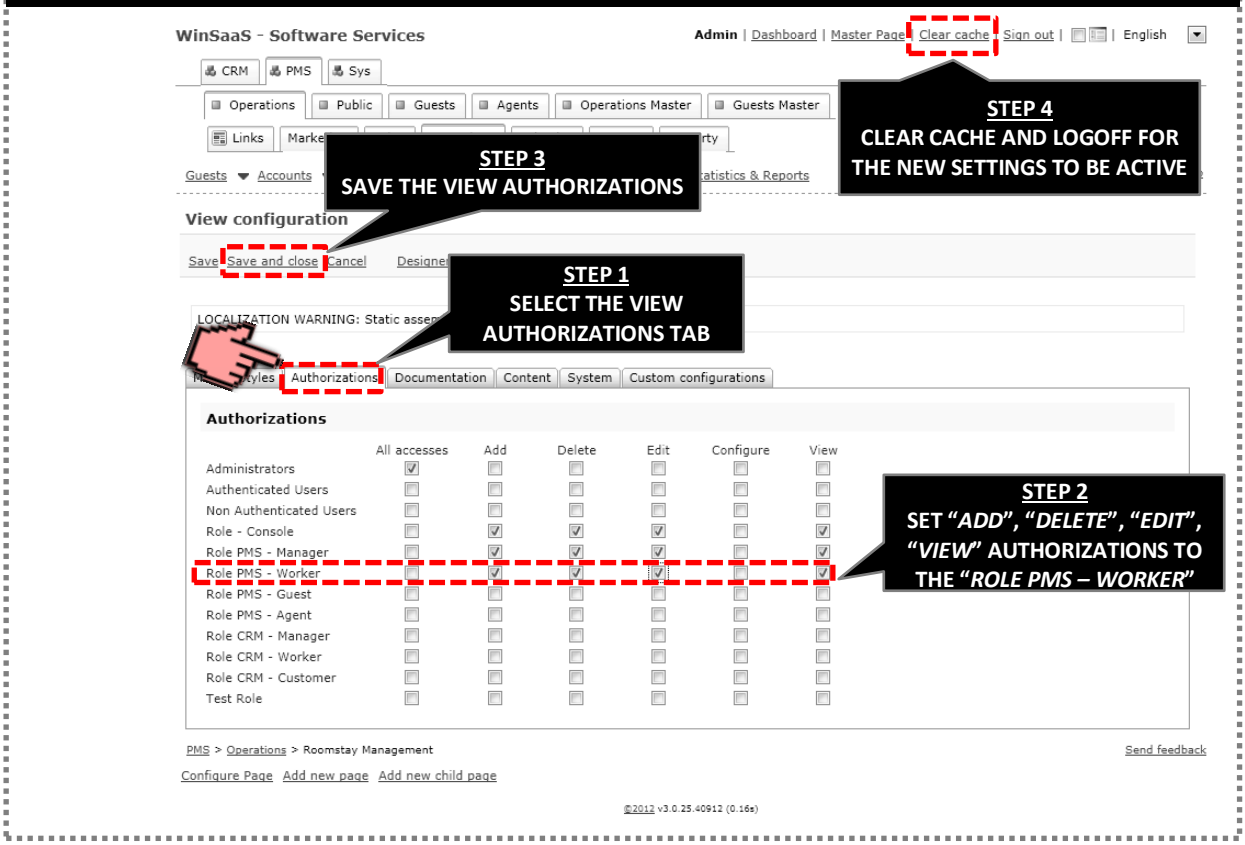
STEP 1 HOW TO GIVE UPDATE AUTHORIZATIONS TO A USER ROLE



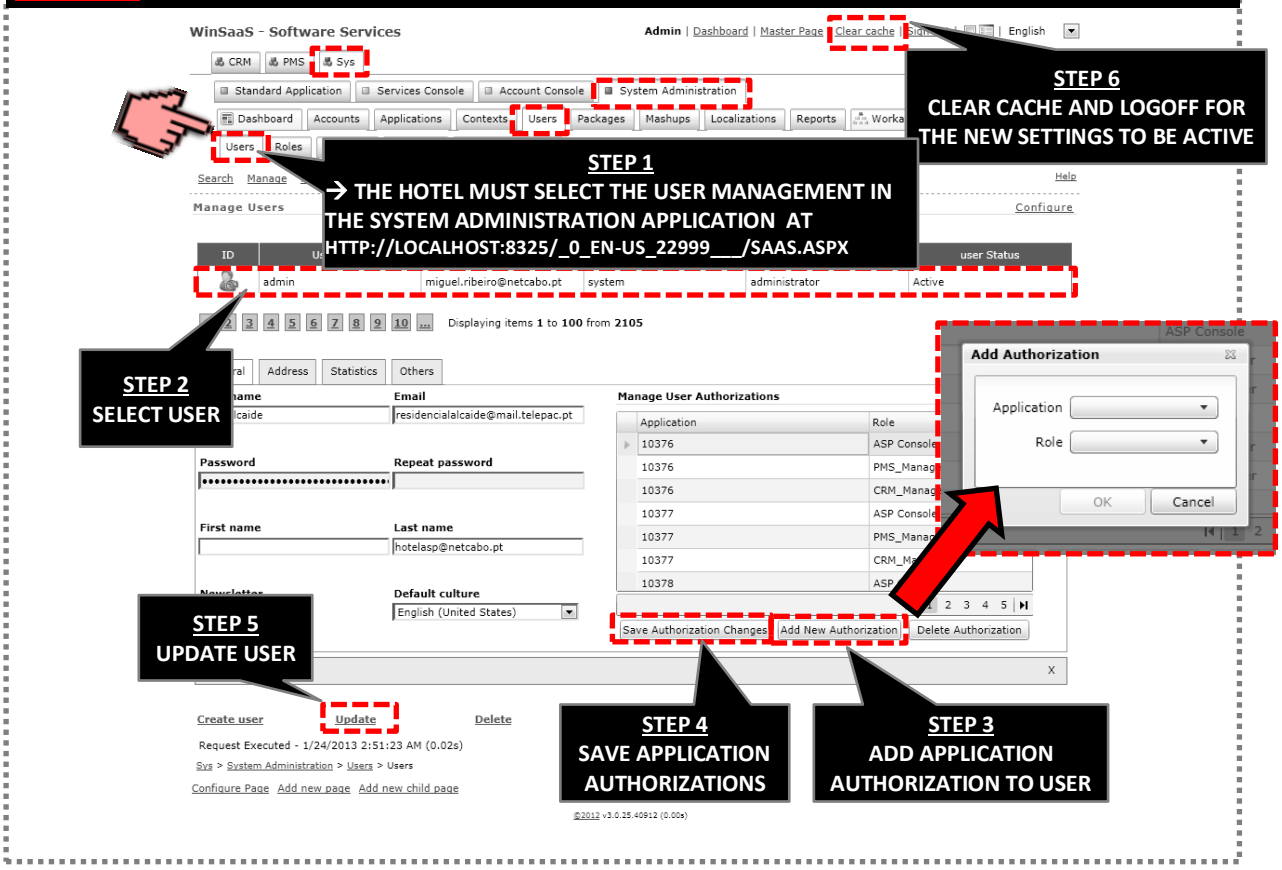
STEP 2 SET WORKAREA AUTHORIZATIONS TO A USER ROLE



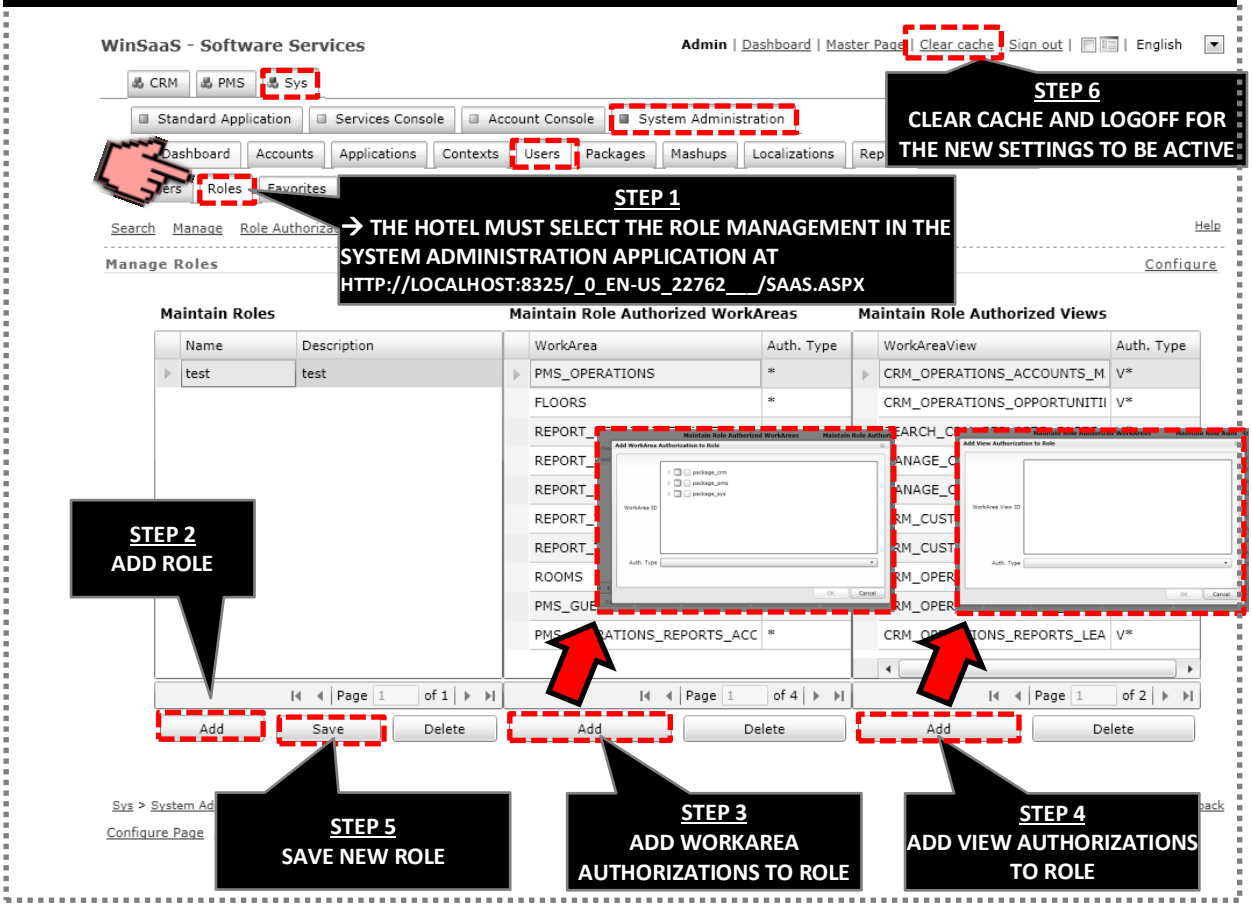
STEP 3 SET VIEW AUTHORIZATIONS TO A USER ROLE



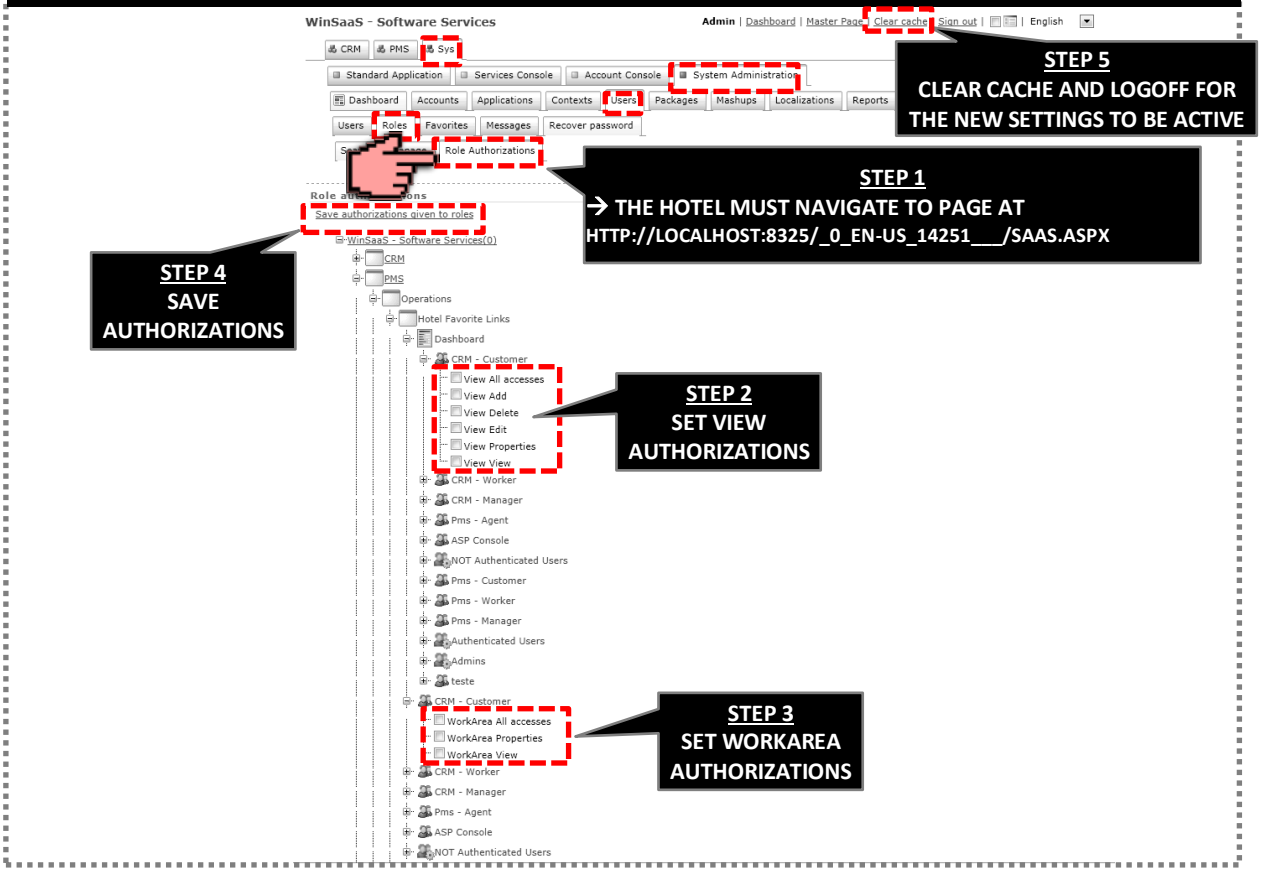
STEP 4 ADVANCED: SET APPLICATION AUTHORIZATIONS TO A SPECIFIC USER



STEP 5 ADVANCED: CREATE NEW USER ROLES



STEP 6 ADVANCED: SET AUTHORIZATIONS TO USER ROLES



3 SETUP ROOM PRICING

This chapter explains how to configure the hotel room pricing. The prices of other hotel products and services should be configured using the SET PRODUCTS AND SERVICES page.

The room pricing should be configured after executing the steps of the SETUP HOTEL chapter. The steps to configure the room pricing are first to set the room rates, then set the agents and finally associate the rates with the agents for certain periods of time.

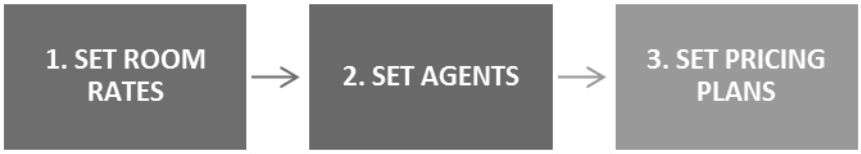


Figure 34 – Room Pricing: Setup Basic Steps

The yield management can be configured by using the *yields by occupancy* and *yields by cut offs* settings in the SET ROOM PLANS page.

The figure below illustrates an example of two room rates (Room Rate A and Room Rate B) with different pricing plans for different agents. The same room rate can have different room pricing for a different agent.

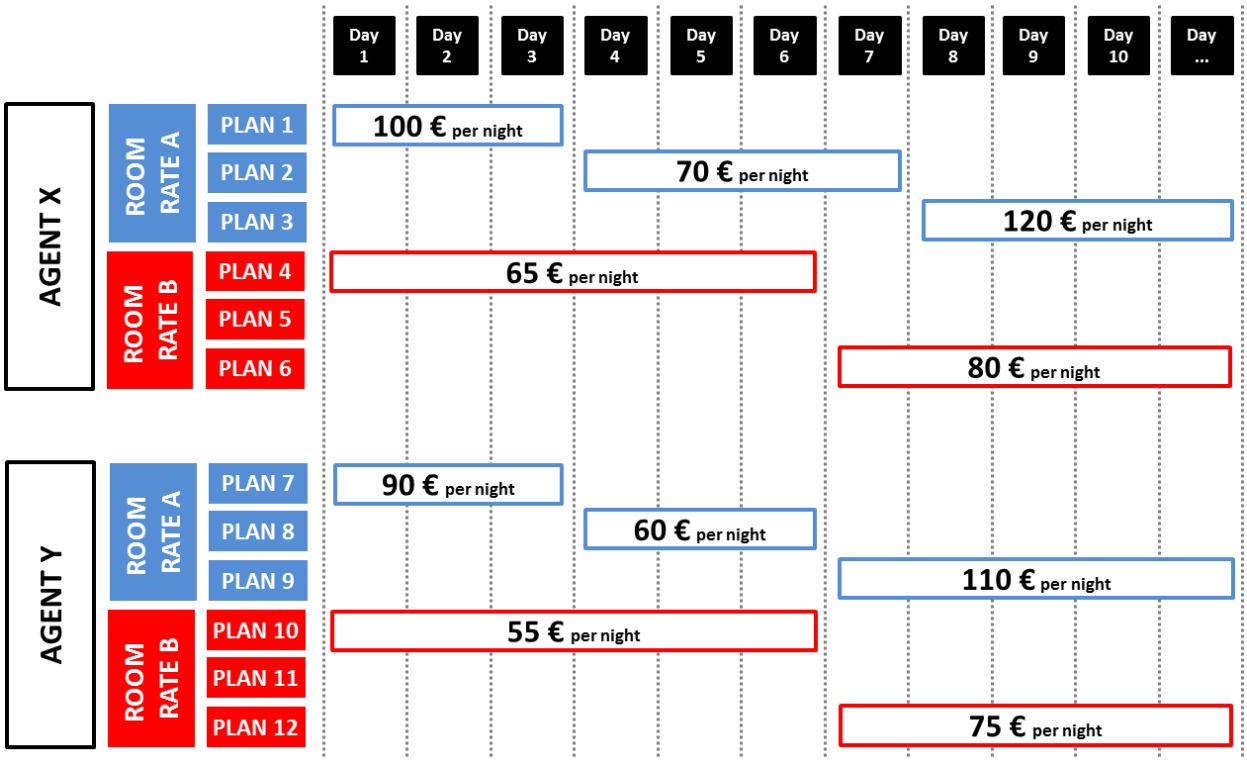


Figure 35 - Pricing Plans

The agent is the main object in the pricing structure. An agent can have multiple pricing plans. Each plan is associated to a certain period of time, with a start date and an end date, and is also associated to a room rate.

The pricing structure is organized accordingly to the diagram below.

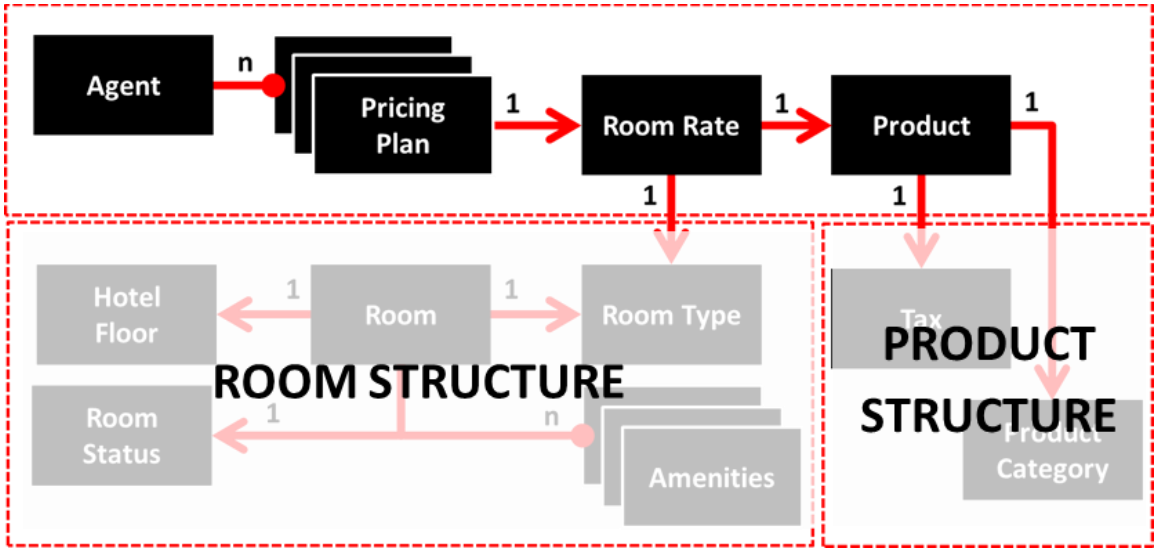


Figure 36 – Room Pricing: Data Model

The agent plans must have a continuum in time and cannot have slots. For example and using the picture below:

- If a booking is created with check-in date "START DATE B" and check-out date "END DATE D" the system will calculate the price incorrectly because it cannot determine the price between "END DATE B" and "START DATE D" and will assume zero for that missing period.

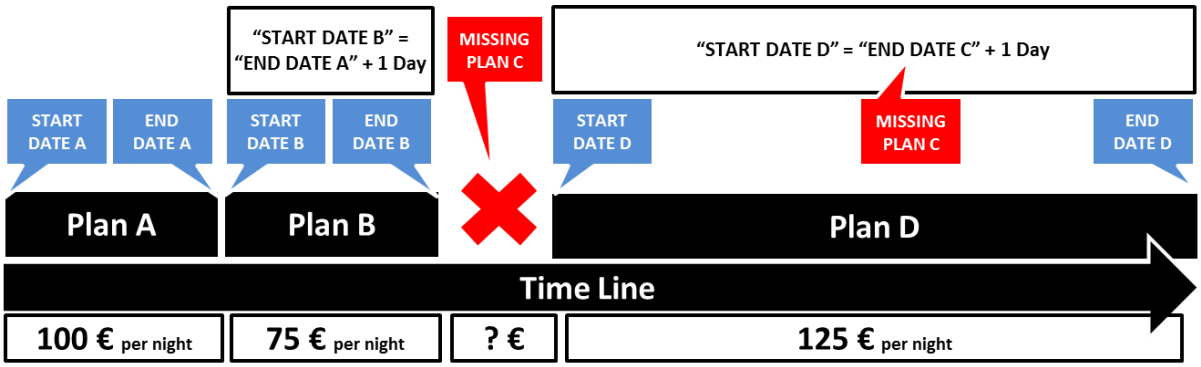


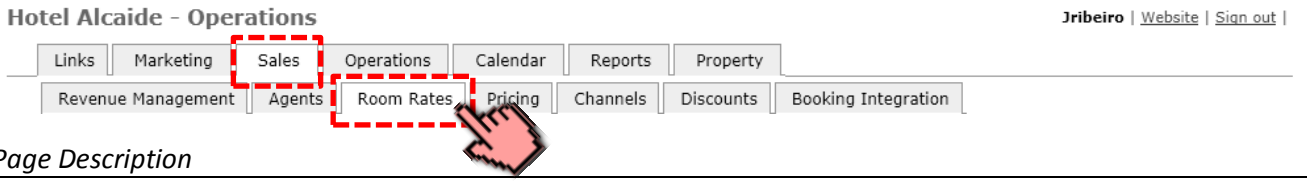
Figure 37 – Pricing Plan: Example of a problem in the agent plans of a specific room rate

It's important that the agent have plans to fill all the hotel business working time periods. Also each plan is associated only to one room rate.

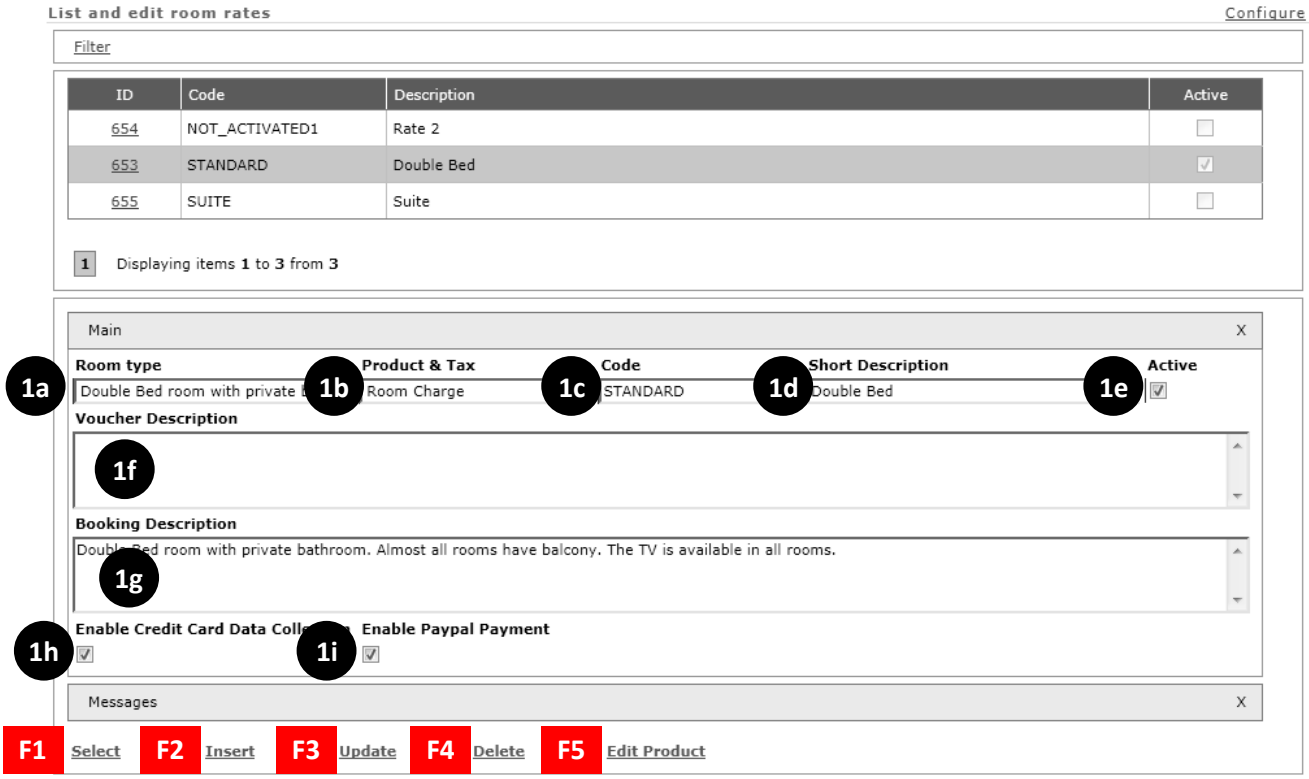
3.1 SET ROOM RATES

This page allows the hotel to define the hotel room rates and link them to the room types and taxes.

Page Location



Page Description



3.1.1 FIELDS

1) Main

Required a. ***Room type*** – the room type associated with the room rate.

i. All free rooms that are associated with the room rate via the room type will be available for booking.

ii. For example: when the customer selects a room rate in the hotel booking page the system will check if there is enough rooms available of the room type associated with the room rate to fulfill the customer request.

iii. The rooms must have the field "Online Reservation" active for them to be available for direct booking.

Required b. ***Product & Tax*** – the product associated with the room rate.

i. This is used to determine the tax that should be applied to the booking and also the product that should be launched into the guest account.

ii. We recommend that the hotel uses the product that has the "Is Room Charge Product" selected.
iii. For reviewing the product settings use the function F5 to navigate to the product detail page.

Required c. ***Code*** – a code to identify the room rate.

Required Public d. ***Short description*** – a short description for the room rate. This description is used in the public booking page of the hotel website to describe the rate.

e. ***Active*** – shows or hides the rate.

Public f. ***Voucher Description*** – the text associated with the ***@RoomRateVoucherDescription*** tag used in the email templates, in particular in the online booking voucher template.
i. Read the SET EMAIL TEMPLATES chapter for more information.

Public g. ***Booking description*** – the long description used in the public booking page of the hotel website that appears below of the "Short Description" field.

Public h. ***Enable Credit Card Data Collection*** – enables the payment by credit card data collection in the public booking page of the hotel website.
i. The system only collects the credit card data. It does not validate the credit card data or process any type of payment.
ii. The system collects the data, saves the data in a secured way and shows the credit card data to the hotel.
iii. It's the responsibility of the hotel to validate and process the payment if needed.

Public i. ***Enable PayPal payment*** – enables the payment by PayPal.
i. The hotel must correctly configure the PayPal integration as explained in SET PAYPAL INTEGRATION chapter

3.1.2 FUNCTIONS

1) **Select** – refresh the data from the database.

2) **Insert** – creates a new room rate.

3) **Update** – saves the data in the database.

4) **Delete** – deletes the room rate from the database if the rate is not associate to any other objects.

5) **Edit Product** – navigates to the detail of the product that is associated with the room rate.

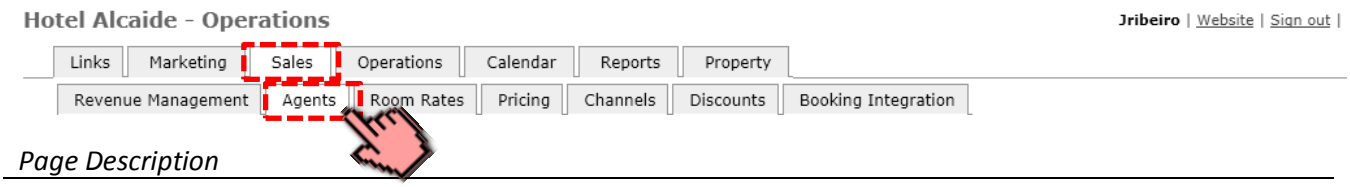
3.2 SET AGENTS

This page allows the hotel to create and manage agents and their room pricing plans.

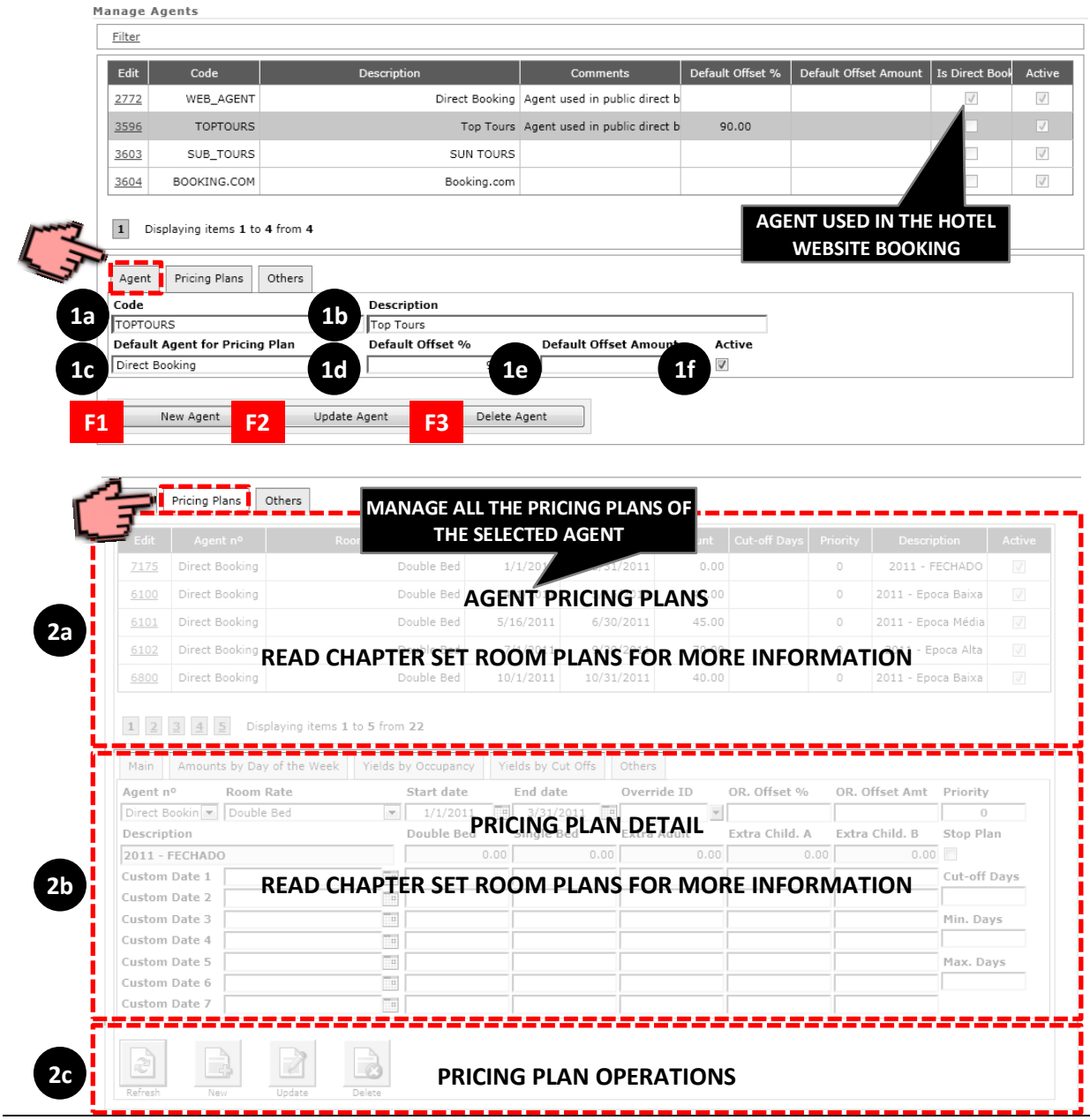
An agent is an entity, person or company, associated with a booking and is considered to be originator of the booking. The agent is also known as the booking agent. A booking can have only one agent associated.

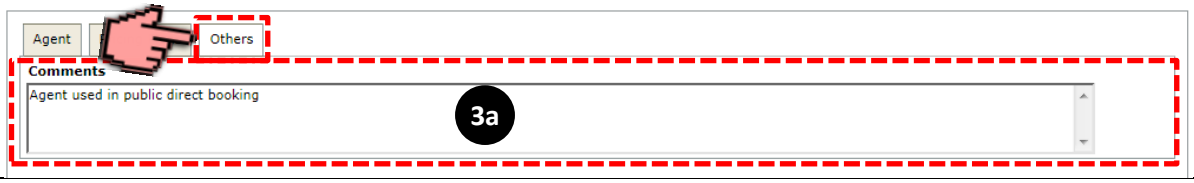
The agent used in the hotel website booking is identified as ***WEB_AGENT*** and cannot be deleted.

Page Location



Page Description





3.2.1 FIELDS

1) Agent – Basic information about the agent.

Required a. ***Code*** – a code that uniquely identifies the agent.

Required b. ***Description*** – a short description about the agent.

c. ***Default Agent for Pricing Plan*** – the default agent.
   i. The agent can inherit the pricing plans from another agent thus avoid duplication of pricing plans.
   ii. Set this field to use another agent pricing.

d. ***Default Offset %*** - the percentage to be applied to the amounts inherited from the default agent.
   i. This applies only if the "Default Agent for Pricing Plan" is selected.
   ii. A percentage is applied to all pricing plans values inherited from the default agent.
   iii. For example: if the "default agent" as a plan with a value of 100 and the current agent as a "Default offset %" of 90%
      - Then the current agent only assumes 90 and not 100.

e. ***Default Offset Amount*** – the amount to add or subtract to the amounts inherited from the default agent.
   i. This applies only if the "Default Agent for Pricing Plan" is selected.
   ii. An amount is added or subtracted (using the minus signal) to all pricing plans values inherited from the default agent.
   iii. For example: if the "default agent" as a plan with a value of 100 and the current agent as a "Default Offset Amount" of 5
      - Then the current agent assumes 105 (100+5).
      - If the "Default Offset Amount" is -10 then the current agent assumes the value 90 (100-10).

f. ***Active*** – shows or hides the agent.

2) Pricing Plans – This tab shows the agent room pricing plans.

a. ***Agent Pricing Plans*** – displays the pricing plans associated with the agent.
   i. Read chapter SET ROOM PLANS for more information.

b. ***Pricing Plan Detail*** – displays the detailed plan data associated with the select row.
   i. Read chapter SET ROOM PLANS for more information.

c. ***Pricing Plan Operations*** – the operations related to the agent pricing plan.
   i. Read chapter SET ROOM PLANS for more information.

3) ***Others***
   a. ***Comments*** – comments about the agent.

3.2.2 FUNCTIONS

1) New Agent – Creates a new agent in the database.

2) Update – Update the agent data in the database.

3) Delete Agent – Deletes the agent from the database.

3.3 SET ROOM PLANS

This page allows the hotel to set the room pricing plans. The hotel can use this page or the SET AGENTS page to configure the plans.

For creating a booking the system requires the hotel to select an agent, a room rate and a time period for the stay with check-in and check-out dates. Also it requests the number of the adults and the children. This is the minimum information that the system needs to determine the pricing to apply to the booking.

This means that for the system to correctly calculate the booking total amount it needs that each agent have for each room rate a set of plans that contains the entire hotel working time periods. This pricing structure combined with the capability of an agent to inherit the plans from another agent gives the hotel more flexibility for creating pricings.

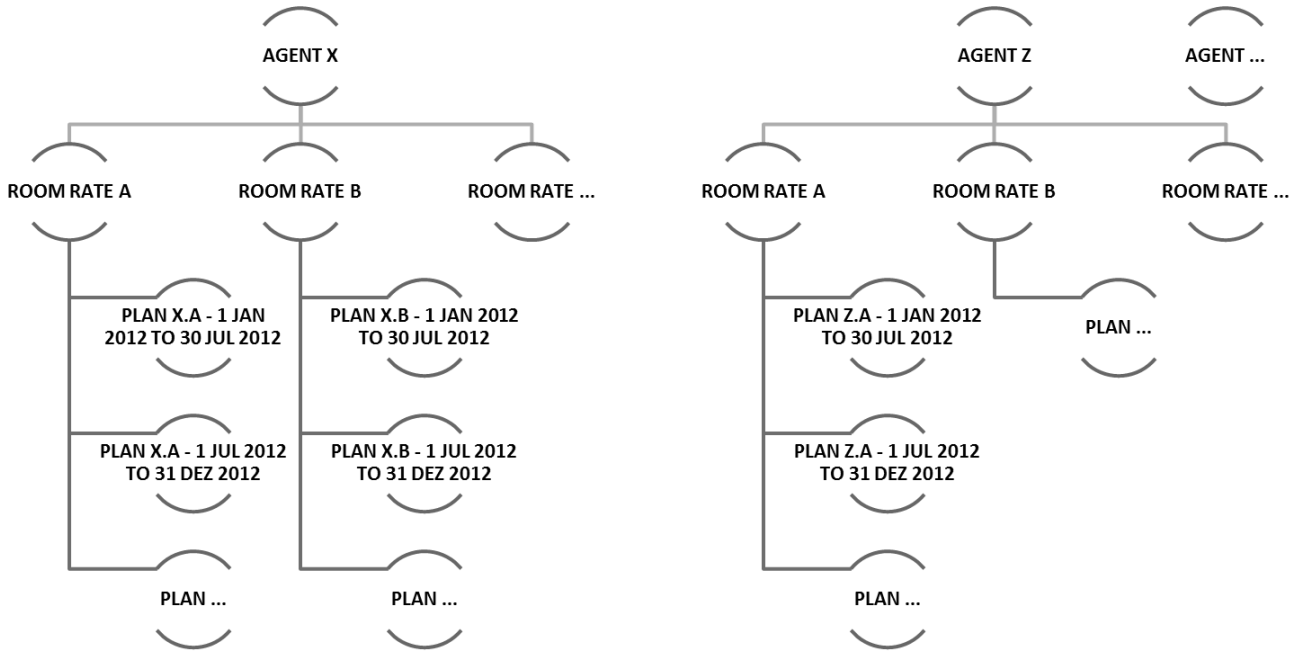


Figure 38 - Pricing Plan: Structure Example

The figure above shows an example illustrating that for each agent you need to set the room rates that are available and for each rate you need to create the plans for the hotel working periods. The plans for a room rate of an agent should not have time gaps between them.

For example, the agent shown below has plans A, B, C and D and they are all continuum in time.

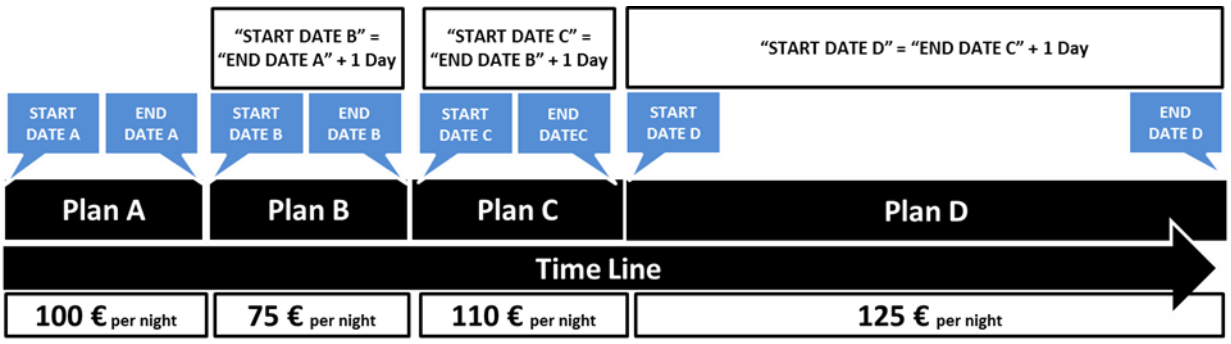
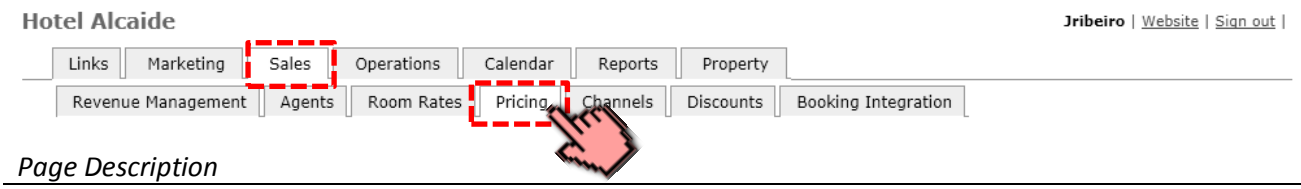


Figure 39 – Pricing Plan: Example of an Agent Plan

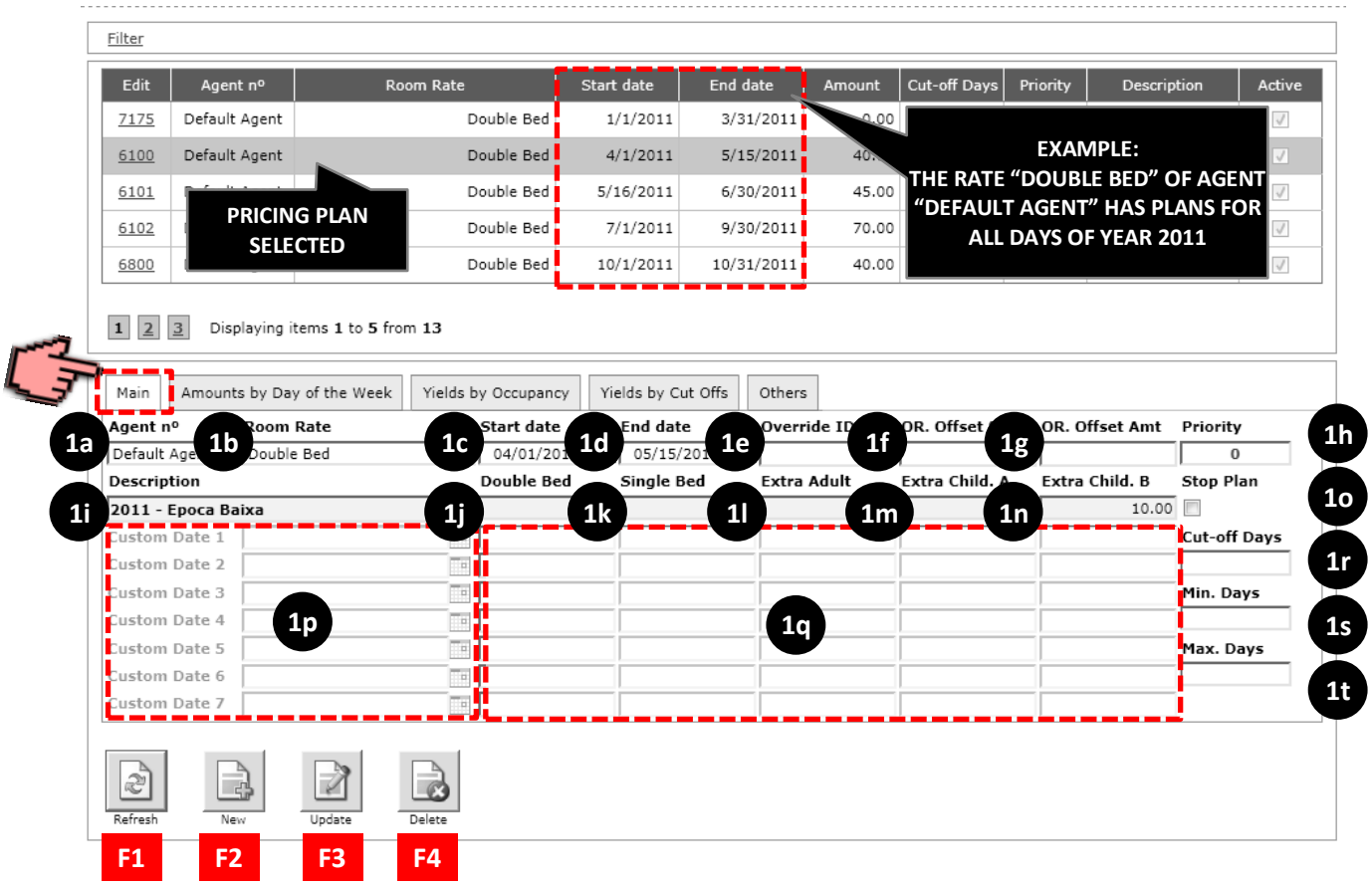
Note that this page shows all plans from all agents and you need to use the filter to choose the plans from a specific agent.

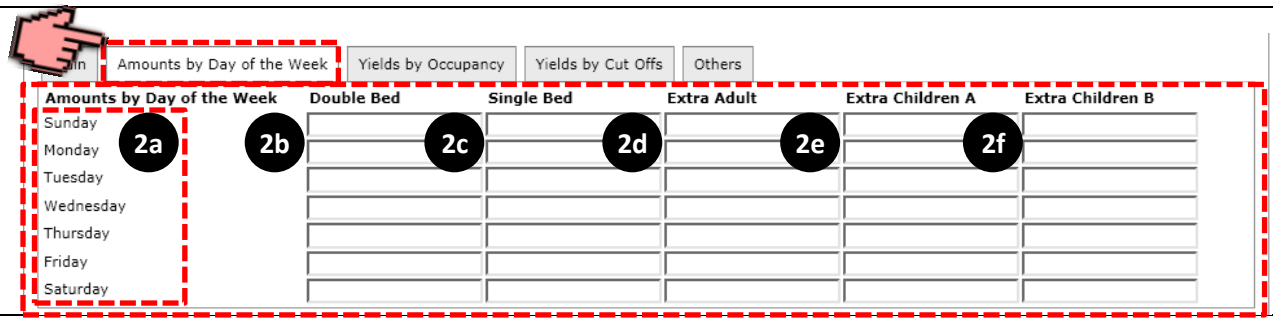
As referred before the agent "***WEB_AGENT***" cannot be deleted because it is the agent used in the hotel web site public booking.

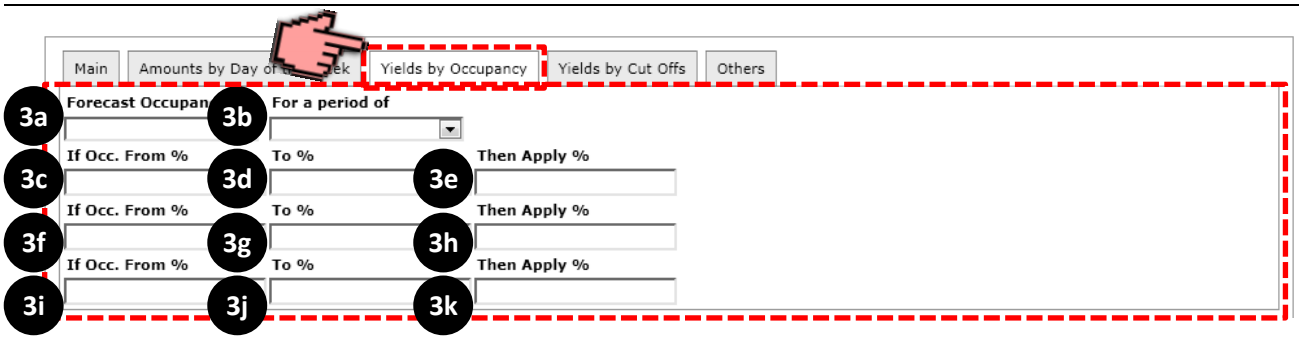
Page Location

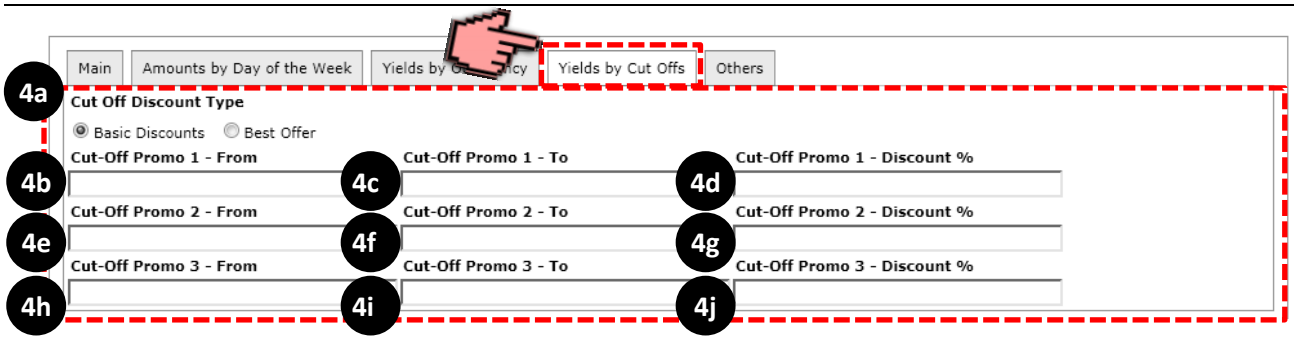


Page Description









3.3.1 FIELDS

1) Main – The basic information of a pricing plan.

Required a. ***Agent nº*** – the agent associated with the plan.

Required b. ***Room Rate*** – the room rate associated with the plan.

Required c. ***Start Date*** – the start date of the plan.

i. This is an inclusive date when calculating rates.

Required d. ***End Date*** – the end date of the plan.

i. This is an inclusive date when calculating rates.

e. ***Override ID*** – the ID of the pricing plan that will override the actual plan.

i. The override means that the actual plan will use all the amounts from the overriding plan and apply to them the defined in the fields “OR. Offset %” and “OR. Offset Amt”.

ii. This allows the hotel to avoid copying all the amounts data between plans and make the pricing management simpler.

f. ***OR Offset %*** - a percentage to apply to all amounts inherited from the overriding plan.

i. Applies only if "Override ID" is filled. It applies a percentage to all amounts that came from the overriding pricing plan.
ii. For example: if the overriding plan has an amount of 100 and the "OR. Offset %" is 75% then the actual plan will assume 75 (100*75%).

g. ***OR Offset Amt*** - a value to add or subtract to all amounts inherited from the overriding plan.
   i. Applies only if "Override ID" is filled. It adds\subtracts an amount to all amounts that came from the overriding pricing plan.
   ii. For example: if the overriding plan has an amount of 100 and the "OR. Offset Amt" is 15 then the actual plan will assume 115 (100+15) or if the "OR. Offset Amt" is -15 then the actual plan will assume 85 (100-15).

Required h. ***Priority*** – the order how the pricing plans are applied to calculate the booking total amount.
   i. The higher numbers have higher priority (a priority of 2 is higher than a priority of 1).
   ii. For example: Let's assume that there are 2 plans:
      - The plan A has a priority of 0, a price of 100 EUR per day and a range from 1 to 10 of June;
      - The plan B has a priority of 1, a price of 80 EUR per day and a range from 8 to 30 of June.
      - The hotel creates a booking from 6 to 12 of June. The system will calculate the following:
         - Day 6 – 100 EUR (Check in date – Amount given by plan A)
         - Day 7 – 100 EUR (Amount given by plan A)
         - Day 8 – 80 EUR (Both plans have a pricing for day 8 but plan B is selected because it has an higher priority)
         - Day 9 – 80 EUR (Both plans have a pricing for day 9 but plan B is selected because it has an higher priority)
         - Day 10 – 80 EUR (Both plans have a pricing for day 10 but plan B is selected because it has an higher priority)
         - Day 11 – 80 EUR (Amount given by plan B)
         - Day 12 – Check-out date

Required i. ***Description*** – a short description about the pricing plan.

Required j. ***Default Double bed amount*** – the price per night for a double bed room.

Required k. ***Default Single bed amount*** – the price per night for a single bed room.
   i. This amount is applied by comparing the "Nº of adults" inserted in the booking creation with the "Min. Number of Adults per Room" information available in the tab "Person per Rooms" of the SET ROOM TYPES page.

Required l. ***Default Extra adult amount*** – the price per night for an extra adult in the room.
   i. This amount is applied by comparing the "Nº of adults" inserted in the booking creation with the "Max. Adults per Room" information available in the tab "Person per Rooms" of the SET ROOM TYPES page.

Required m. ***Default Extra child A amount*** – the price per night for extra children of group type A in the room.

i. Read SET HOTEL MAIN PROPERTIES chapter for more info about children groups.
ii. The booking requires the user to set the number of adults and the number of children.
- The children are divided in two generic groups, namely group A and group B. These groups exist to give the hotel the flexibility to set different prices accordingly to the age of the children.

iii. This amount is applied by comparing the "Nº of children of type A" inserted in the booking creation with the "Max. Children per Room" information available in the tab "Person per Rooms" of the SET ROOM TYPES page.

Required n. ***Default Extra child B amount*** – the price per night for an extra child of group type B in the room.

i. Read SET HOTEL MAIN PROPERTIES chapter for more info about children groups.
ii. This amount is applied by comparing the "Nº of children of type B" inserted in the booking creation with the "Max. Children per Room" information available in the tab "Person per Rooms" of the SET ROOM TYPES page.

o. ***Stop plan*** – disables the plan from being used to calculate the booking price.

i. The stop plan check box and active check box have the same impact and consequences but have different conceptual meanings.
ii. The stop plan should be a kind of a temporary "pause" the plan.
iii. A stopped plan is shown with the color red in the REVENUE MANAGEMENT page.

p. ***Custom dates*** – the plan custom dates.

i. Select this option to apply prices to specific dates.
ii. These prices have higher priority than the prices set in the range.
iii. The system allows setting seven days of custom pricings.

q. ***Custom dates amounts*** – the plan custom amounts.

i. These are the amounts associate with each of the 7 custom dates.
ii. Each custom date can have a pricing applied to "Double Bed", "Single Bed", "Extra Adult", "Extra Child. A" and "Extra Child. B".

r. ***Cut off days*** – the plan cut-off days.

i. The plan is applied only if the booking check-in date is at least the "cut off days" later than the booking date
ii. CHECK-IN DATE >= ACTUAL DATE + CUTOFF DAYS.
iii. For example: if the "cut off days" is 5, the actual date is 10 of June and the check-in booking date is 14 of June then:
- The plan cannot be applied because it does not respect the cut off days
- But if the check-in booking date is 15 of June then the plan is applied.

s. ***Min Days*** – the minimum number of days the booking must have for the plan to be applied.

t. ***Max Days*** – the maximum number of days the booking can have for the plan to be applied.

2) Amounts by Day of the Week – This allows to set prices for certain days of the week. This has higher priority than the default prices of the range of dates but has less priority than the prices set for custom dates.

a. ***Days of the week*** – the days of the week.

b. ***Double bed amount*** – set the amount to be applied for a double bed.

c. ***Single bed amount*** – set the amount to be applied for a single bed.

d. ***Extra adult*** – set the amount to be applied for an extra adult.

e. ***Extra children A*** – set the amount to be applied for extra children of type A.

f. ***Extra children B*** – set the amount to be applied for extra children of type B.

3) Yields by Occupancy – This applies percentages to all amounts of the plan accordingly to the hotel occupation rate.

a. ***Forecast Occupancy in*** – select the type of calculation to be used to determine the occupancy rate.

i. The default is the "Each Booking day".

- This option calculates the occupancy rate for each day of the booking and applies to each of those days the rules defined in the "If Occ. From %", "To %" and "Then Apply %" fields.

ii. For example:

- The plan establish a price of 100 EUR per day between day 1 and day 4
- "Forecast occupancy in" = "Each Booking Day"
- "For a period of" = "1 day"
- Row 1 Rule
  - a. "If Occ from %" = 0
  - b. "To %" = 49
  - c. "Then apply %" = 20
- Row 2 Rule
  - a. "If Occ from %" = 50
  - b. "To %" = 75
  - c. "Then apply %" = 10
- Row 3 Rule
  - a. "If Occ from %" = 76
  - b. "To %" = 80
  - c. "Then apply %" = 5
- Hotel Occupancy rates for days:
  - a. Day 1 = 25%
  - b. Day 2 = 60%
  - c. Day 3 = 76 %
  - d. Day 3 = 81 %

iii. <u>A creation of a booking between days 1 and days 4</u>

- Day 1 price = 80 EUR (100 EUR * 20% discount from Row 1 occ. rule)
- Day 2 price = 90 EUR (100 EUR * 10% discount from Row 2 occ. rule)
- Day 3 price = 95 EUR (100 EUR * 5% discount from Row 3 occ. rule)

- Day 4 price = 100 EUR (no occ. Rule is applied because the hotel occ. rate of day 3 is higher than the max. established in Row 2 occ. rule)

b. ***For a period of*** – this is the range of days the system will calculate the occupancy rate.
   i. The default is "1 day". Meaning the system will calculate the occupancy rate for 1 day.

c. ***RULE 1 - If Occ from %*** - the start occupation rate (inclusive) for rule 1.

d. ***RULE 1 - To %*** - the end occupation rate (inclusive) for rule 1.

e. ***RULE 1 - Then apply %*** - the percentage to be applied to all amounts for rule 1.

f. ***RULE 2 - If Occ from %*** - the start occupation rate (inclusive) for rule 2.

g. ***RULE 2 - To %*** - the end occupation rate (inclusive) for rule 2.

h. ***RULE 2 - Then apply %*** - the percentage to be applied to all amounts for rule 2.

i. ***RULE 3 - If Occ from %*** - the start occupation rate (inclusive) for rule 3.

j. ***RULE 3 - To %*** - the end occupation rate (inclusive) for rule 3.

k. ***RULE 3 - Then apply %*** - the percentage to be applied to all amounts for rule 3.

4) Yields by Cut Offs – This applies percentages to all amounts of the plan accordingly to the hotel cut off rules.

a. ***Cut off discount type*** – the cut-off method. Selects the cut off method to apply to the plan.
   i. ***"Basic Discounts"*** – applies the discount rule type.
      - Applies the discounts accordingly to the day's difference between the creation booking date and the check-in booking date.
      - The basic discount rule type is explained by the example below:
        - The plan establish a price of 100 EUR per day between 1 and 30 of June
        - "Cut Off Discount Type" = "Basic Discounts"
        - Rule 1
          - " Cut-Off Promo 1 – From" = 5
          - " Cut-Off Promo 1 – To" = 7
          - " Cut-Off Promo 1 – Discount %" = 7.5
        - Rule 2
          - " Cut-Off Promo 2 – From" = 8
          - " Cut-Off Promo 2 – To" = 9
          - " Cut-Off Promo 2 – Discount %" = 15
        - Rule 3
          - " Cut-Off Promo 3 – From" = 10
          - " Cut-Off Promo 3 – To" = 999
          - " Cut-Off Promo 3 – Discount %" = 20
        - A booking is created in <u>2 of June</u> for a period <u>from 6 to 12 of June</u>
          - The cut off is 4 days (6 of June - 2 of June = 4 days). No discount is applied to the pricing plan.

- The price is 100 EUR per day.
  - A booking is created in 1 of June for a period from 6 to 12 of June
    - The cut off is 5 days. The RULE 1 discount is applied to the pricing plan (5 is between the 5 and 9 range of RULE 1).
      - The price is 92.5 EUR per day.
  - A booking is created in 15 of May for a period from 6 to 12 of June
    - The cut off is 21 days. The RULE 3 discount is applied to the pricing plan (21 is between the 10 and 999 range of RULE 3).
      - The price is 80 EUR per day.

ii. ***"Best Offer"*** – applies the best offer rule type.

- Applies discounts accordingly to the day's difference between the creation booking date and the check-in booking date.
- The best offer rule type is explained by the example below:
  - The plan establish a price of 100 EUR per day between 1 and 30 of June
  - "Cut Off Discount Type" = "Best Offer"
  - Rule 1
    - " Cut-Off Promo 1 – From" = 5
    - " Cut-Off Promo 1 – To" = 7
    - " Cut-Off Promo 1 – Discount %" = 7.5
  - Rule 2
    - " Cut-Off Promo 2 – From" = 8
    - " Cut-Off Promo 2 – To" = 9
    - " Cut-Off Promo 2 – Discount %" = 15
  - Rule 3
    - " Cut-Off Promo 3 – From" = 10
    - " Cut-Off Promo 3 – To" = 999
    - " Cut-Off Promo 3 – Discount %" = 20
  - A booking is created in 2 of June for a period from 6 to 12 of June
    - The cut off is 4 days (6 of June - 2 of June = 4 days). No discount is applied to the pricing plan.
      - The price is 100 EUR per day.
  - A booking is created in 1 of June for a period from 6 to 12 of June
    - 6 of June = 92.5 EUR (**6 Cut off days** – Applying **RULE 1**)
    - 7 of June = 92.5 EUR (**7 Cut off days** – Applying **RULE 1**)
    - 8 of June = 85 EUR (**8 Cut off days** – Applying **RULE 2**)
    - 9 of June = 85 EUR (**9 Cut off days** – Applying **RULE 2**)
    - 10 of June = 80 EUR (**10 Cut off days** – Applying **RULE 3**)
    - 11 of June = 80 EUR (**11 Cut off days** – Applying **RULE 3**)
    - 12 of June = Check out date

b. ***RULE 1 – Cut-off Promo 1 - From*** – the minimum number of days for the rule 1 range.

c. ***RULE 1 – Cut-off Promo 1 - To*** – the maximum number of days for the rule 1 range.

d. ***RULE 1 – Cut-off Promo 1 - Discount %*** - the percentage to be applied if the cut-off days is inside the rule 1 days range.

e. ***RULE 2 – Cut-off Promo 2 - From*** – the minimum number of days for the rule 2 range.

f. ***RULE 2 – Cut-off Promo 2 - To*** – the maximum number of days for the rule 2 range.

g. ***RULE 2 – Cut-off Promo 2 - Discount %*** - the percentage to be applied if the cut-off days is inside the rule 2 days range.

h. ***RULE 3 – Cut-off Promo 3 - From*** – the minimum number of days for the rule 3 range.

i. ***RULE 3 – Cut-off Promo 3 - To*** – the maximum number of days for the rule 3 range.

j. ***RULE 3 – Cut-off Promo 3 - Discount %*** - the percentage to be applied if the cut-off days is inside the rule 3 days range.

5) Others

a. ***Active*** – disables the plan from being used in the room pricing calculation.

3.3.2 FUNCTIONS

1) Refresh – refresh the plan data from the database.

2) New – creates a new plan.

3) Update – saves the plan data in the database.

4) Delete – deletes the plan from the database.

3.4 REVENUE MANAGEMENT

The revenue management page displays in one page all the pricing data for all agents and room rates. Also this page shows the occupation rates and average prices per day. The page results from a mix between a calendar and the agent hierarchical structure as displayed in the figure below. The columns represent the days and the rows represent the amounts established by each plan.

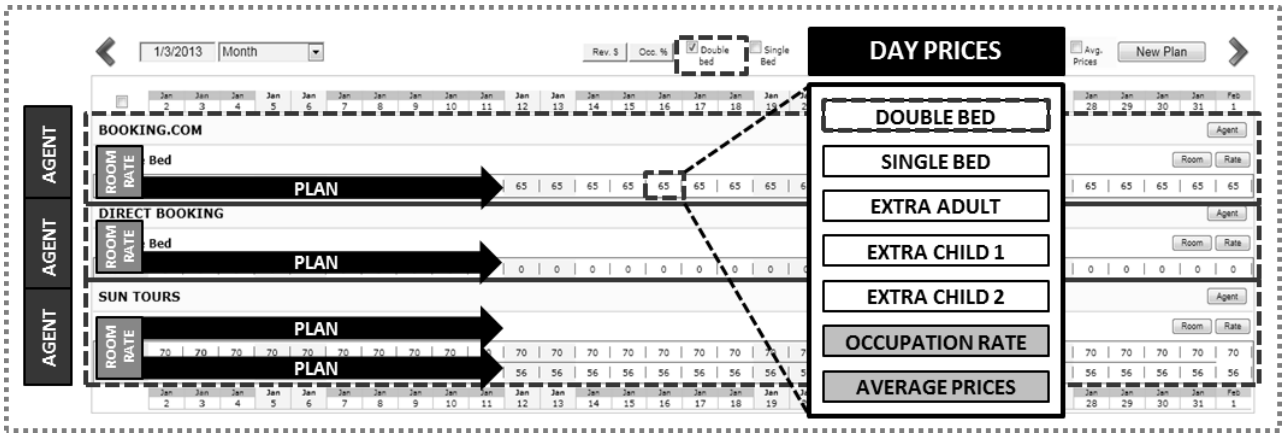


Figure 40 - Revenue Management Page Layout

For example the figure below shows that Agent A has 3 plans, namely the Plan 1.a, Plan 2.a and Plan 2.b.

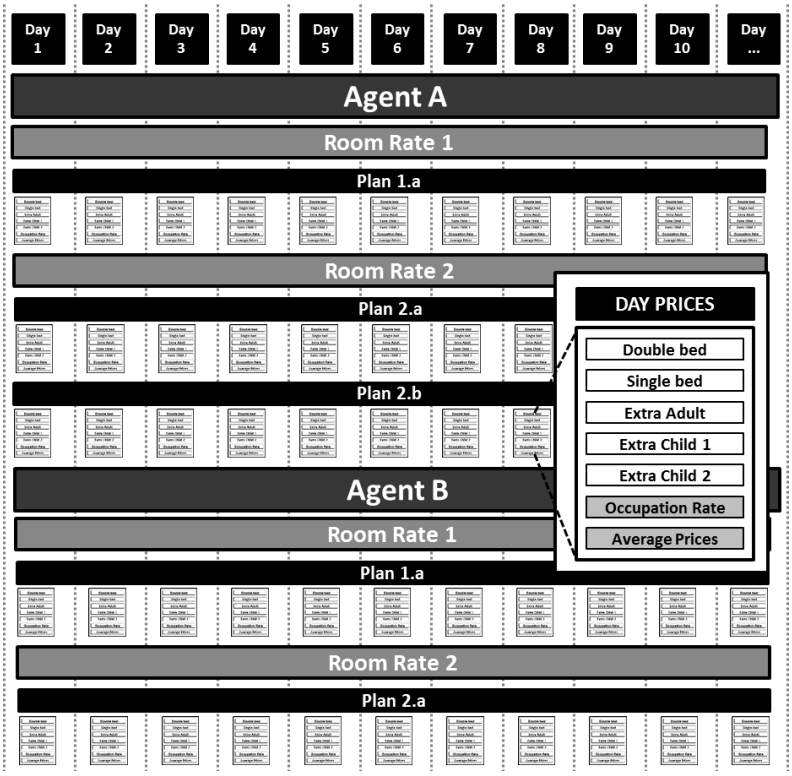
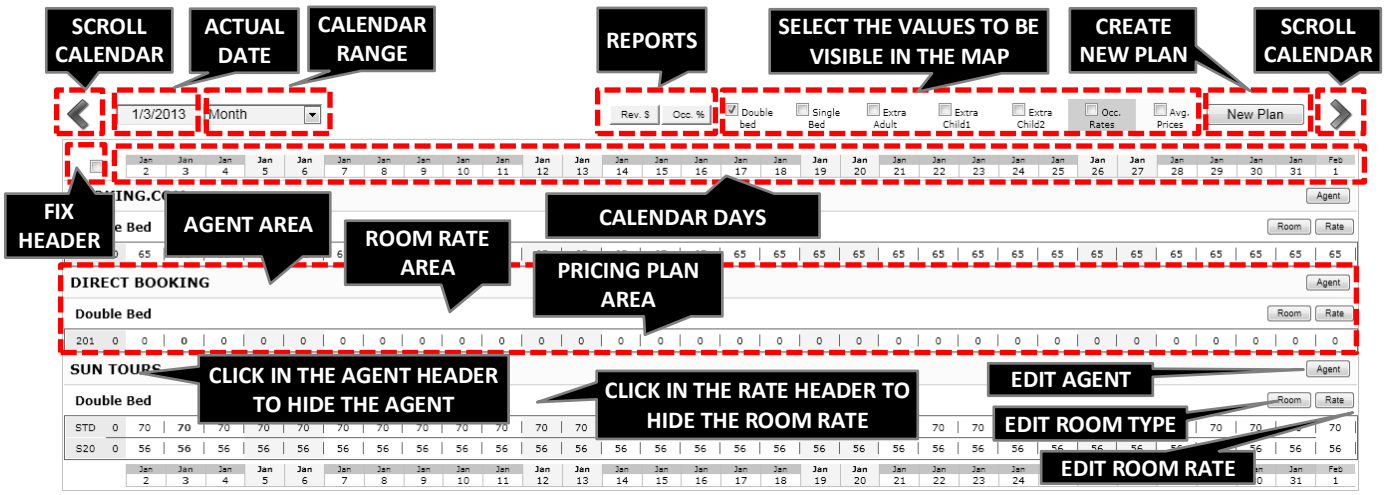


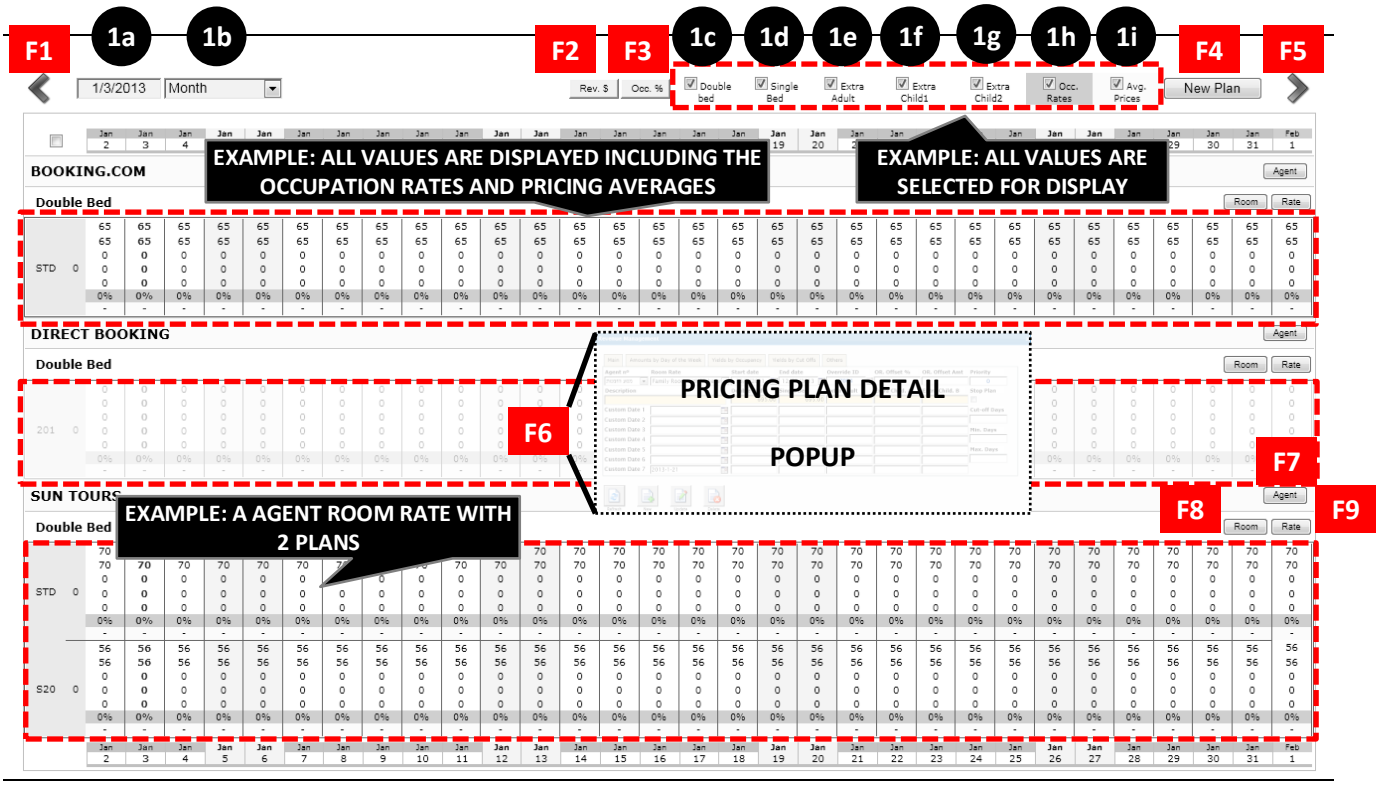
Figure 41 - Revenue Management Page Example

The Plan 1.a is applied when the hotel selects the Agent A and the room rate 1. The Plan 2.a and Plan 2.b are chosen for pricing calculation when the hotel select the Agent A and the room rate 2. If Plan 2.a has a higher priority than Plan 2.b then Plan 2.a is applied instead of Plan 2.b. This page allow also to access to the common pricing functions such as plan creation, edit plans, edit agent, edit room rates or edit room types.

Page Location

Page Description





3.4.1 FIELDS

1) **Calendar View**
   a. ***Day Selection*** – select the first day to be displayed in the calendar.

   b. ***Period Selection*** – select the period to display in the page
      i. 1 month
      ii. 2 months
      iii. 3 months

   c. ***Double Bed*** – select to display the double bed price amount in the plan row.

   d. ***Single Bed*** – select to display the single bed price amount in the plan row.

   e. ***Extra Adult*** – select to display the extra adult price amount in the plan row.

   f. ***Extra Child 1*** – select to display the extra child of type A price amount in the plan row.

   g. ***Extra Child 2*** – select to display the extra child of type B price amount in the plan row.

   h. ***Occ. Rates*** – select to display the day occupancy rates.

   i. ***Avg. Prices*** – select to display the day average prices.

3.4.2 FUNCTIONS

1) **Scroll Left** – move a "Period Selection" to the left of the "Day Selection".

2) **Rec. $** - popup the average price per day report.

3) **Occ. %** - popup the average occupation per day report.

4) **New Plan** – opens a popup with an empty pricing plan page.

5) **Scroll Right** – move a "Period Selection" to the right of the "Day Selection".

6) **"Click in a Value"** – by clicking in any amount it opens a popup with the plan that is associated with the amount selected.

7) **Agent** – opens a popup with the selected agent page.

8) **Room** – opens a popup with the selected room type page.

9) **Rate** – opens a popup with the selected room rate page.

4 SETUP WEBSITE

The hotel website is an important tool for the hotel to interact and network with the guests, not only the new guests but also the recurrent guests. The following picture show the steps needed to configure the hotel website.

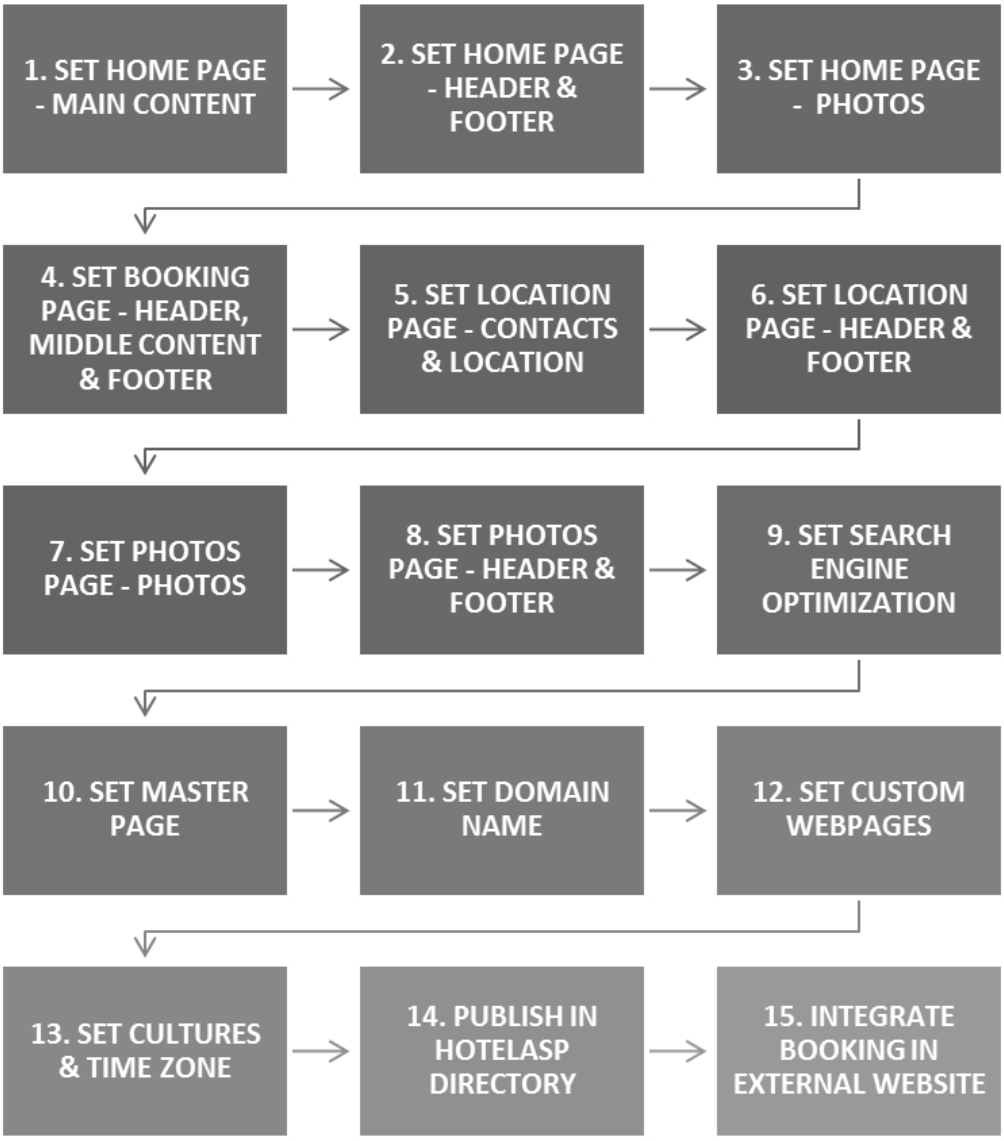


Figure 42 – Hotel Website: Configuration Steps

The hotel can add more pages and change the design and layout of their website. The default template includes a navigation bar located in page header that includes useful links as shown in the figure below.

Figure 43 – Hotel Website: Main Links

The user can also choose different look and styles by selecting the options available in the combo box "Template" as shown in picture presented before. Regarding the structure the system by default provides four pages as shown in the figure below.

Figure 44 - Hotel Website: Default Pages

4.1 HOTEL WEBSITE LAYOUTS

The content of the four default pages can be configured by the hotel as explained in the following topics.

Figure 45 - Hotel Website: Page Layouts

Each standard page is composed by content areas that can be changed by the hotel. The following layouts identify the areas that can be changed by the hotel.

4.1.1 HOME PAGE LAYOUT

The home page layout is organized accordingly to the following illustration.

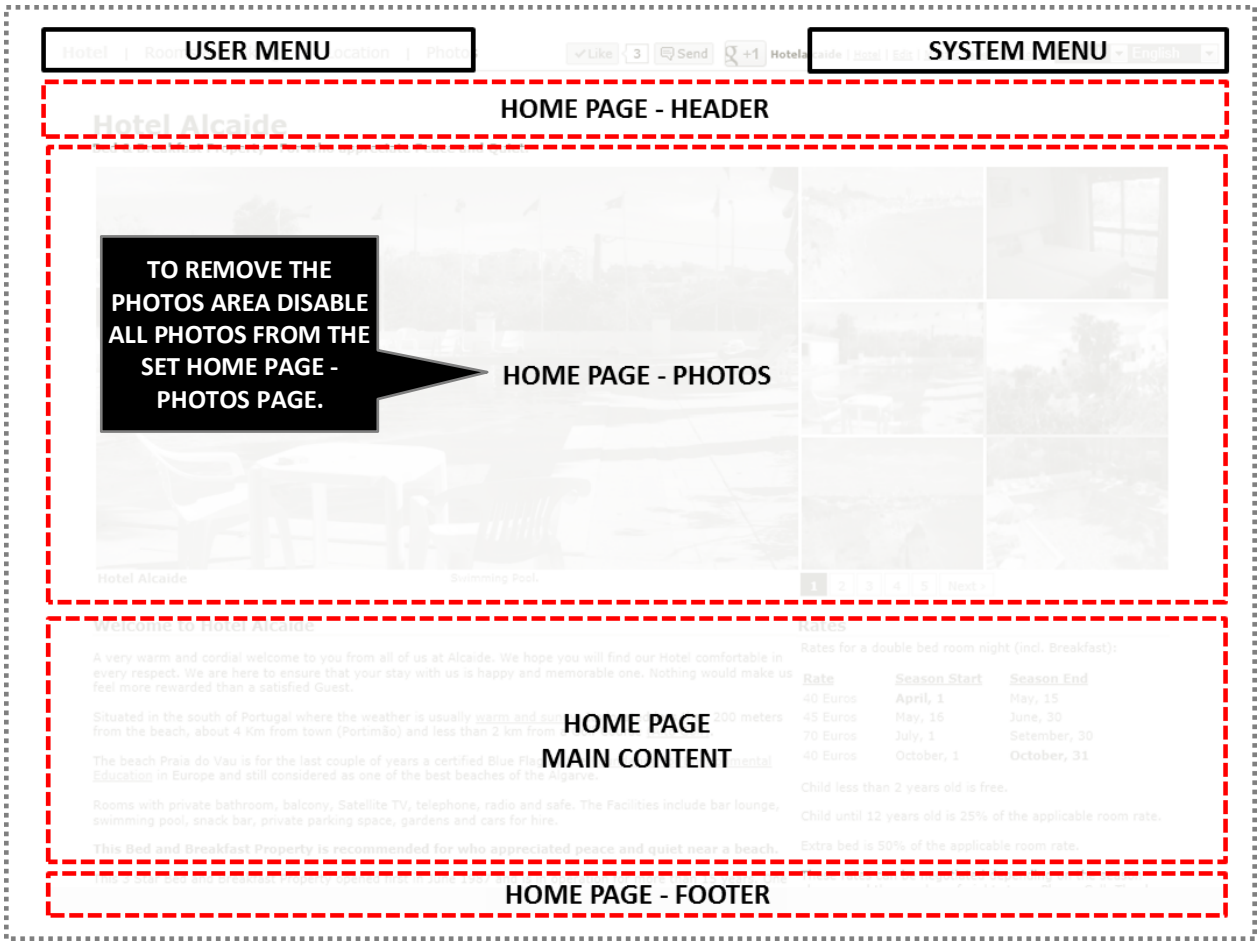


Figure 46 – Hotel Website: Home Page Layout

The home page photos area can be removed from the home page if there are no home page photos available for publishing. Read the SET HOME PAGE - PHOTOS chapter for more information.

The following areas can be edited by the hotel:

a) HOME PAGE - HEADER
b) HOME PAGE - PHOTOS
c) HOME PAGE – MAIN CONTENT
d) HOME PAGE - FOOTER

The hotel should read the SET HOME PAGE - MAIN CONTENT , SET HOME PAGE - HEADER & FOOTER and SET HOME PAGE - PHOTOS chapters for more information.

4.1.2 BOOKING PAGE LAYOUT

The booking page layout is organized accordingly to the following illustration.

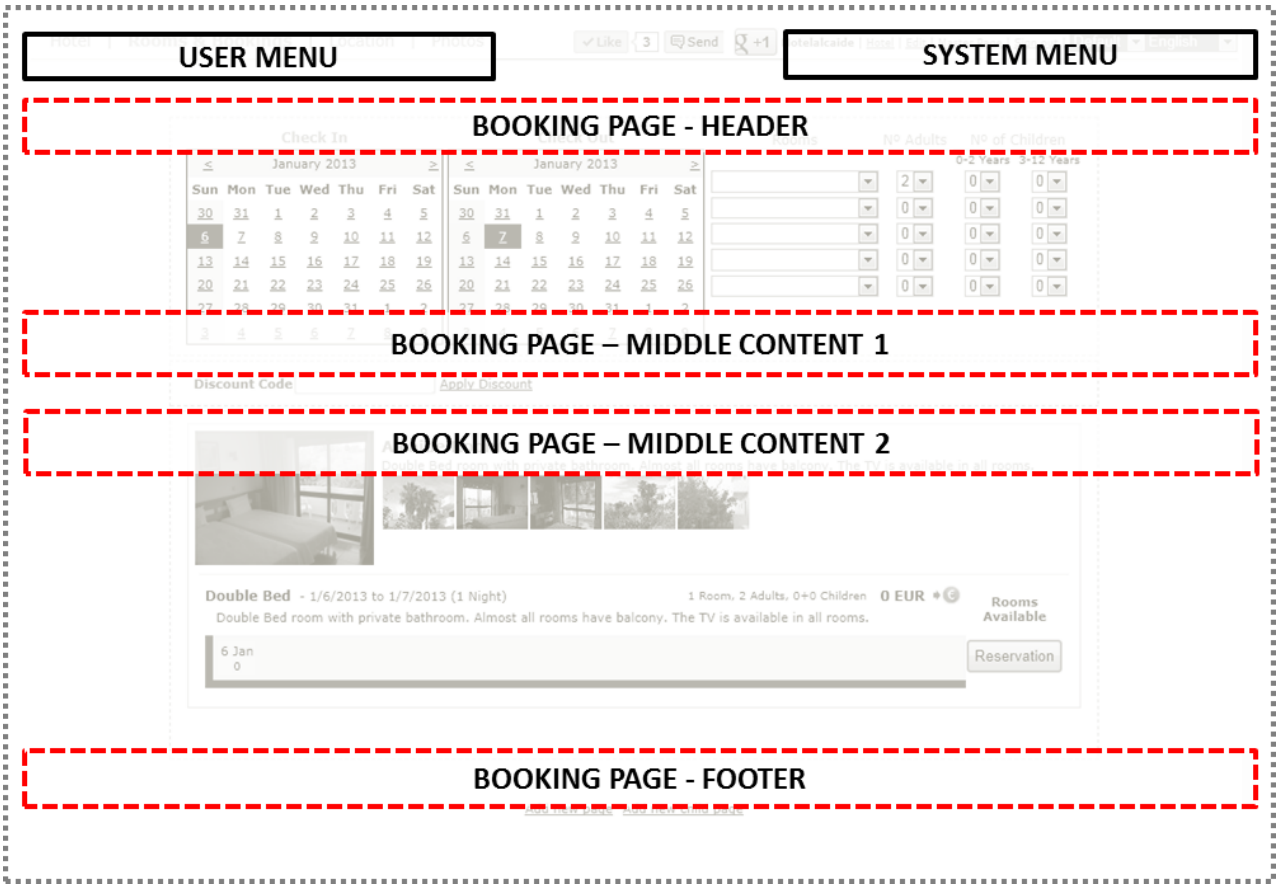


Figure 47 - Hotel Website: Booking Page Layout

The “MIDDLE CONTENT 1” area is located before the discount code field and the “MIDDLE CONTENT 2” is located after the discount code field.

The following areas can be edited by the hotel:

a) BOOKING PAGE - HEADER
b) BOOKING PAGE – MAIN CONTENT 1
c) BOOKING PAGE – MAIN CONTENT 2
d) BOOKING PAGE - FOOTER

The hotel should read the SET BOOKING PAGE - HEADER, FOOTER AND MIDDLE CONTENT chapter for more information.

4.1.3 LOCATION PAGE LAYOUT

The location page layout is organized accordingly to the following illustration.

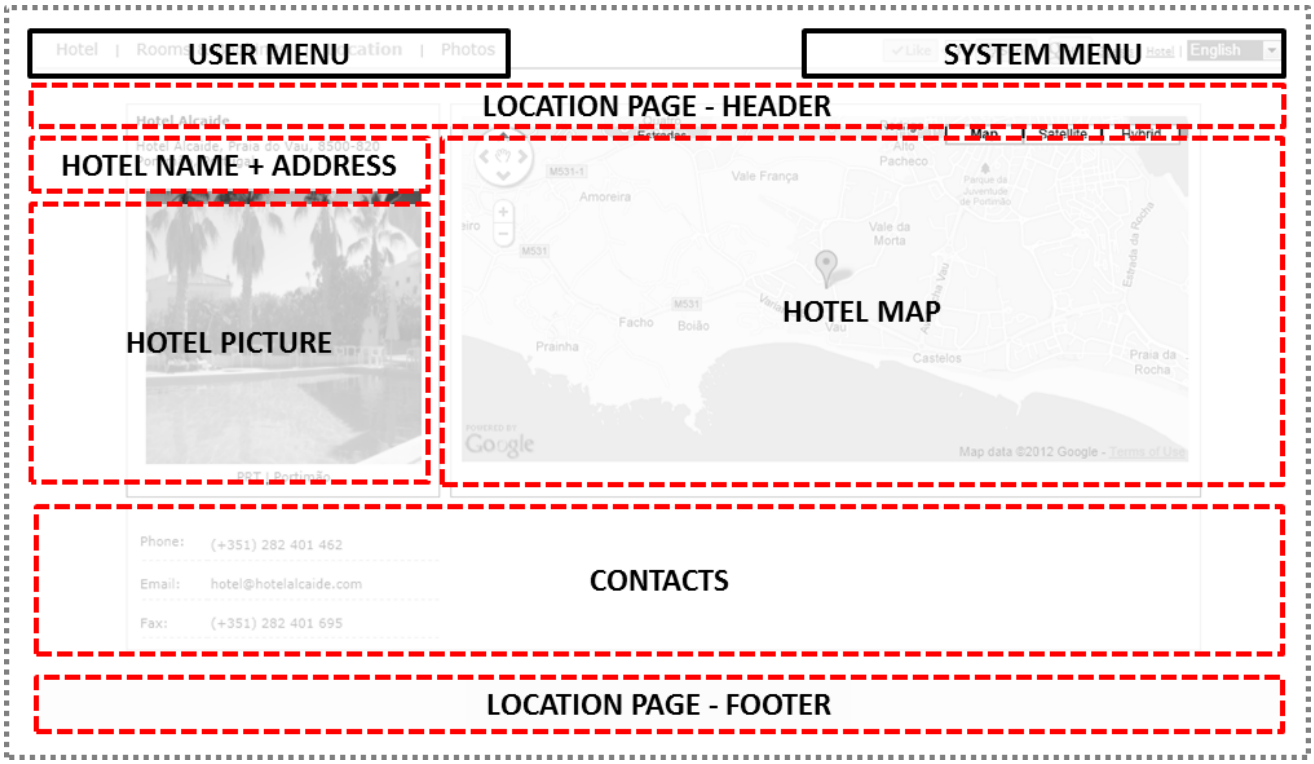


Figure 48 - Hotel Website: Location Page Layout

The following areas can be edited by the hotel:

a) HOTEL NAME
b) ADDRESS
c) LOCATION PAGE - HEADER
d) HOTEL MAP
e) CONTACTS
f) LOCATION PAGE – FOOTER

The hotel should read the SET LOCATION PAGE and SET LOCATION PAGE – HEADER & FOOTER chapters for more information.

4.1.4 PHOTOS PAGE LAYOUT

The photos page layout is organized accordingly to the following illustration.

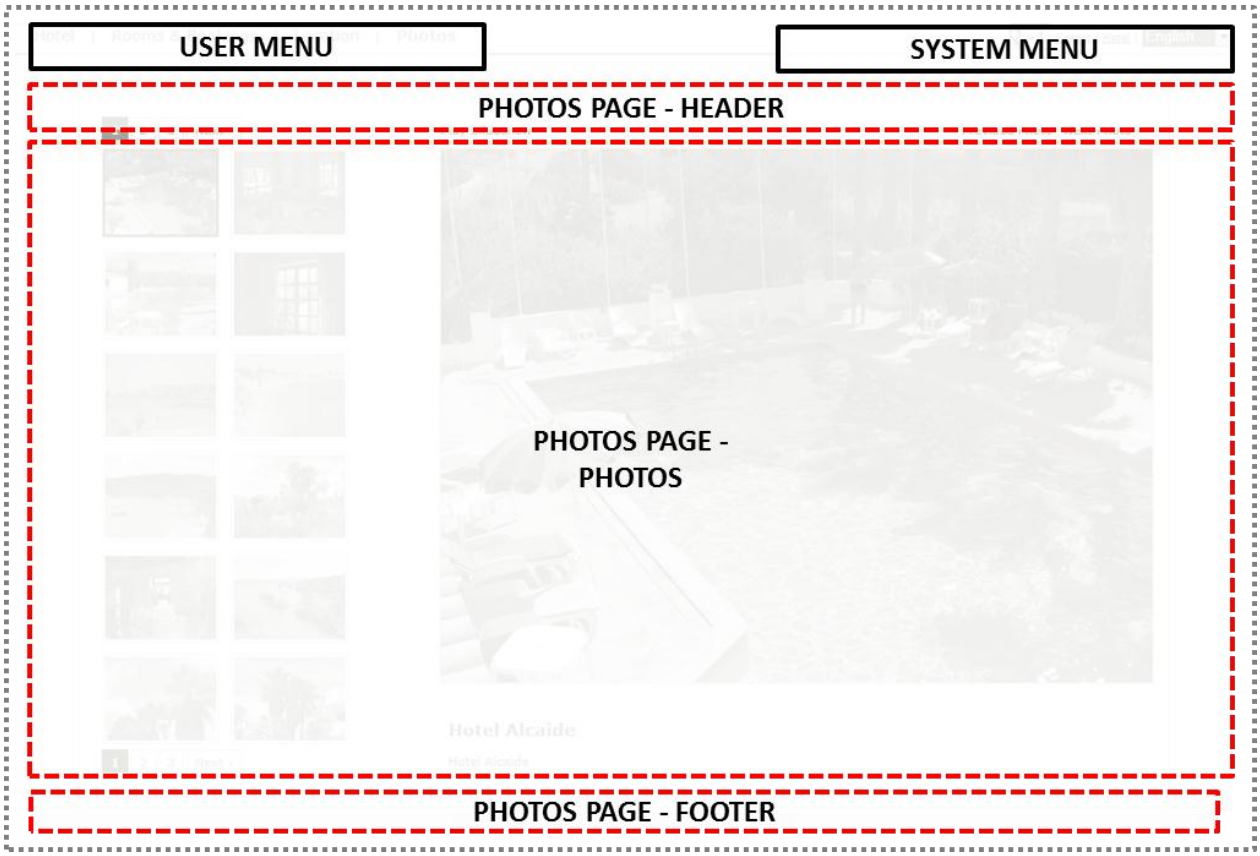


Figure 49 - Hotel Website: Photos Page Layout

The following areas can be edited by the hotel:

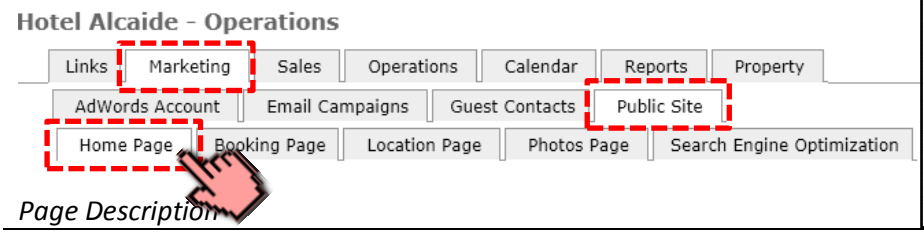
a) PHOTOS PAGE – HEADER
b) PHOTOS PAGE – PHOTOS
c) PHOTOS PAGE – FOOTER

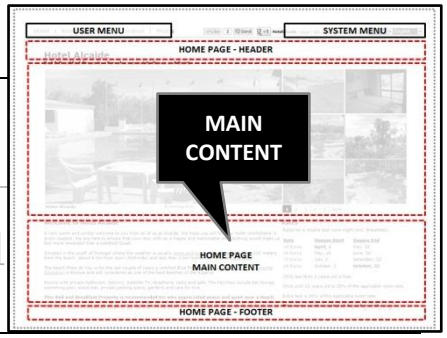
The hotel should read the SET PHOTOS PAGE and SET PHOTOS PAGE - HEADER & FOOTER for more information.

4.2 SET HOME PAGE - MAIN CONTENT

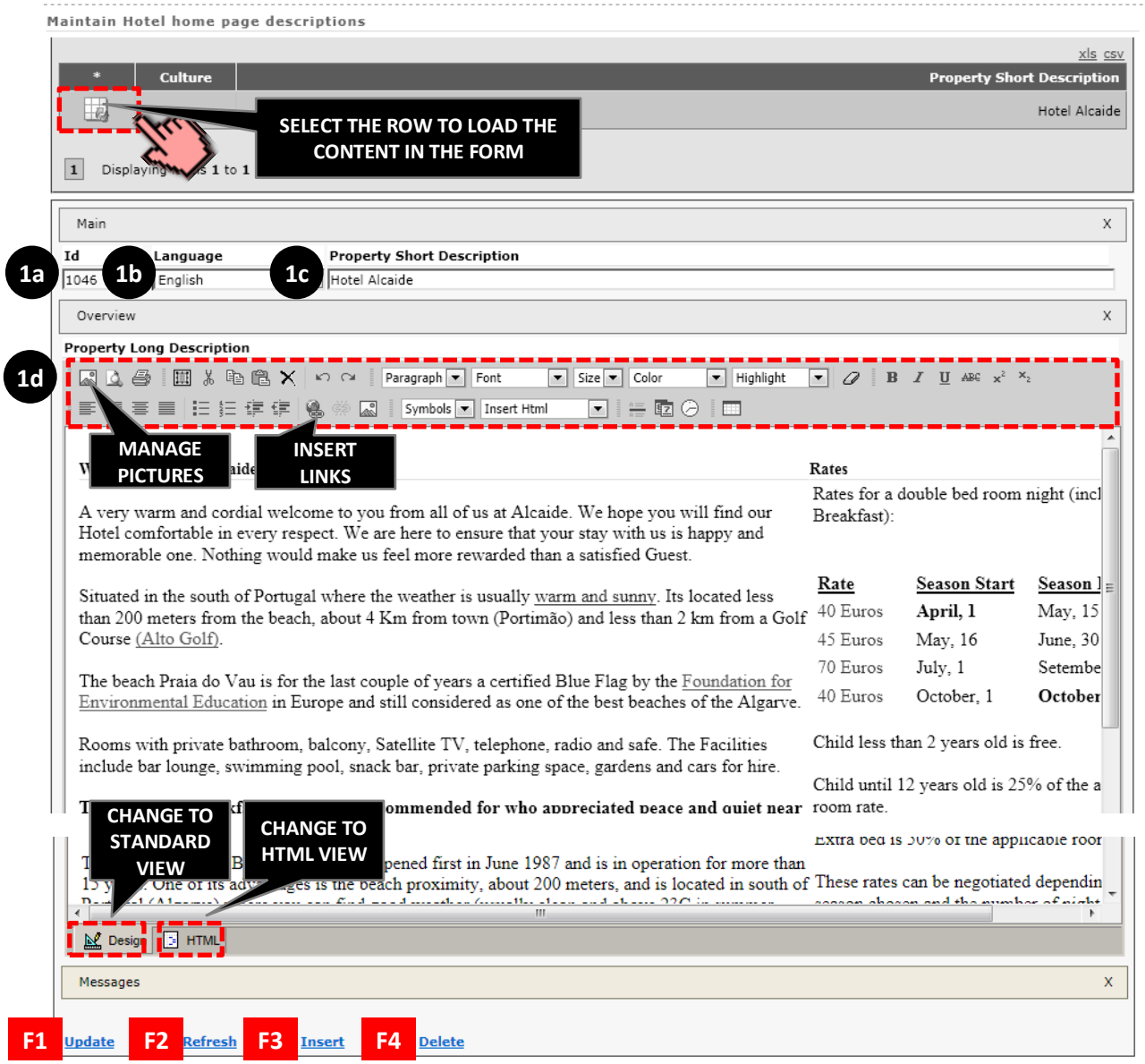
This page allows the hotel to configure the main content of the hotel website homepage. The content can be translated to several languages.

Page Location





Page Description



4.2.1 FIELDS

1) Main

Read Only a. ***Id*** – the content system id.

Required b. ***Language*** – the language associated with the content.

i. The default and primary language is "English".
ii. If the system doesn't find the content associated with the browser language it will always default to "English".
iii. It's required that the hotel create at least one content in the "English" language.

Required c. ***Property short description*** – a short description describing the content.

Required Public d. ***Property long description*** – the content in html format to be published in the hotel website.

i. This content is associated with the "Language" and its public content.

4.2.2 FUNCTIONS

1) Update – saves the content in the database.

2) Refresh – refresh the content from the database.

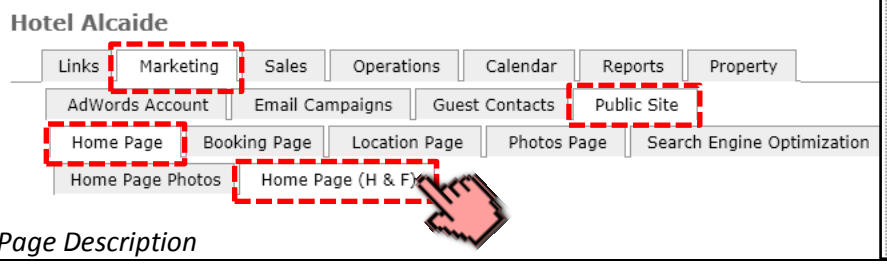
3) Insert – creates a new content in the database.

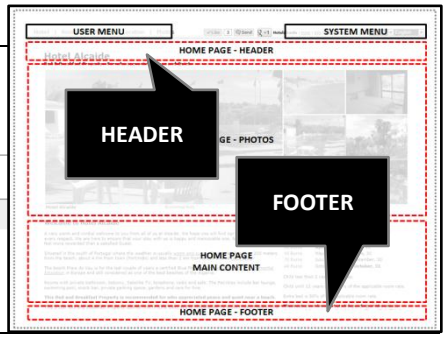
4) Delete – deletes the content from the database.

4.3 SET HOME PAGE - HEADER & FOOTER

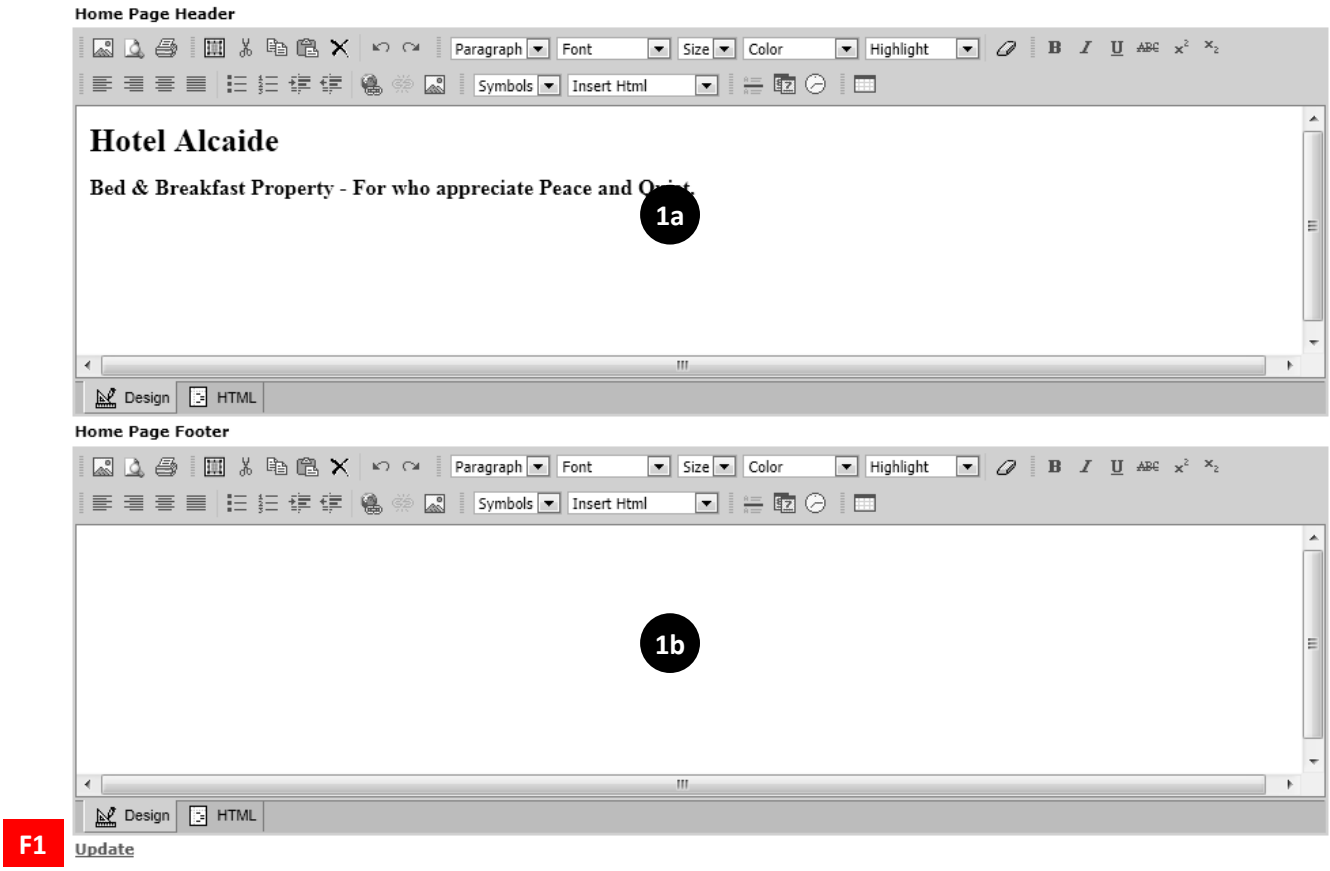
This page lets the hotel to configure the header and footer of the hotel website home page.

Page Location





Page Description



4.3.1 FIELDS

1) Main

Public a. ***Home page header*** – the html content associated with the page header.

Public b. ***Home page footer*** – the html content associated with the page footer.

4.3.2 FUNCTIONS

1) **Update** – save the content in the database.

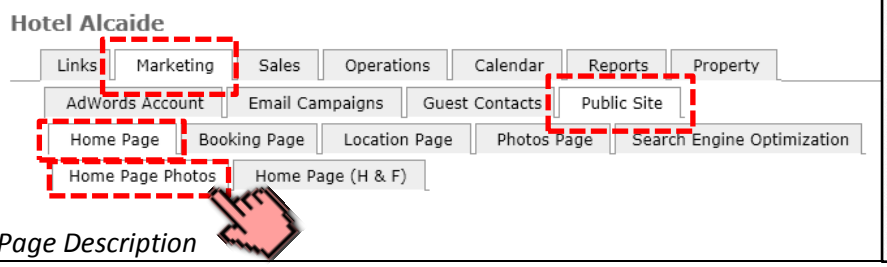
4.4 SET HOME PAGE - PHOTOS

This page permits the hotel to configure the photos displayed in the hotel website homepage. The hotel can opt not to show this area by removing all photos or by unselecting the "Is Public" field from all the photos.

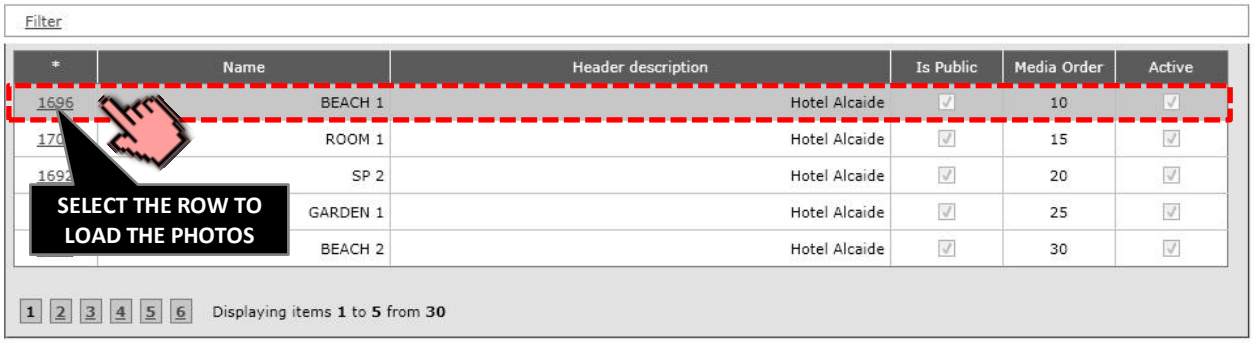
The steps to save a picture are:

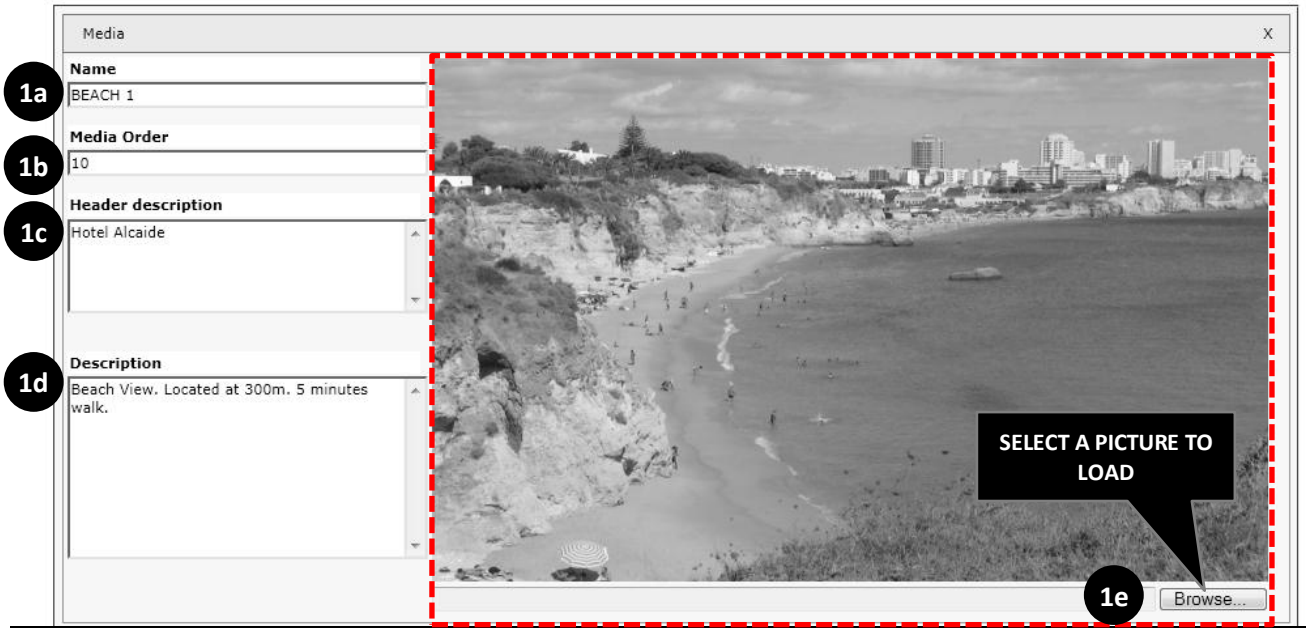
1. Select and upload the picture by pressing the button "Browse";
2. Fill the picture header and body descriptions;
3. Save in the database by clicking the insert or update buttons.

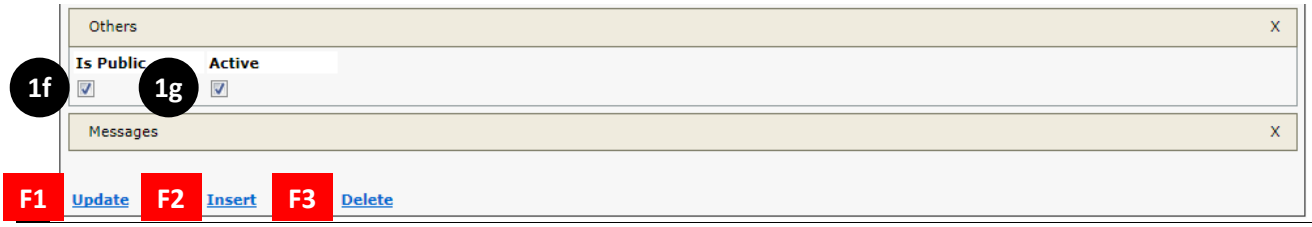
Page Location



Page Description







4.4.1 FIELDS

1) Main

Required a. ***Name*** – the name of the picture.

Required b. ***Media order*** – the order to display the pictures.

i. The smallest numbers are shown first.

Required Public c. ***Header description*** –the header description of the picture.

Required Public d. ***Description*** – the description of the picture.

Required Public e. ***Picture*** – the picture to be shown in the home page.

f. ***Is public*** – publish the photo in the home page.

g. ***Active*** – shows or hides the photo.

4.4.2 FUNCTIONS

1) **Update** – save the picture in the database.

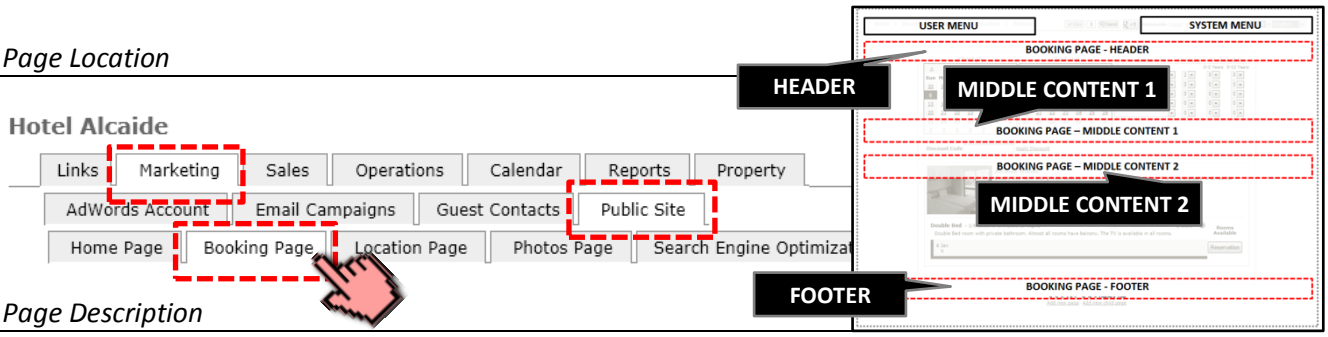
2) **Insert** – creates a new photo.

3) **Delete** – deletes the photo from the database.

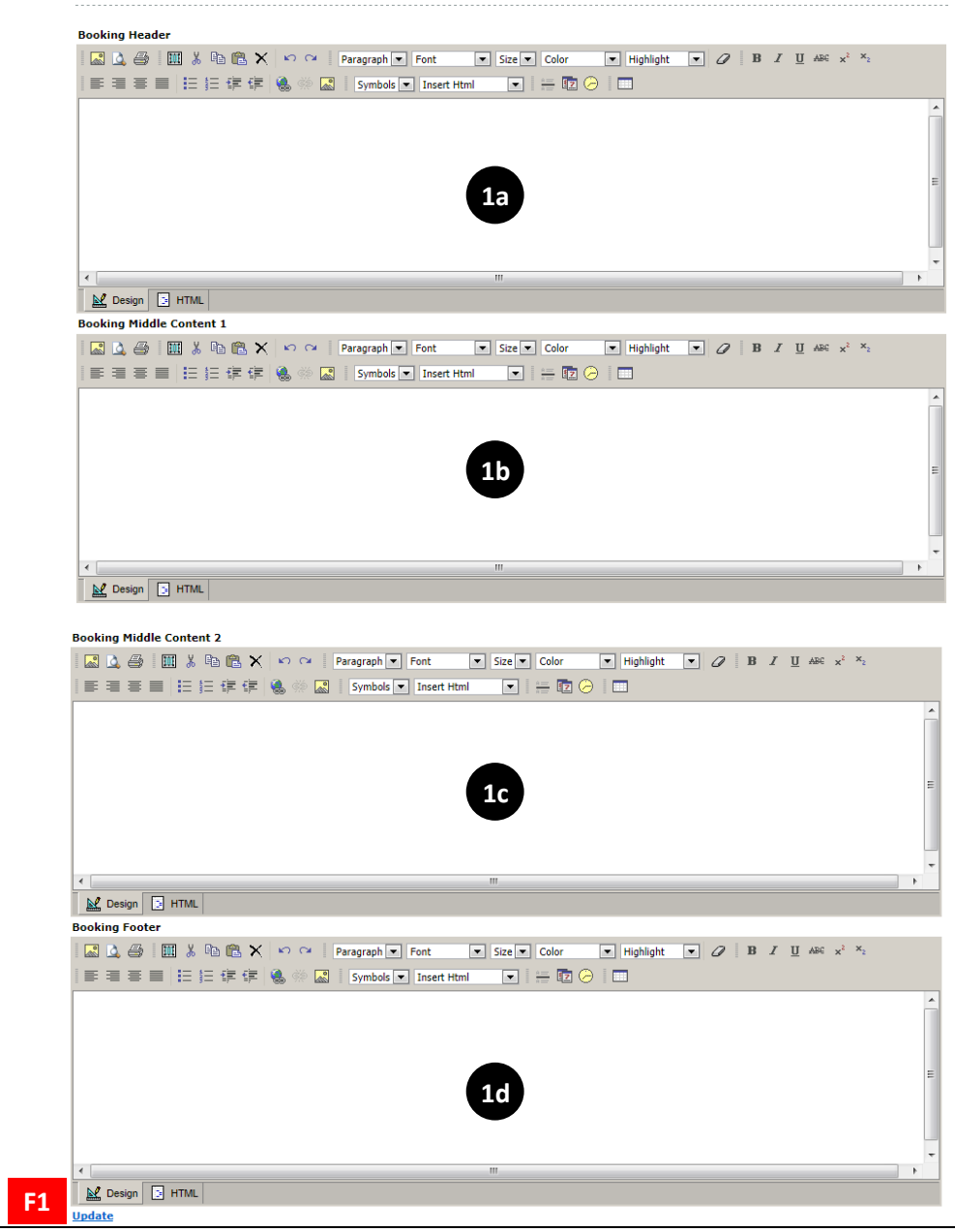
4.5 SET BOOKING PAGE - HEADER, FOOTER AND MIDDLE CONTENT

This page allows the hotel to set the header, footer and middle contents areas of the booking page. The "MIDDLE CONTENT 1" area is located before the discount code field and the "MIDDLE CONTENT 2" is located after the discount code field.

Page Location



Page Description



4.5.1 FIELDS

1) Main

Public a. ***Booking header*** – the header html content.

Public b. ***Booking middle content 1*** – the first middle html content.

Public c. ***Booking middle content 2*** – the second middle html content.

Public d. ***Booking footer*** – the footer html content.

4.5.2 FUNCTIONS

1) Update – save the content in the database.

4.5.3 BOOKING PAGE LAYOUT

The basic booking page layout is described in the following figure.

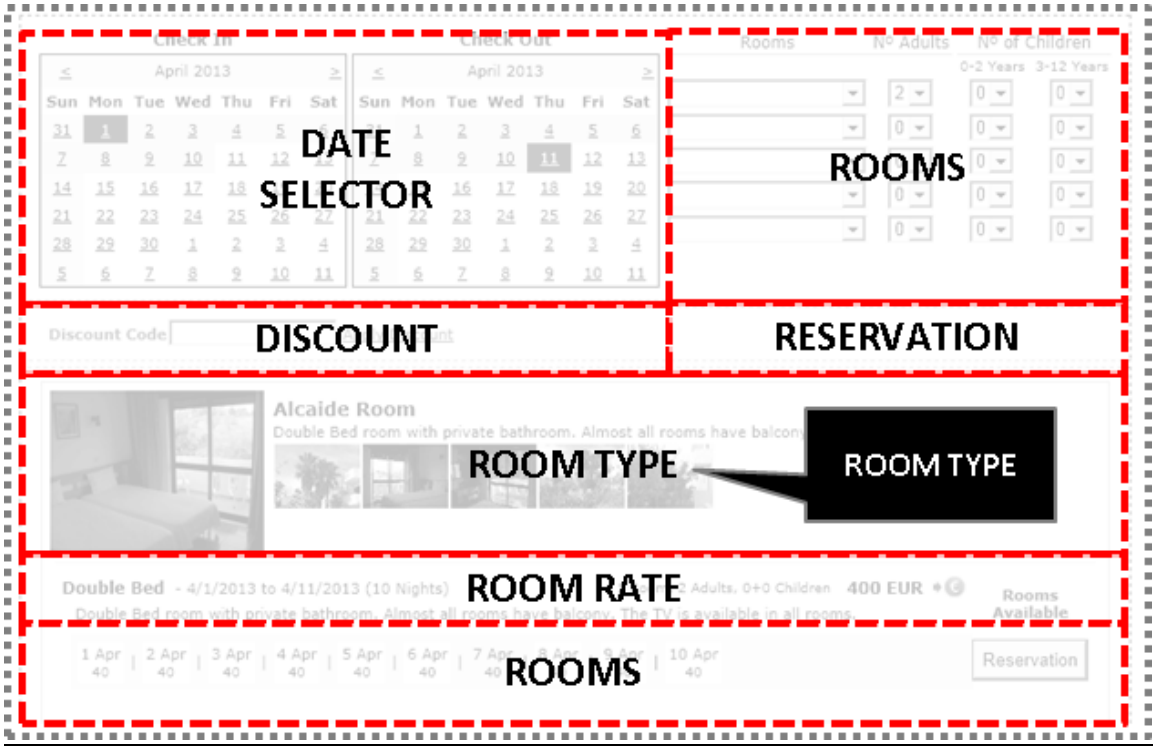
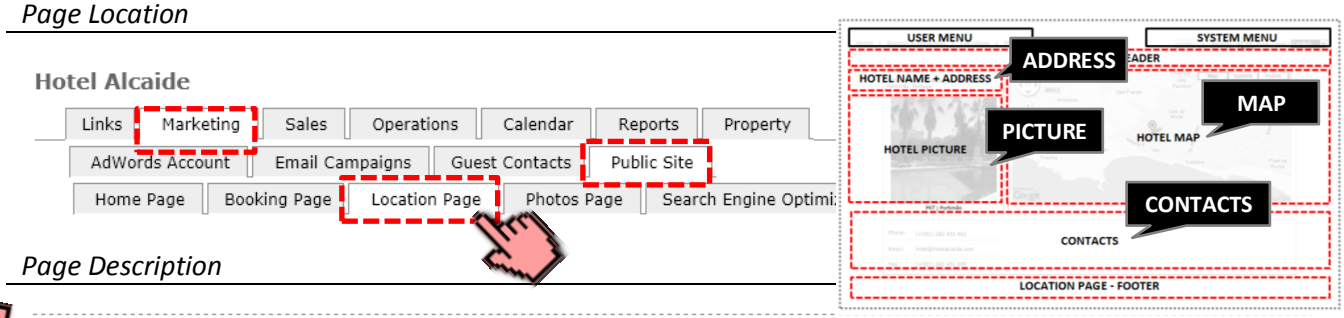


Figure 50 - Booking Page Layout

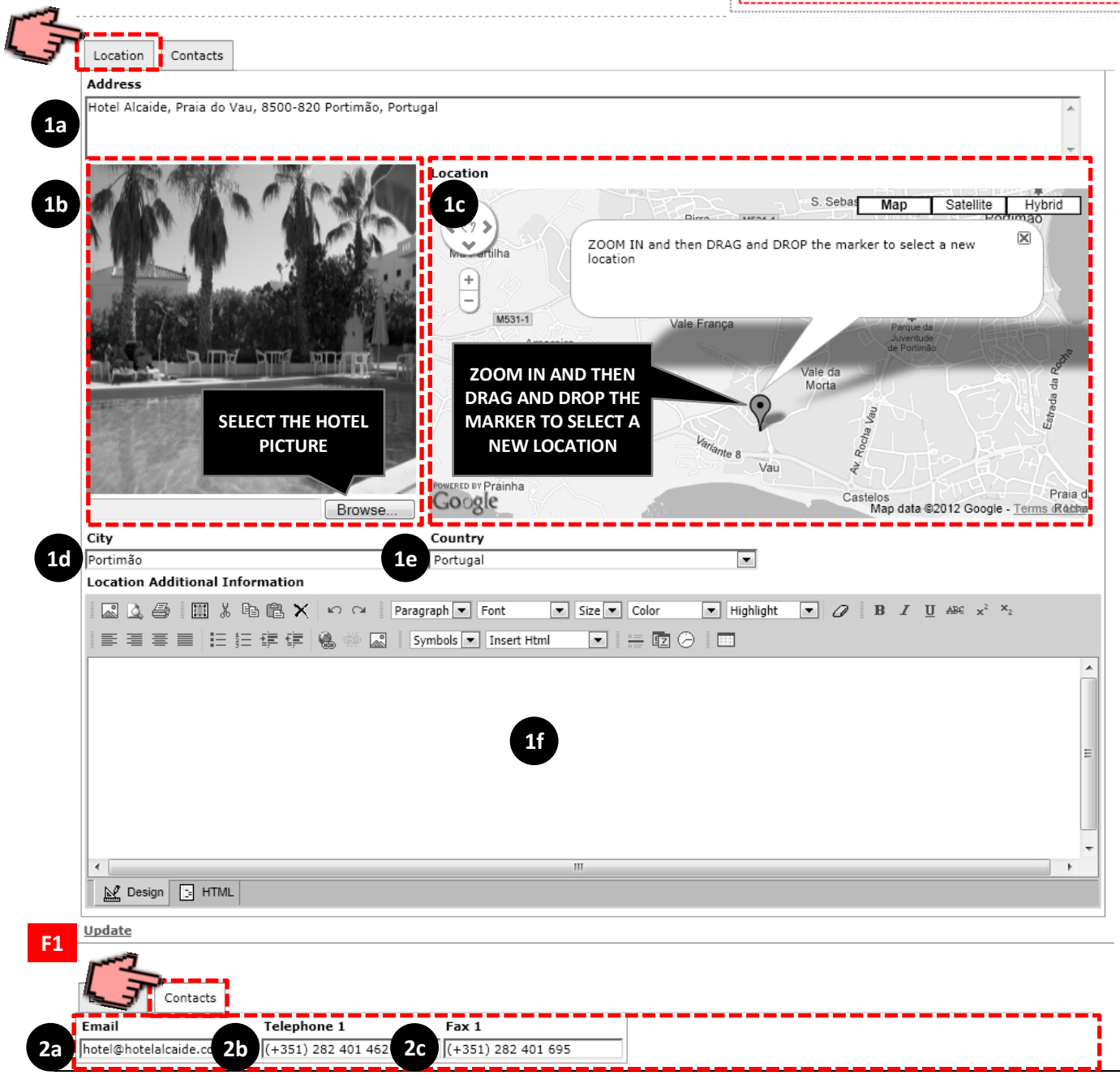
4.6 SET LOCATION PAGE

This page allows the hotel to set the hotel localization and public contacts. The header and footer of the location page are set in the SET LOCATION PAGE – HEADER & FOOTER page.

Page Location



Page Description



4.6.1 FIELDS

1) Location

Public a. ***Address*** – the hotel address.

Public b. ***Picture*** – the hotel picture.

i. Click in the "Browse" button to select a new picture.

ii. After the picture is loaded the hotel needs to click the "update" button to save the data in the database.

Public c. ***Location*** – the hotel location.

i. The marker must be dragged and dropped to set a new location.

Public d. ***City*** – the city where the hotel is located.

Public e. ***Country*** – the country where the hotel is located.

Public f. ***Location additional information*** – additional information about the hotel location.

2) Contacts

Public a. ***Email*** – the public email to contact the hotel.

Public b. ***Telephone 1*** – the public telephone number to contact the hotel.

Public c. ***Fax 1*** – the public fax number to contact the hotel

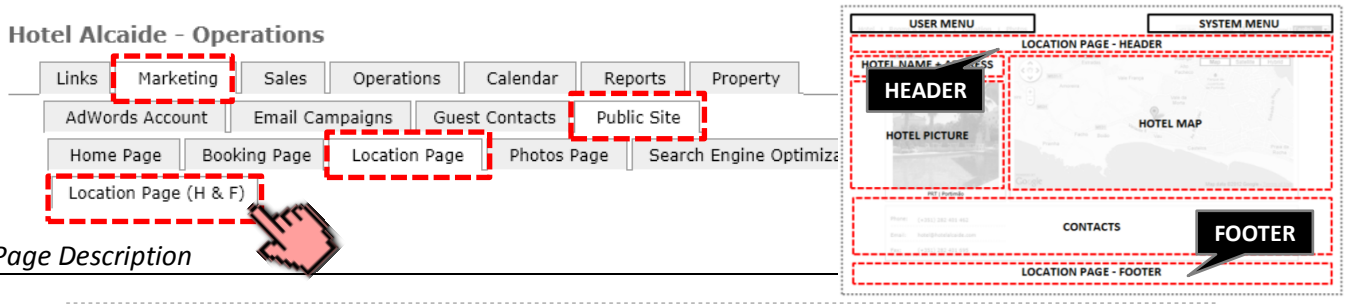
4.6.2 FUNCTIONS

1) Update – save the data in the database.

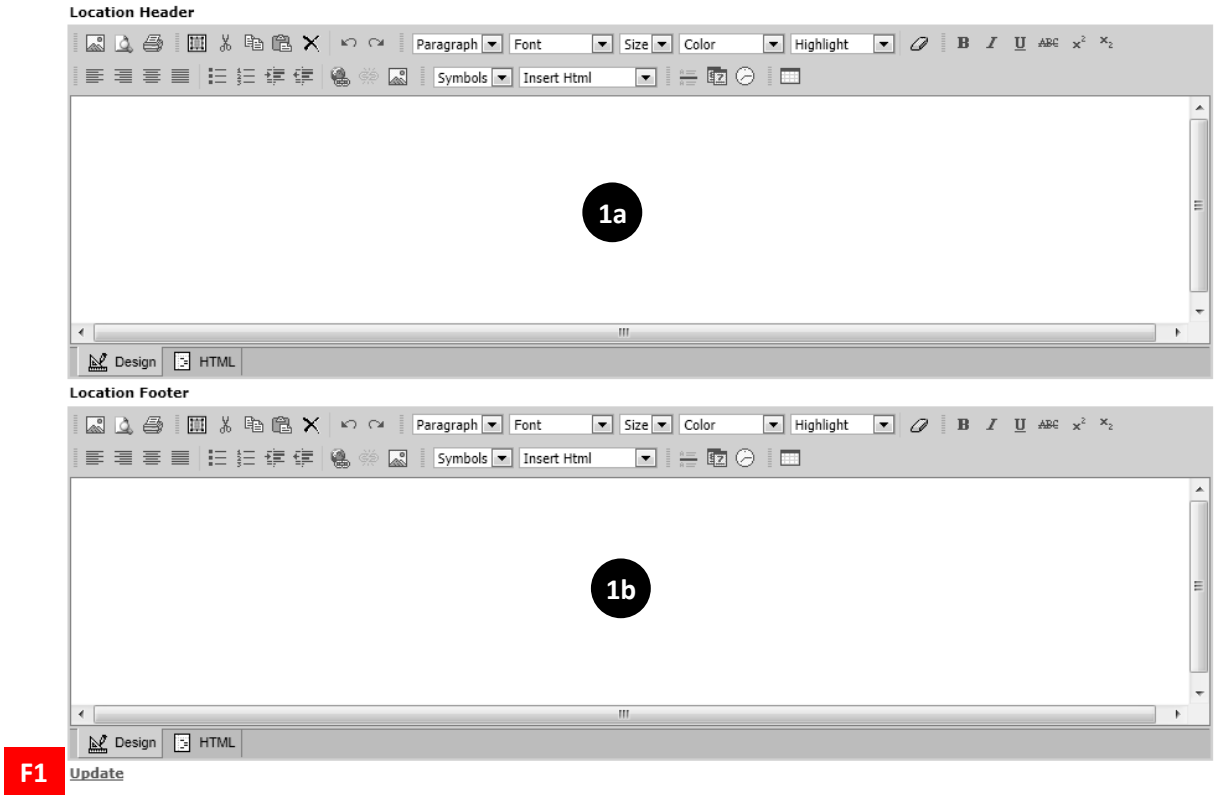
4.7 SET LOCATION PAGE – HEADER & FOOTER

This page allows the hotel to set the header and footer of the hotel website location page. The middle content of the location page is set in the SET LOCATION PAGE.

Page Location



Page Description



4.7.1 FIELDS

1) Main

Public a. ***Location header*** – the html content of the location header.

Public b. ***Location footer*** – the html content of the location footer.

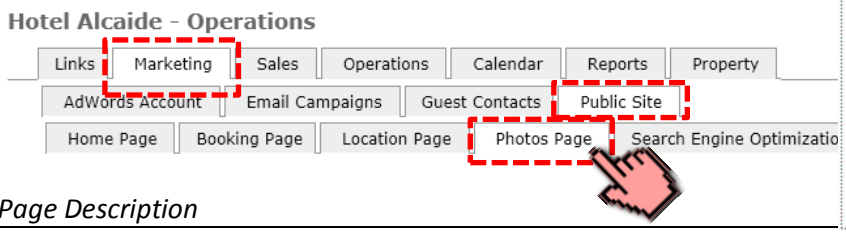
4.7.2 FUNCTIONS

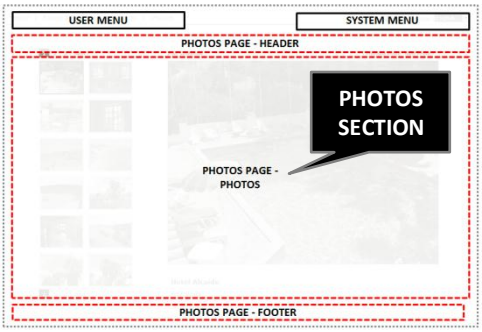
1) Update – save the content in the database.

4.8 SET PHOTOS PAGE

This page allows the hotel to set the pictures of the hotel website photo page. The header and footer of the photos page are configured in the SET PHOTOS PAGE - HEADER & FOOTER page.

Page Location





Page Description

4.8.1 FIELDS

1) Main

Required a. ***Name*** – the name of the picture.

Required b. ***Media order*** – the order to display the pictures.

i. The smallest numbers are shown first.

Required Public c. ***Header description*** –the header description of the picture.

Required Public d. ***Description*** – the description of the picture.

Required Public e. ***Picture*** – the picture to be shown in the photo page.

2) Others

a. ***Is public*** – publish the photo in the photo page.

b. ***Active*** – shows or hides the content.

Public c. ***Keywords*** – the keywords associated with the picture.

d. ***Comments*** – internal comments about the picture.

4.8.2 FUNCTIONS

1) Insert – creates a new photo.

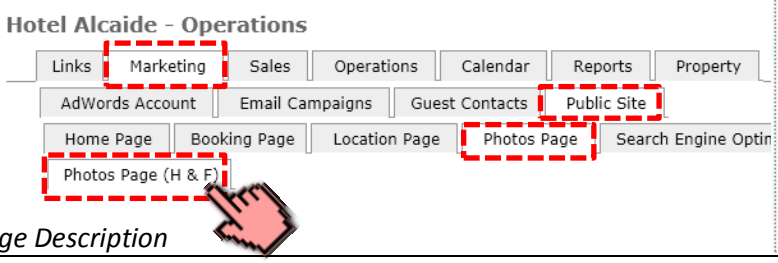
2) Delete – deletes the photo from the database.

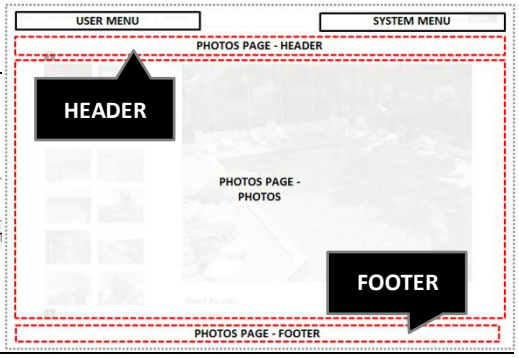
3) Update – saves the information in the database.

4.9 SET PHOTOS PAGE - HEADER & FOOTER

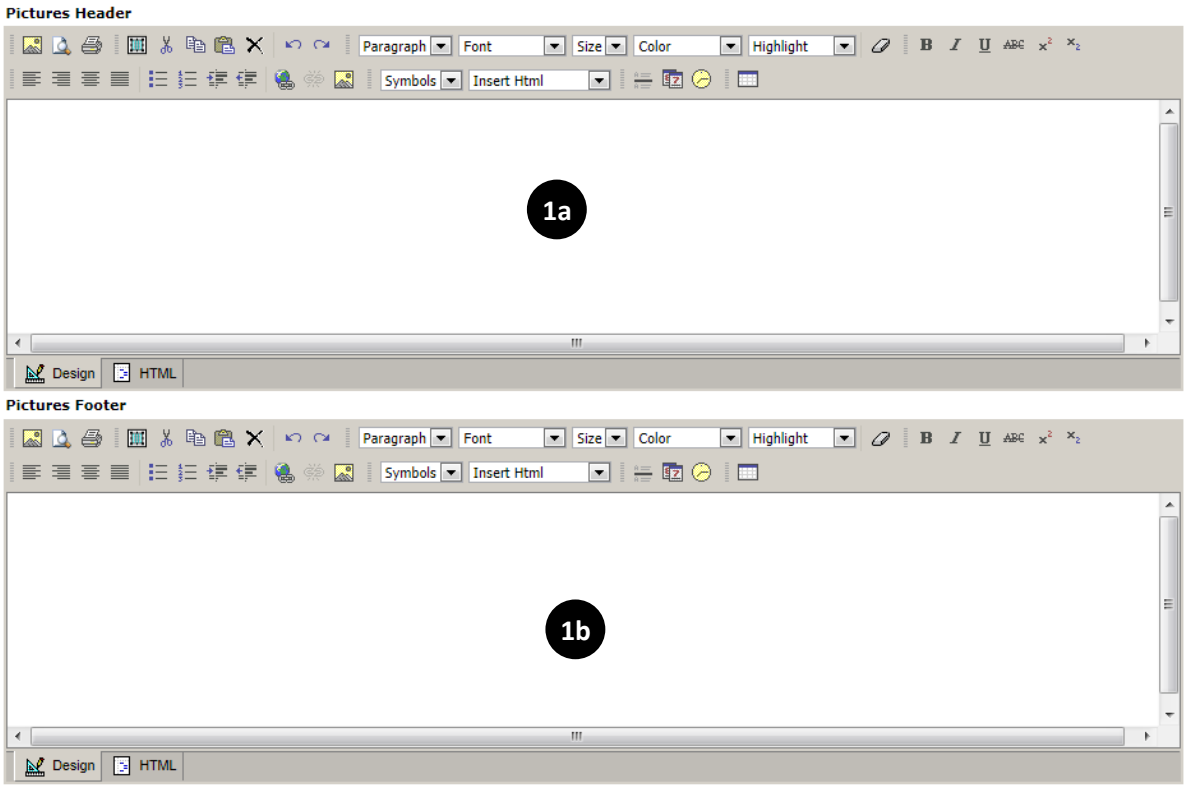
This page allows the hotel to set the header and footer of the hotel website photos page. The photos are configured in the SET PHOTOS PAGE.

Page Location





Page Description



F1 Update

4.9.1 FIELDS

1) Main

Public a. ***Pictures header*** – the html content of the photos header.

Public b. ***Pictures footer*** – the html content of the photos footer.

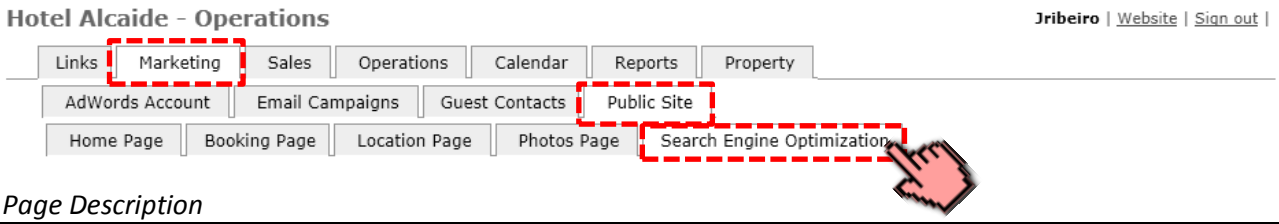
4.9.2 FUNCTIONS

1) **Update** – save the content in the database.

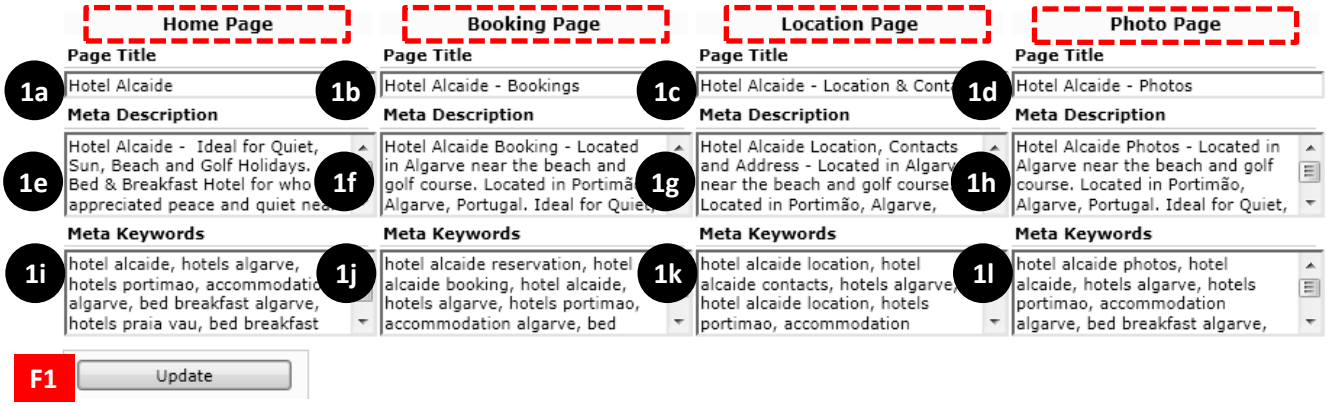
4.10 SET SEARCH ENGINE OPTIMIZATION

This page allows the hotel to optimize the hotel website standard pages for search engine optimization. The hotel can configure the page title, the meta description and the meta keywords of the default pages.

Page Location



Page Description



4.10.1 FIELDS

Public **1) Main – All information is public and used by search engines**

a. ***Home Page - Page Title*** – The page title of the home page. Max. 40 characters.
b. ***Booking Page - Page Title*** – The page title of the booking page. Max. 40 characters.
c. ***Location Page - Page Title*** – The page title of the location page. Max. 40 characters.
d. ***Photos Page - Page Title*** – The page title of the photos page. Max. 40 characters.

e. ***Home Page – Meta Description*** – A human readable description of the page content.
f. ***Booking Page – Meta Description*** – A human readable description of the page content.
g. ***Location Page – Meta Description*** – A human readable description of the page content.
h. ***Photos Page – Meta Description*** – A human readable description of the page content.

i. ***Home Page – Meta Keywords*** – A set of keywords related with the content of the page.
j. ***Booking Page – Meta Keywords*** – A set of keywords related with the content of the page.
k. ***Location Page – Meta Keywords*** – A set of keywords related with the content of the page.
l. ***Photos Page – Meta Keywords*** – A set of keywords related with the content of the page.

4.10.2 FUNCTIONS

1) Update – save the data in the database.

4.11 SET MASTER PAGE

This page allows the hotel to set the hotel website master page. The master page is a parent page structure that is applicable to all hotel website pages.

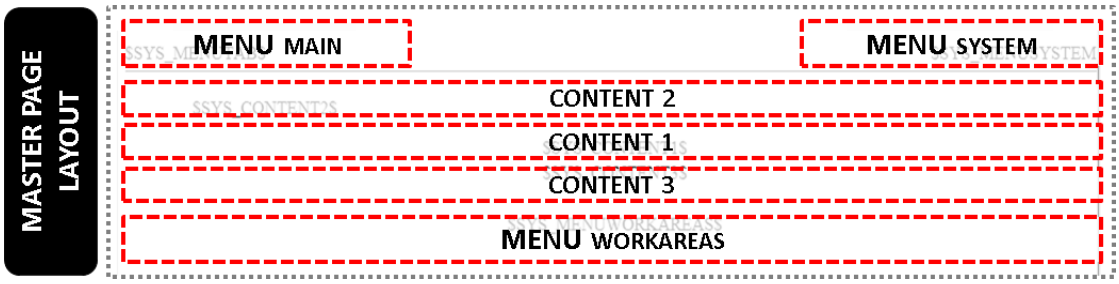


Figure 51 – Hotel Website: Master Page Layout

The master page is divided in two main components, namely the master page HTML (body) and the master style sheet (header) and both can be edited by the hotel using the master page edit area.

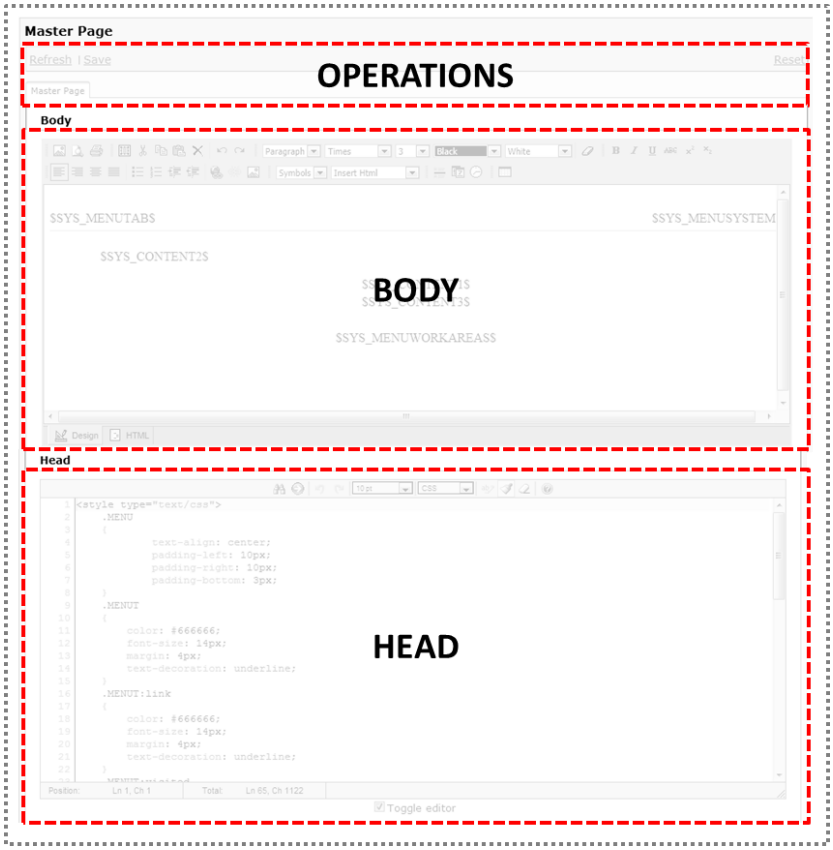


Figure 52 - Master Page Edit Area

The master page contains special **TOKENS** (start with a $) that cannot be removed from the page but can be hidden by using inline CSS.

We recommend that only users that are proficient in HTML should manage the master page. If you remove by mistake one of the 6 required TOKENS your website will stop. If this situation occurs contact the system administrator to remove from the server the problematic master page.

The content of the $SYS_CONTENT1$, $SYS_CONTENT2$ and $SYS_CONTENT3$ tokens can be managed in the SET CUSTOM WEBPAGES – ADD & EDIT page.

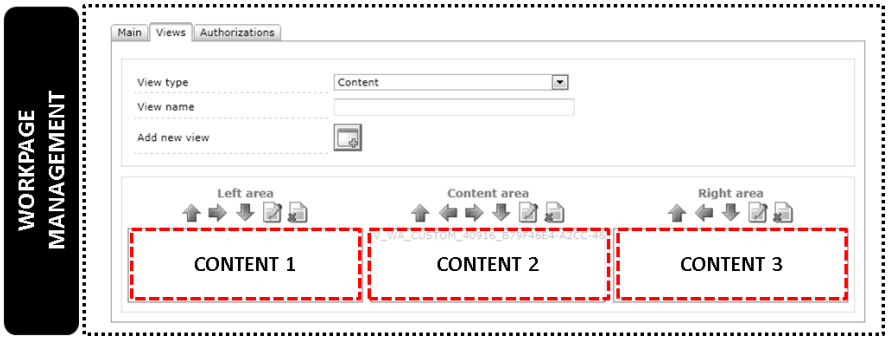
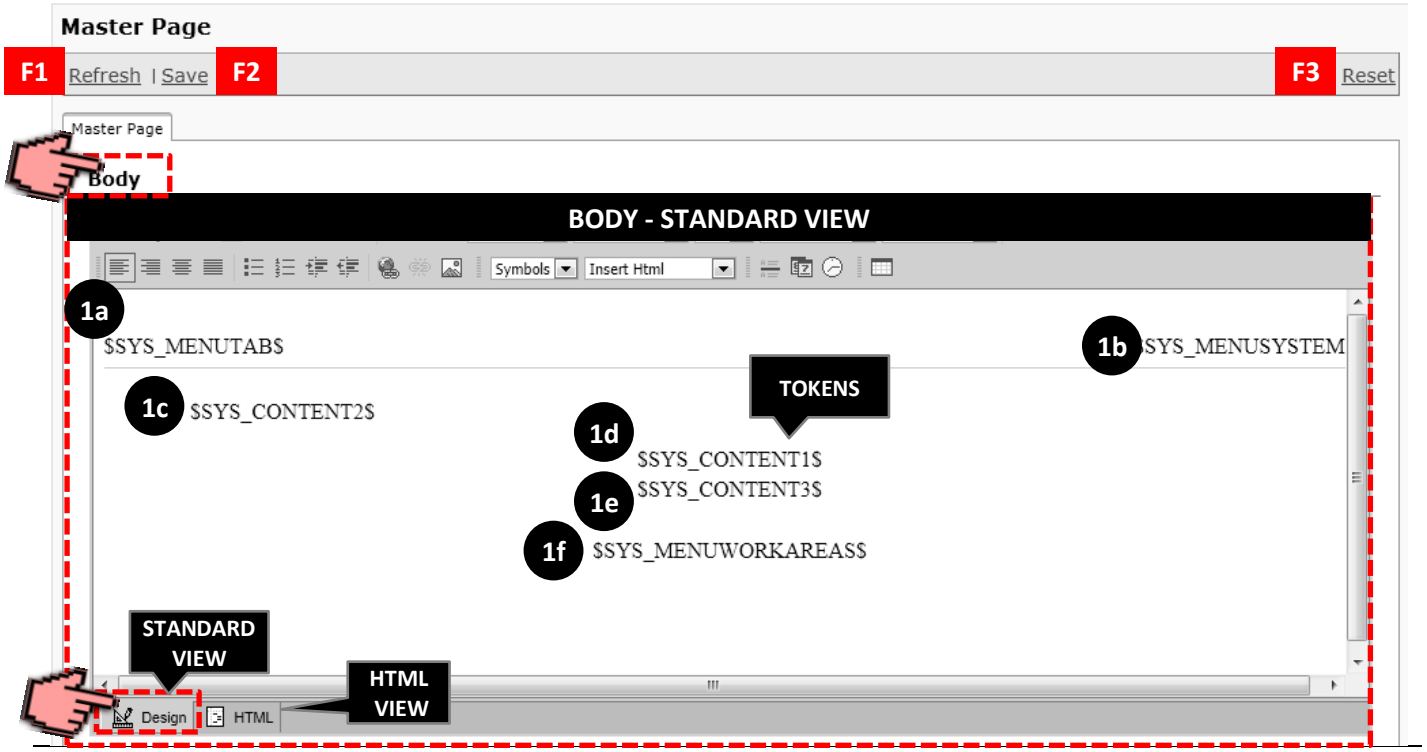


Figure 53 - Master Page: Workarea Management of the Content Areas

The system uses the master page to identify the location of the content areas and fill them with the appropriate data.

Page Location (HOTEL WEBSITE)

Page Description



Head

HEADER – PRINT VIEW

```
<style type="text/css">
    .MENU
    {
            text-align: center;
            padding-left: 10px;
            padding-right: 10px;
            padding-bottom: 3px;
    }
    .MENUT
    {
        color: #666666;
        font-size: 14px;
        margin: 4px;
        text-decoration: underline;
    }
    .MENUT:link
    {
        color: #666666;
        font-size: 14px;
        margin: 4px;
        text-decoration: underline;
    }
```

Position: Ln 1, Ch 1 Total: Ln 65, Ch 1122

2a

CHANGE TO CSS TEXT VIEW

Toggle editor

Master Page

Body

BODY – HTML VIEW

Symbols Insert Html

```
<td align="center">
  <table style="width: 800px;">
    <tbody>
      <tr>
        <td>
          $SYS_CONTENT2$
        </td>
      </tr>
    </tbody>
  </table>
</td>
</tr>
<tr>
  <td style="padding-top: 10px;" align="center">
    <table>
      <tbody>
        <tr>
          <td vAlign="top" align="center">
            $SYS_CONTENT1$
          </td>
        </tr>
```

TOKENS

3a

WARNING: THE TOKENS $..$ ARE EMBEDDED IN THE HTML. THEY CAN BE LOCATED IN ANYPLACE OF THE HTML OR EVEN BE HIDDEN BY USING CSS

BUT THEY CANNOT BE REMOVED FROM THE HTML

HTML VIEW

HTML

Head

HEADER – TEXT VIEW

```
{
        text-align: center;
        padding-left: 10px;
        padding-right: 10px;
        padding-bottom: 3px;
}
.MENUT
{
    color: #666666;
    font-size: 14px;
    margin: 4px;
    text-decoration: underline;
}
.MENUT:link
{
    color: #666666;
    font-size: 14px;
    margin: 4px;
    text-decoration: underline;
}
.MENUT:visited
{
    color: #666666;
```

4a

Toggle editor

4.11.1 FIELDS

1) **Body (Standard View) - This is the design view of the HTML master content.**
    a. ***TOKEN $SYS_MENUTAB$*** – the website main navigation menu token.
        i. Allows the user to access the website pages. It's a required master page token. It cannot be removed.

    b. ***TOKEN $SYS_MENUSYSTEM$*** – the website system navigation menu token.
        i. A menu that gives access to the master page, management area, language settings, template and other links. It's a required master page token. It cannot be removed.

    c. ***TOKEN $SYS_CONTENT2$*** – the website content area nº2 token.
        i. This is typically the main content area of the three content areas available. It's a required master page token. It cannot be removed. Read the view management topic in the SET CUSTOM WEBPAGES – ADD & EDIT chapter for more information.

    d. ***TOKEN $SYS_CONTENT1$*** – the website content area nº1 token.
        i. It's a required master page token. It cannot be removed.

    e. ***TOKEN $SYS_CONTENT3$*** – the website content area nº3 token.
        i. It's a required master page token. It cannot be removed.

    f. ***TOKEN $SYS_MENUWORKAREAS$*** – the website workareas navigation menu token.
        i. It allows creating and managing workareas\webpages. It's a required master page token. It cannot be removed.

2) **Header (Print View)**
    a. ***Header*** – the header part of the master page.
        i. Switch the "Toggle Editor" to edit the text. Use this place to change the website CSS or to insert script code such as Google analytics.

3) **Body (HTML View)**
    a. ***Body*** – the body part of the master page. Switch to the html view to start editing HTML.

4) **Header (Text View)**
    a. ***Header*** – the header part of the master page. Switch the "Toggle Editor" to edit the text.

4.11.2 FUNCTIONS

1) **Refresh** – refresh the master page.

2) **Save** – saves and activates the master page.

3) **Reset** – deletes the current template and replace it by the system default template. This option should be used if the actual master page is having rendering problems.

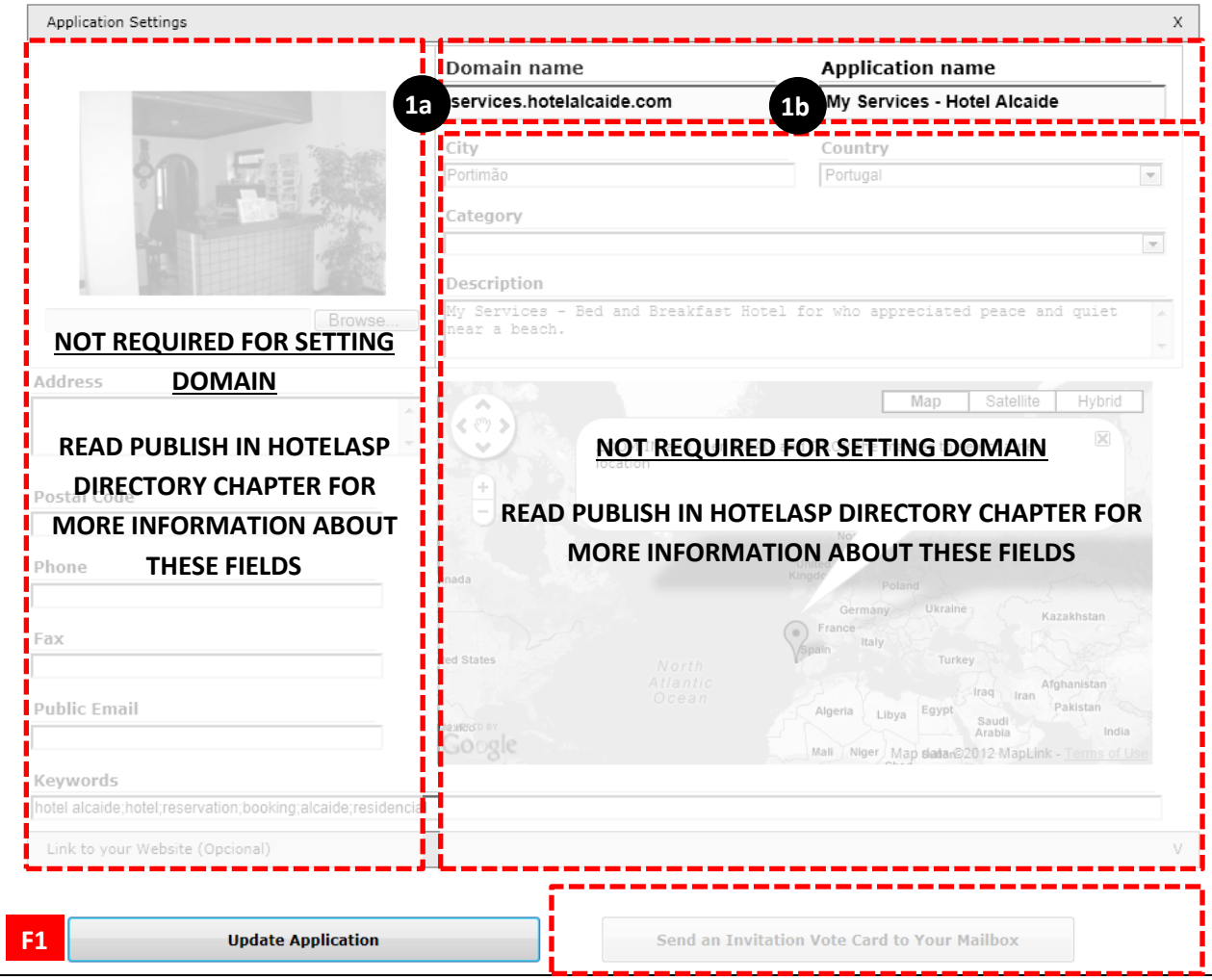
4.12 SET DOMAIN NAME

This page allows the hotel to set the domain name of the hotel website. The system by default allows the hotel to set domain names based on the "hotelasp.com" domain. For example: If your hotel is called "Alcaide" it can have a domain name of "alcaide.hotelasp.com".

It's also possible to use the hotel own domain name such as "www.hotelalcaide.com" but in this situation you need to contact the system administrator via the email hotelasp@hotelasp.com to set the full domain and get the server IP address.

Page Location

Page Description



4.12.1 FIELDS

1) Application Settings

Required Public a. ***Domain name*** – the domain name associated with the hotel public site.

Required Public b. ***Application name*** – the hotel name.

4.12.2 FUNCTIONS

1) Update – save the domain name and application name in the database.

4.13 SET CUSTOM WEBPAGES – ADD & EDIT

The system allows the hotel to add and edit custom webpages to the website. The system has two kinds of webpages, namely: the system web pages that cannot be changed by the hotel (e.g. the hotel website default pages or the hotel management pages) and the custom webpages that can be changed by the hotel.

The term "*Workarea*" is equivalent to webpage and "*View*" is equivalent to zone or area of the webpage. In the present version the hotel only has the "*Content*" view available. The content view is equivalent to a HTML section of the webpage. A *Workarea* is composed by views and they can be located in the left area, middle area and the right area of the *Workarea* as shown in the figure below.

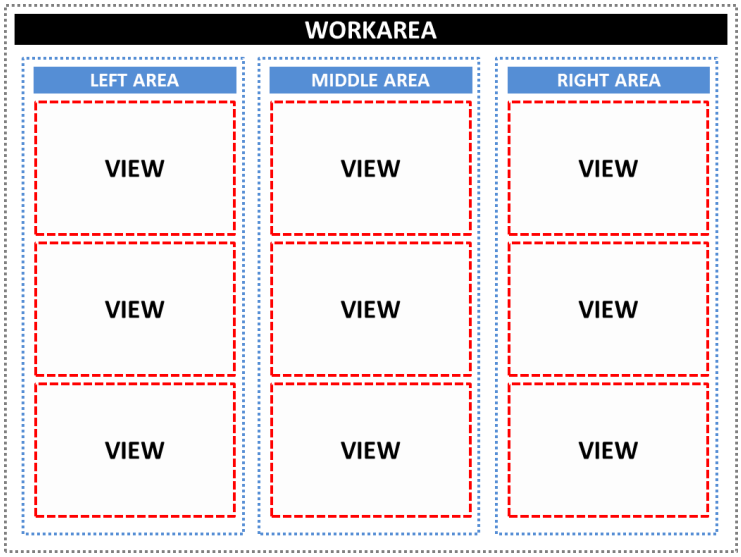


Figure 54 - Workarea Layout

The hotel to add a custom page must go to the page footer and click the link "*Add new page*" to add a new sibling web page or click the link "*Add new child page*" to add a child page. The system requests confirmation and redirects to the WORKAREA MANAGEMENT page where the hotel can change the page properties. The hotel must also properly set the authorizations for the new page in the *Workarea* and the *View* authorizations tabs as shown in the figure below.

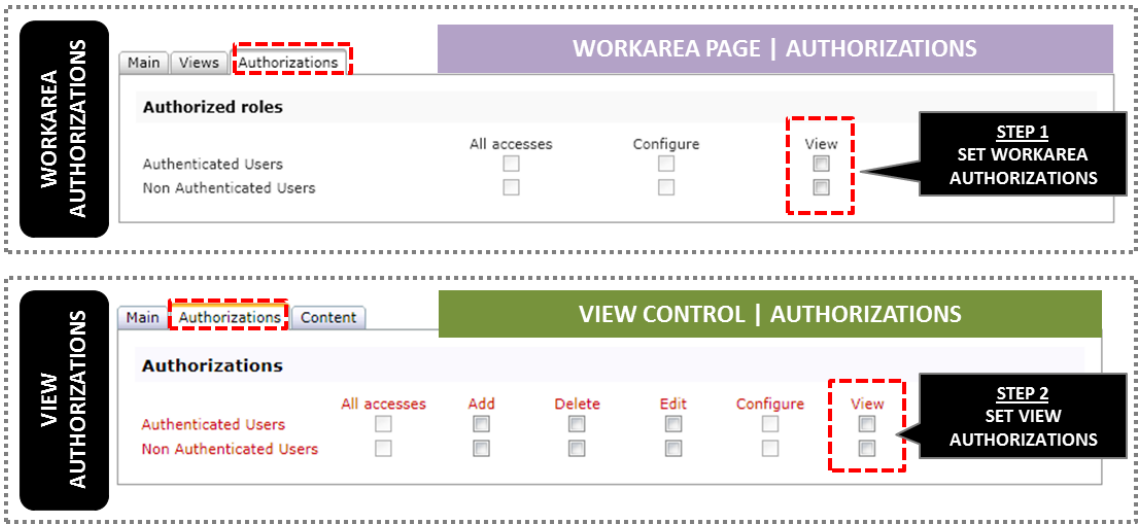


Figure 55 - Workarea Authorizations

The hotel must check the *read* authorizations referred in the previous picture as "STEP 1 – SET WORKAREA AUTHORIZATIONS" and also check the *read* authorizations referred in the previous figure as "STEP 2- SET VIEW AUTHORIZATIONS". The roles available are the following:

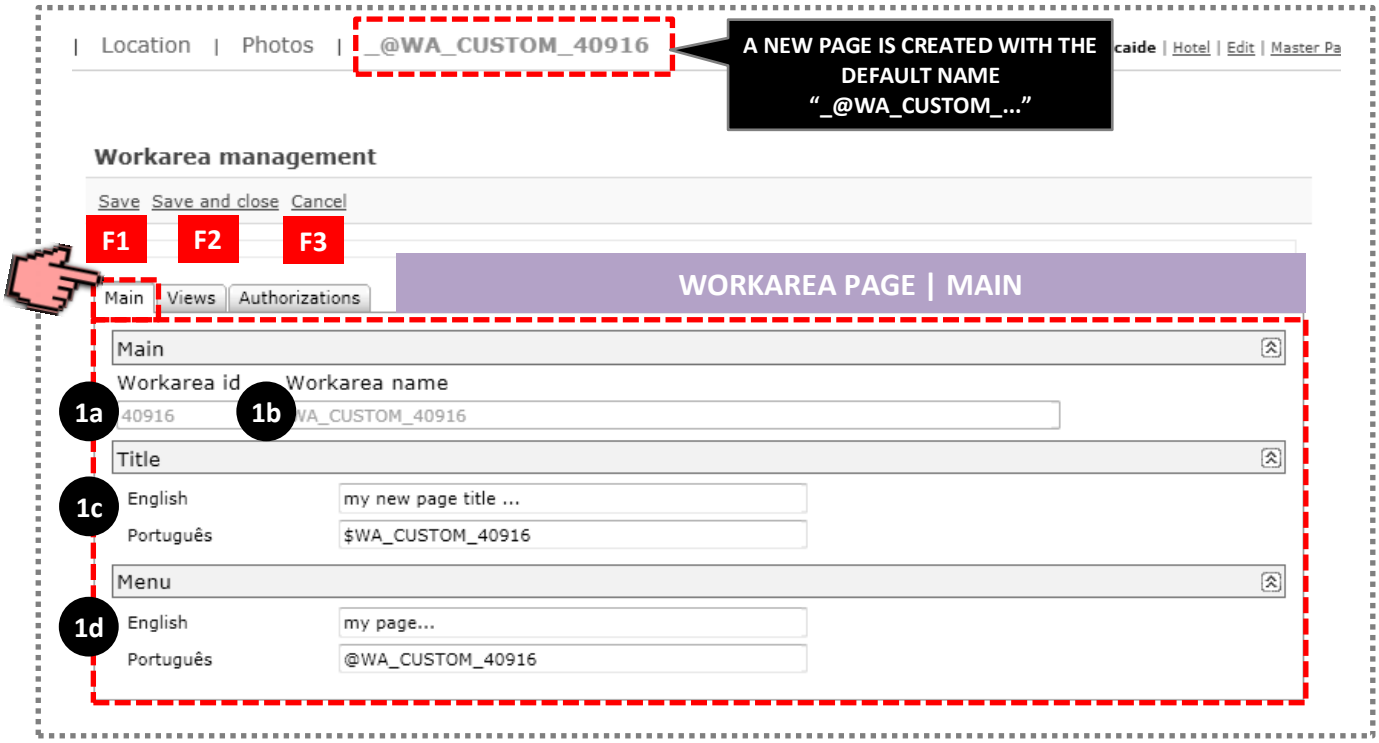
- **Authenticated User** - gives access only to users that have been authenticated in the system with a valid username and password. The authenticated user can be the hotel manager, the standard hotel user or the guest user.
- **Non Authenticated Users** – gives access only to anonymous users. The user is not identified in the system.

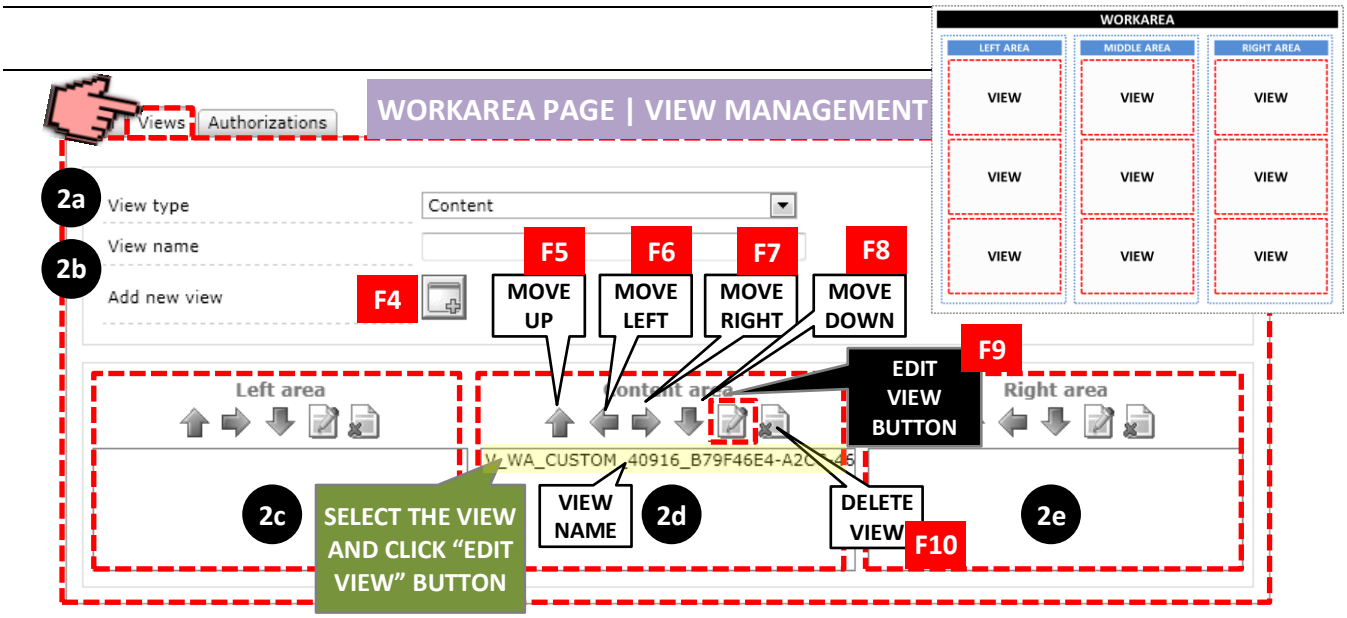
A public page must have the **Authenticated Users** and the **Non Authenticated Users** authorizations checked in both the *Workarea* and the *View* to be displayed to all users.

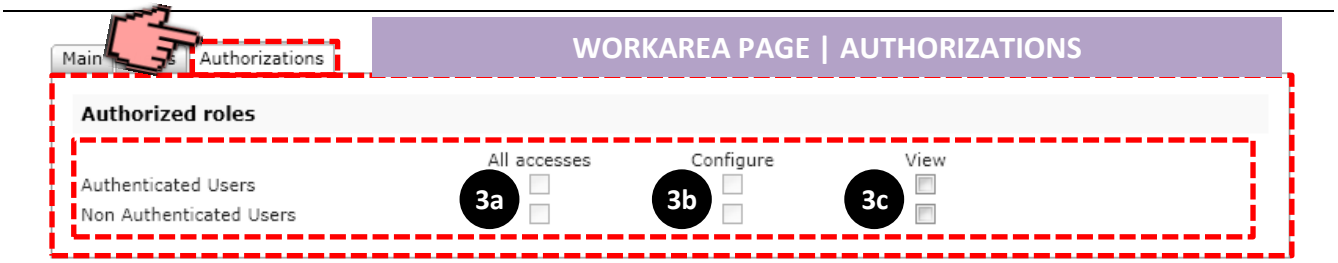
Page Location

4.13.1 WORKAREA MANAGEMENT

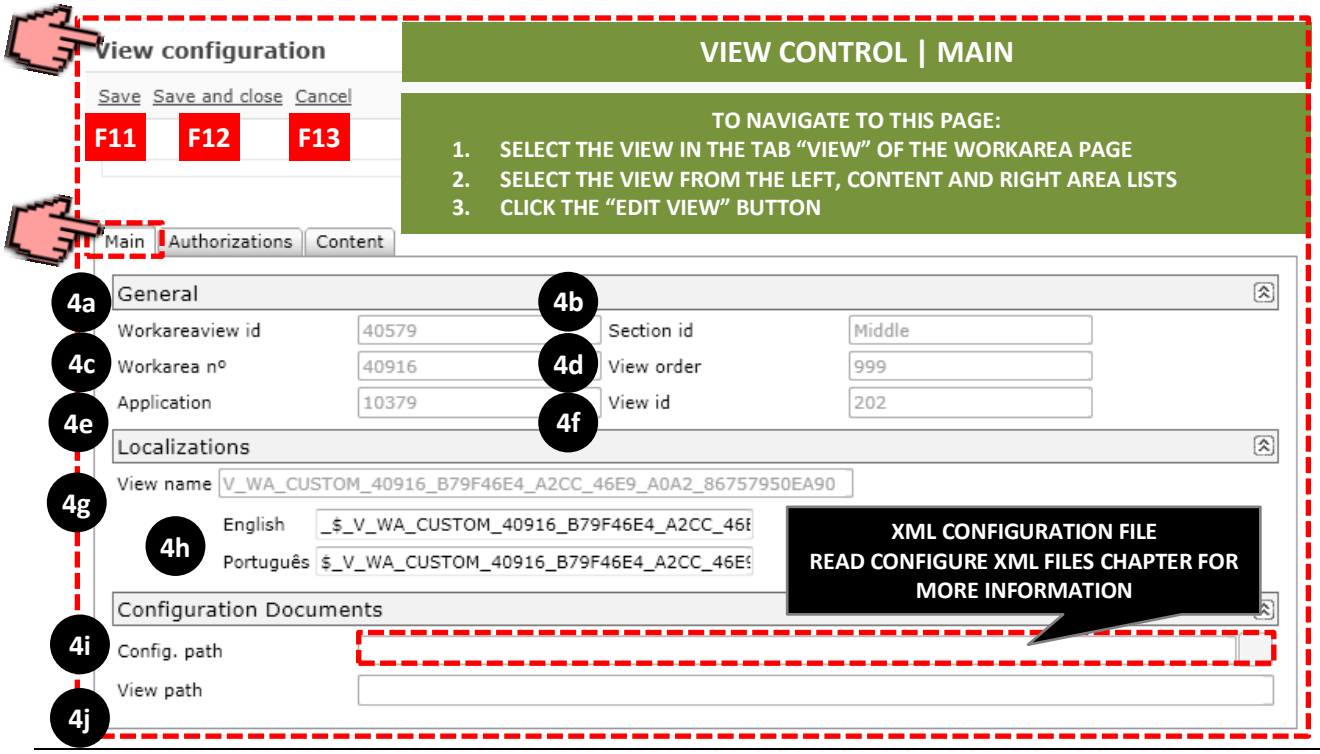
Page Description

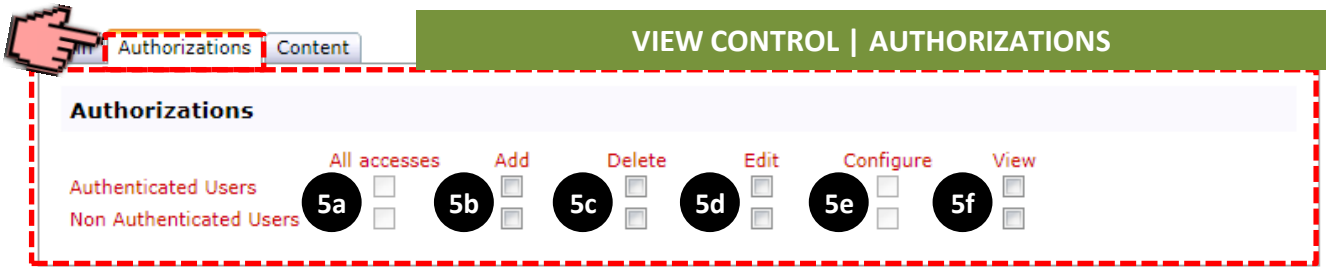


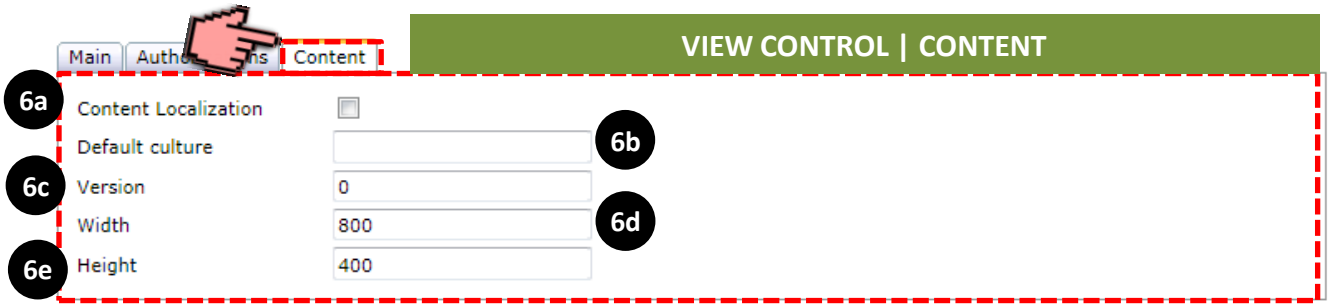




4.13.2 VIEW MANAGEMENT







4.13.3 FIELDS

1) WORKAREA | Main

Required / Read Only a. ***Workarea id*** – the webpage internal ID.

Required / Read Only b. ***Workarea name*** – the webpage unique name.

Required / Read Only c. ***Tile*** – the title of the page for each active language.

i. To add or remove languages read the SET CULTURES & TIME ZONE chapter.

Required / Read Only d. ***Menu*** – the menu name of the page for each active language.

i. To add or remove languages read the SET CULTURES & TIME ZONE chapter.

2) WORKAREA | Views – The *Workarea* is a container of views. A view is a web control that can be for example an HTML container or a business view control.

NOTE: USE THIS TAB TO SELECT THE VIEW AND GO TO THE VIEW MANAGEMENT PAGE

a. ***View type*** – the view type to add to the webpage.

i. The default view is the "Content" view that is equivalent to an HTML container.

b. ***View name*** – the name of view.

c. ***Left Content Zone*** – the views that are located in the left area of the webpage.

i. This zone is represented by the master page token ***$SYS_CONTENT1$.***

ii. Read the SET MASTER PAGE for additional information.

d. ***Middle Content Zone*** – the views that are located in the middle area of the webpage.

i. This zone is represented by the master page token ***$SYS_CONTENT2$***.

ii. Read the SET MASTER PAGE for additional information.

e. ***Right Content Zone*** – the views that are located in the right area of the webpage.
   i. This zone is represented by the master page token ***$SYS_CONTENT3$***.
   ii. Read the SET MASTER PAGE for additional information.

3) WORKAREA | Authorizations

Read Only a. ***All Accesses*** – gives access to all page functionalities.
   i. This feature is enabled only for system administrators.

Read Only b. ***Configure*** – gives access to configuration page functionalities.
   i. This feature is enabled only for system administrators.

c. ***View*** – gives view access to the page.
   i. For public access the hotel must check the boxes for authenticated users and non-authenticated users.

4) VIEW | Main

Required Read Only a. ***WorkareaView id*** – an internal ID number to identify the view.

Required Read Only b. ***Section id*** – the place or section where the view is located in the webpage (i.e. left area, content area or right area).

Required Read Only c. ***Workarea*** – the id of the container webpage.

Required Read Only d. ***View order*** – the order of appearance of the view inside the webpage section (i.e. left area, content area or right area).

Required Read Only e. ***Application*** – the application that owns the view.

Required Read Only f. ***View id*** – the view type id.

Required Read Only g. ***View name*** – the name of the view.

Required e. ***View header*** – a short description of the view for each of the active languages.
   i. To add or remove languages read the SET CULTURES & TIME ZONE chapter.

Read Only h. ***Config path*** – the XML configuration file path.
   i. Applies only to business view types.
   ii. The present version does not permit the user to add business views to the online account.
   iii. The user must use the local version and the system administration application to access this setting.
   iv. Read the CONFIGURE XML FILES chapter for more information about XML files.

Read Only i. ***View path*** – the web control path.

5) VIEW | Authorizations

Read Only a. ***All Accesses*** – gives access to all page functionalities.
   i. This feature is enabled only for system administrators.

b. ***Add*** – gives access to "add" features.
   i. This means features that create objects in the database.
   ii. This feature is enabled only for system administrators.

c. ***Delete*** – gives access to "delete" features.
   i. This means features that delete objects from the database.
   ii. This feature is enabled only for system administrators.

d. ***Edit*** – gives access to "edit" features.
   i. This means features that update objects in the database.
   ii. This feature is enabled only for system administrators.

Read Only e. ***Configure*** – Gives access to configuration features.
   i. This feature is enabled only for system administrators.

f. ***View*** – gives read access to the view.
   i. For public access the hotel must check the boxes for authenticated users and non-authenticated users.

Read Only j. ***View path*** – the web control path.

6) VIEW | Content

a. ***Content Localization*** – enables the content to be localized in each of the active languages.
   i. The hotel creates content for each of the active languages by selecting the language in the "language selector", edit the content and save.
   ii. The system will associate the saved content to the selected language.
   iii. If the user selects a language without an associated content the system will show the content associated with the language of the "Default Culture" field.

b. ***Default Culture*** – defines the default language.
   i. It should follow the ISO 630 language classification for two letter codes (e.g. en is equivalent to English language).
   ii. It's used when "Content Localization" is active and the system cannot find content for a certain language.

c. ***Version*** – the version of the content.
   i. This enables the hotel to reverse to older versions of the content.
   ii. The system saves the content associated with a specific version.

d. ***Width*** – the width of the view control.

e. ***Height*** – the height of the view control.

4.13.4 FUNCTIONS

1) **WORKAREA | Save** – saves the *Workarea* data in the database.

2) **WORKAREA | Save and close** – saves the *Workarea* data and returns to the previous page.

3) **WORKAREA | Cancel** – does not save and returns to the previous page.

4) **WORKAREA | Add new view** – adds a new *View* to the *Workarea*.

5) **WORKAREA | Move Up** – moves up the selected *View*.

6) **WORKAREA | Move Left**– moves the selected *View* to a left area of the *Workarea* (e.g. move the view from the right area to content area or from content area to left area).

7) **WORKAREA | Move Right** – moves the selected *View* to a right area of the *Workarea* (e.g. move the view from the left area to content area or from content area to right area)

8) **WORKAREA | Move Down** – moves down the selected *View*.

9) **WORKAREA | Edit View** – edits the selected *View*.

10) **WORKAREA | Delete View** – delete the selected *View* from the *Workarea*.

11) **VIEW | Save** – saves the *View* data in the database.

12) **VIEW | Save and close** – saves the *View* and returns to the previous page.

13) **VIEW | Cancel** – does not save and returns to the previous page.

4.14 SET CUSTOM WEBPAGES – MOVE & DELETE

The system allows the hotel to configure, move and delete custom webpages. The hotel cannot delete or move system webpages such as the hotel standard pages or the hotel management pages.

The custom pages have the *Workarea* menu activated and the following links available:

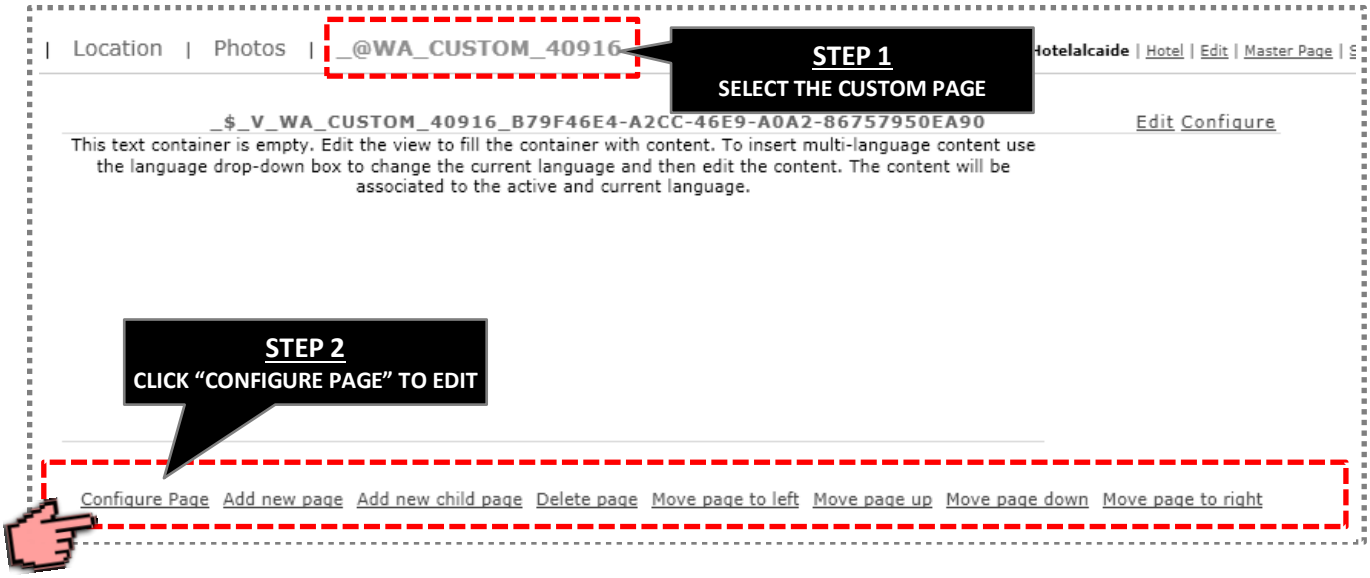
- ***Configure Page*** – edit the active page.
- ***Delete Page*** – delete the active page.
- ***Move page to left*** – move the active page to the left.
  - A custom page cannot be move to the left of a system webpage.
- ***Move page up*** – move the active page to the parent page level.
- ***Move page down*** – move the active page to the child page level.
- ***Move page to right*** – move the active page to right.
  - A custom page cannot be move to the right of a system webpage.

These links are available in the footer of the page and only appear when the active page is a custom page.

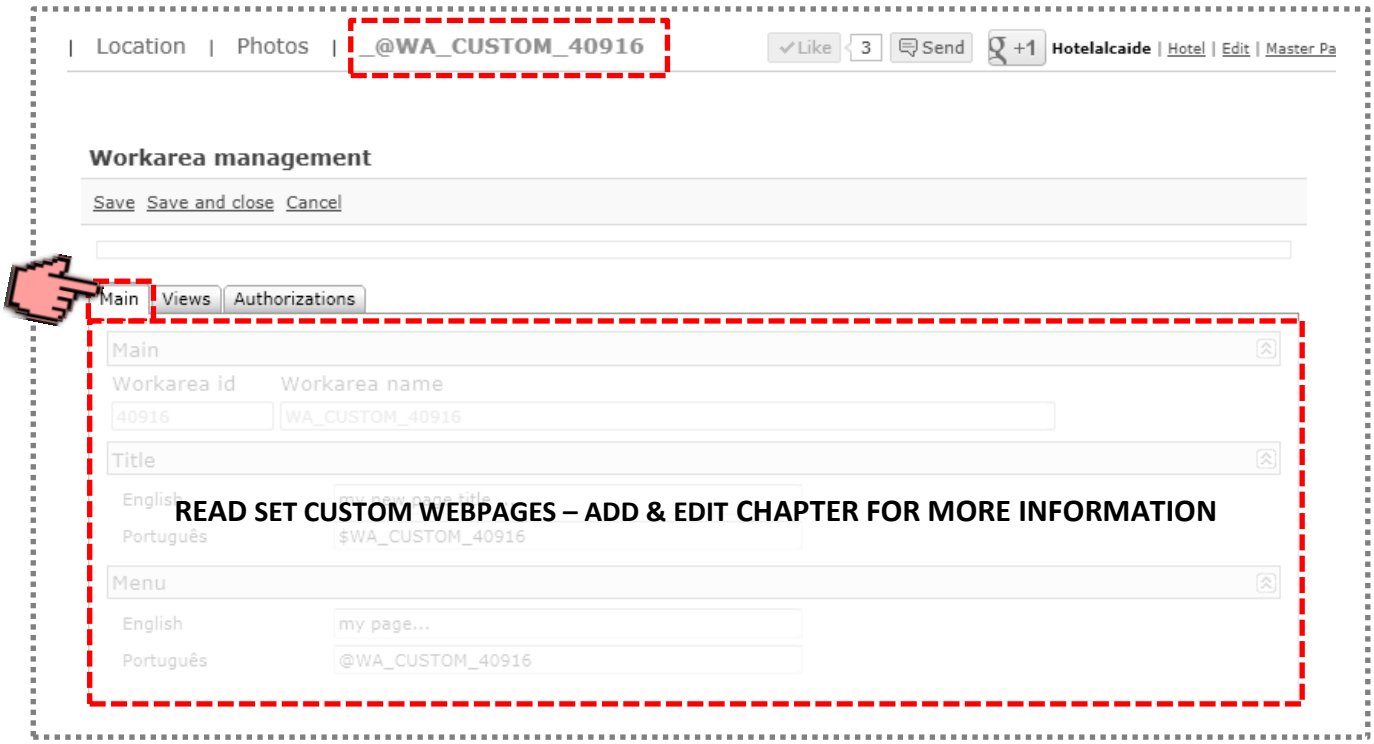
4.14.1 CONFIGURE CUSTOM WEBPAGE

The configuration features are explained in the SET CUSTOM WEBPAGES – ADD & EDIT chapter.

Page Location



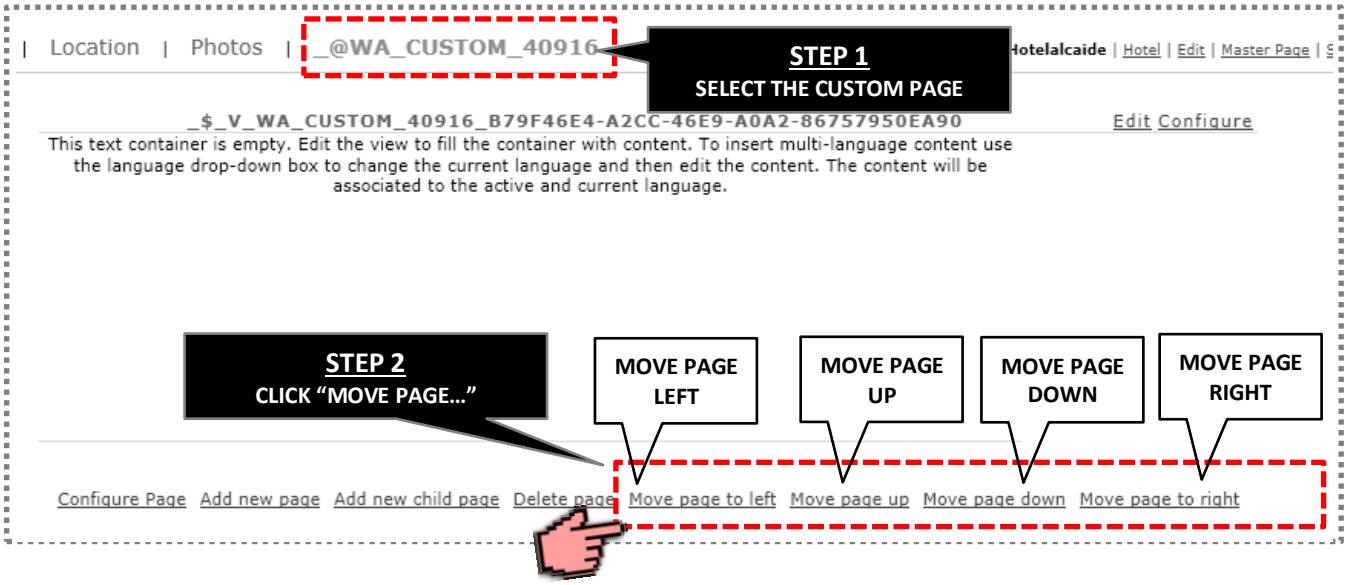
Page Description



4.14.2 MOVE CUSTOM WEBPAGE

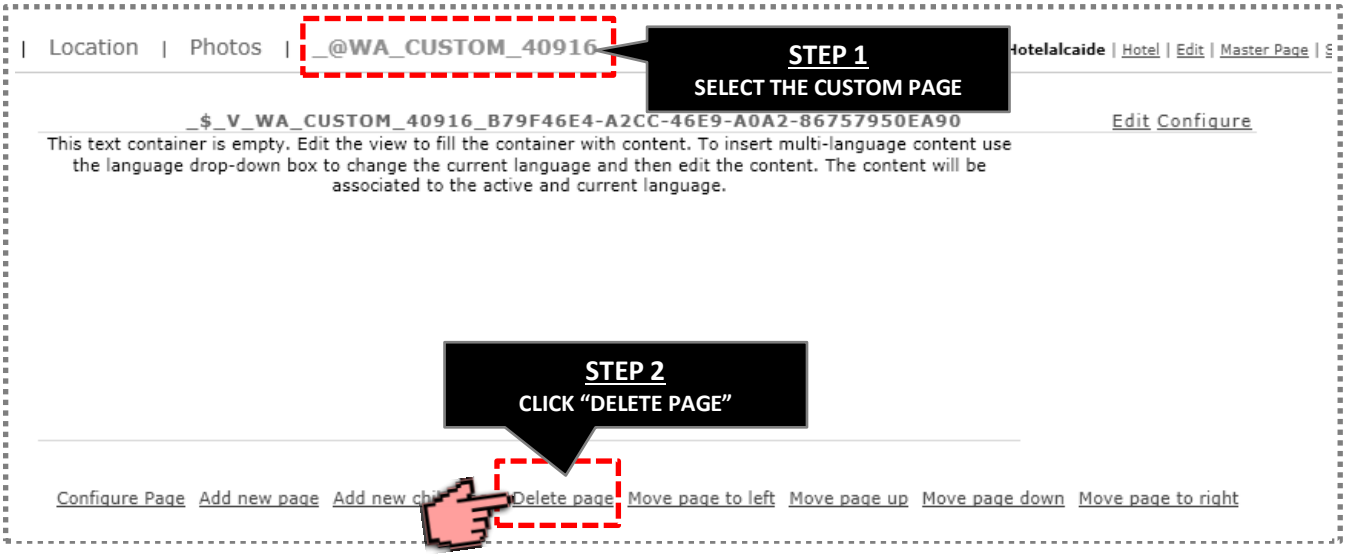
The system allows the hotel to move the custom webpage. Only the custom pages have “Move page to left”, “Move page up”, “Move page down” and “Move page to right” links available. The custom webpage cannot be move to the left of the system webpages.

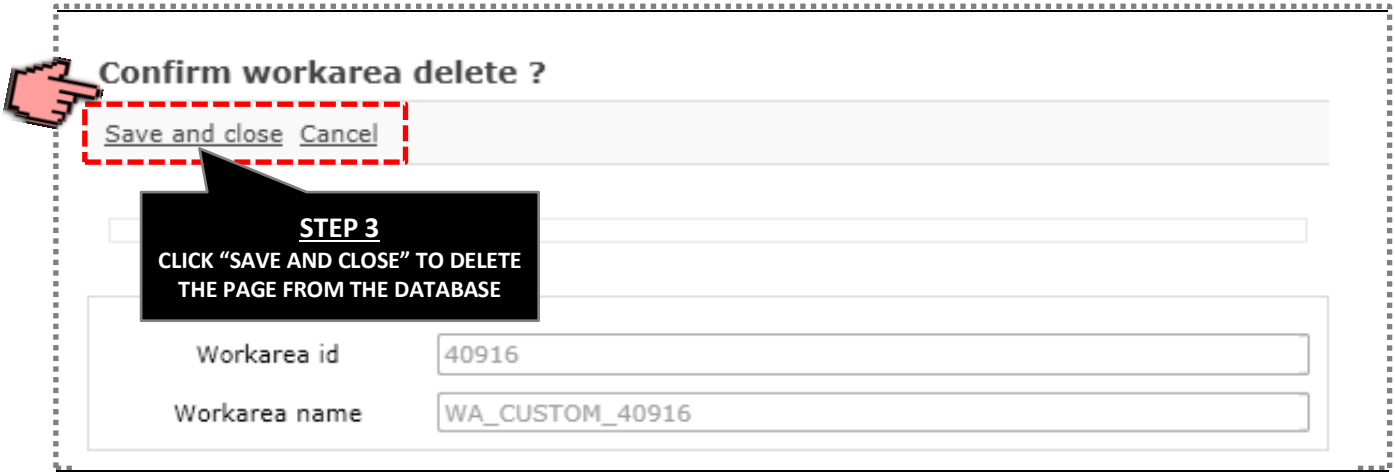
Page Location



4.14.3 DELETE CUSTOM WEBPAGE

The system allows the hotel to delete custom webpages. Only the custom pages have the "Delete Page" link available.





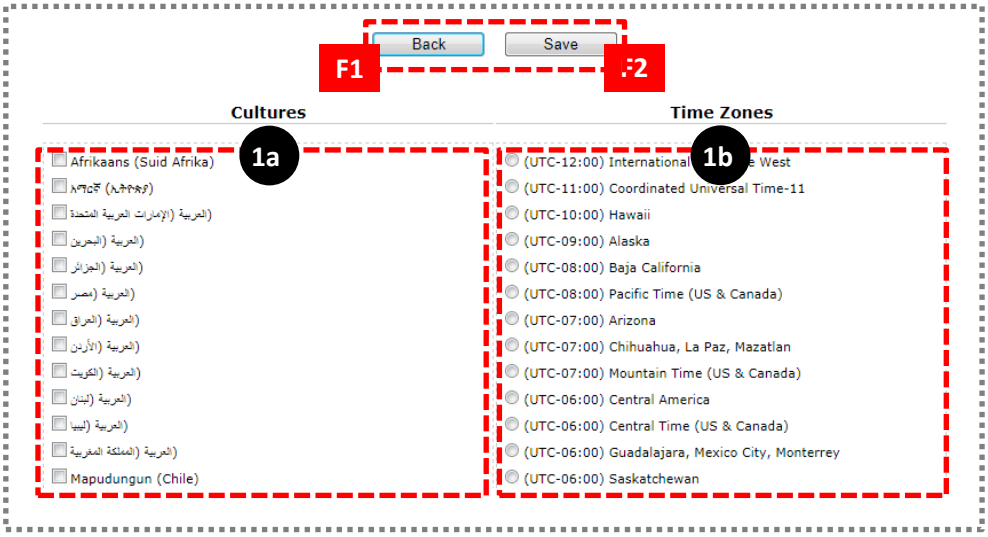
4.15 SET CULTURES & TIME ZONE

This page allows the hotel to define the available cultures and time zone. The culture is different from the language. A language can have several cultures and is based in the ISO 639 standard.

For example the English language (“en”) can be associated with English American culture (“en-US”), English Great Britain culture (“en-GB”) or English Australian culture (“en-AU”). The culture setting defines the use of decimal character separator or the date format (“mm/dd/yyyy” versus “dd-mm-yyyy”).

Page Location

Page Description



4.15.1 FIELDS

1) Main

Public a. ***Cultures*** – select the cultures available in the website. The hotel can add multiple cultures.

Public b. ***Time Zones*** – select the time zone to be used in website.

4.15.2 FUNCTIONS

1) **Back** – cancels the operation and returns to the previous page.

2) **Save** – saves the configuration in the database.

4.16 PUBLISH IN HOTELASP DIRECTORY

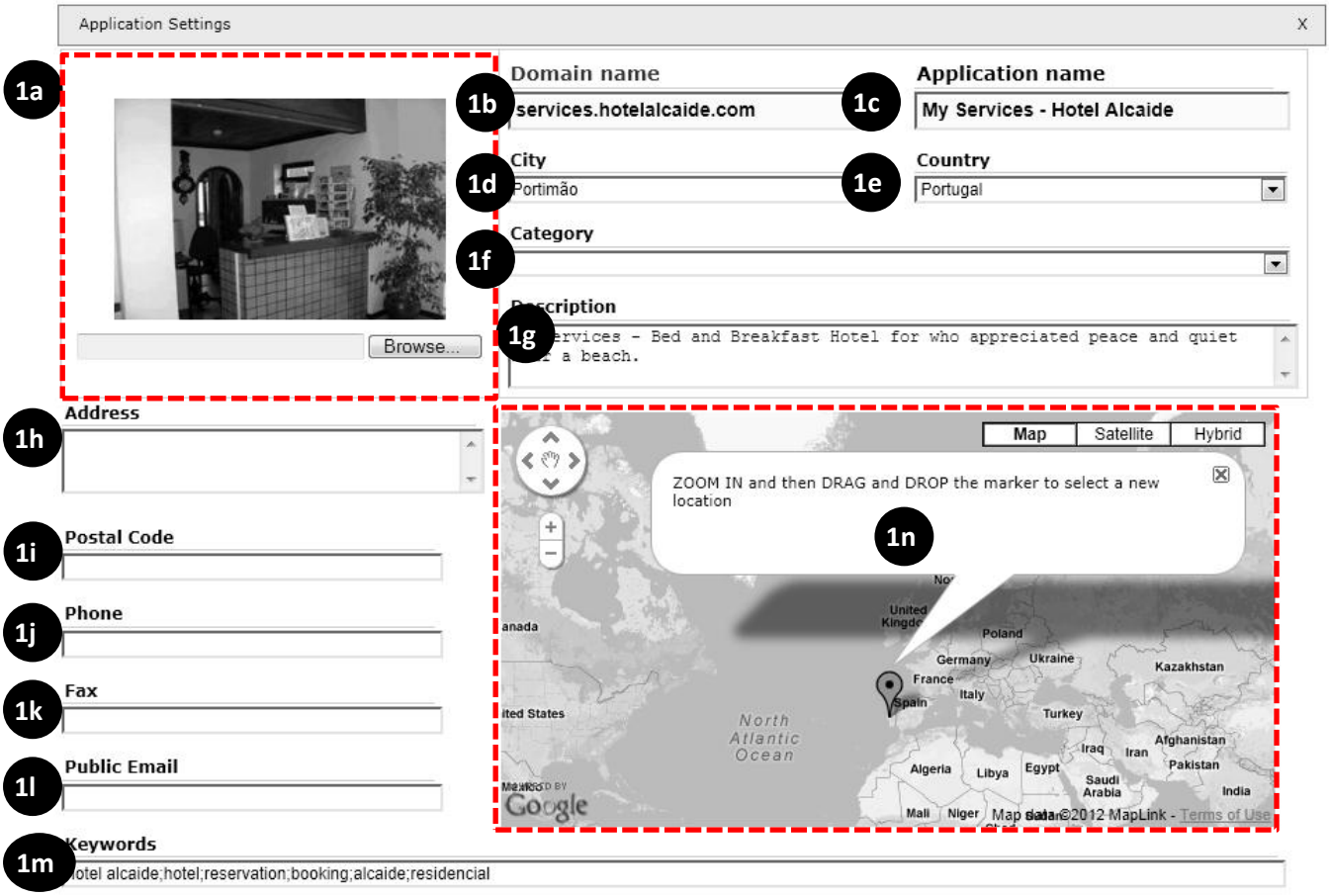
This page is used to set the hotel website domain name and to set the hotel information to be published in the HotelASP Public Directory.

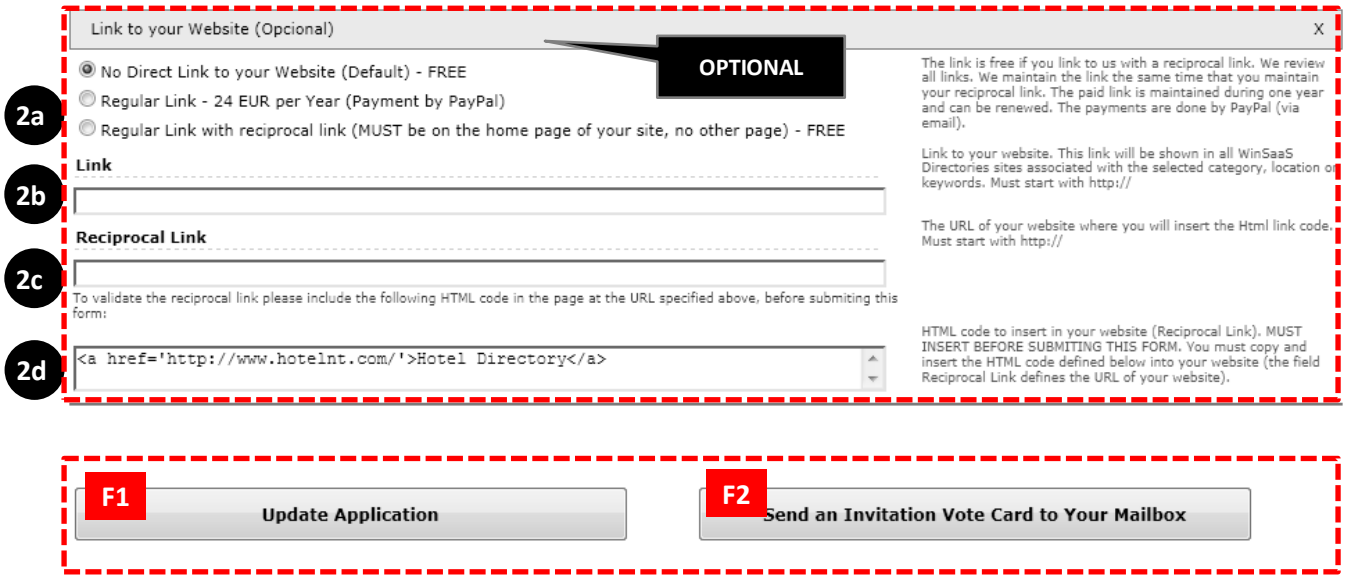
The HotelASP directory publishes automatically all registered hotels using the information set in this page. To remove your hotel from the HotelASP directory send an email to hotelasp@hotelasp.com requesting the removal.

This information is used only in the HotelASP directory and is not used in the hotel website.

Page Location

Page Description





4.16.1 FIELDS

1) Application Settings

Required Public a. ***Picture*** – the picture to be published in the HotelASP Directory.

Required Public b. ***Domain name*** – the domain name associated with the hotel public site.

Required Public c. ***Application name*** – the hotel name.

Public d. ***City*** – the city where the hotel is located.

Public e. ***Country*** – the country where the hotel is located.

Public f. ***Category*** – NOT TO BE USED.

Public g. ***Description*** – a short description of the hotel to be published in the HotelASP Directory.

i. Maximum of 80 characters.

Public h. ***Address*** – the hotel address to be published in the HotelASP Directory.

Public i. ***Postal code*** – the hotel postal code to be published in the HotelASP Directory.

Public j. ***Phone*** – the hotel phone to be published in the HotelASP Directory.

Public k. ***Fax*** – the hotel fax to be published in the HotelASP Directory.

Public l. ***Public email*** – the public email address to be published in the HotelASP Directory.

Public m. ***Keywords*** – the hotel keywords to be published in the HotelASP Directory.

Public

n. ***Geo Location*** – the hotel geo location to be published in the HotelASP Directory.

2) Link to your website (Optional) – This is used if the hotel website is not hosted with HotelASP. For example if the hotel already has a website and wants a direct link from the HotelASP Directory to his external site.
By default the HotelASP Directory only publishes the websites hosted in HotelASP.

a. ***Link Type*** – the link type published by HotelASP.
   i. ***"No Direct Link to your Website"*** – this is the default option.
      1. By default the HotelASP links to the hotel website that is hosted in HotelASP.

   ii. ***"Regular Link"*** – A direct link from the HotelASP directory to an external website.
      1. Contact hotelasp@hotelasp.com for more information.

   iii. ***"Regular Link with reciprocal link"*** – a direct link from the HotelASP directory to an external website but the hotel must insert a reciprocal link in his external website pointing to the link defined in bullet "2d".
      1. Contact hotelasp@hotelasp.com for more information.

b. ***Link*** – the URL of the hotel external website.
   i. Only applies to options "Regular Link" and "Regular Link with reciprocal link".
   ii. This is the link to be published in the HotelASP Directory.
   iii. Must start with http://.

c. ***Reciprocal Link*** – the URL of the external website where the hotel will insert the Html link code.
   i. Only applies to option "Regular Link with reciprocal link".
   ii. Must start with http://.

d. ***Html link code*** – the HTML code that must be inserted in the website referenced by the reciprocal link.

4.16.2 FUNCTIONS

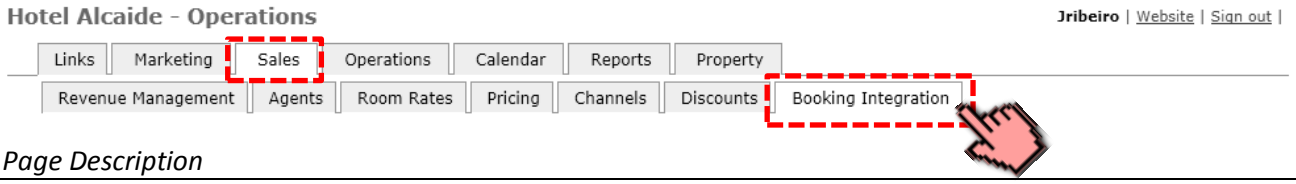
1) Update – saves the data in the database.

2) Send and Invitation Vote Card to Your Mailbox – sends a virtual business card (aka ***Vote for*** Hotel ***Website***) to the hotel email.
   a. This is an email that contains information about your hotel website and should be forward to your customers and friends to create awareness about the hotel new website.

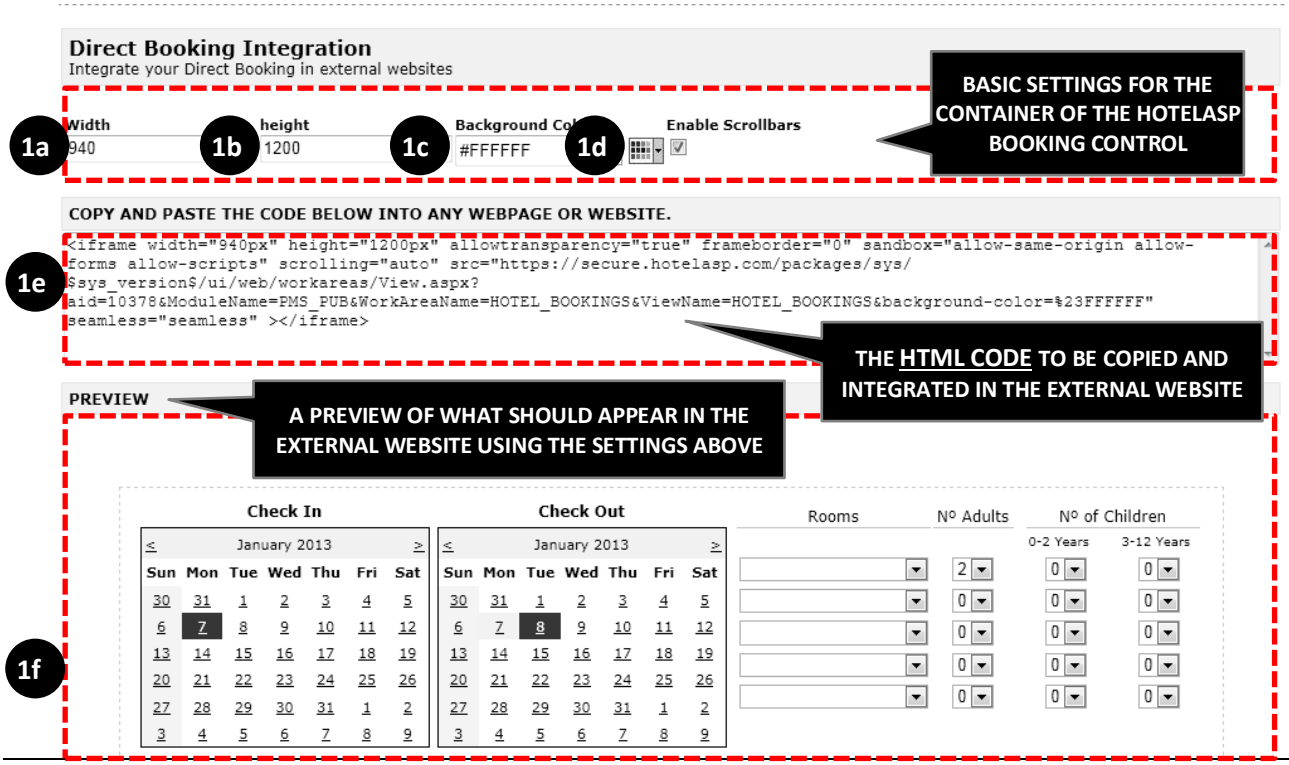
4.17 INTEGRATE BOOKING ENGINE IN EXTERNAL WEBSITE

The hotels that already have a website and don't want to change to a HotelASP website can still benefit from the HotelASP marketing, booking and management features by integrating the HotelASP in the existent hotel website. The hotel just needs to embed and integrate the HotelASP HTML code in the external website.

Page Location



Page Description



4.17.1 FIELDS

1) Main

Required a. ***Width*** – the width of the *iframe* that contains the HotelASP booking control.

Required b. ***Height*** – the height of the *iframe* that contains the HotelASP booking control.

Required c. ***Background color*** – the background color of the *iframe* that contains the HotelASP control.

d. ***Enable Scrollbars*** – defines if the *iframe* will use or not scroll bars.

Public e. ***Html*** – the html code to copy and embed in the external site.

Public f. ***Preview*** – the preview of the HotelASP booking control using the settings.

5 HOTEL MARKETING & SALES

The HotelASP marketing tools helps the hotel to generate traffic to the hotel website and more specific to the hotel booking page. The additional traffic increases the probability of more revenue and more brand awareness.

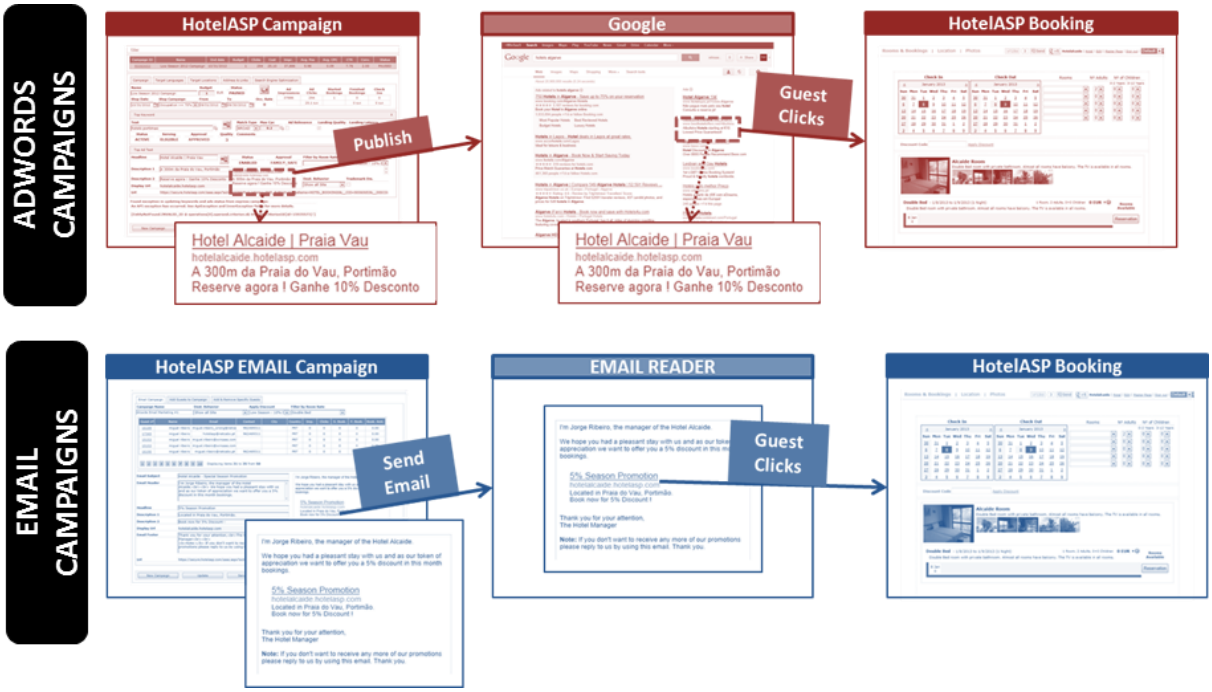


Figure 56 – Marketing Campaign Types

The HotelASP marketing tools offers AdWords and email campaigns tightly integrated with discount promotions, promotional room rates, yield management and the hotel booking page. The figure above shows the basic steps to configure campaigns using the HotelASP marketing tools.

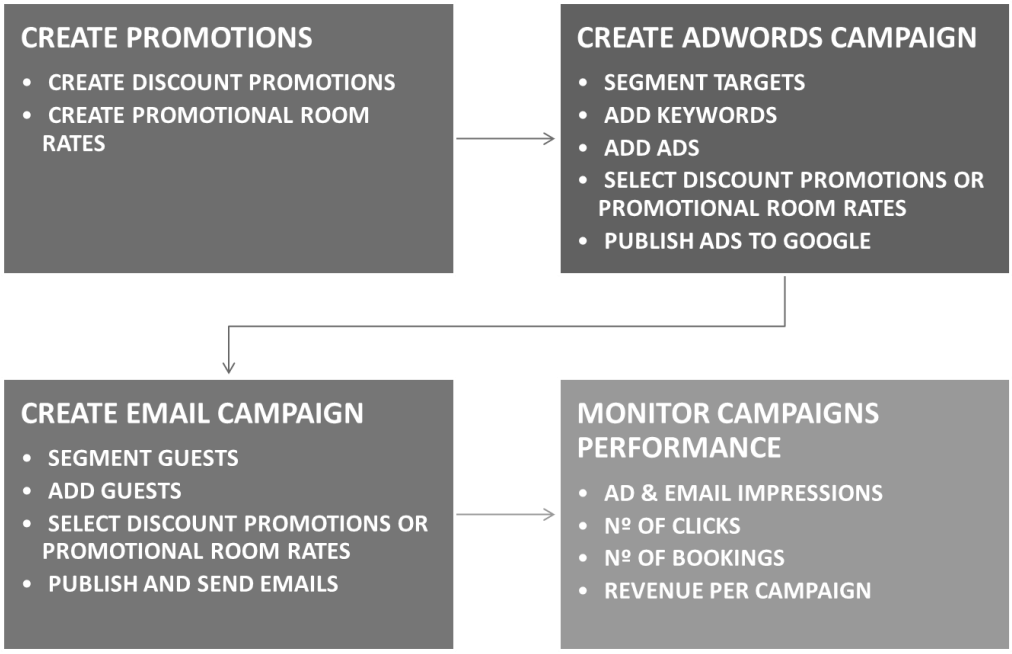


Figure 57 – Marketing Campaigns: Basic Steps

A successful marketing campaign depends not only of well-designed promotions but also of a well-designed hotel website.

The hotel can create traffic to the website but if the website is not well designed the most probable outcome is the user to go way and the hotel loose the money and time spend in the campaign. For this reason is important the hotel to review the Setup website chapter before launching the campaign.

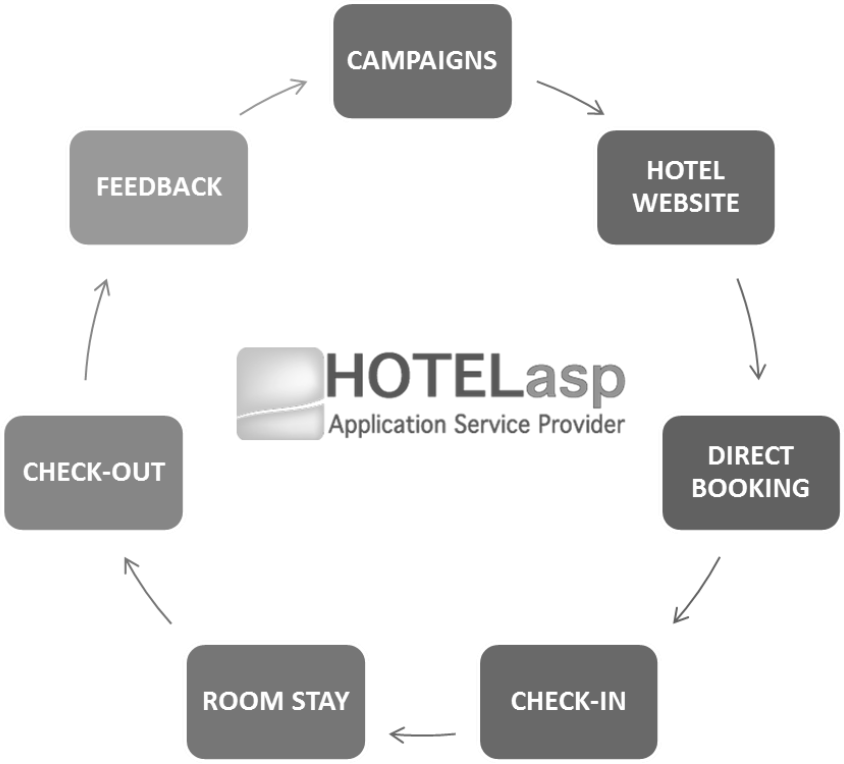


Figure 58 – Guest Loyalty Loop

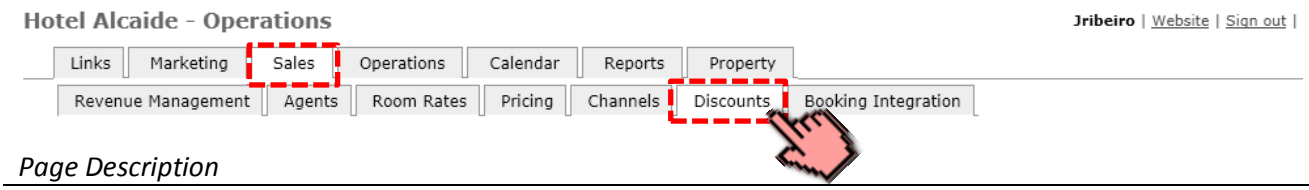
The integration of marketing, sales and operations in a unique service offers the hotel a valuable tool to create and maintain a guest loyalty loop that benefits the guest and the hotel.

5.1 SET DISCOUNT PROMOTIONS

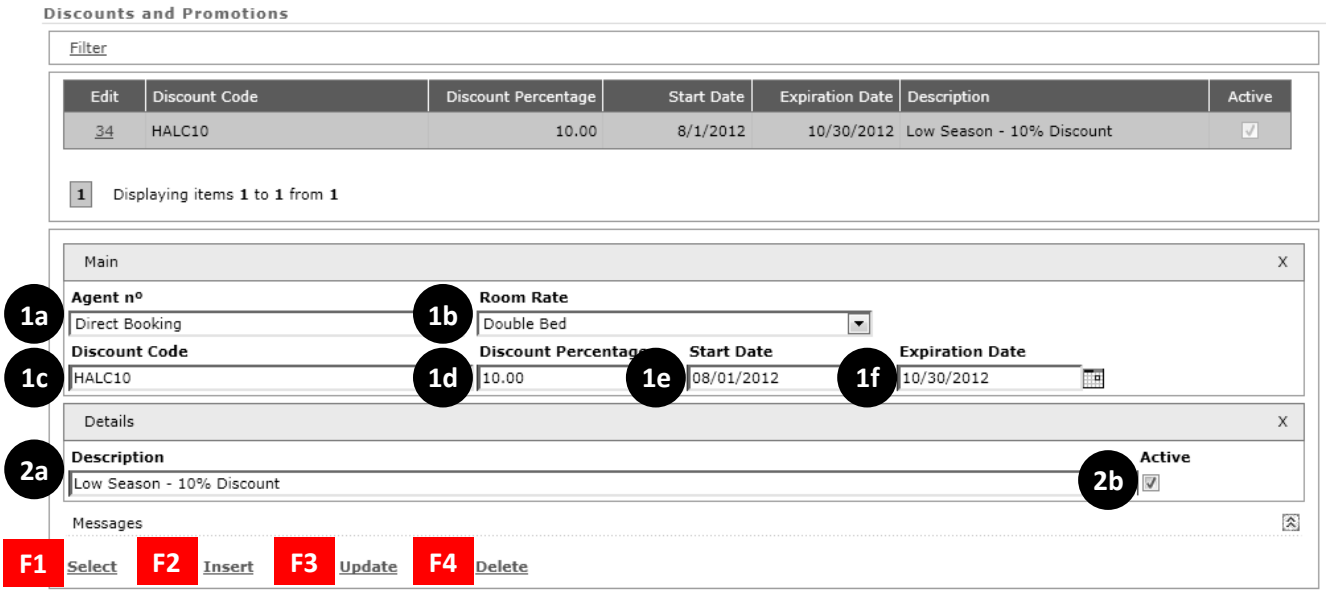
This page allows the hotel to create and manage discount promotions. These discount codes can be used directly by the hotel customers in the hotel website booking page or can be integrated in targeted marketing campaigns. The discount codes can be an important marketing instrument to attract more customers to your hotel.

Also the hotel can set specific guest discounts at the GUEST MANAGEMENT page using the field "Discount Percentage". These discounts will be automatically applied when the guest does a booking using his private guest site. These specific guest discounts cannot be used in the hotel public booking page.

Page Location



Page Description



5.1.1 FIELDS

1) **Main**

a. ***Agent nº*** – the agent associated with the discount code.

i. It's optional.

ii. If selected then the discount code can only be applied if the booking is created for that specific agent.

b. ***Room rate*** – the room rate to be associated with the discount code.

i. It's optional.

ii. If selected then the code can only be applied if the booking is created with that specific room rate.

Required Public c. ***Discount Code*** - the promotion code that the user can use in the hotel booking page to retrieve a specific discount.

i. For example:

- Assume the following data:
  - Agent = (empty)
  - Room Rate = SUITE
  - Discount Code = PROMO10
  - Discount Percentage = 12.5
  - Start date = 1 June
  - End Date = 5 June
- A user goes to the hotel website in 30 of May, goes to the hotel booking page and insert the code "PROMO10"
  - The system does not consider the discount code because is valid only between 1 and 5 of June.
- A user goes to the hotel website in 2 of June, goes to the hotel booking page, selects the "STANDARD" room rate and insert the code "PROMO10"
  - The system does not consider the discount code because the user did not select the "SUITE" room rate.
- A user goes to the hotel website in 2 of June, goes to the hotel booking page, selects the "SUITE" room rate and insert the code "PROMO10"
  - The system applies a discount of 12.5% to all SUITE room rates.

Required d. ***Discount Percentage*** – the discount percentage to be applied to the total of the booking.

Required e. ***Start date*** – the start date of the valid period for applying the code.

Required f. ***End date*** – the end date of the valid period for applying the code.

2) Details

Public a. ***Description*** – a short text describing the discount promotion.

b. ***Active*** – shows or hides the discount code.

5.1.2 FUNCTIONS

1) Refresh – refresh the form data.

2) Insert – creates a discount promotion.

3) Update – saves the data in the database.

4) Delete – deletes the promotion from the database.

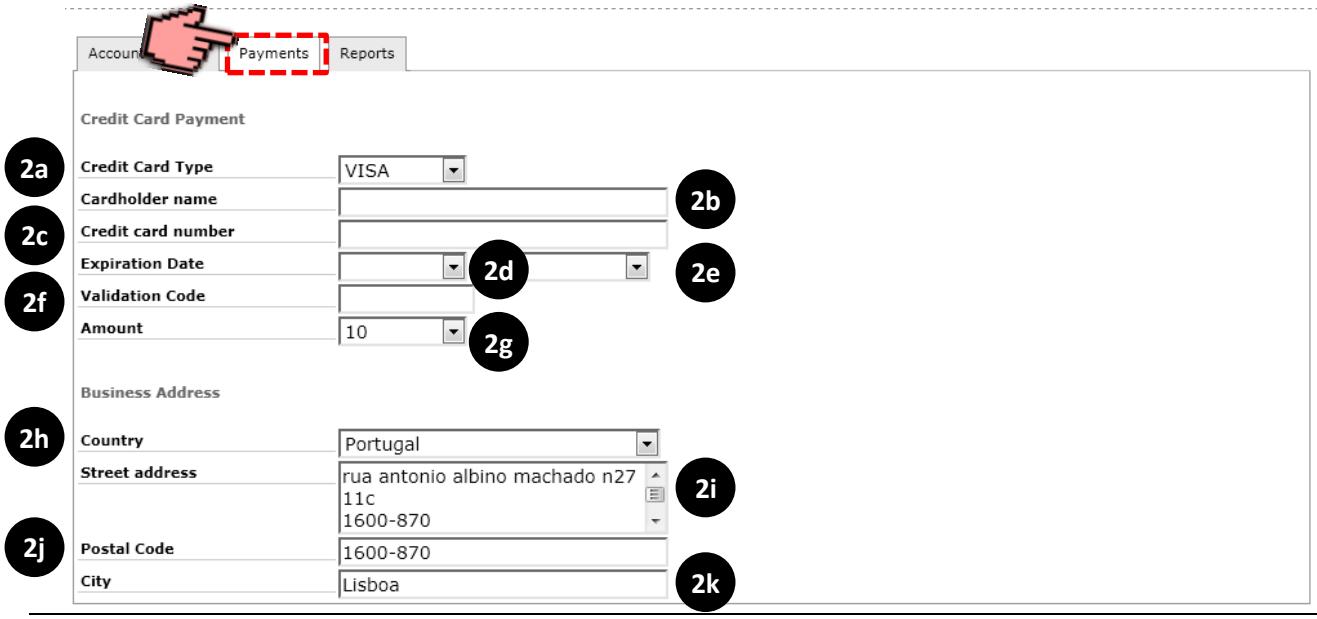
5.2 SET ADWORDS ACCOUNT

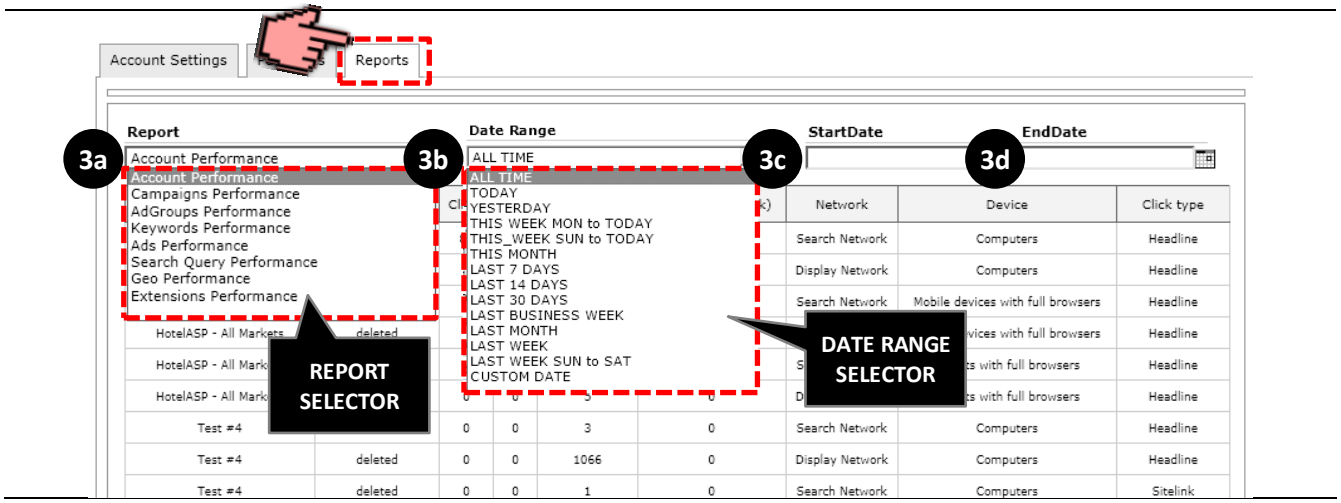
The hotel to start using the AdWords campaigns needs to activate the AdWords account and proceed with an initial payment.

The first step is to press the button "Activate", then proceed with the payment by filling the "Payments" tab and finally press the button "Make Payment". The system will verify the credit card information and credit the payment in your AdWords account. This last step can take from a couple of hours to a couple of days depending of the credit card payment process. For more information contact us at hotelasp@hotelasp.com.

Page Location

Page Description





5.2.1 FIELDS

1) Account Settings

Read Only a. ***AdWords ID*** – the Google AdWords ID.

Read Only b. ***AdWords name*** – the AdWords account name.

Required c. ***Currency*** – The AdWords account currency.

Required d. ***Datetime zone*** – the AdWords account time zone.

Read Only e. ***Usage*** – the API credits usage.

2) Payments – All fields are required for payment processing and are applicable to the credit card holder.

Required a. ***Credit card type*** – the credit card type.

Required b. ***Cardholder name*** – the credit card holder name.

Required c. ***Credit card number*** – the credit card number.

Required d. ***Expiration month date*** – the credit card expiration month.

Required e. ***Expiration year date*** – the credit card expiration year.

Required f. ***Validation code*** – the credit card validation code.

Required g. ***Amount*** – the payment amount.

i. This amount will be credited in the hotel AdWords account.

Required h. ***Country*** – the credit card holder business address country.

Required i. ***Street address*** – the credit card holder business address.

Required j. ***Postal code*** – the credit card holder business address postal code.

Required k. ***City*** – the credit card holder business address city.

3) Reports

a. ***Report*** – the report type. Check the figure above for the reports available.

b. ***Date range*** – the selection of a predefined period range.

c. ***Start date*** – the start date for the report.

a. It requires the hotel to select the "CUSTOM DATE" from the "Date range" field.

d. ***End date*** – the end date for the report.

a. It requires the hotel to select the "CUSTOM DATE" from the "Date range" field.

5.2.2 FUNCTIONS

1) **Activate** – activate the AdWords account.

2) **Make payment** – request a payment to the AdWords account.

I. All the fields in the payment tab must be filled for the order to be successfully processed.

5.3 ADWORDS CAMPAIGNS

The hotel can create Google AdWords campaigns integrated with the hotel booking website. These campaigns generate traffic to your website and can work with discount promotions.

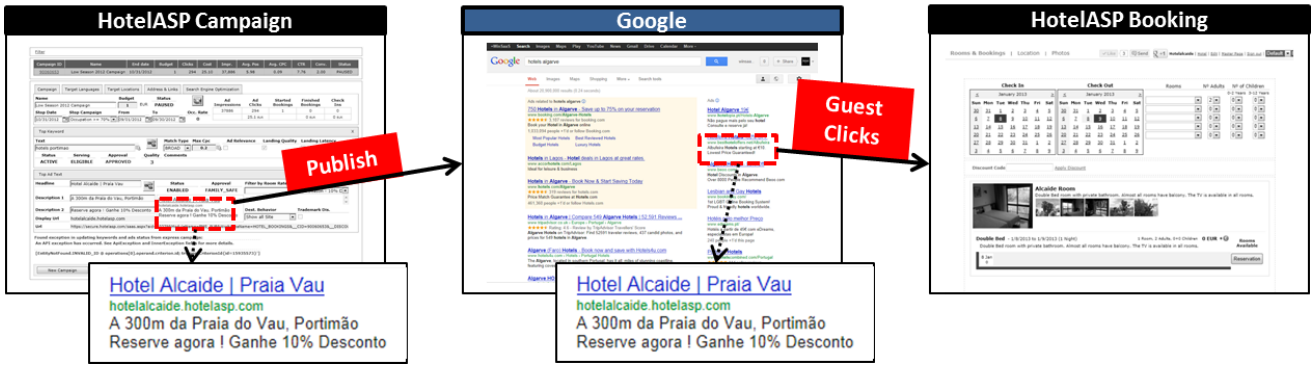


Figure 59 – AdWords Campaigns: Generate Traffic to your Website

The campaign page allows the hotel to create and manage AdWords campaigns but first the hotel must set the AdWords account as defined in the SET ADWORDS ACCOUNT page. The campaign page layout is organized accordingly to the picture below.

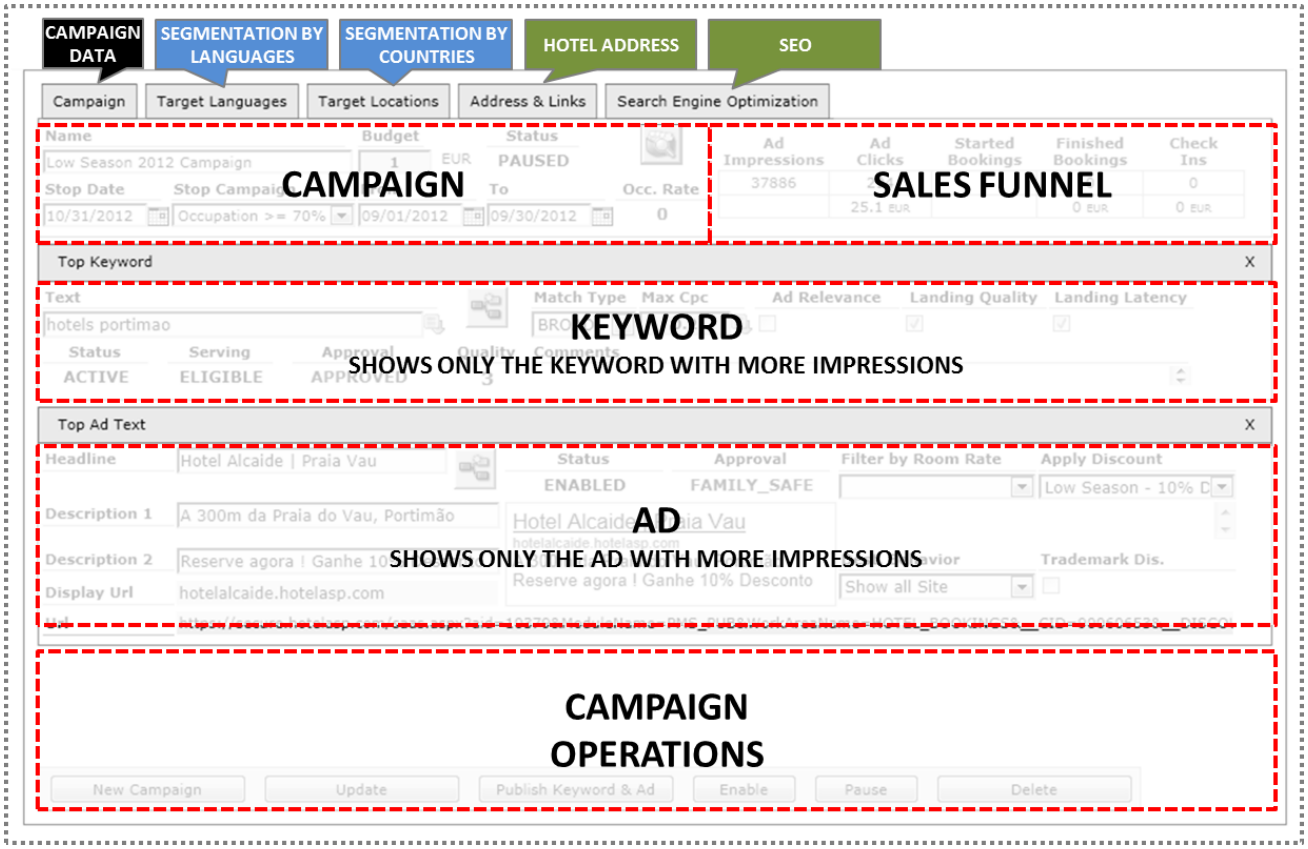


Figure 60 - AdWords Campaigns: Page Layout

This page shows only the ad and the keyword with more impressions but the hotel can have multiple keywords and ads associated with the campaign as explained in the following topics.

The campaign creates hotel awareness and drives the customer to the hotel website and consequently creating an opportunity for direct sales. The sales funnel is an important report to understand and track the success of the campaign.

Sales Funnel
From Ad Impressions to Check Ins

Ad Impressions	Ad Clicks	Started Bookings	Finished Bookings	Check Ins
1124	53	5	4	4
	12.1 EUR		2.754 EUR	2.754 EUR

"Started Bookings" – The user clicked the Ad and clicked the booking button.
"Finished Bookings" or "Conversions" – clicked the Ad, clicked the booking button and clicked the payment button.

Figure 61 – AdWords Campaigns: Sales Funnel

The sales funnel as described in the picture above shows the performance of your campaigns from ad impressions to check-ins.

The figure below illustrates the basic steps of a campaign life cycle.

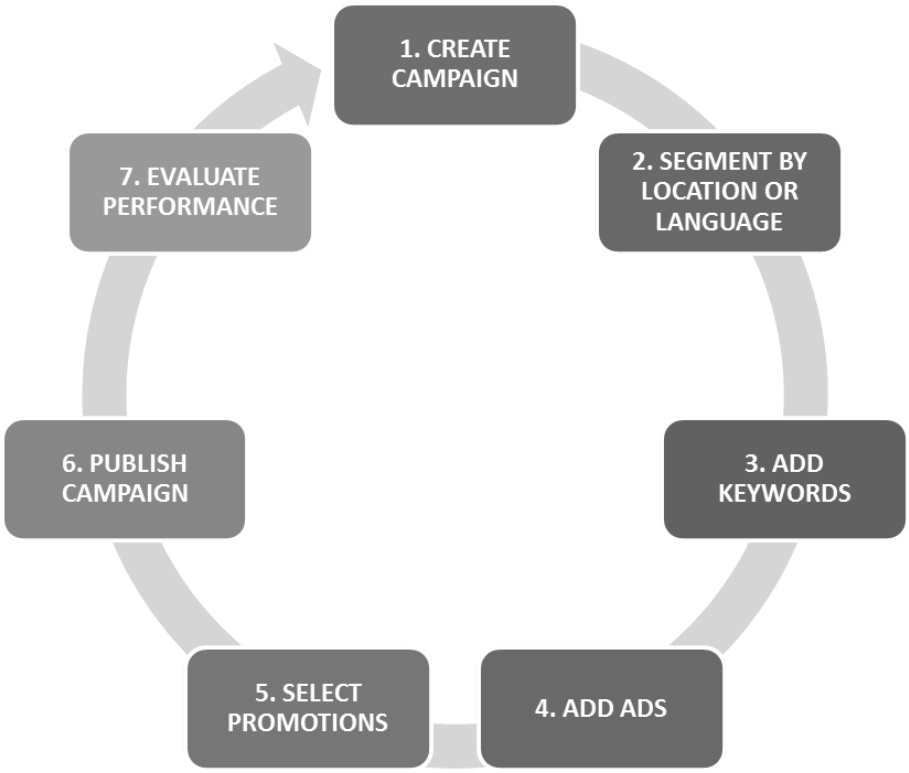
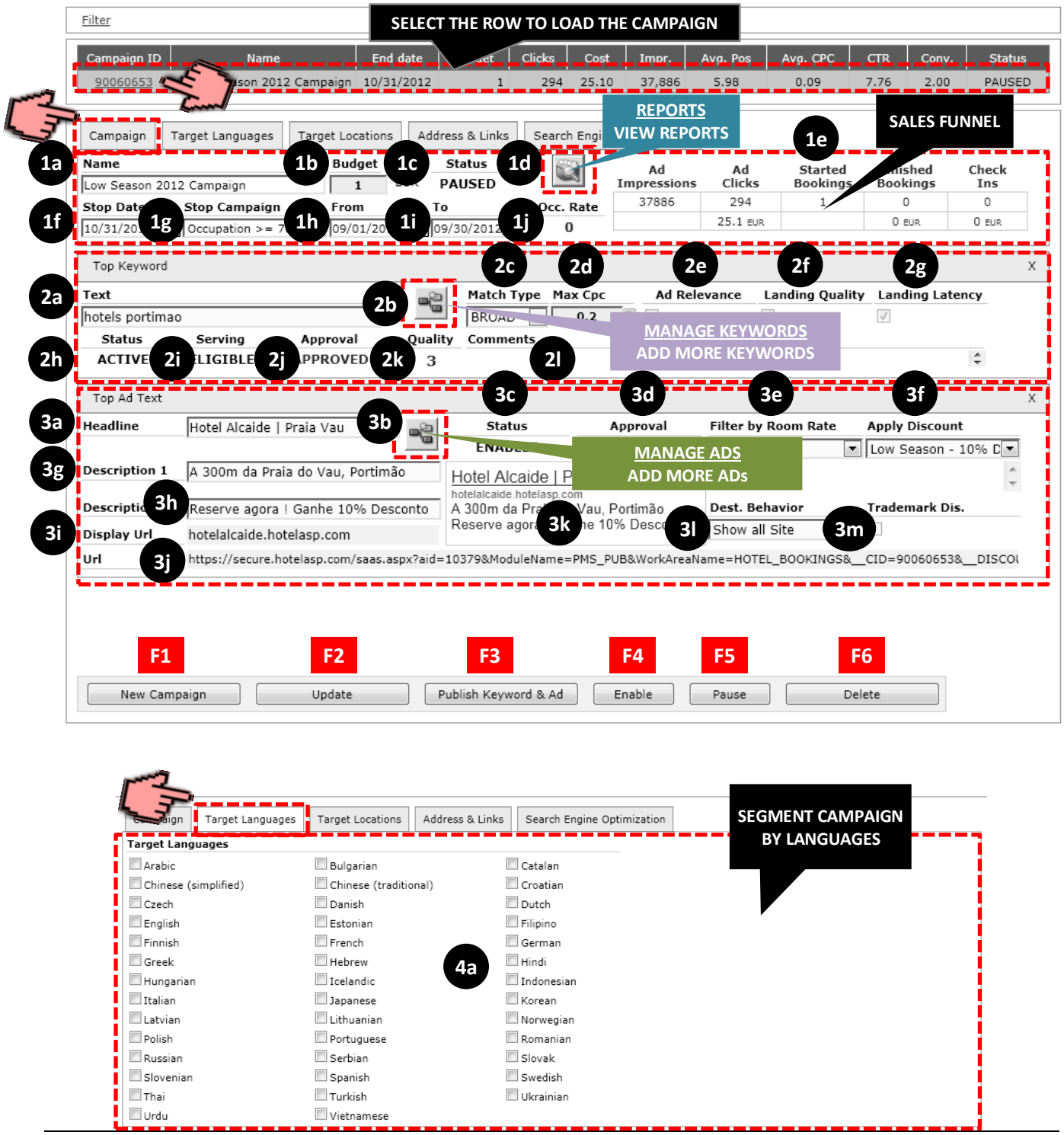


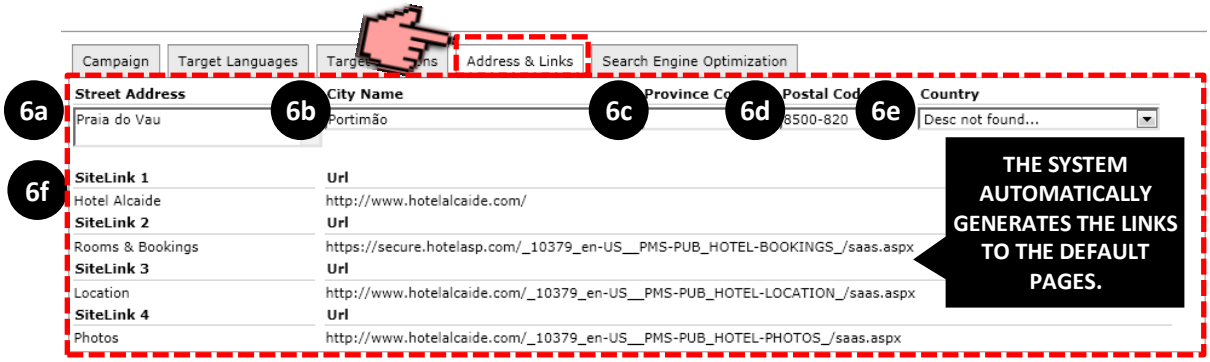
Figure 62 – AdWords Campaign Cycle

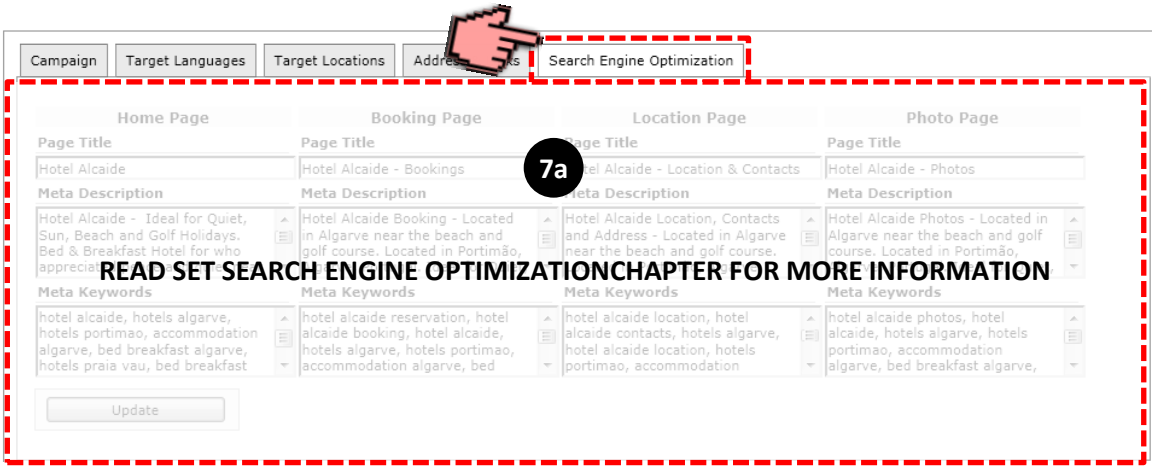
Page Location

Page Description



Campaign
Target Locations
Address & Links
Search Engine Optimization
SEGMENT CAMPAIGN BY COUNTRIES
Target Locations
Afghanistan
Albania
Algeria
Andorra
Angola
Anguilla
Antigua and Barbuda
Argentina
Armenia
Australia
Austria
Azerbaijan
Bahrain
Bangladesh
Barbados
Belarus
Belgium
Belize
Benin
Bermuda
Bhutan
Bolivia
Bosnia and Herzegovina
Botswana
Bouvet Island
Brazil
British Indian Ocean Territory
Brunei Darussalam
Bulgaria
Burkina Faso
Burundi
Cambodia
Cameroon
Canada
Cape Verde
Cayman Islands
Central African Republic
Chad
Chile
China
Christmas Island
Cocos (Keeling) Islands
Colombia
Comoros
Congo
Congo, Democratic Republic
Cook Islands
Costa Rica
5a


Campaign
Target Languages
Address & Links
Search Engine Optimization
6a
Street Address
Praia do Vau
6b
City Name
Portimão
6c
6d
6e
Country
Desc not found...
6f
SiteLink 1
Hotel Alcaide
Url
http://www.hotelalcaide.com/
SiteLink 2
Rooms & Bookings
Url
https://secure.hotelasp.com/_10379_en-US__PMS-PUB_HOTEL-BOOKINGS_/saas.aspx
SiteLink 3
Location
Url
http://www.hotelalcaide.com/_10379_en-US__PMS-PUB_HOTEL-LOCATION_/saas.aspx
SiteLink 4
Photos
Url
http://www.hotelalcaide.com/_10379_en-US__PMS-PUB_HOTEL-PHOTOS_/saas.aspx
THE SYSTEM AUTOMATICALLY GENERATES THE LINKS TO THE DEFAULT PAGES.


Campaign
Target Languages
Target Locations
Search Engine Optimization
Home Page
Booking Page
Location Page
Photo Page
Page Title
Hotel Alcaide
Hotel Alcaide - Bookings
Hotel Alcaide - Photos
7a
Meta Description
Meta Keywords
Update
READ SET SEARCH ENGINE OPTIMIZATIONCHAPTER FOR MORE INFORMATION

MANAGE KEYWORDS: ADD MORE KEYWORDS

CLICK THE BUTTON "MANAGE KEYWORDS" TO OPEN THE KEYWORDS MANAGEMENT POPUP

Filter

Keyword ID	Text	Clicks	Cost	Impr.	Avg. Pos	Avg. CPC	FP. C			
33916066	hotels portimao	192	5.98	6,483	6.14	0.03	1.0			
35605991	portimao hotels	9	1.60	2,251	6.58	0.18	1.2			
44166067	hotel portimão	0	0.00	222	6.21	0.00	0.3			
87944923	vau hotel	3	0.63	381	4.56	0.21	0.09	7.87	0.00	ACTIVE
94533838	praia do vau	22	3.34	1,317	3.18	0.15	0.33	16.70	0.00	ACTIVE
123868031	bed and breakfast algarve	0	0.00	30	5.80	0.00	2.25	0.00	0.00	ACTIVE
274187498	bed breakfast algarve	0	0.00	63	7.54	0.00	1.50	0.00	0.00	ACTIVE
319133249	hotels in portimao	0	0.00	117	7.11	0.00	1.00	0.00	0.00	ACTIVE
4354288468	hotel em portimão	0	0.00	79	7.44	0.00	0.17	0.00	0.00	ACTIVE
6271827796	hotels praia vau	4	0.90	282	5.82	0.23	0.20	14.18	2.00	ACTIVE
8722559881	hoteis praia do vau	2	0.36	79	5.28	0.18	0.06	25.32	0.00	ACTIVE

Keyword Settings | Quality Score

8a Keyword ID | 8b AdGroup ID: 3876665093 | 8c Status | 8d Serving Status | 8e Approval Status

8f Text | 8g Match Type | 8h MaxCpc | 8i DestinationUrl

Add Keyword (F7) | Update Keyword (F8) | Enable (F9) | Pause (F10) | Delete Keyword (F11)

MANAGE ADS: ADD MORE ADs

CLICK THE BUTTON "MANAGE ADS" TO OPEN THE ADS MANAGEMENT POPUP

Filter

Ad ID	Headline	Clicks	Cost	Impr.	Avg. Pos	Avg. CPC
12615818093	Hotel Alcaide | Portimão	38	3.90	8,927	6.26	0.10
12635434013	Hotel Alcaide | Praia Vau	152	12.78	13,661	5.72	0.08

Ad Settings

9a Ad ID: 12615 8 | 9b AdGroup ID: 3876665093 | 9c Status: ENABLED | 9d Approval Status: FAMILY_SAFE | 9e Trademark Dis.

9f Headline: Hotel Alcaide | Portimão | Comments

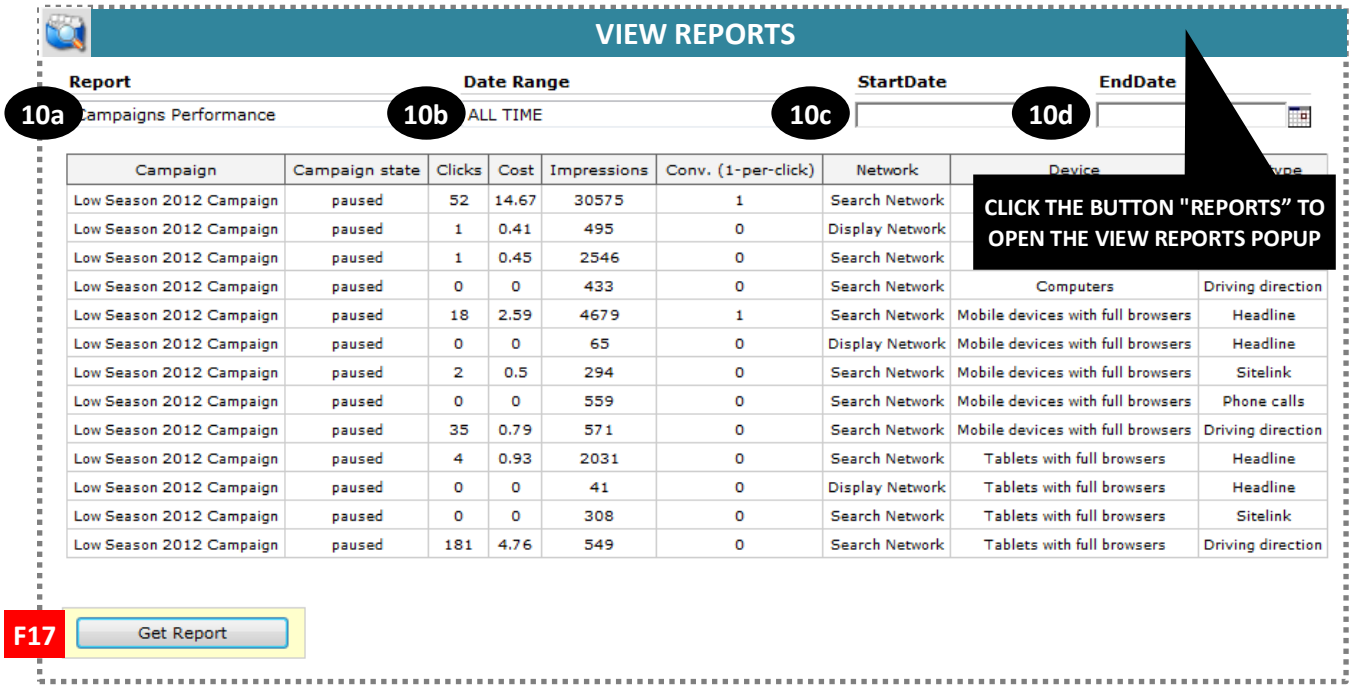
9g Description 1: Quiet, Sun and near the Beach

9h Description 2: Book now for a 10% discount !

9i Display Ur: hotelalcaide.hotelasp.com

9j Url: https://secure.hotelasp.com/saas.aspx?aid=10379&ModuleName=PMS_PUB&WorkAreaName=HOTEL_BOOKING

Add Ad (F12) | Update Ad (F13) | Enable (F14) | Pause (F15) | Delete Ad (F16)



Campaign	Campaign state	Clicks	Cost	Impressions	Conv. (1-per-click)	Network	Device	Type
Low Season 2012 Campaign	paused	52	14.67	30575	1	Search Network		
Low Season 2012 Campaign	paused	1	0.41	495	0	Display Network		
Low Season 2012 Campaign	paused	1	0.45	2546	0	Search Network		
Low Season 2012 Campaign	paused	0	0	433	0	Search Network	Computers	Driving direction
Low Season 2012 Campaign	paused	18	2.59	4679	1	Search Network	Mobile devices with full browsers	Headline
Low Season 2012 Campaign	paused	0	0	65	0	Display Network	Mobile devices with full browsers	Headline
Low Season 2012 Campaign	paused	2	0.5	294	0	Search Network	Mobile devices with full browsers	Sitelink
Low Season 2012 Campaign	paused	0	0	559	0	Search Network	Mobile devices with full browsers	Phone calls
Low Season 2012 Campaign	paused	35	0.79	571	0	Search Network	Mobile devices with full browsers	Driving direction
Low Season 2012 Campaign	paused	4	0.93	2031	0	Search Network	Tablets with full browsers	Headline
Low Season 2012 Campaign	paused	0	0	41	0	Display Network	Tablets with full browsers	Headline
Low Season 2012 Campaign	paused	0	0	308	0	Search Network	Tablets with full browsers	Sitelink
Low Season 2012 Campaign	paused	181	4.76	549	0	Search Network	Tablets with full browsers	Driving direction

5.3.1 FIELDS

1) Campaign – the campaign basic data

Required a. ***Name*** – the name of the campaign.

Required b. ***Budget*** – the maximum amount per day that the system is allowed to spend in ads.

   a. The currency amount is the AdWords account currency.

Read Only c. ***Status*** – the status of the campaign.

d. ***"REPORTS" button*** – view the campaign reports.

   a. Shows the campaign reports popup.

Read Only e. ***Sales funnel*** – view the campaign performance.

Required f. ***Stop date*** – the date to stop the campaign.

g. ***Stop campaign*** – the occupation rule to stop the campaign.

   a. For example: if the hotel occupation rate is higher than 70% the system automatically stops the campaign.

   b. This trigger is verified every time the hotel checks this page.

h. ***From*** – the start date to be applied to the rule defined in the field "Stop campaign".

i. ***To*** – the end date to be applied to the rule defined in the field "Stop campaign".

j. ***Occ. rate*** – the actual occupation rate of the hotel between the "From" and "To" dates.

2) Top keyword – This tab shows the keyword with more impressions. To view all the keywords associated with the campaign press the button "MANAGE KEYWORDS"

Required a. ***Text*** – the text keyword.

b. ***"MANAGE KEYWORDS" button*** – view and manage multiple keywords.
   i. Shows the keyword management popup.

Required c. ***Match type*** – the type of keyword match.

Required d. ***Max Cpc*** – the maximum cost per click.
   i. The currency is the AdWord account currency.

Read Only e. ***Ad relevance*** – the relevance of the keyword regarding the ads.

Read Only f. ***Landing quality*** – the quality of the landing page.

Read Only g. ***Landing latency*** – the time spend to load the landing page.

Read Only h. ***Status*** – the status of the keyword.

Read Only i. ***Serving*** – if the keyword is being displayed.

Read Only j. ***Approval*** – if the keyword is approved.

Read Only k. ***Quality*** – the quality of the keyword.

Read Only l. ***Comments*** – comments about the keyword.

3) Top Ad Text – This tab shows the advertisement (aka AD) with more impressions. To view all the ads associated with the campaign press the button "MANAGE ADS"

Required Public a. ***Headline*** – the headline of the ad.

b. ***"MANAGE ADS" button*** – view and manage multiple ads.
   i. Shows the ads management popup.

Read Only c. ***Status*** – the ad status.

Read Only d. ***Approval*** – displays if the ad has been approved.

e. ***Filter by room rate*** – includes a filter by room rate in the ad link (Url).
   i. This is used for example when the hotel wants the user to see only a special promotional room rate.
   ii. The booking page will show only the selected room rate.

f. ***Apply discounts*** – includes a discount promotion in the ad link (Url).
   i. The discount code will be automatically applied when the user navigates to the booking page.

Required Public
g. ***Description 1*** – the first description below the ad headline.

Required Public
h. ***Description 2*** – the last description of the ad.

Required Public
i. ***Display Url*** – the Url (aka Link) to show in the ad.

Read Only Public
j. ***Url*** – the Url generated by the system.
   i. This Url is generated by the system and should not be edited directly.

Read Only Public
k. ***AD PREVIEW*** – the ad preview.
   i. Click in the link to navigate to the booking page and validate what the user will see when he clicks in the Google Ad.

Required
l. ***Dest. Behavior*** – sets the destination behavior of the hotel website landing page.
   i. *Show All Site* – the user navigates to the booking page and has access to all pages of the hotel website.
   ii. *Show only Booking* – the user navigates to the booking page but only sees the hotel booking page.
      i. The header and footer of the hotel website are removed.
      ii. The user does not have access to the other pages of the website such as the home page, location or photos pages.

Read Only
m. ***Trademark dis.*** – displays a warning if the ad infringes any trademark.

4) Target Languages

a. ***Target Languages*** – target the campaign only to specific languages.

5) Target Locations

a. ***Target Locations*** – target the campaign only to specific countries.

6) Address & Links

Public
a. ***Street address*** – the address of the hotel.

Public
b. ***City name*** – the city where the hotel is located.

Public
c. ***Province code*** – the province code of the hotel.

Public
d. ***Postal code*** – the postal code of the hotel.

Public
e. ***Country*** – the country where the hotel is located.

Read Only Public
f. ***Site link Name*** – the links generated by the system to the hotel website default pages.

7) **Search Engine Optimization**
   a. ***SEO*** – set this section to improve the landing page quality of the ad and thus improving the chance of the ad being displayed at a lower cost per click.
      i. For more information read the SET SEARCH ENGINE OPTIMIZATION chapter.

8) **Keyword Management POPUP – Use this page to manage multiple keywords. Click the button "MANAGE KEYWORDS" to access this popup.**

Read Only a. ***Keyword ID*** – the internal keyword id.

Read Only b. ***Ad group ID*** – the ad group associated with the keyword.

Read Only c. ***Status*** – the status of the keyword.

Read Only d. ***Serving*** – if the keyword is being displayed.

Read Only e. ***Approval*** – if the keyword is approved.

Required f. ***Text*** – the keyword text.

Required g. ***Match type*** – the type of keyword match.

Required h. ***Max Cpc*** – the maximum cost per click.

i. ***Destination Url*** – NOT AVAILABLE.

9) **Ads Management POPUP – Use this page to manage the multiple ads. Click the button "MANAGE ADS" to access this popup.**

Read Only a. ***Ad ID*** – The internal id of the ad.

Read Only b. ***Ad group ID*** – the ad group associated with the ad.

Read Only c. ***Status*** – The ad status.

Read Only d. ***Approval*** – Displays if the ad has been approved.

Read Only e. ***Trademark dis.*** – Displays a warning if the ad infringes any trademark.

Required Public f. ***Headline*** – the headline of the ad.

Required Public g. ***Description 1*** – the first description below the ad headline.

Required Public h. ***Description 2*** – the last description of the ad.

Required Public i. ***Display url*** – the Url to show in the ad.

Required
Public

j. ***Url*** – the url generated by the system.
   a. This url is generated by the system and should not be edited directly.

10) **Reports POPUP – Use this page to view the campaign reports. To access this popup click in the "REPORTS" button.**
   a. ***Report*** – the type of report to be displayed.
      i. Read the SET ADWORDS ACCOUNT chapter for more information about these reports.

   b. ***Date Range*** – the date range of data to be displayed in the report.

   c. ***Start date*** – filter the report by an initial date.
      i. Must select "CUSTOM DATE" from the "Date Range" field.

   d. ***End date*** – filter the report by an end date.
      i. Must select "CUSTOM DATE" from the "Date Range" field.

5.3.2 FUNCTIONS

1) **CAMPAIGN | New campaign** – creates a new campaign.

2) **CAMPAIGN | Update** – save the campaign data in the database except the keyword and the ad. This function only saves the basic data in the HotelASP database.
   i. The hotel must explicit click in the button "Publish Keyword & ad" to submit the new data to Google AdWords.

3) **CAMPAIGN | Publish keyword & ad** – published and submits the keyword and ad data to the Google AdWords.

4) **CAMPAIGN | Enable** – activates the campaign.

5) **CAMPAIGN | Pause** – stops the campaign.

6) **CAMPAIGN | Delete** – deletes the campaign.

7) **KEYWORD MANAGEMENT | Add keyword** – add a keyword to the campaign.

8) **KEYWORD MANAGEMENT | Update keyword** – updates the keyword data.

9) **KEYWORD MANAGEMENT | Enable** – activates the keyword.

10) **KEYWORD MANAGEMENT | Pause** – stops the keyword from being used.

11) **KEYWORD MANAGEMENT | Delete** – deletes the keyword.

12) **AD MANAGEMENT | Add ad** – creates an ad.

13) **AD MANAGEMENT | Update ad** – updates the ad data.

14) **AD MANAGEMENT | Enable** – activates the ad.

15) **AD MANAGEMENT | Pause** – stops the ad from being used.

16) **AD MANAGEMENT | Delete** – deletes the ad.

17) **AD MANAGEMENT | Get report** – displays the report.

5.4 EMAIL CAMPAIGNS

The hotel has a significant database of emails from customers that have stayed in the hotel and the guests usually authorize the hotel to use that email for communications and promotions. This feature helps the hotel to use that authorized email database by creating email campaigns.

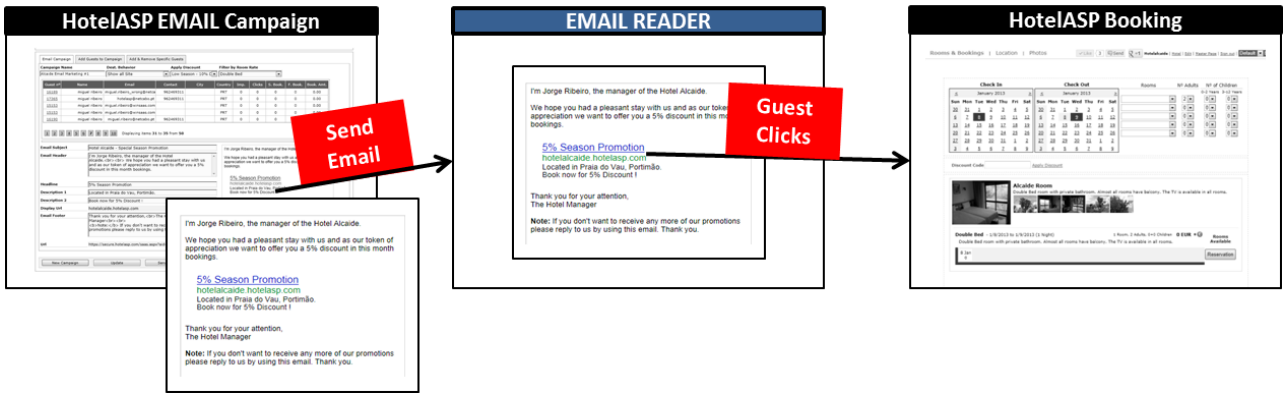


Figure 63 - Email Campaigns

The basic steps to create an email campaign are described in illustration below.

Figure 64 - Email Campaigns: Basic Configuration Steps

The email structure must follow a set of rules as described in the picture below.

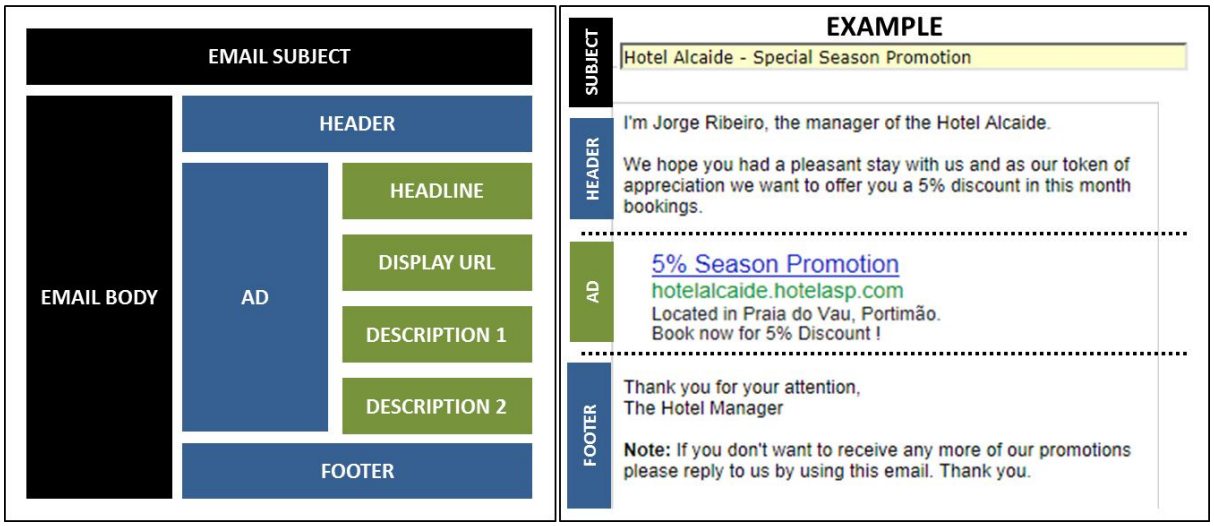
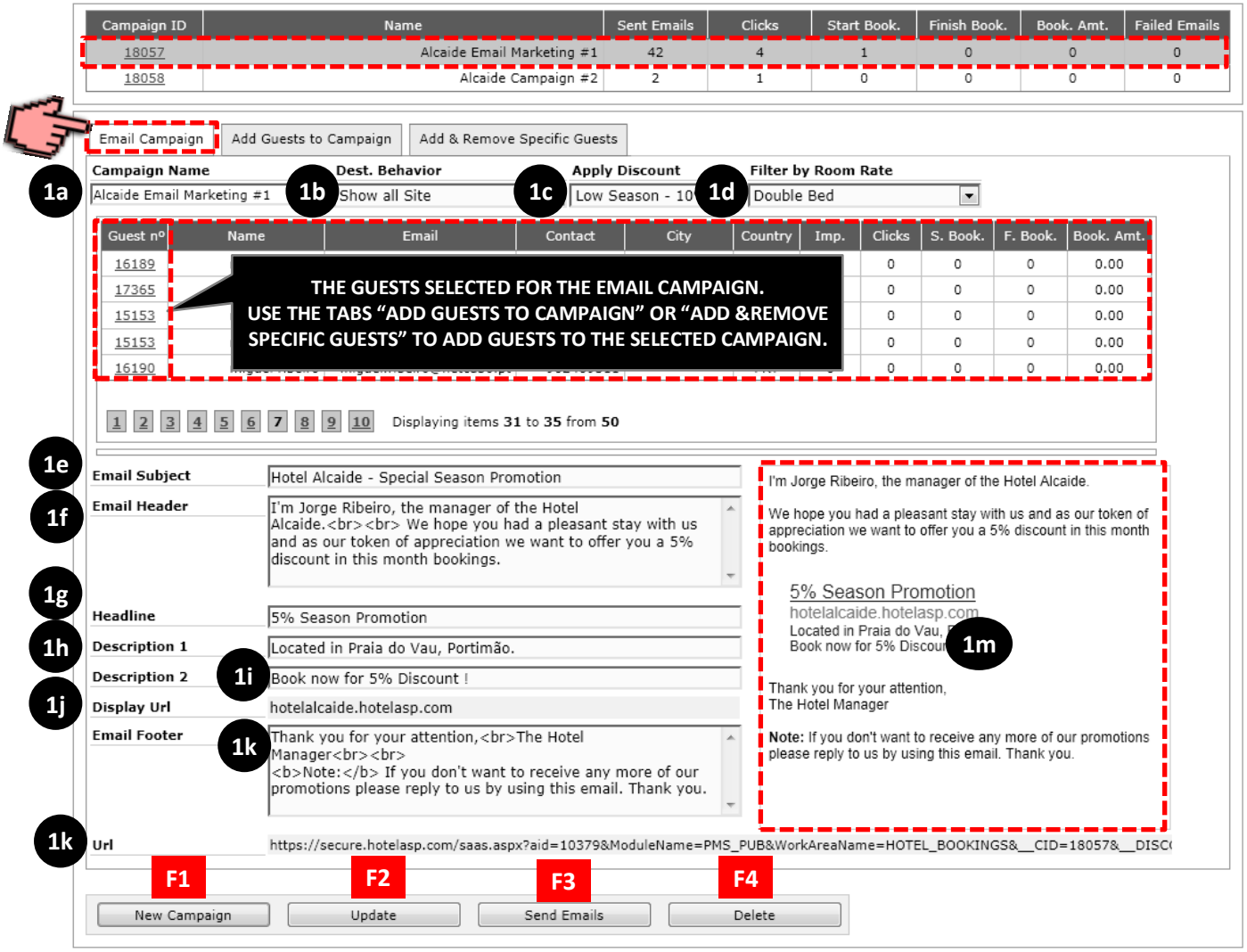


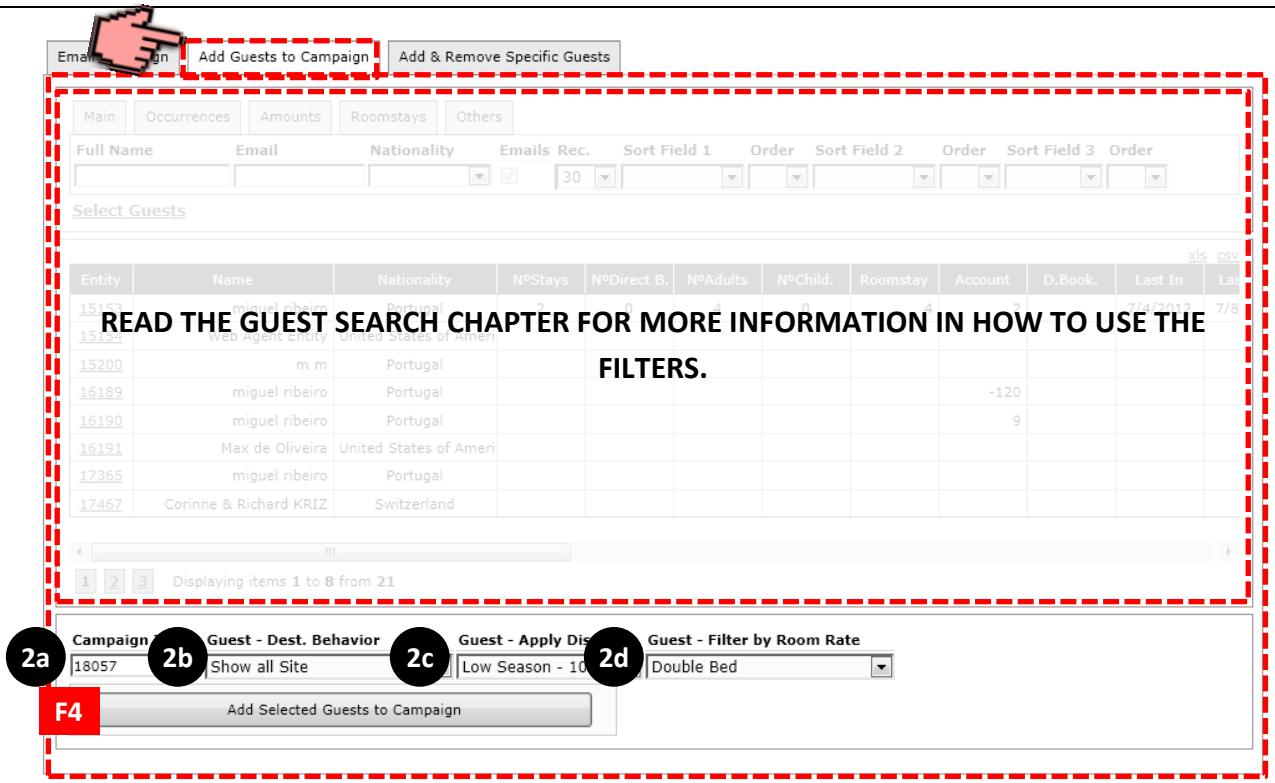
Figure 65 - Email Campaign Layout

The hotel can use HTML in the email body. We advise to keep the email simple and if possible the most personalized possible for the target guests.

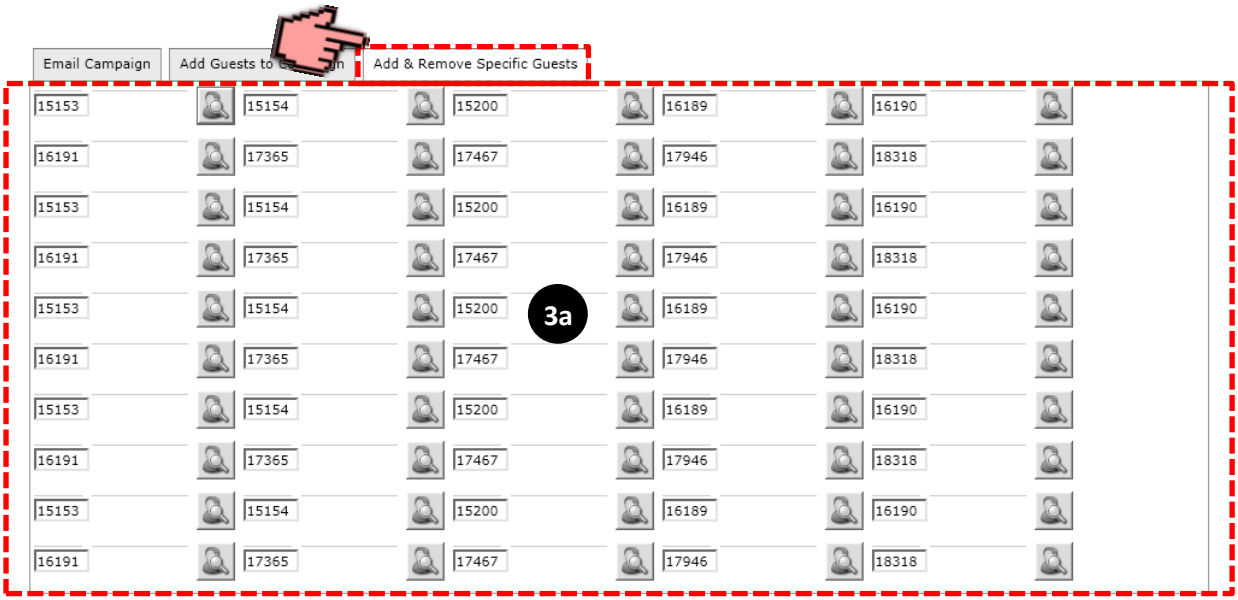
Page Location

Page Description





READ THE GUEST SEARCH CHAPTER FOR MORE INFORMATION IN HOW TO USE THE FILTERS.



5.4.1 FIELDS

1) Email Campaign

Required a. ***Campaign name*** – the name of the campaign.

Required b. ***Dest. Behavior*** – sets the destination behavior of the hotel website landing page.

i. *Show All Site* – the user navigates to the booking page and has access to all pages of the hotel website.

ii. *Show only Booking* – the user navigates to the booking page but only sees the hotel booking page.

i. The header and footer of the hotel website are removed.

ii. The user does not have access to the other pages of the website such as the home page, location or photos pages.

c. ***Apply discounts*** – includes a discount promotion in the ad link (Url).

i. The discount code will be automatically applied when the user navigates to the booking page.

d. ***Filter by room rate*** – includes a filter by room rate in the ad link (Url).

i. The booking page will show only the selected room rate.

Required Public e. ***Email Subject*** – The subject of the email.

Required Public f. ***Email header*** – the header of email body.

Required Public g. ***Headline*** – the headline of the ad to be included in the email body.

Required Public h. ***Description 1*** – the description 1 of the ad to be included in the email body.

Required Public i. ***Description 2*** – the description 2 of the ad to be included in the email body.

Required Public j. ***Display Url*** – the url of the ad to be included in the email body.

Required Public k. ***Email Footer*** – the footer of the email body.

Read Only Public l. ***Url*** – the internal Url of the ad to be included in the email body.

Read Only Public m. ***PREVIEW*** – the preview of the email.

2) Add Guests to Campaign – Select the guests using the filters available and press the button "Add Selected Guests to Campaign" to add those selected guests to the campaign.

Read Only a. ***Campaign ID*** – the internal id of the campaign.

Required b. ***Dest. behavior*** – sets the destination behavior of the hotel website landing page.

c. ***Apply discounts*** – includes a discount promotion in the email link (Url).

d. ***Filter by room rate*** – a filter to be applied to the email link (Url) that only shows specific room rates in the hotel booking page.

3) Add & Remove Specific Guests.

a. ***Guests ID*** – select the guest's ids to add to the campaign.

5.4.2 FUNCTIONS

1) New campaign – create a new email campaign.

2) Update – saves the campaign data in the database.

3) Send Emails – publish the campaign and send the emails.

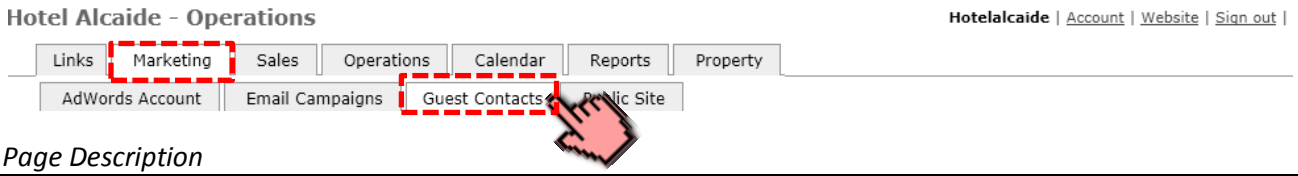
4) Delete – delete the email campaign.

5) Add Selected Guests to Campaign – add the selected guests to the selected campaign.

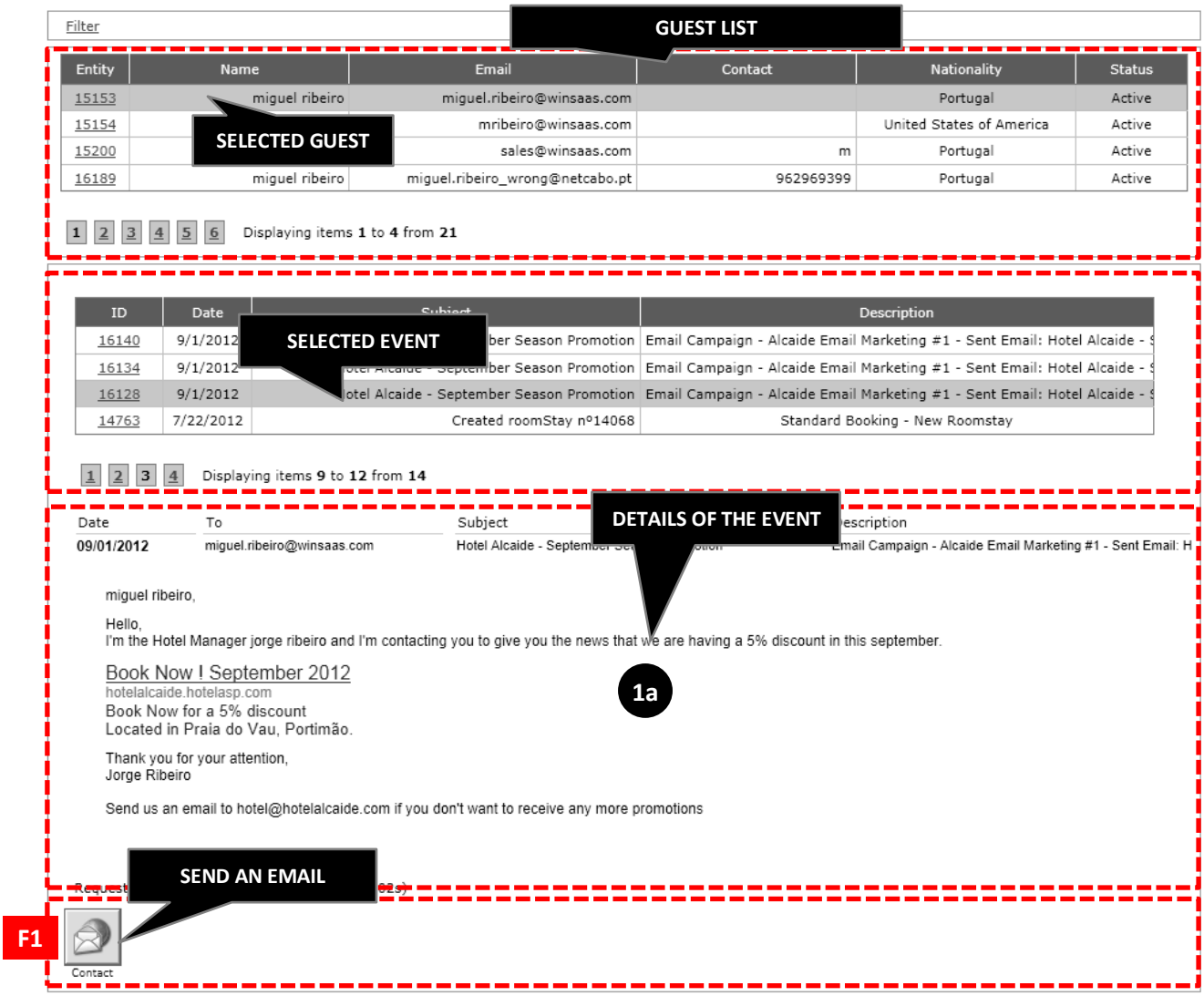
5.5 GUEST CONTACTS & HISTORY

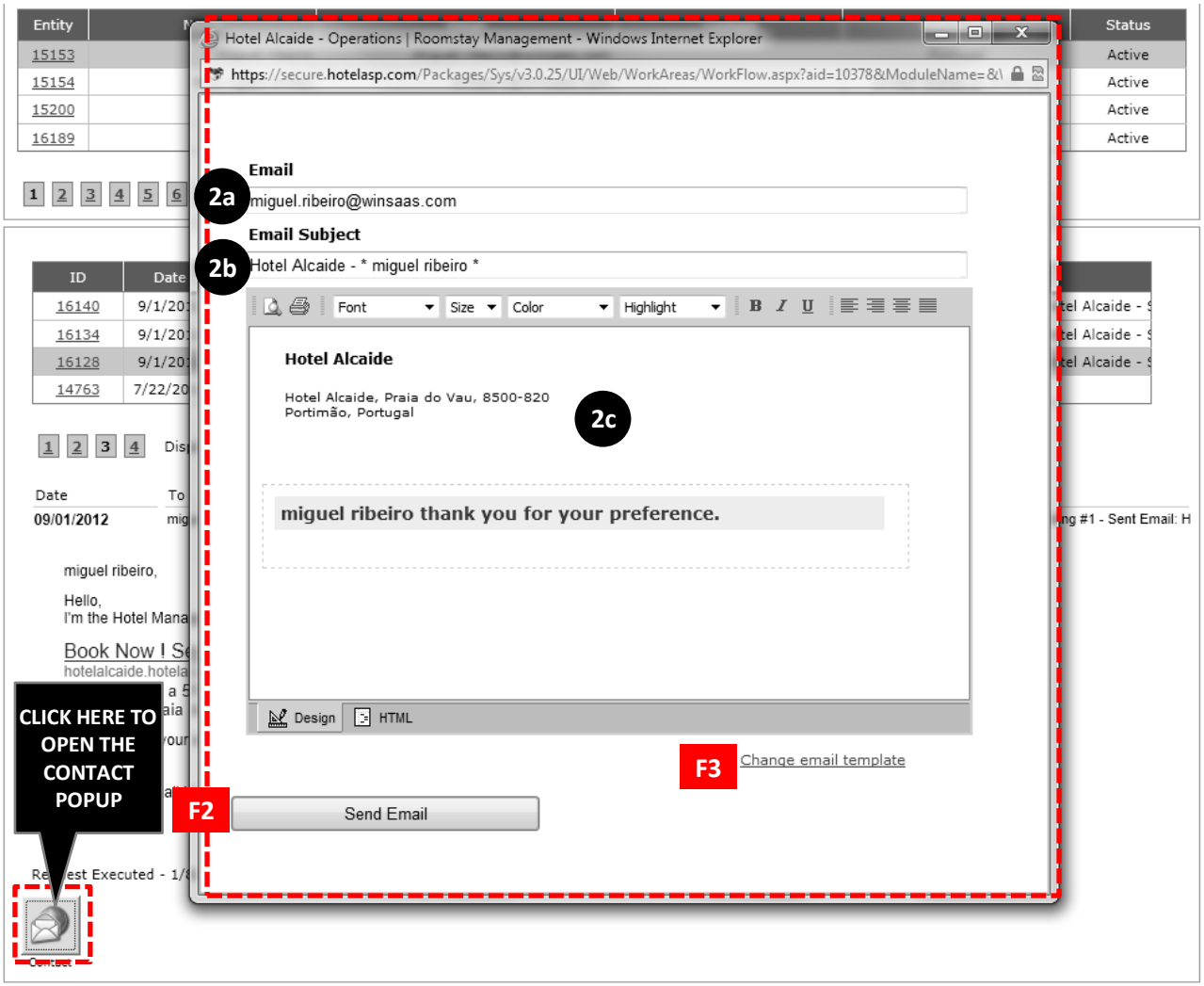
The hotel can view all the interactions between the hotel and a specific guest. The system logs all the events related to guests. This allows the hotel to have a complete history of the guest and improve the customer relationship. This system also logs all the emails that are sent by the hotel to the guest.

Page Location



Page Description





5.5.1 FIELDS

1) **Main**
   a. ***Event Detail*** – shows the detail of the saved guest event.
2) **Contact popup**
   a. ***Email*** – the guest email.

   b. ***Email Subject*** – the subject of the email.

   c. ***Body*** – the email body.

5.5.2 FUNCTIONS

1) **Contact** – launches the guest contact popup using the selected guest information.

2) **Send Email** – send the email to the guest.
   a. The hotel should request authorization from the guest to use the email.

3) **Change the email template** – changes the associated email template.

5.6 HOTEL WEBSITE BOOKINGS

The direct bookings page allows the hotel to view and manage the bookings created in the hotel website.

The page displays all the bookings created by guests in the hotel website booking page and shows basic information such as the guest comments, credit card data or the promotions used by the guest.

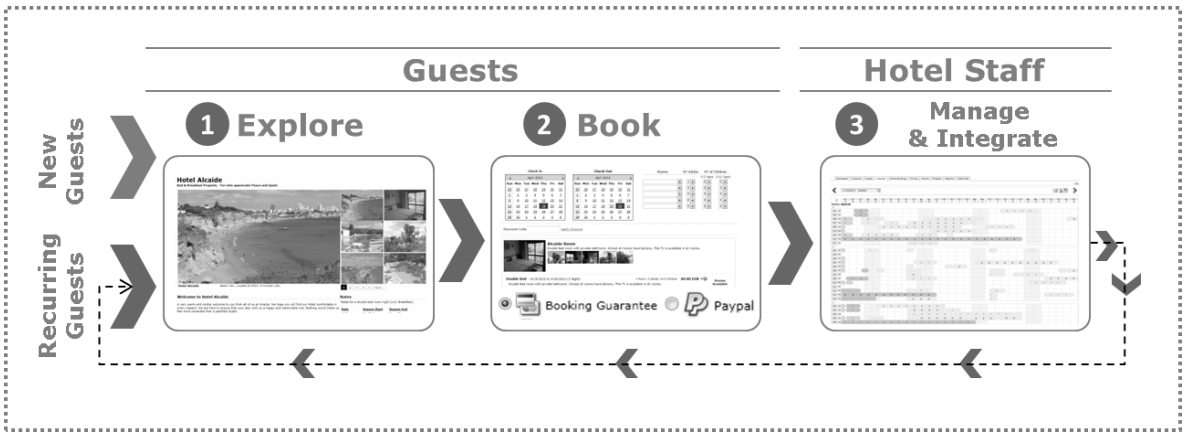


Figure 66 – Hotel Website: From Look to Book

The customer can explore and book in the hotel website and the hotel can integrate and manage the direct booking. These steps are all integrated in real-time and define a close loop that facilitates recurrent bookings creating value for the customer and for the hotel.

The figure below exemplifies the basic workflow steps.

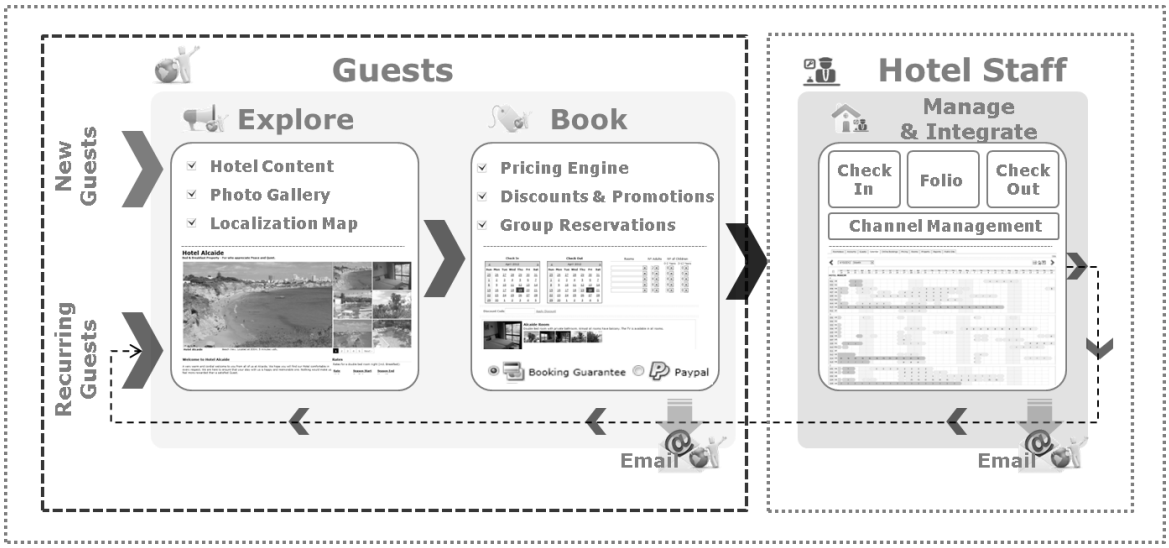


Figure 67 – Hotel Website: Direct Booking Workflow

We recommend the hotel to read the WEBSITE BOOKING EXAMPLE chapter to understand how a direct booking works and what are the steps the guest goes through when is doing a reservation.

The system provides a guest private site where the guest can view the booking status and log and also access to special promotions. T

he hotel can set discounts specific to guests in the GUEST MANAGEMENT page. The guest to benefit from the discount needs to authenticate in his guest private site using the credentials provided in the voucher.

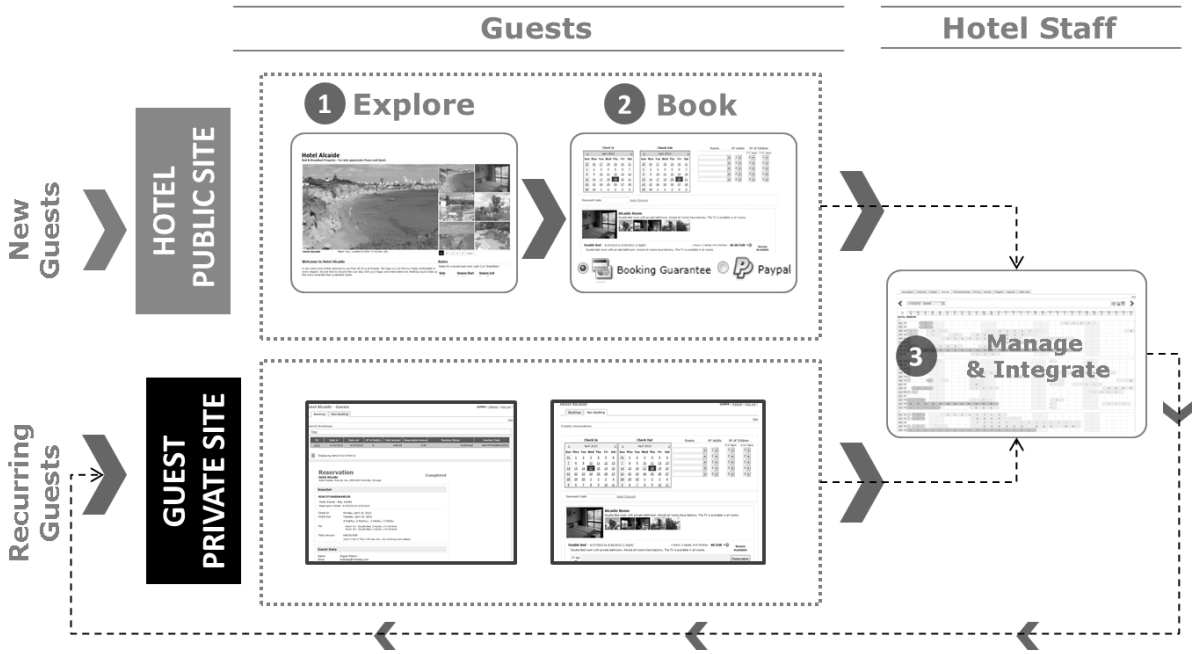


Figure 68 - Guest Private Site

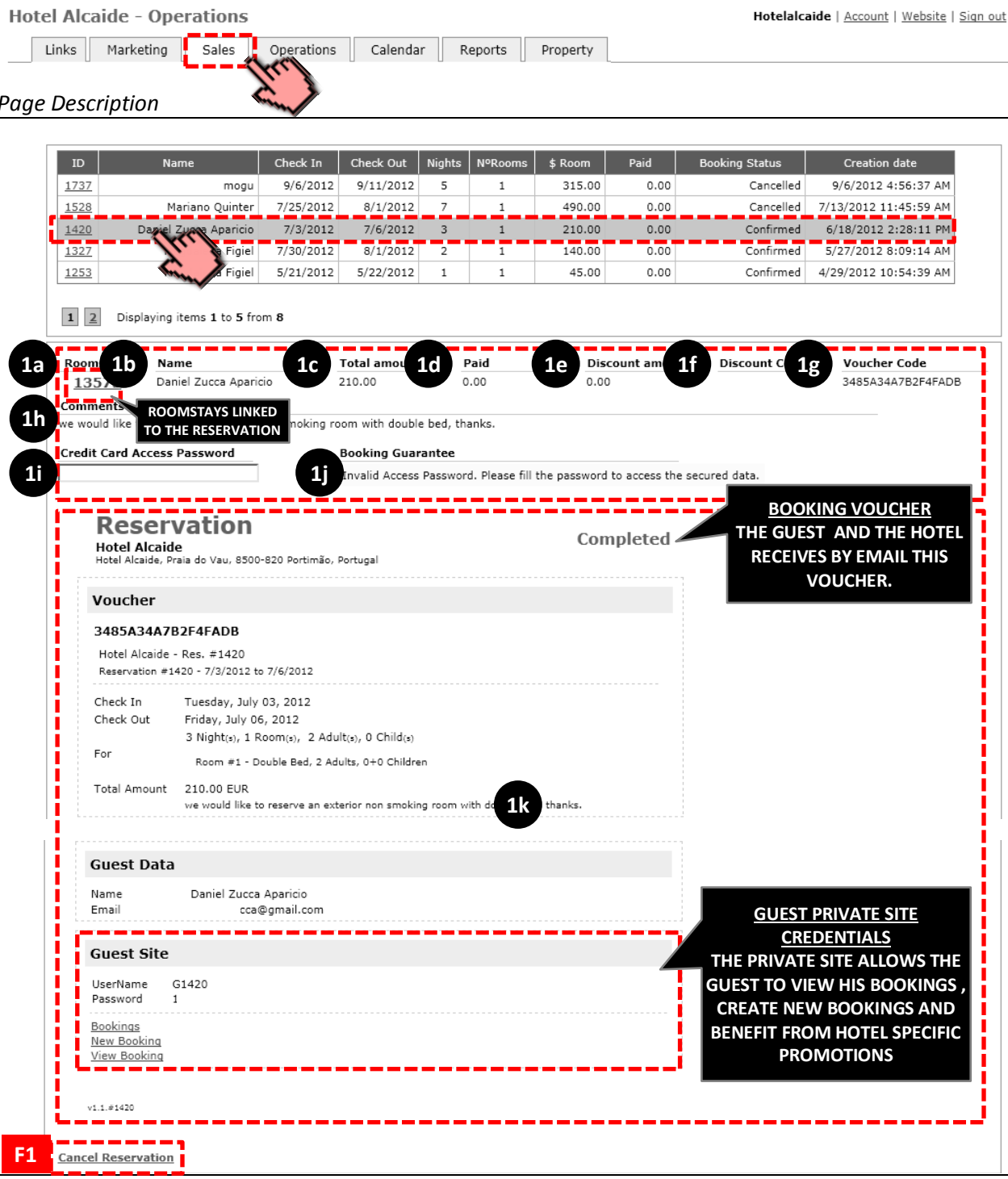
The WEBSITE BOOKING EXAMPLE chapter shows the private guest site pages and features available for the guest.

The direct bookings page not only allows the hotel to manage the bookings created in the hotel website but also allows the hotel to access the credit card data and comments submitted by the customers.

The hotel to view the card data the hotel needs to insert the credit card access password that was defined in the SET HOTEL MAIN PROPERTIES page.

Page Location

Page Description



5.6.1 FIELDS

1) Main

Read Only a. ***Roomstay*** – the roomstays associated with the booking.

i. The hotel can navigate to the associated roomstays by clicking in the links.

ii. For example: one booking can have 2 or more roomstays associated if the guest books 2 or more rooms.

Read Only b. ***Name*** – the name of the guest that submitted the booking.

Read Only c. ***Total amount*** – the total amount booked by the guest.

Read Only d. ***Paid*** – the amount paid by the guest.

i. This field is used in the PayPal payments. The credit card data collection does not use this field because this option does not process the payment it just collects the data from the guest and shows it to the hotel.

Read Only e. ***Discount amount*** – the amount that was discounted from the regular price due to the submission of a discount code.

Read Only f. ***Discount code*** – the promotion discount code used by the guest.

Read Only g. ***Voucher code*** – the voucher code generated by the system.

Read Only h. ***Comments*** – the guest comments about the booking.

i. ***Credit card access password*** – the password to access the credit card data.

i. The hotel must fill the card access password and press again the row in the list to view the credit card details.

ii. This password is set in the SET HOTEL MAIN PROPERTIES page.

Read Only j. ***Booking guarantee*** – the credit card data filled by the guest.

i. The hotel must fill the "credit card access password" and press again the row in the list to view the data.

Read Only k. ***PREVIEW*** – a preview of the voucher sent to the guest.

i. The hotel also receives by email a copy of the voucher.

5.6.2 FUNCTIONS

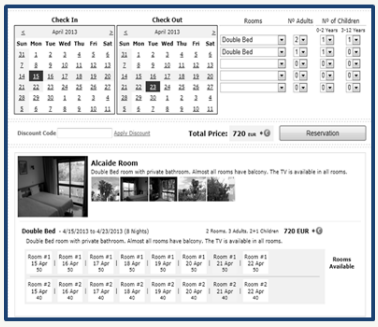
1) **Cancel reservation** – cancels the reservation.

a. The status of the booking is changed to "cancelled".

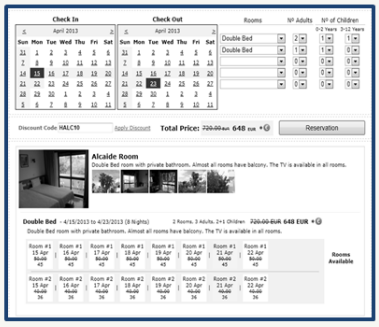
b. The guest will see in his private site the booking with the status "cancelled". The hotel should assure that the guest is adequately and previously informed of this situation.

5.6.3 WEBSITE BOOKING EXAMPLE

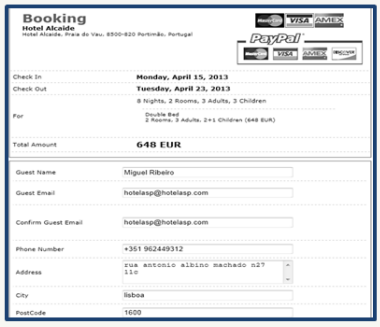
The following pages show an example of a direct booking in the perspective of the guest. It shows what the guest sees and what steps he needs to accomplish a reservation.



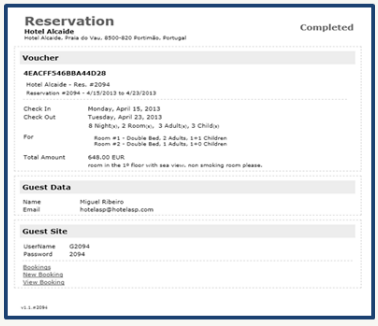
STEP 1 - THE GUEST SELECTS THE DATES, TWO ROOMS AND ALSO FILLS THE RATE, Nº OF ADULTS AND CHILDREN.



STEP 2 - THE GUEST FILLS THE DISCOUNT CODE AND CLICKS "APPLY DISCOUNT". HE CONFIRMS THE AMOUNTS AND CLICKS THE "RESERVATION" BUTTON.

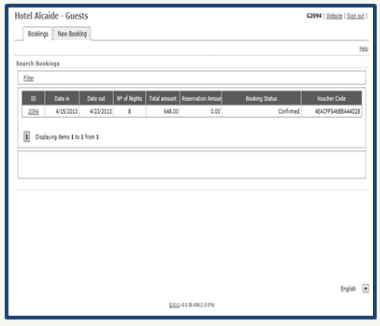


STEP 3 - THE GUEST FILLS THE REQUESTED BOOKING DATA, INCLUDING THE CREDIT CARD DATA. ACCEPTS THE TERMS AND CLICKS THE "MAKE RESERVATION" BUTTON.

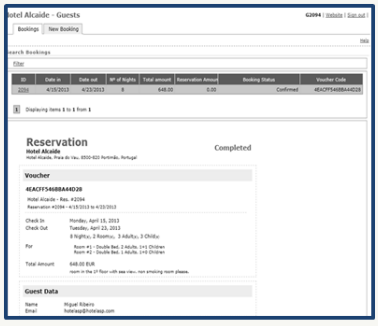


STEP 4 - THE GUEST RECEIVES BY EMAIL A VOUCHER CONFIRMING THE RESERVATION.

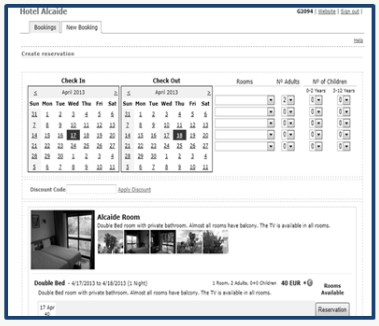
STEP 5 - THE GUEST GOES TO HIS PRIVATE WEB SITE AND USE THE USERNAME AND PASSWORD PROVIDED IN THE VOUCHER.



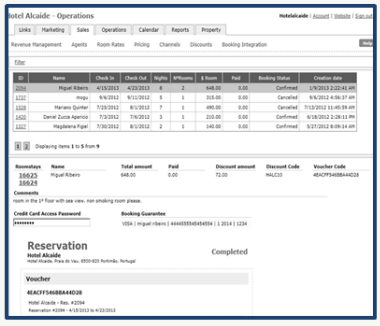
STEP 6 - CONFIRMS THE STATUS OF BOOKING



STEP 7 - CHECKS THE VOUCHER



STEP 8 - STARTS A NEW BOOKING INSIDE HIS PRIVATE WEB SITE

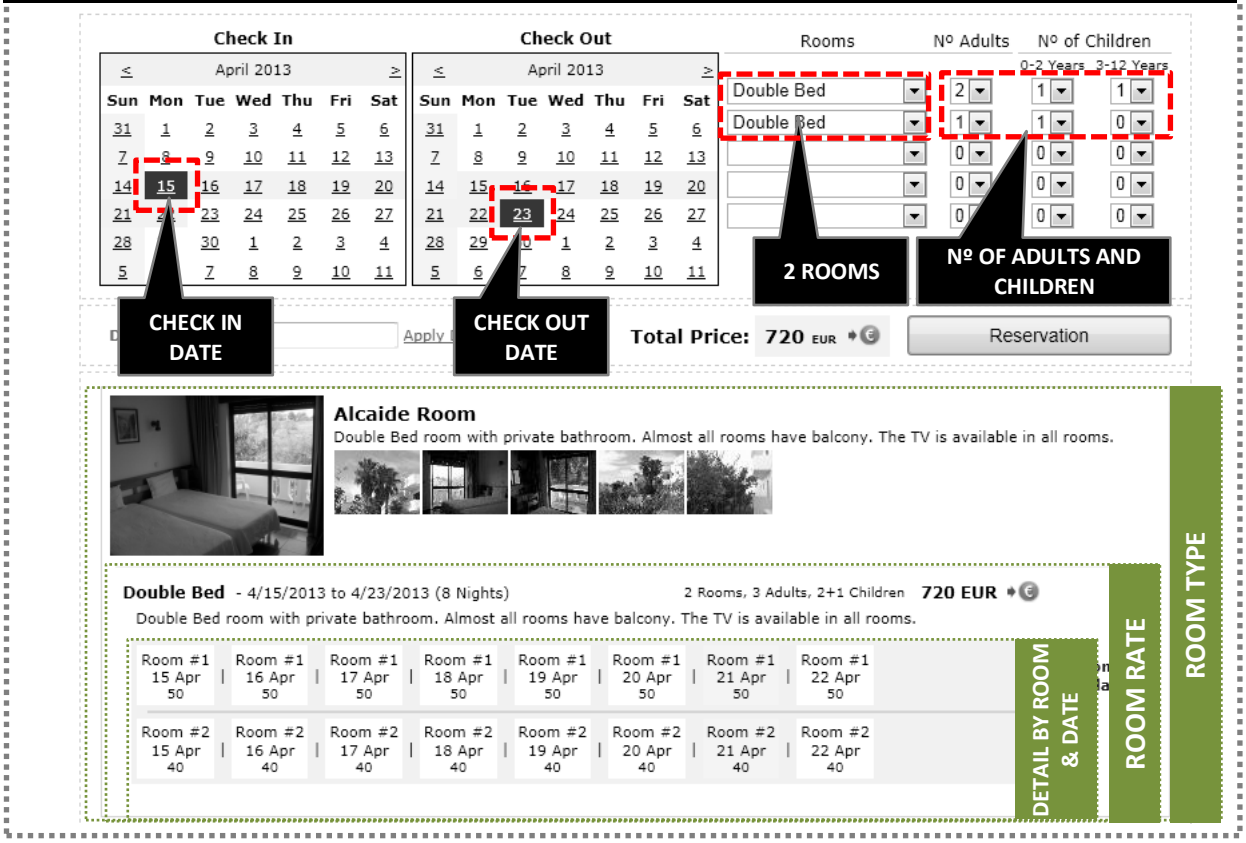


STEP 9 - THE HOTEL RECEIVES AN EMAIL WITH THE BOOKING AND COLLECTS AND VALIDATES THE CREDIT CARD DATA.

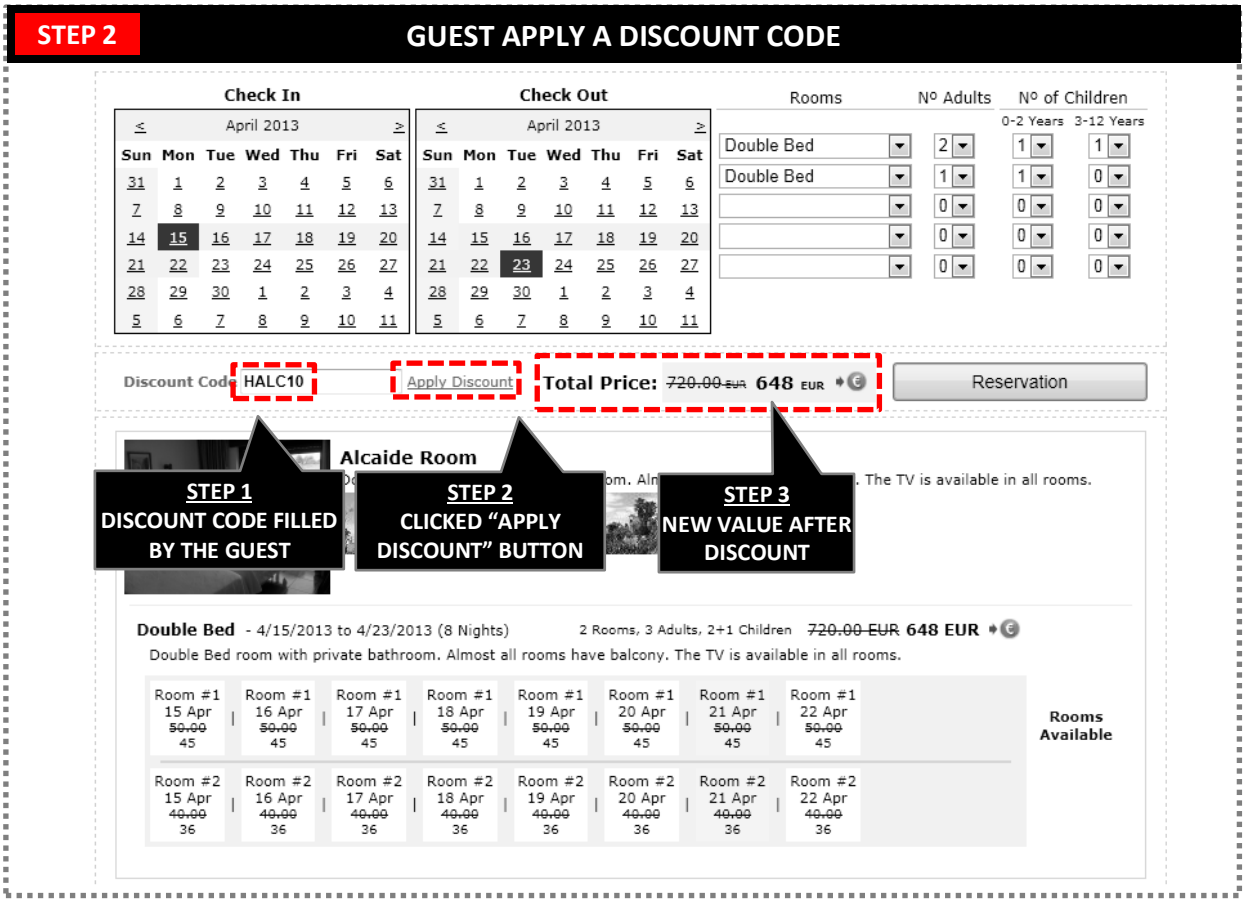
Figure 69 – Direct Booking: A Guest Perspective Example

The standard guest usually goes through steps 1 to 4 but the more advanced guest can access their private site and execute steps 5, 6, 7 and 8. The step 9 is only for the hotel.

STEP 1 GUEST STARTS A BOOKING



STEP 2 GUEST APPLY A DISCOUNT CODE



STEP 3 GUEST FILLS BOOKING DATA

Booking

Hotel Alcaide

Hotel Alcaide, Praia do Vau, 8500-820 Portimão, Portugal

Check In	**Monday, April 15, 2013**
Check Out	**Tuesday, April 23, 2013**
For	8 Nights, 2 Rooms, 3 Adults, 3 Children Double Bed 2 Rooms, 3 Adults, 2+1 Children (648 EUR)
Total Amount	**648 EUR**

Guest Name	Miguel Ribeiro
Guest Email	hotelasp@hotelasp.com
Confirm Guest Email	hotelasp@hotelasp.com
Phone Number	+351 962449312
Address	rua antonio albino machado n27 11c
City	lisboa
PostCode	1600
Country	Portugal
Notes	room in the 1° floor with sea view. non smoking room please.

Select payment type Booking Guarantee / Paypal

GUEST SELECT PAYMENT TYPE

Credit Card Type	VISA
Credit Card Number	4444555545454554
Credit Card Holders Name	miguel ribeiro
Credit Card Expiration Date (Month / Year)	01 2014
Credit Card Validation Code	1234

Terms and Conditions

I Agree with the Hotel Terms and Conditions ☑

GUEST MUST ACCEPT HOTEL TERMS & CONDITIONS

Make Reservation

STEP 4 GUEST RECEIVES VOUCHER CONFIRMING THE RESERVATION

Reservation

Hotel Alcaide
Hotel Alcaide, Praia do Vau, 8500-820 Portimão, Portugal

Completed

Voucher

4EACFF546BBA44D28

Hotel Alcaide - Res. #2094
Reservation #2094 - 4/15/2013 to 4/23/2013

Check In	Monday, April 15, 2013
Check Out	Tuesday, April 23, 2013
	8 Night(s), 2 Room(s), 3 Adult(s), 3 Child(s)
For	Room #1 - Double Bed, 2 Adults, 1+1 Children Room #2 - Double Bed, 1 Adults, 1+0 Children
Total Amount	648.00 EUR
	room in the 1º floor with sea view. non smoking room please.

Guest Data

Name	Miguel Ribeiro
Email	hotelasp@hotelasp.com

ACCESS INFORMATION TO THE GUEST PRIVATE SITE

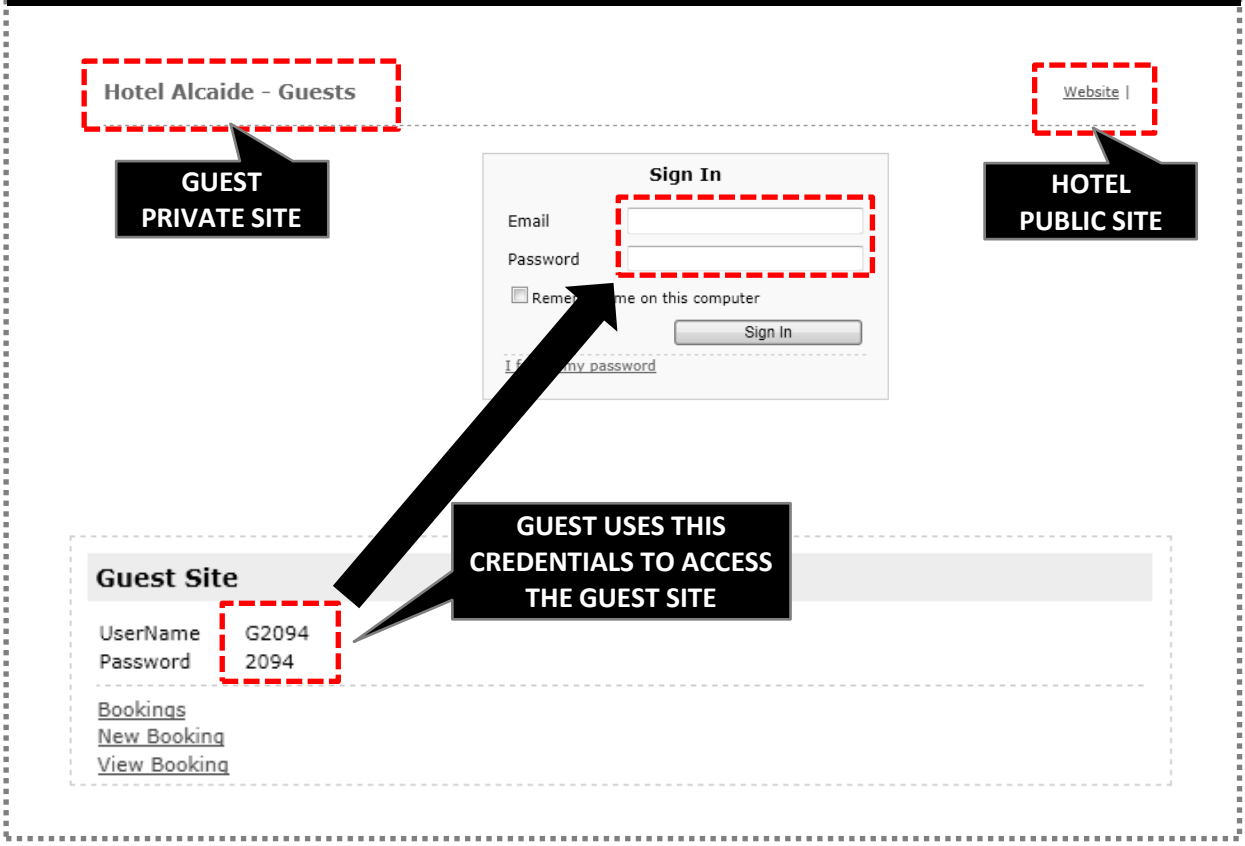
Guest Site

UserName	G2094
Password	2094

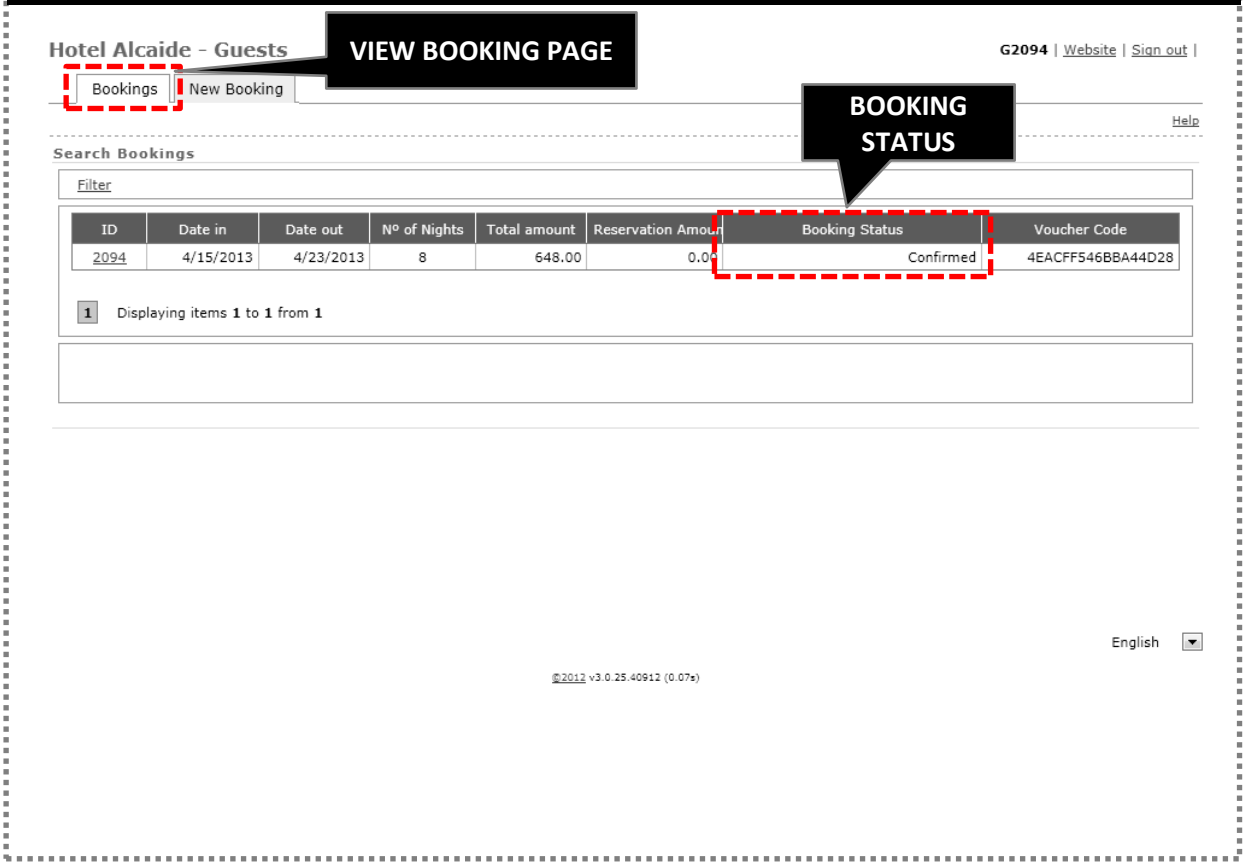
Bookings
New Booking
View Booking

v1.1.#2094

STEP 5 GUEST CHECK HIS SITE [GUEST SITE]



STEP 6 GUEST CONFIRMS THE BOOKING STATUS [GUEST SITE]



STEP 7 GUEST CHECKS THE VOUCHER [GUEST SITE]

Hotel Alcaide - Guests

VIEW BOOKINGS PAGE

G2094 | Website | Sign out |

Bookings | New Booking

Help

Search Bookings

Filter

ID	Date in	Date out	Nº of Nights	Total amount	Reservation Amoun	Booking Status	Voucher Code
2094	4/15/2013	4/23/2013	8	648.00	0.00	Confirmed	4EACFF546BBA44D28

1 Displaying items 1 to 1 from 1

SELECTED ROW

Reservation

Hotel Alcaide

Hotel Alcaide, Praia do Vau, 8500-820 Portimão, Portugal

Completed

Voucher

4EACFF546BBA44D28

Hotel Alcaide - Res. #2094

Reservation #2094 - 4/15/2013 to 4/23/2013

Check In Monday, April 15, 2013

Check Out Tuesday, April 23, 2013

8 Night(s), 2 Room(s), 3 Adult(s), 3 Child(s)

For Room #1 - Double Bed, 2 Adults, 1+1 Children
Room #2 - Double Bed, 1 Adults, 1+0 Children

Total Amount 648.00 EUR

room in the 1º floor with sea view. non smoking room please.

Guest Data

Name Miguel Ribeiro

Email hotelasp@hotelasp.com

STEP 8 GUEST STARTS A NEW BOOKING [GUEST SITE]

Hotel Alcaide

NEW BOOKING PAGE

G2094 Website | Sign out |

Bookings | New Booking

GUEST IS AUTHENTICATED. THE GUEST DATA IS AUTOMATICALLY FILLED BY THE SYSTEM. SAVING TIME FOR THE GUEST AND THE HOTEL AVOIDS DUPLICATION OF DATA.

Create reservation

Check In — April 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	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	1	2	3	4
5	6	7	8	9	10	11

Check Out — April 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	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	1	2	3	4
5	6	7	8	9	10	11

Discount Code Apply Discount

Alcaide Room

Double Bed room with private bathroom. Almost all rooms have balcony. The TV is available in all rooms.

Double Bed - 4/17/2013 to 4/18/2013 (1 Night) 1 Room, 2 Adults, 0+0 Children **40 EUR**

Double Bed room with private bathroom. Almost all rooms have balcony. The TV is available in all rooms.

Rooms Available

17 Apr
40

Reservation

STEP 9 HOTEL VALIDATES THE CREDIT CARD DATA [HOTEL PRIVATE SITE]

Hotel Alcaide - Operations

Hotelalcaide | Account | Website | Sign out |

Links | Marketing | Sales | Operations | Calendar | Reports | Property

HOTEL SALES

Revenue Management | Agents | Room Rates | Pricing | Channels | Discounts | Booking Integration

Help

Filter

ID	Name	Check In	Check Out	Nights	NºRooms	$ Room	Paid	Booking Status	Creation date
2094	Miguel Ribeiro	4/15/2013	4/23/2013	8	2	648.00	0.00	Confirmed	1/9/2013 2:22:41 AM
1737	mogu	9/6/2012	9/11/2012	5	1	315.00	0.00	Cancelled	9/6/2012 4:56:37 AM
1528	Mariano Quinter	7/25/2012	8/1/2012	7	1	490.00			
1420	Daniel Zucca Aparicio	7/3/2012	7/6/2012	3	1	210.00			
1327	Magdalena Figiel	7/30/2012	8/1/2012	2	1	140.00			

STEP 2
HOTEL SELECTS ROW

1 BOOKING → 2 ROOMS → 2 ROOMSTAYS

Roomstays	Name	Total amount	Paid	Discount amount	Discount Code	Voucher Code
16625 16624	Miguel Ribeiro	648.00	0.00	72.00	HALC10	4EACFF546BBA44D28

PROMOTION DATA

Comments

room in the 1º floor with sea view. non smoking room please.

Credit Card Access Password

••••••••

Booking Guarantee

VISA | miguel ribeiro | 4444555545454554 | 1 2014 | 1234

STEP 3
HOTEL VIEWS CREDIT CARD DATA

STEP 1
HOTEL FILLS ACCESS PASSWORD DEFINED IN THE MAIN PROPERTIES PAGE OF THE HOTEL

Completed

mão, Portugal

013

Check In	Monday, April 15, 2013
Check Out	Tuesday, April 23, 2013
	8 Night(s), 2 Room(s), 3 Adult(s), 3 Child(s)
For	Room #1 - Double Bed, 2 Adults, 1+1 Children Room #2 - Double Bed, 1 Adults, 1+0 Children
Total Amount	648.00 EUR room in the 1º floor with sea view. non smoking room please.

Guest Data

Name	Miguel Ribeiro
Email	hotelasp@hotelasp.com

Guest Site

UserName	G2094
Password	2094

Bookings
New Booking
View Booking

v1.1.#2094

Cancel Reservation

5.7 CHANNEL MANAGER INTEGRATION

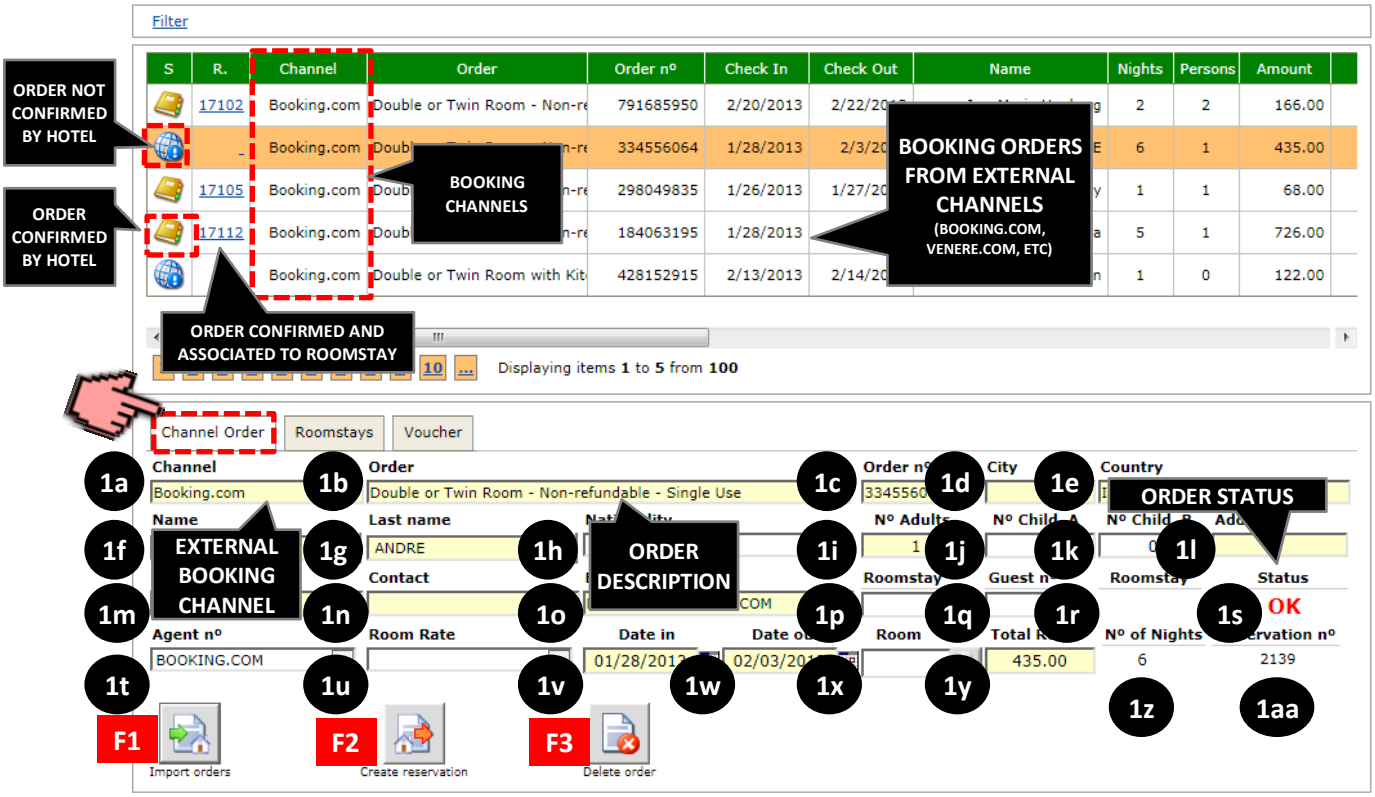
This page allows the hotel to integrate with the channel manager and get the booking orders from the external booking sites.

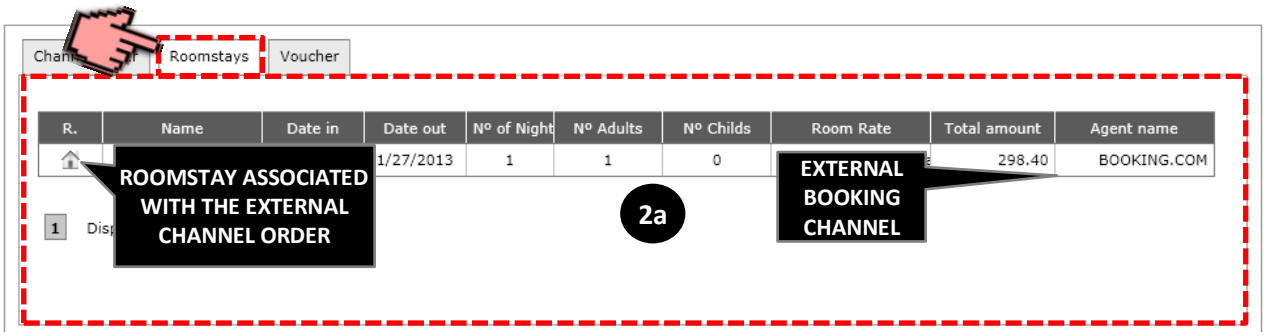
The hotel must set the credentials in the SET HOTEL MAIN PROPERTIES page for this page to be able to connect with the channer manager and get the orders.

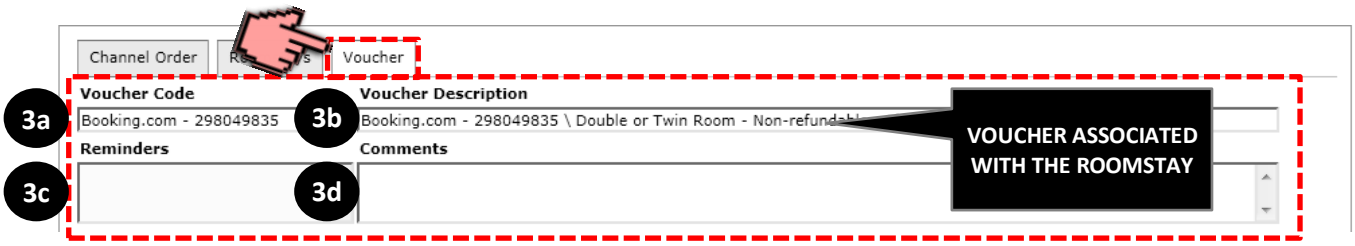
The channel manager integration page allows the hotel to review the orders (i.e. ***waiting status***) that arrive from the channel manager and create the corresponding roomstays (i.e ***confirmed status***). The orders that have a roomstay associated are classified has "***Confirmed***" and the orders that are still without a roomstay associated are classified as "***Waiting***" or "***Non confirmed***".

Page Location

Page Description







5.7.1 FIELDS

1) Channel Order – This tab allows the hotel to review the channel order data

Read Only a. ***Channel*** – the channel that originated the order.

i. This data was created by the external channel.

Read Only b. ***Order*** – the order description.

i. This data was created by the external channel.

Read Only c. ***Order nº*** – the order number.

i. This data was created by the external channel.

Read Only d. ***City*** – the city associated with the order.

i. This data was generated by the external channel.

Read Only e. ***Country*** — the country associated with the order.

i. This data was generated by the external channel.

Required f. ***Name*** – the guest name.

i. This data was generated by the external channel and will be used in the roomstay creation. The hotel should review this data before creating the reservation.

Required g. ***Last Name*** – the guest last name.

i. This data was generated by the external channel and will be used in the roomstay creation. The hotel should review this data before creating the reservation.

Required h. ***Nationality*** – the guest nationality.

i. This data was generated by the external channel and will be used in the roomstay creation. The hotel should review this data before creating the reservation.

Required i. ***Nº Adults*** – the number of adults.

i. This data was generated by the external channel and will be used in the roomstay creation. The hotel should review this data before creating the reservation.

Required j. ***Nº Child. A*** – the number of children of group type A.

Required k. ***Nº Child. B*** – the number of children of group type B.

Read Only l. ***Address*** – the address associated with the order.

i. This data was generated by the external channel.

m. ***Passport \ ID*** – the guest identification.

n. ***Contact*** – the guest contact.

o. ***Email*** – the guest email.

i. This data can be generated by the external channel and will be used in the roomstay creation. The hotel should review this data before creating the reservation.

p. ***Roomstay*** – the roomstay associated with the order.

q. ***Guest nº*** - the guest id associated with the order.

r. ***Roomstay*** – the roomstay link.

s. ***Status*** – the order status.

i. If the order is not associated with a roomstay the order status is defined and set by the external channel manager.

ii. If the order is associated with a roomstay then the order status is equivalent to the roomstay status.

Required t. ***Agent nº*** - the agent associated with the roomstay.

i. The hotel should review this data before creating the reservation.

Required u. ***Room rate*** – the room rate associated with the roomstay.

i. The hotel should review this data before creating the reservation.

Required v. ***Date in*** – the check-in date.

i. This data was generated by the external channel and will be used in the roomstay creation. The hotel should review this data before creating the reservation.

Required w. ***Date out*** – the check-out date.

i. This data was generated by the external channel and will be used in the roomstay creation. The hotel should review this data before creating the reservation.

Required x. ***Room*** – the room associated with the roomstay.

i. The hotel should review this data before creating the reservation.

Required y. ***Total Room*** – the total room amount in the external channel manager currency.

i. This data was generated by the external channel and will be used in the roomstay creation. The hotel should review this data before creating the reservation.

ii. The hotel should review carefully this value and confirm the associated currency.

Read Only z. ***Nº Nights*** – the number of nights.

Read Only aa. ***Reservation Nº*** - the reservation id.

2) Roomstay – This tab shows the roomstays associated with the selected order

Read Only a. ***Roomstays*** – the roomstays associated with the selected order.

3) Voucher

a. ***Voucher Code*** – the voucher code.

b. ***Voucher description*** – the voucher description.

c. ***Reminders*** – the reminders notes associated with the roomstay.

d. ***Comments*** – the comments associated with the roomstay.

5.7.2 FUNCTIONS

1) Import Orders – integrate and import the orders from the external channel manager.

2) Create reservation – create a roomstay using the form data.

3) Delete order – delete the order.

a. This will delete the order only in HotelASP and not in the external channel manager.

6 HOTEL OPERATIONS

The HotelASP offers a complete solution for the hotel front-office and back-office operations. These operations are fully integrated with the marketing and sales features as shown in the figure below.

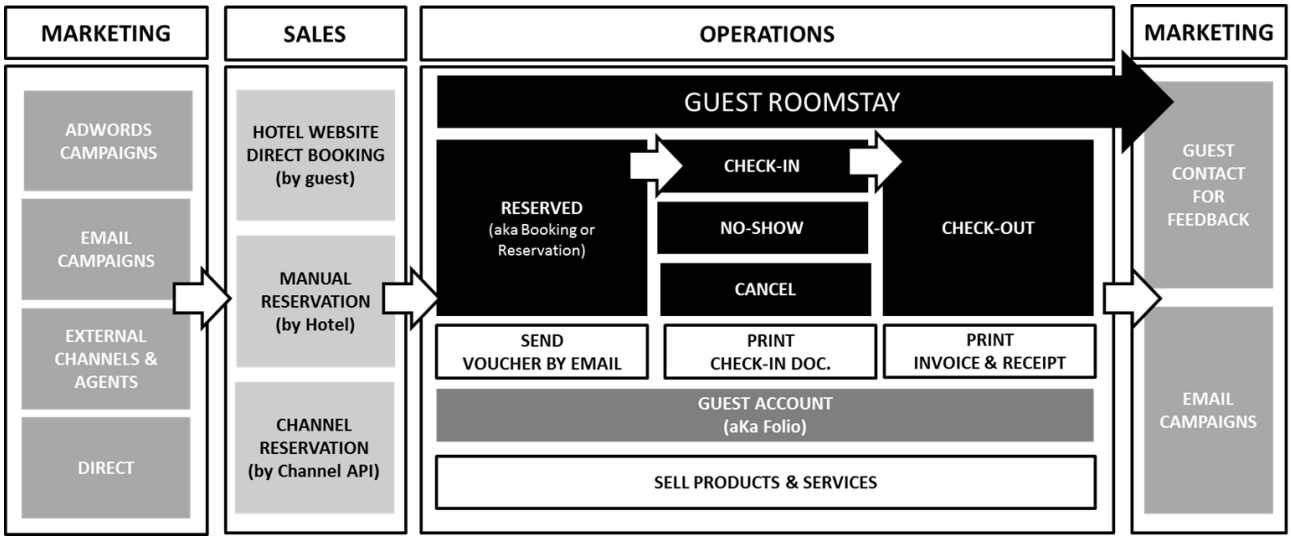


Figure 70 - HotelASP Operations

The central object is the roomstay. The roomstay can be in state reserved, check-in, no-show, canceled or check-out. A reserved roomstay is also called a booking or a reservation. The roomstay life cycle is typically composed by the steps shown in the figure below.

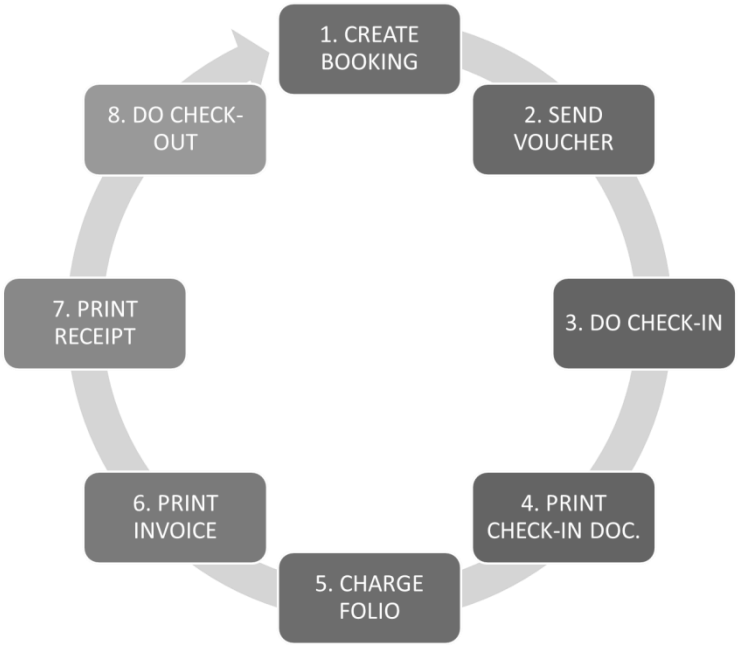


Figure 71 - Roomstay Life Cycle

A room stay (aka roomstay) is associated with only one guest account. A guest account can be associated with many room stays. A booking is equivalent to a roomstay in the reserved state.

The figure below illustrates examples of the pages associated with the main steps of the roomstay life cycle.

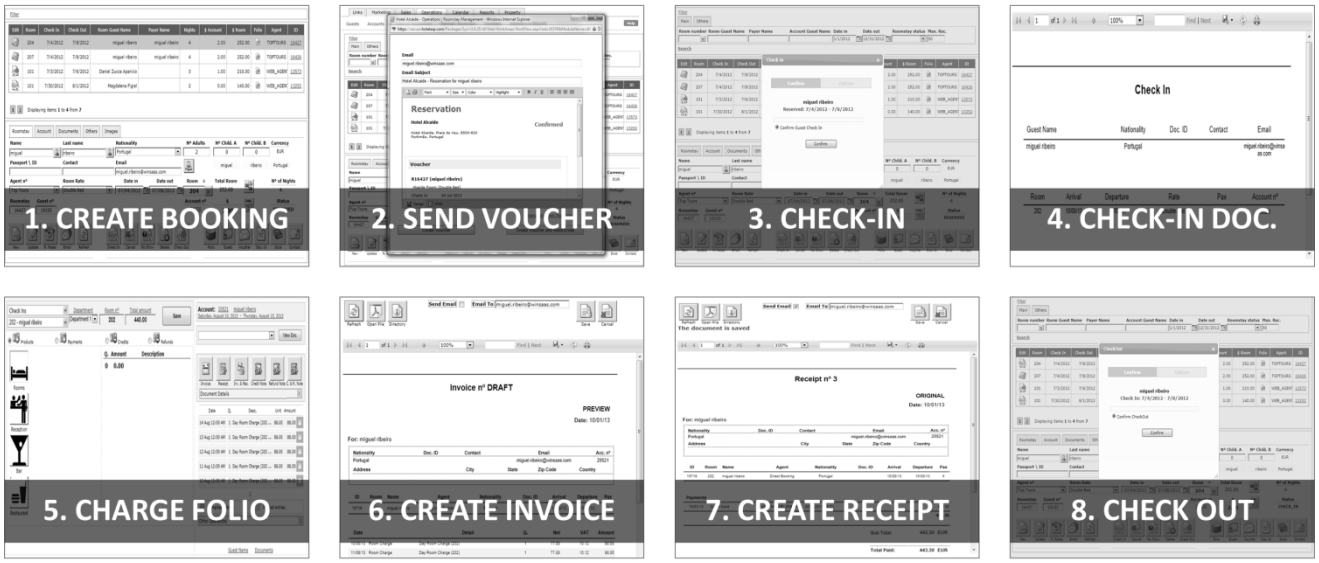


Figure 72 - Roomstay Life Cycle: Page Examples

The model below illustrates the existence of three guests associated directly or indirectly with the roomstay. The diagram also shows the relationship between the roomstay and the account.

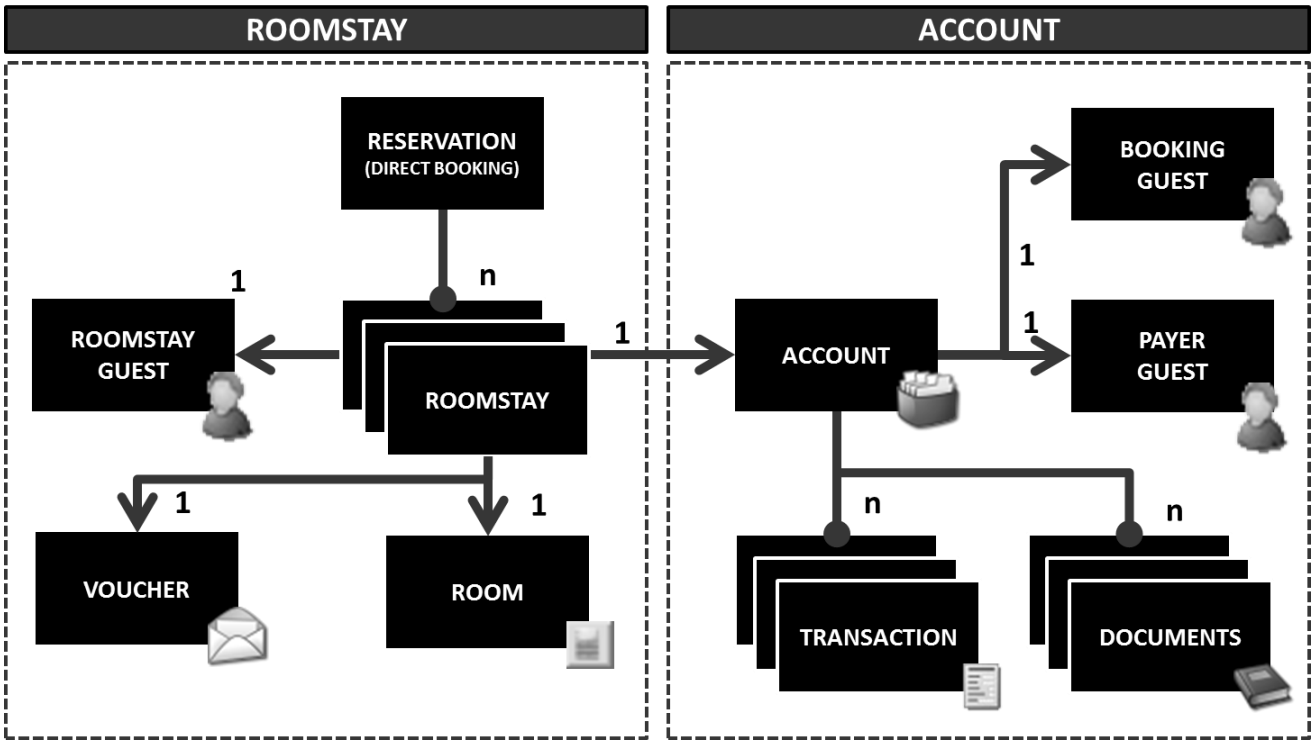


Figure 73 - Operations Data Model

The roomstay guest is the guest that uses and consumes the room night stay service, the booking guest is the guest associated with the account and is typically the guest responsible for the booking and finally the payer guest is the guest associated with the account that is responsible for the payments.

The hotel has also specific documents for each stage of the guest life cycle. The figure below shows the main reports available:

GUEST REPORTS

- **RESERVED** *- GUEST BOOKS*
  - VOUCHER DOCUMENT
- **CHECK-IN** *- GUEST ARRIVES AND STAYS IN HOTEL*
  - CHECK-IN DOCUMENT
  - DRAFT INVOICE DOC. & DRAFT RECEIPT DOC.
- **CHECK-OUT** *- GUEST LEAVES THE HOTEL*
  - FINAL INVOICE DOC.
  - FINAL RECEIPT DOC.
  - FINAL CREDIT NOTE DOC. & REFUND NOTE DOC.

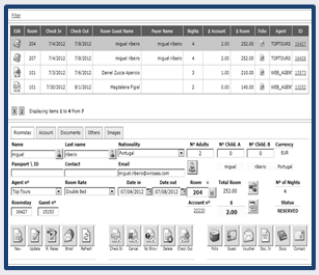
HOTEL REPORTS

- *ACCOUNTING REPORTS*
- *ROOMSTAY REPORTS*
- *FOLIO REPORTS*
- *GUEST REPORTS*

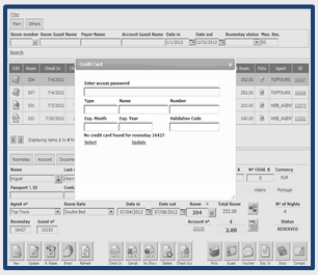
Figure 74 – HotelASP Operations: Main Reports

The guest reports are for external use and are given to the customers. The hotel reports are typically for internal use and are detailed in the HOTEL REPORTS chapter. The hotel reports include accounting roomstay, account and guest reports.

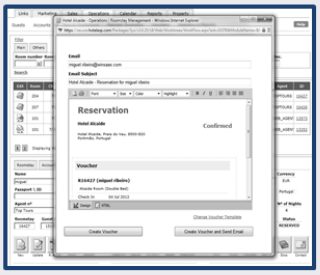
The roomstay life cycle starts with the booking creation and it ends with the check-out as shown below.



1. FILL THE GUEST DATA

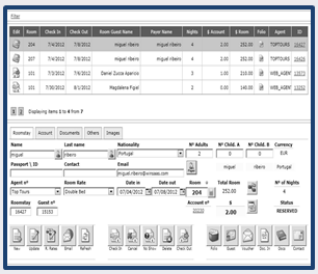


2. FILL THE BOOKING DATA



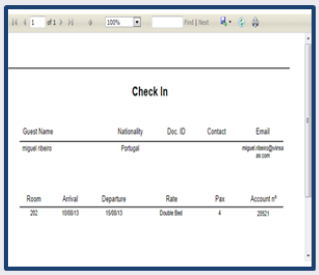
3. CLICK "NEW". IN VOUCHER POPUP CLICK "CREATE VOUCHER"

4. CLICK "CHANGE RATE DETAIL". CHANGE THE DAY RATES AND CLICK "UPDATE"



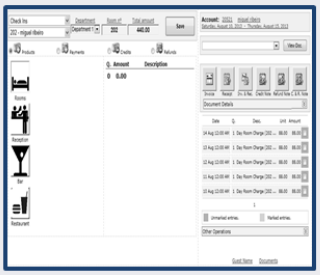
5. CHANGE CONTACT. CLICK "UPDATE"

6. CLICK "CHECK IN"

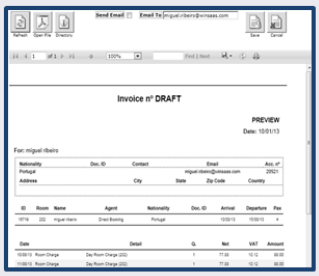


7. CLICK "DOC. IN". PRINT THE CHECK IN DOCUMENT

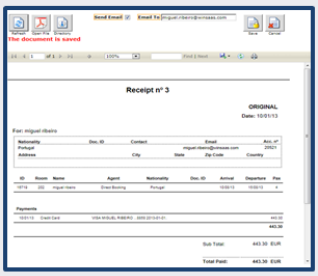
8. CHANGE ROOM AND CLICK "UPDATE"



9. CLICK "FOLIO". CHARGE A SNACK IN THE GUEST ACCOUNT



10. CLICK "FOLIO". CREATE INVOICE



11. GUEST PAYS. CREATE RECEIPT

12. CLICK "CHECK OUT"

Figure 75 – Hotel Operations: From booking to check-out an example of a roomstay life cycle

6.1 ROOMSTAY MANAGEMENT

This page allows the hotel to manage the entire life cycle of a roomstay, including for example the guest check-in and check-out. The roomstay page is the central work area of the hotel and gives the hotel access to all bookings, including the reservations done by the customers in the hotel website.

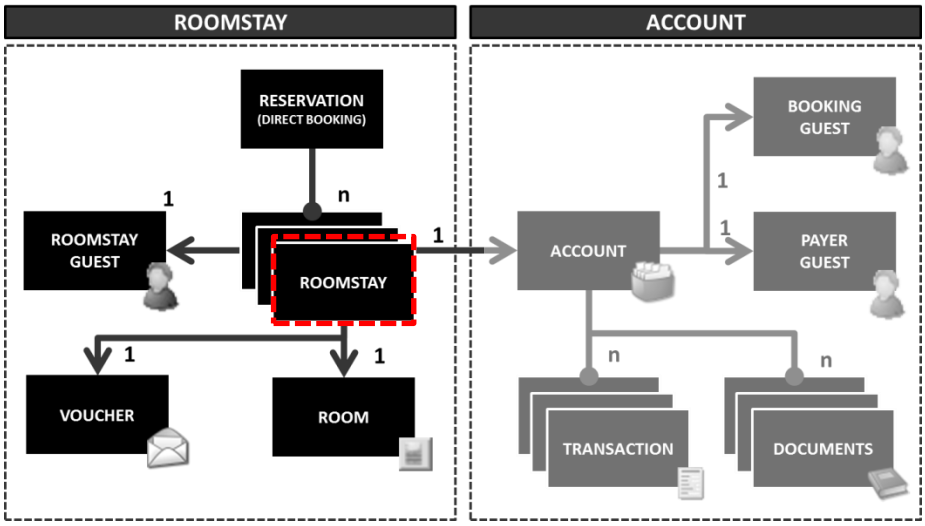


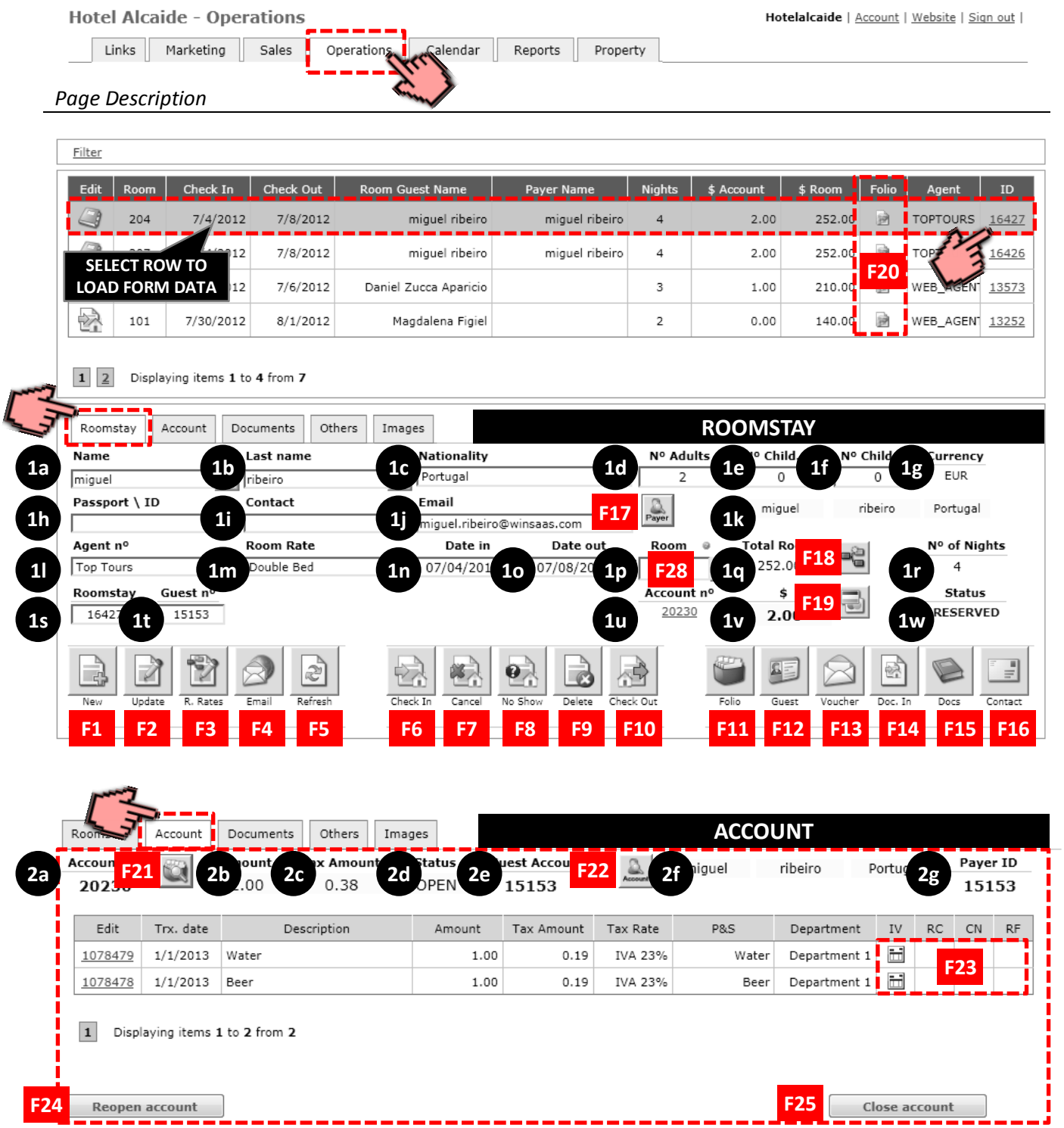
Figure 76 - Roomstay Model

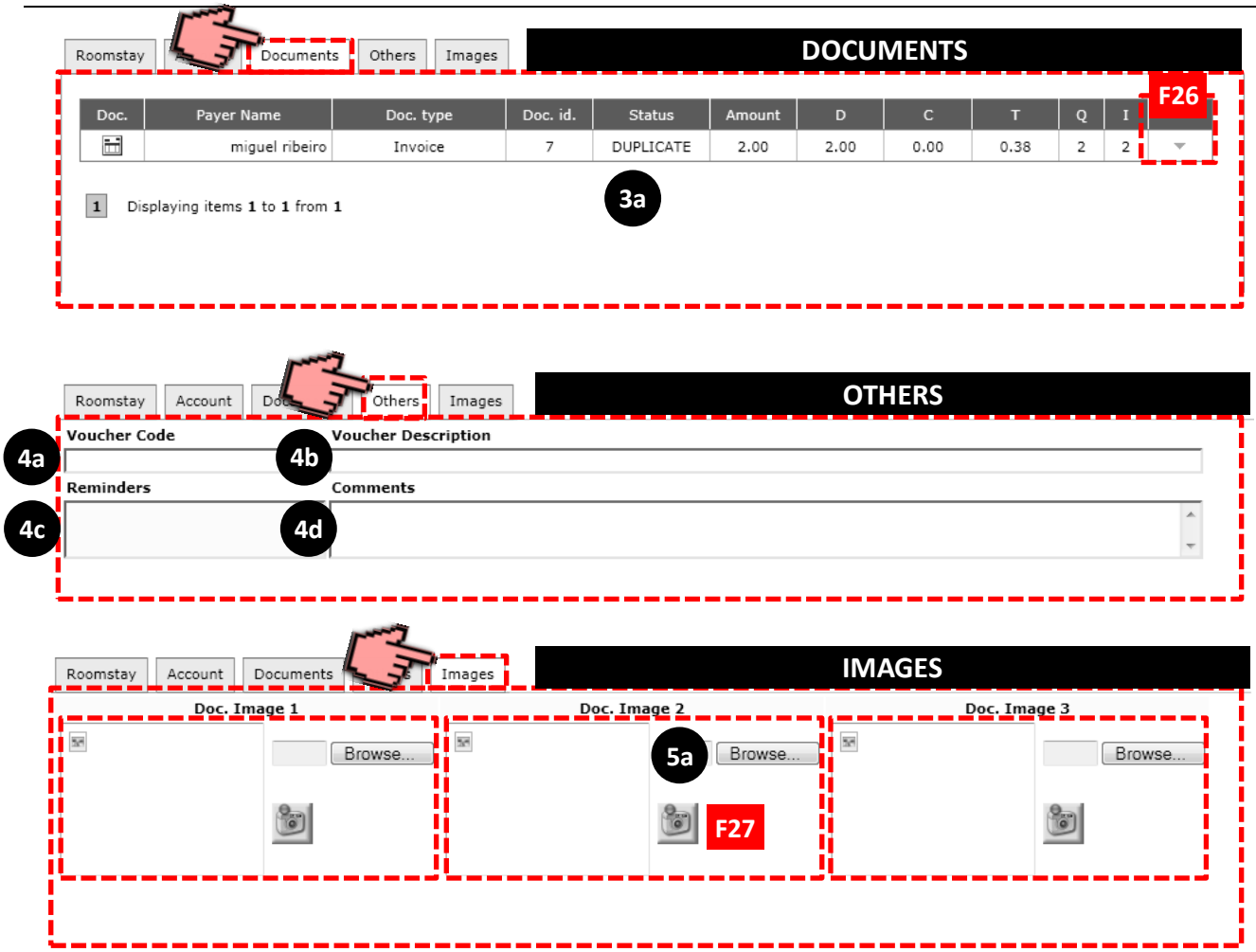
This page also provides several additional features such as change account or change payer. The hotel should read the ROOMSTAY MAIN OPERATIONS chapter for examples and more information.

Figure 77 – Roomstay Main Operations

Page Location

Page Description





6.1.1 FIELDS

1) Roomstay

Required a. ***Name*** – the guest first name.

i. The guest associated with the roomstay.

ii. This is the guest that will consume the room night stay service.

Required b. ***Last name*** – the guest last name.

Required c. ***Nationality*** – the guest nationality.

Required d. ***Nº of adults*** – the number of adults booked.

i. The total number of persons is equal to the number of adults plus the number of children of group types A and B.

Required e. ***Nº of child A*** – the number of children of group type A.

i. The children are divided in two generic groups, namely group A and group B.

ii. Read the SET HOTEL MAIN PROPERTIES chapter for the children type definition.

Required f. ***Nº of child B*** – the number of children of group type B.

i. Read the SET HOTEL MAIN PROPERTIES chapter for the children type definition.

Read Only g. ***Currency*** – the roomstay currency.

h. ***Passport \ ID*** – the ID of the guest.
   i. For example: the passport ID or the citizen identification card ID.

i. ***Contact*** – a number to contact the guest.
   i. For example: a phone or mobile number.

j. ***Email*** – the guest email.
   i. The system uses this email to send vouchers or accounting documents to the guest.
   ii. Also this email is used for the marketing campaigns.
   iii. The hotel should request the guest permission to use this email for hotel communications.

Required k. ***Payer*** – the payer name and nationality.
   i. This guest is responsible for the payment and is associated with the account and not directly to the roomstay.
   ii. This is the guest that will be responsible for the account payment. This guest can be different from the guest that is using the room.

Required l. ***Agent*** – the booking agent.

Required m. ***Room rate*** – the room rate associated with the roomstay.

Required n. ***Date in*** –the guest check-in date.

Required o. ***Date out*** – the guest check-out date.

Required p. ***Room*** – the room assigned with the roomstay.
   i. The hotel must assign a room to the roomstay.

Read Only q. ***Total room*** – the total roomstay amount.

Read Only r. ***Nº of nights*** – the number of night stays.

Read Only s. ***Roomstay*** – the roomstay id.

Read Only t. ***Guest nº*** – the roomstay guest id. The guest that is using the room.

Read Only u. ***Account nº*** – the roomstay account id.

Read Only v. ***Total amount*** – the total amount of the account associated with the roomstay.
   i. The total amount includes not only the room stay amount but also other guest expenses.

Read Only w. ***Status*** – the roomstay status.

2) **Account – the account associated with the roomstay. An account can be associated with multiple roomstays but a roomstay can only be associated with one account.**

Read Only a. ***Account nº*** – the account associated with the roomstay.

Read Only b. ***Amount*** – the total account amount.

Read Only c. ***Tax amount*** – the tax amount of the account.

Read Only d. ***Status*** – the status of the account.

Read Only e. ***Guest account nº*** – the guest associated with the account. This guest is not associated directly with the roomstay but with the account.
   i. This is the guest that booked the rooms.
   ii. This guest can be different from the guest that is using the rooms or from the guest that is responsible for payment.
   iii. The account can have two guests associated, one is the payer guest and the other is the guest responsible for the booking.

Read Only f. ***Guest account name*** – the guest name and nationality associated with the account.

Read Only g. ***Payer ID*** – the payer guest associated with the account.
   i. This guest is not associated directly with the roomstay but with the account.
   ii. This is the guest responsible for the payment of the account.

3) **Documents – the accounting documents associated with the account.**

Read Only a. ***Documents list*** – The list of all accounting documents associated with the account.

4) **Others**
   a. ***Voucher code*** – the code of the voucher associated with the roomstay.
   b. ***Voucher description*** – the voucher description.
   c. ***Reminders*** – reminders notes associated with the roomstay.
   d. ***Comments*** – comments associated with the roomstay.

5) **Images – the pictures associated with the roomstay.**
   a. ***Images*** – a set of 3 images attached to the roomstay.
      i. They can be uploaded by pressing the “Browse” button or by pressing the webcam button.

6.1.2 FUNCTIONS

1) **New** – create a new roomstay.
    a. A popup will open asking if the hotel wants to create and send a voucher to the guest.

2) **Update** – update the roomstay without recalculating the daily room rates.
    a. This update does not override the manual day rates set by the hotel.
    b. The daily room rates can be set by clicking in the "Day Rates" button (i.e. the F18 function).

3) **R. Rates** – update the roomstay and recalculate all the daily room rates associated with the roomstay.
    a. This operation overrides any manual daily rates set by the hotel.
    b. The daily room rates can be set by clicking in the "Day Rates" button (i.e. the F18 function).

4) **Email** – opens the booking confirmation popup.
    a. It allows the hotel to send a voucher to the guest confirming the booking.

5) **Refresh** – refreshes the form data from the database.

6) **Check-in** – execute the guest check-in process.
    a. To get the check-in document the hotel must press the button "Doc. In".
    b. Read the ROOMSTAY MAIN OPERATIONS chapter for more information.

7) **Cancel** – cancels but does not delete the booking.

8) **No Show** – changes the booking status to no-show.

9) **Delete** – deletes the booking.

10) **Check out** – executes the guest check-out process.

11) **Folio** – navigates to the point of sale. Read POINT OF SALE page for more information.

12) **Guest** – navigates to the guest detail. Read the GUEST MANAGEMENT page for more information.

13) **Voucher** – navigates to the voucher detail. Read the VOUCHERS page for more information.

14) **Doc. In** – navigates to the check-in document.

15) **Docs** – navigates to the documents list. Read the ACCOUNTING DOCUMENTS page for more information

16) **Contact** – contact the guest by email.

17) **Account Payer** – select the payer guest associated with the selected account.
    a. Read the ROOMSTAY MAIN OPERATIONS chapter for more information.

18) **Day Rates** – updates the daily rates of the roomstay.
    a. Read the ROOMSTAY MAIN OPERATIONS chapter for more information.

19) **Credit card** – access the credit card information.
    a. Read the ROOMSTAY MAIN OPERATIONS chapter for more information.

20) **Folio links** – navigates to the selected guest folio.

21) **Change Account** – change the account associated with the roomstay.
    a. Read the ROOMSTAY MAIN OPERATIONS chapter for more information.

22) **Guest Account** – select the guest (not the payer) associated with the selected account.

23) **Documents links I** – navigate to the accounting documents associated with the account transaction.

24) **Reopen account** – change the account to open state.

25) **Close account** – close the account.

26) **Documents links II** – navigate to the pdf document.

27) **Webcam picture** – take a picture using the webcam and associate the picture to the roomstay.

28) **Select rooms** – the hotel can directly insert the room number or can use the "Select room" button to show a list of rooms available.
    a. The list is sorted by room allocation score. The highest score appear first.

    b. The system uses an algorithm to determine the best room allocation to avoid room fragmentation or too many gaps between rooms and days.

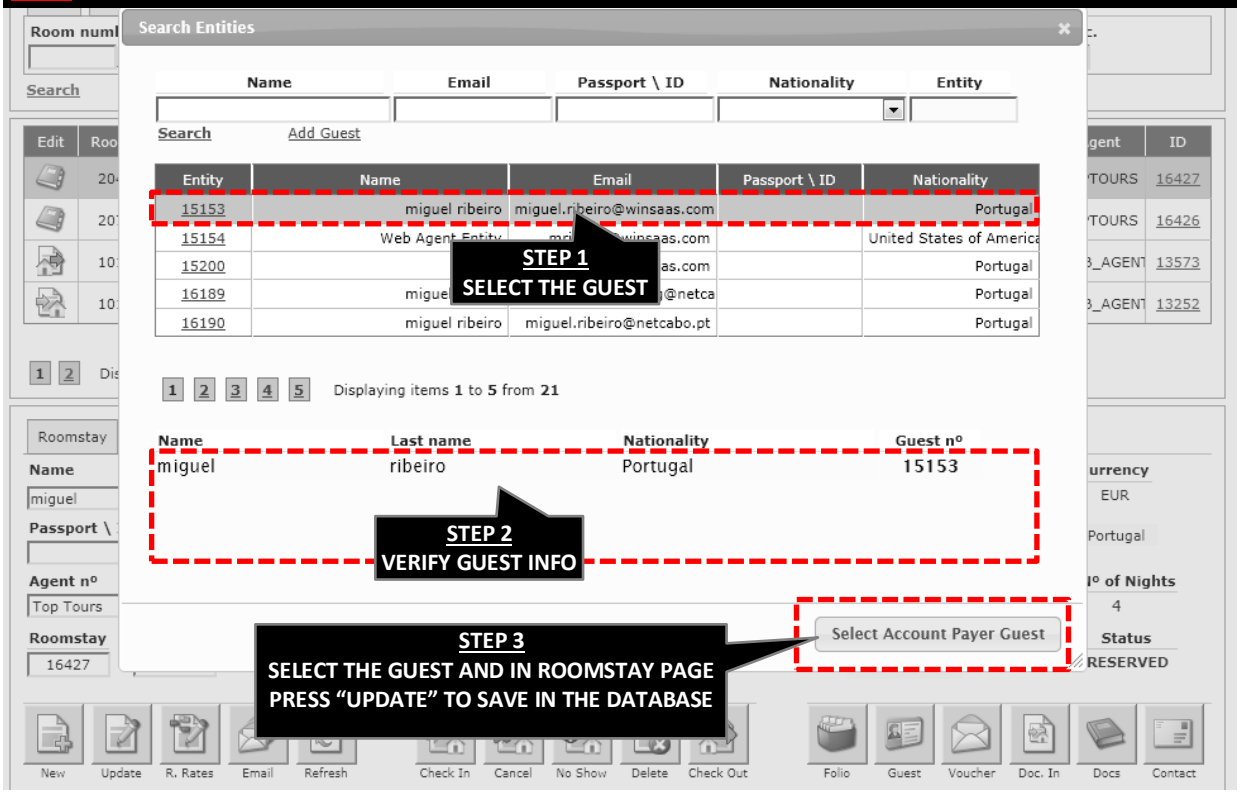
    c. The algorithm objective is to minimize a situation where the hotel needs to refuse a booking because there is no time slot available for the booking requested but the hotel has empty rooms available.

6.1.3 ROOMSTAY MAIN OPERATIONS

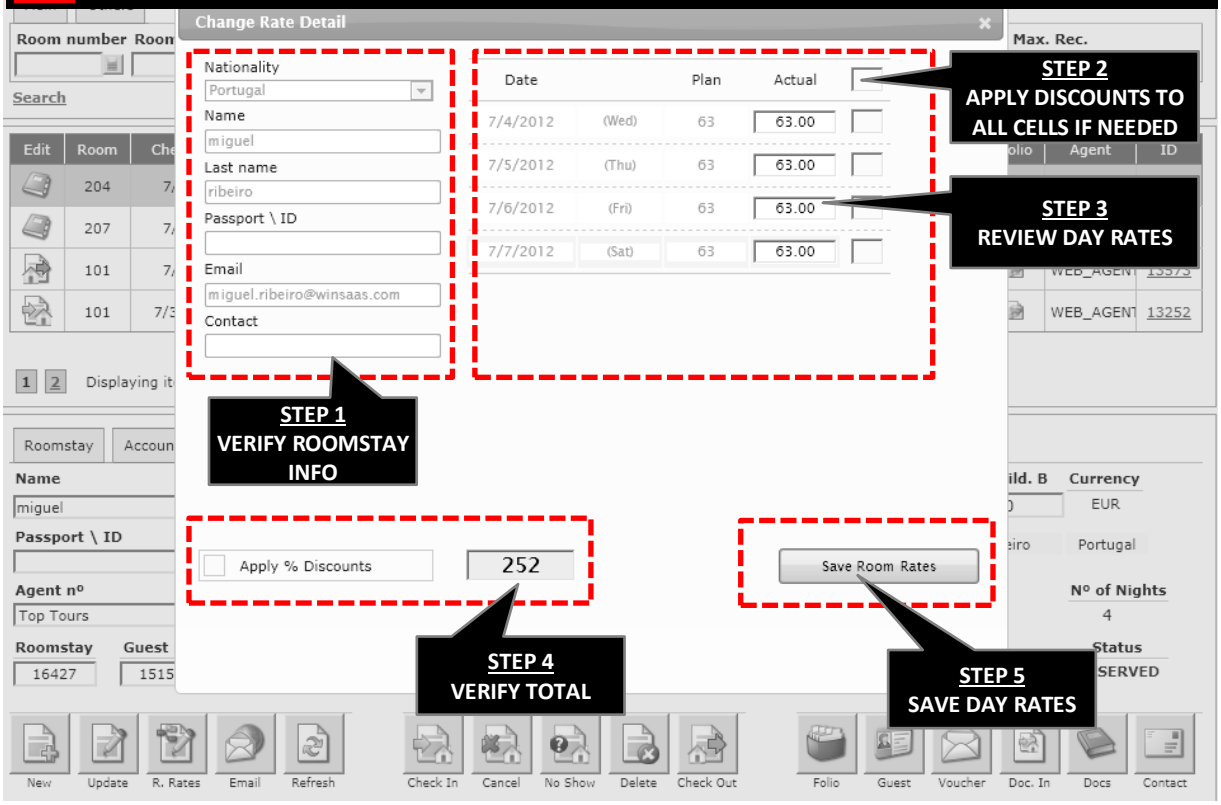
The roomstay main operations are illustrated in the following examples.

Figure 78 - Roomstay Main Operations: Examples

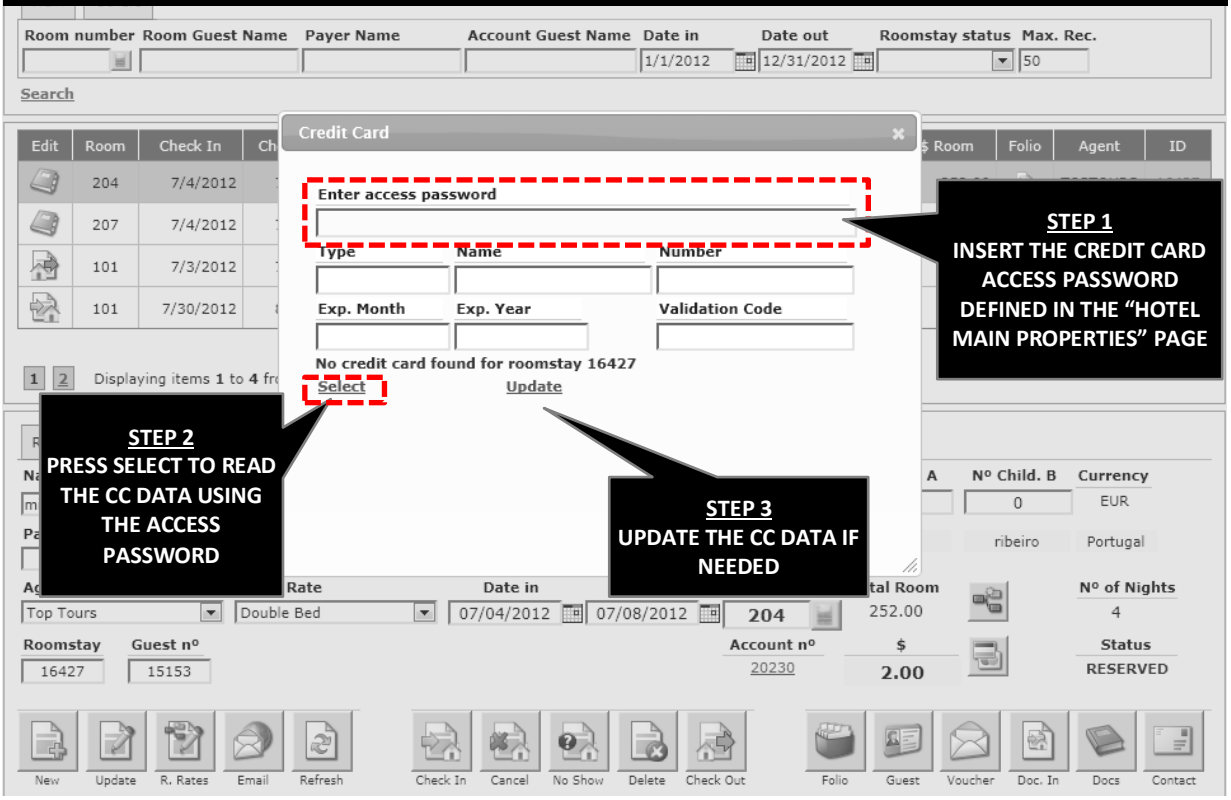
F17 CHANGE PAYER OF THE ACCOUNT



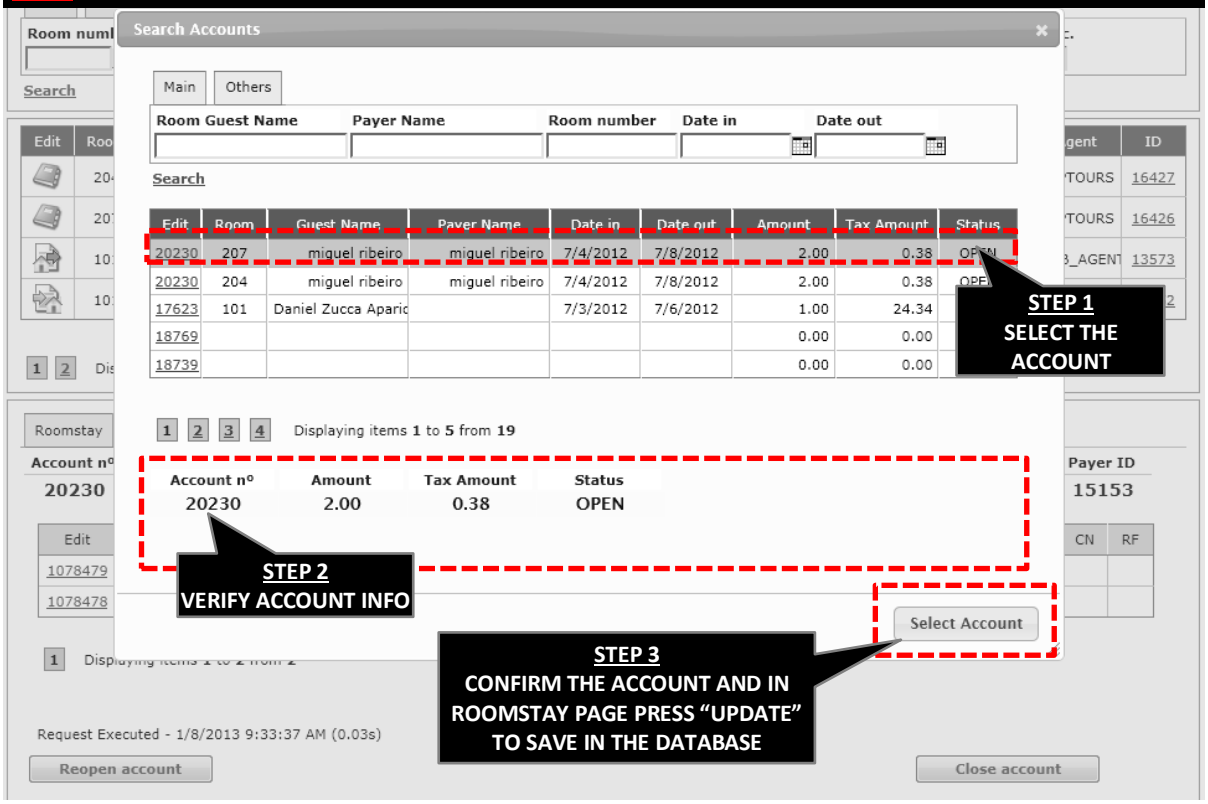
F18 CHANGE DAY RATES



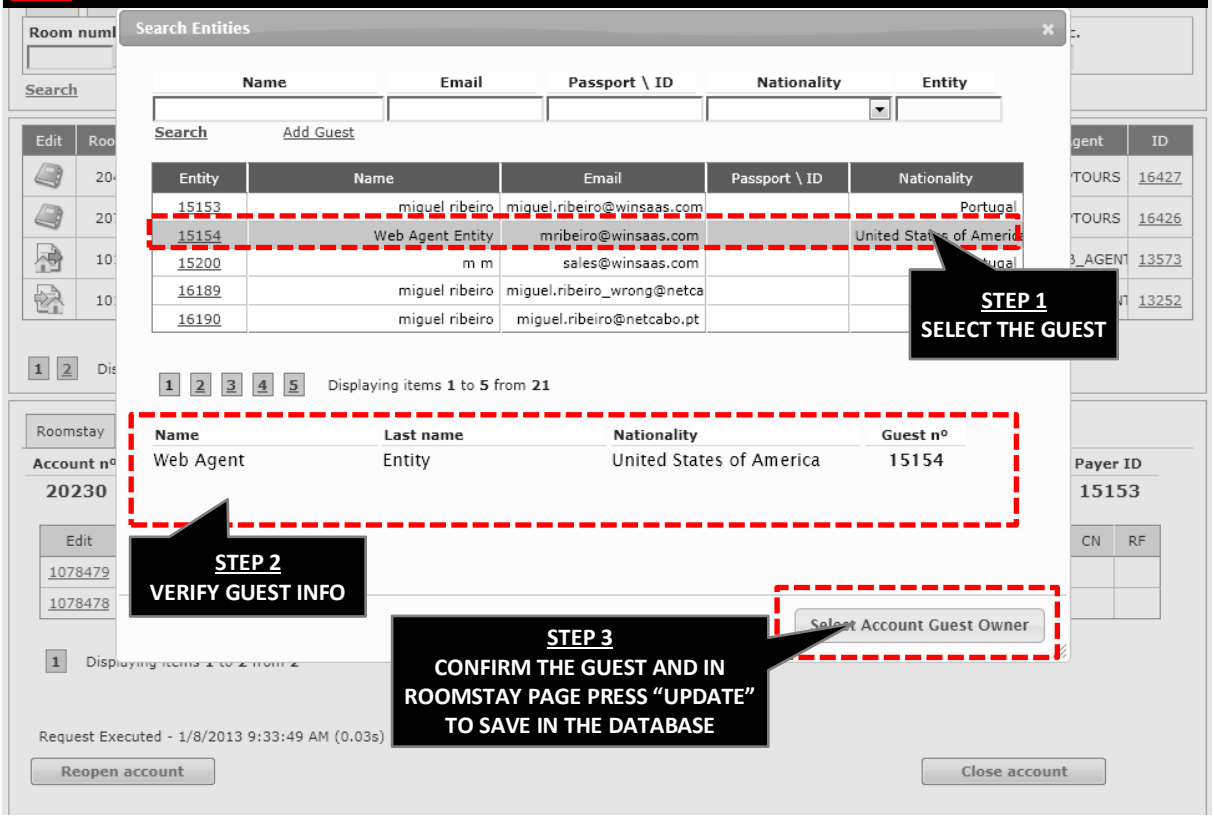
F19 VIEW CREDIT CARD INFORMATION



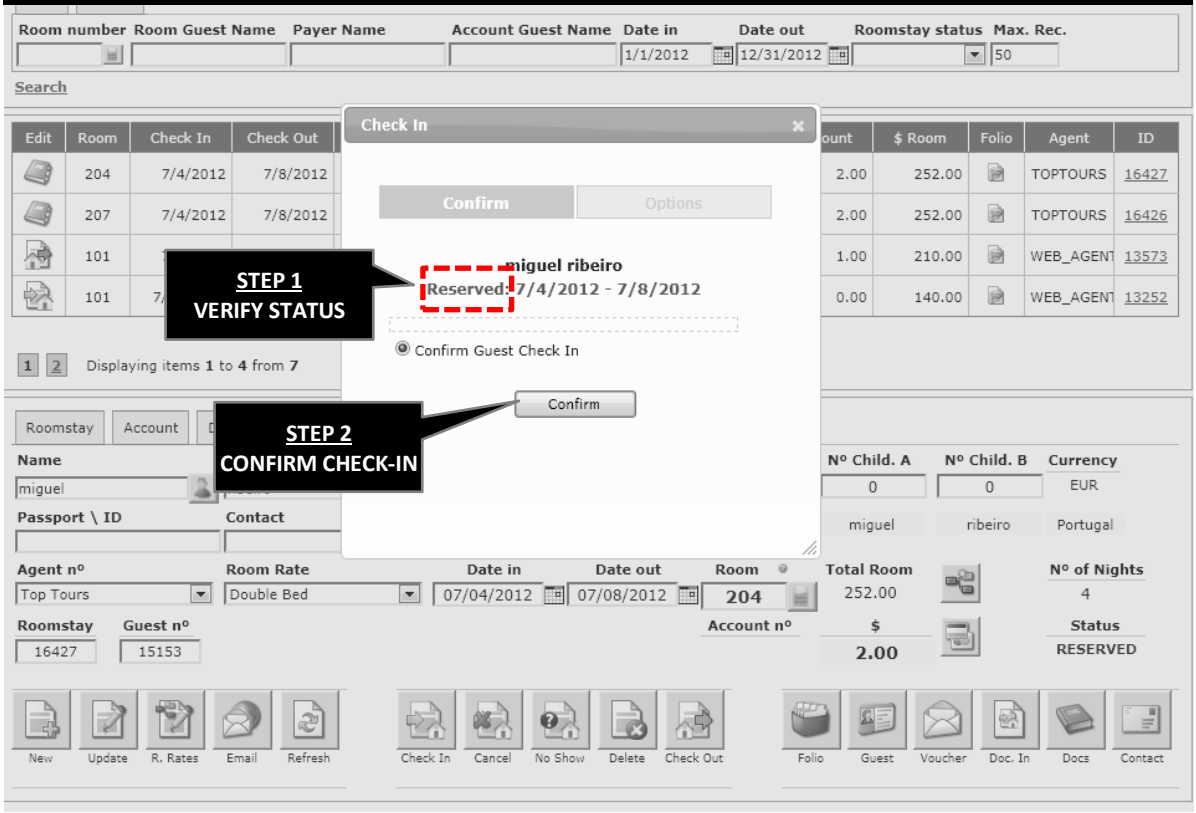
F21 CHANGE THE ACCOUNT OF THE ROOMSTAY



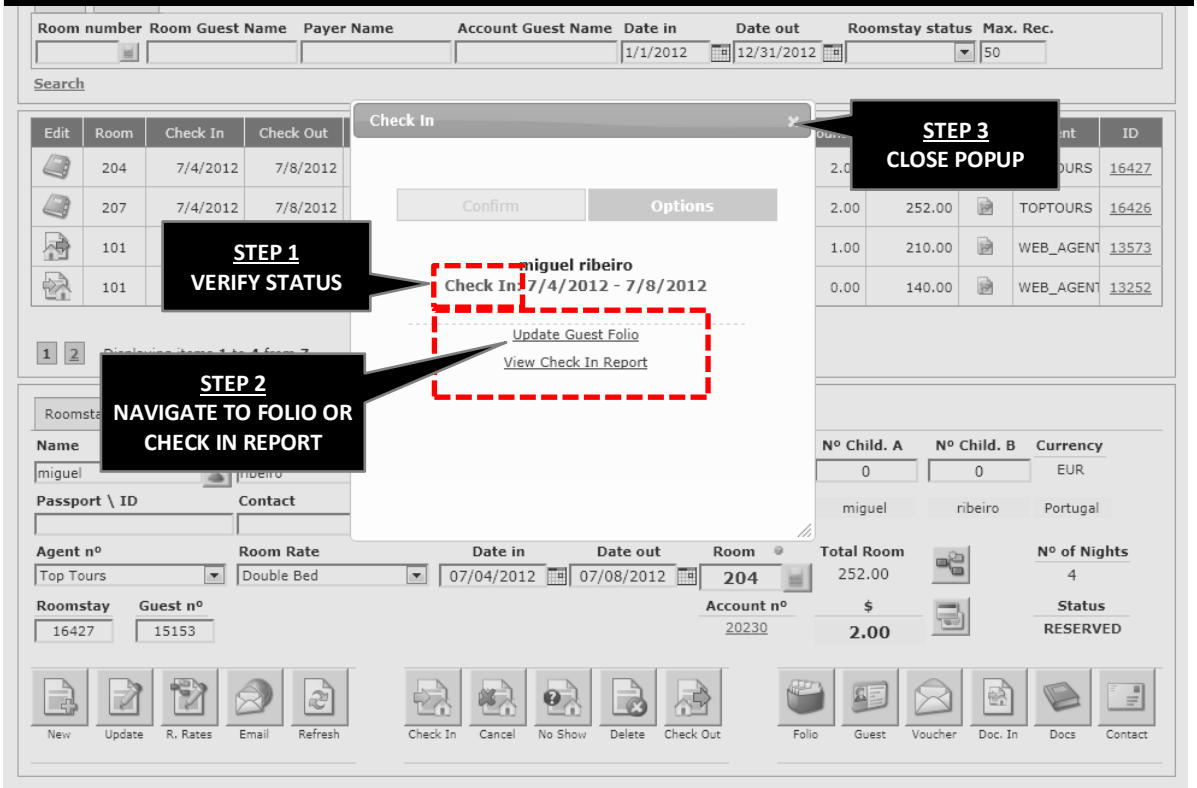
F22 CHANGE GUEST ASSOCIATED WITH THE ACCOUNT



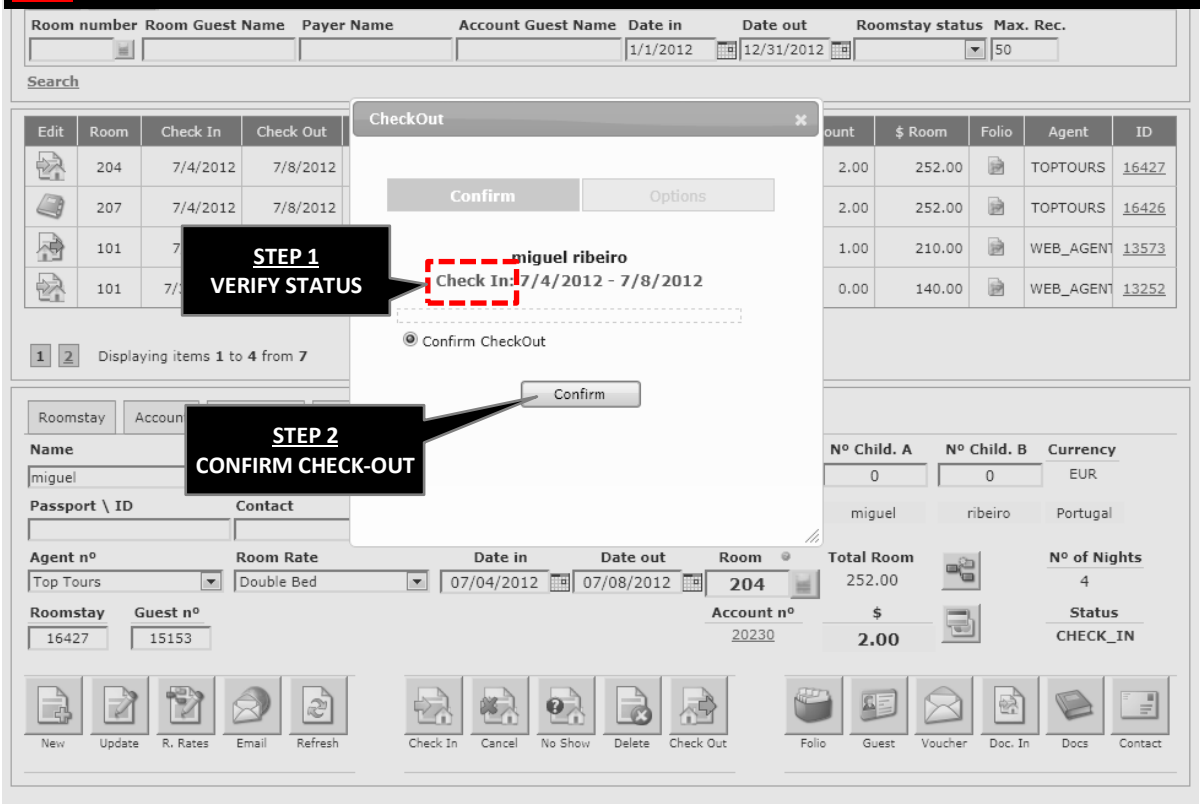
F6 CHECK IN – STEP 1



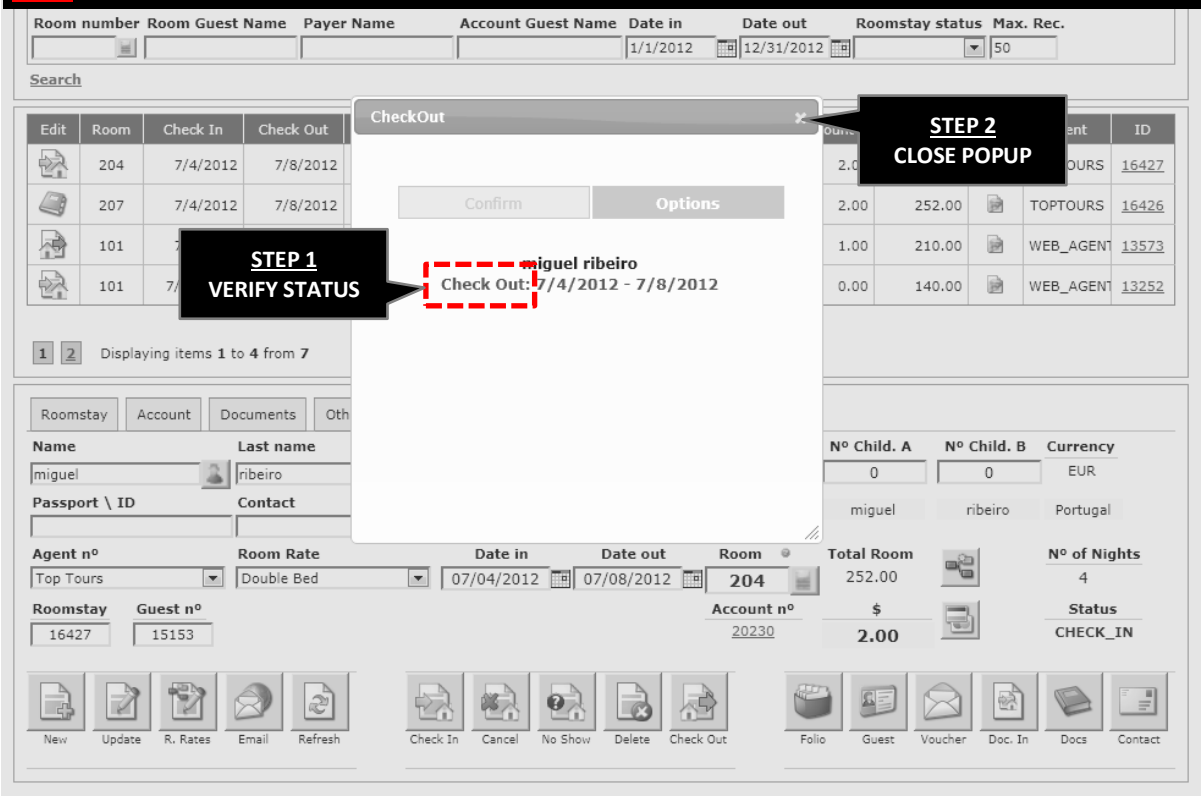
F6 CHECK IN – STEP 2



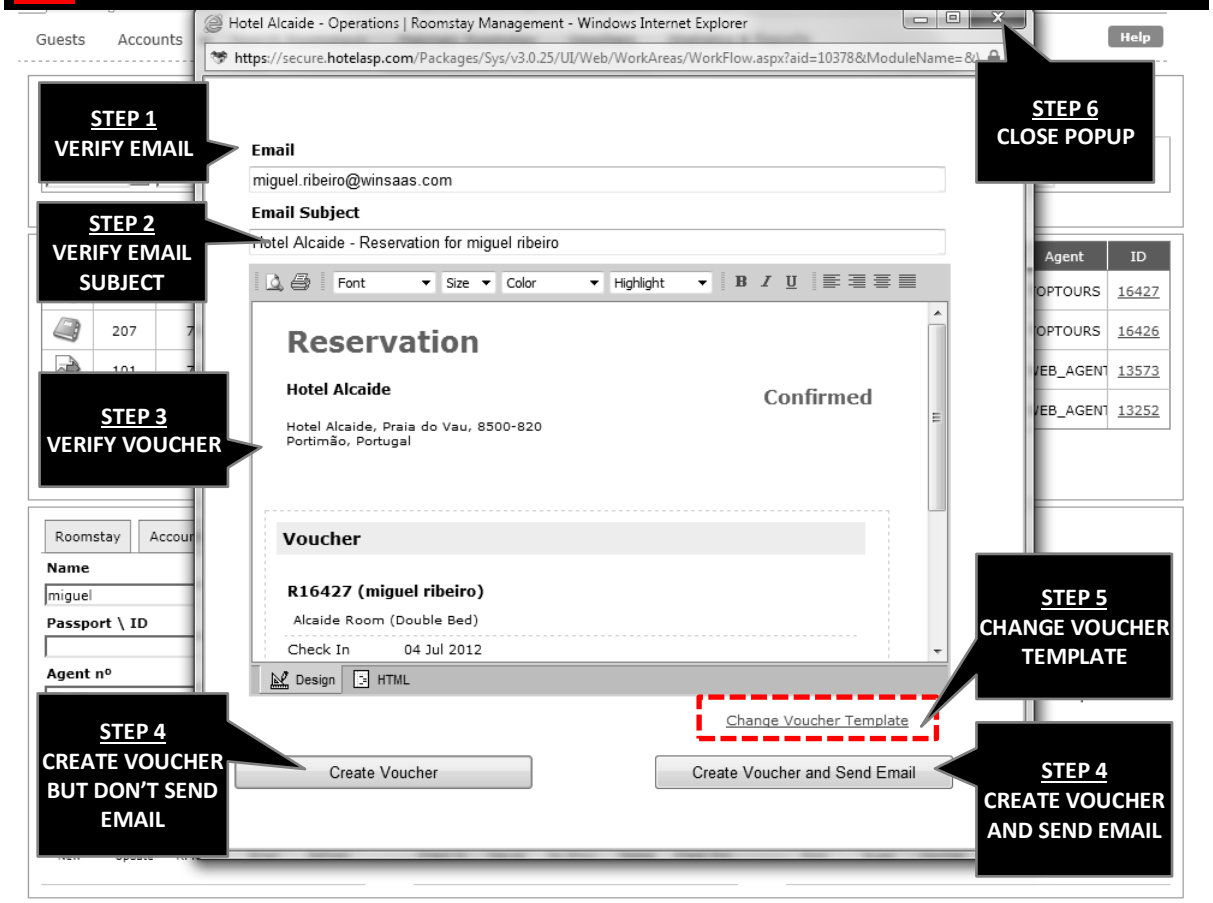
10 CHECK OUT – STEP 1



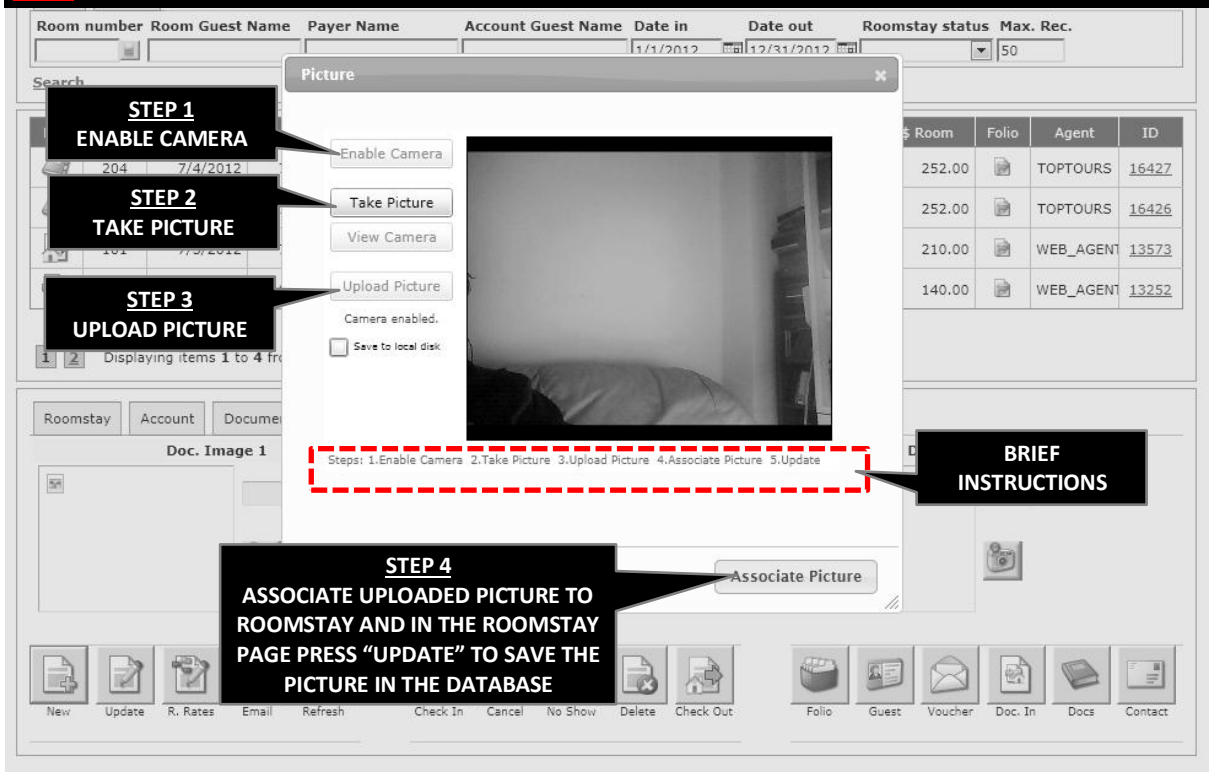
F10 CHECK OUT – STEP 2



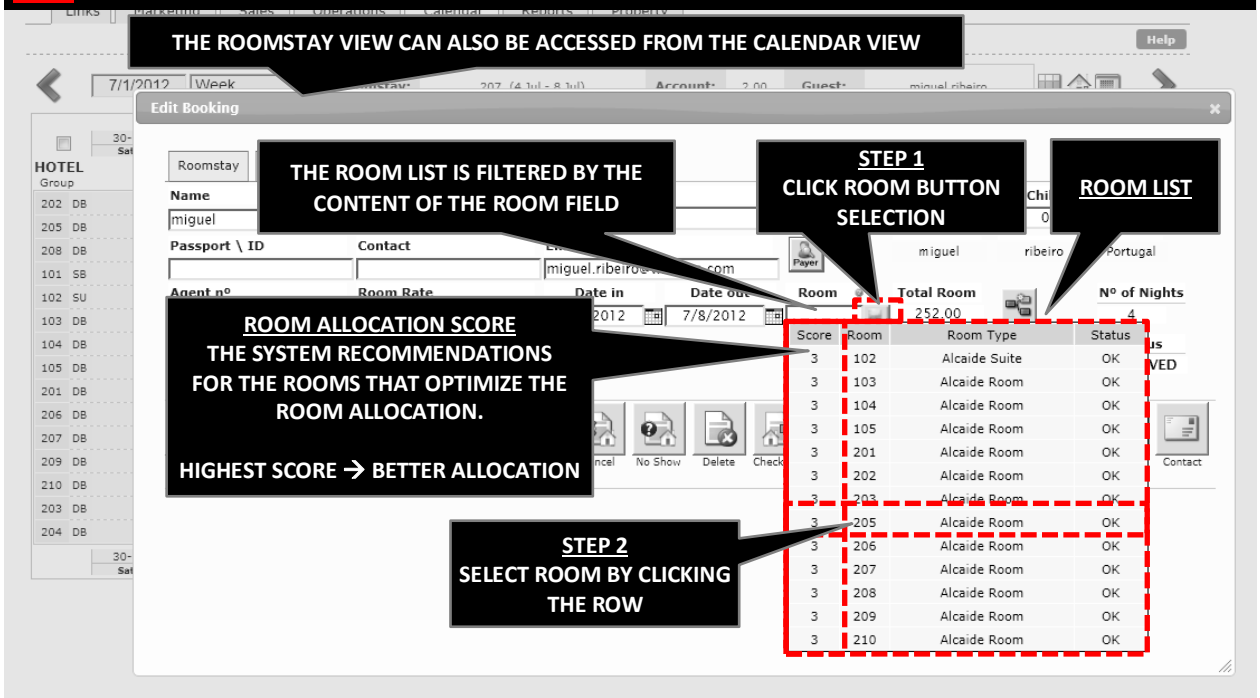
F22 SEND CONFIRMATION TO THE GUEST



F27 ASSOCIATE PICTURE FROM WEBCAM TO ROOMSTAY



F28 SELECT ROOMS & ALLOCATION SCORE

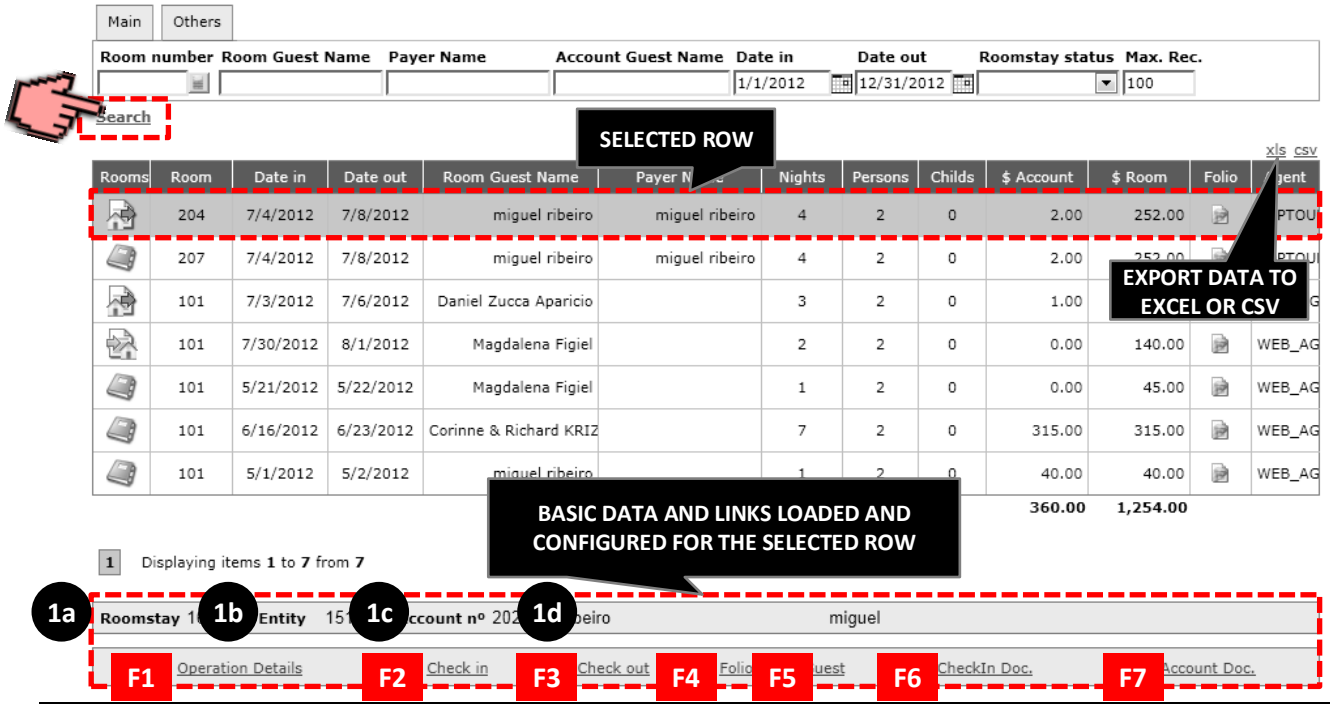


6.2 EXPRESS CHECK-IN & CHECK-OUT

This page allows the hotel to quickly process the guest check in and check outs.

Page Location

Page Description



6.2.1 FIELDS

1) **Main**
   a. ***Roomstay*** – the roomstay id.
   b. ***Entity*** – the guest id associated with the roomstay.
   c. ***Account*** – the account id associated with the roomstay.
   d. ***Guest name*** – the guest name.

6.2.2 FUNCTIONS

1) **Operation Details** – view the ROOMSTAY MANAGEMENT page associated with the selected row.

2) **Check in** – execute the check-in of the selected row.

3) **Check out** – execute the check-out of the selected row.

4) **Folio** – navigate to the POINT OF SALE page associated with the selected row.

5) **Guest** – navigate to the GUEST MANAGEMENT page associated with the selected row.

6) **Check in doc.** – navigate to the check-in document associated with the selected row.

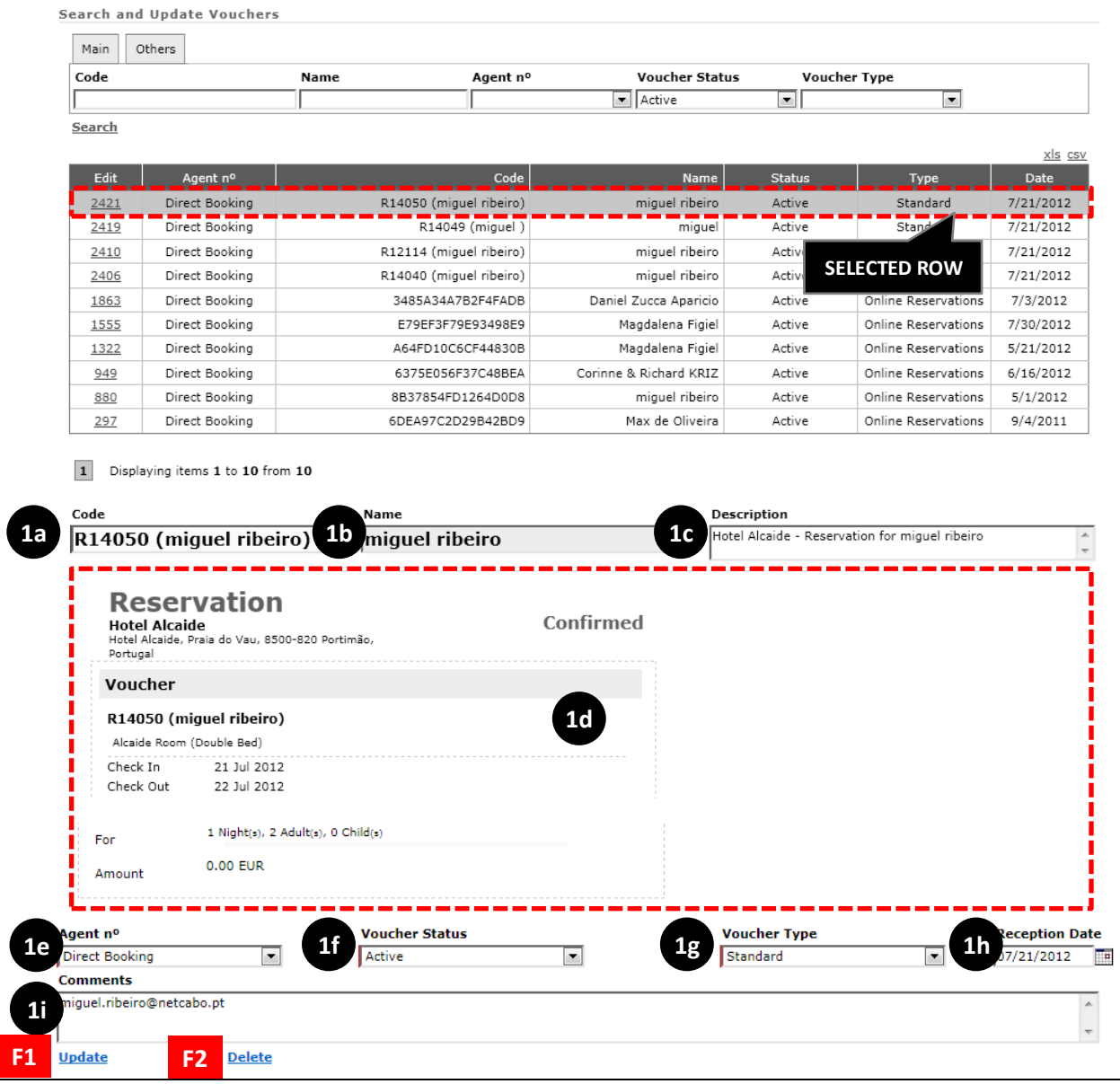
7) **Account doc.** – navigate to the ACCOUNTING DOCUMENTS page associated with the selected row.

6.3 VOUCHERS

This page allows the hotel to search, update and delete vouchers created directly by the hotel or vouchers created in the hotel website booking page.

Page Location

Page Description



6.3.1 FIELDS

1) Main

Required Public a. ***Code*** – the voucher unique code.

Required b. ***Name*** – the name of the guest associated with the voucher.

Public c. ***Description*** – the voucher description.

Public d. ***PREVIEW*** – a preview of the voucher.

Required e. ***Agent nº*** - the agent associated with the voucher.

Required f. ***Voucher status*** – the status of the voucher.

Required g. ***Voucher type*** – the voucher type.

h. ***Reception date*** – the date the voucher was created.

i. ***Comments*** – comments about the voucher.

6.3.2 FUNCTIONS

1) Update – saves the voucher data in the database.

2) Delete – deletes the voucher from the database.

6.4 CALENDAR VIEW

This page allows the hotel to quickly access the roomstays and visualize the hotel occupancy. The calendar displays the hotel room availability per day, week, 1 month, 2 months and 3 months.

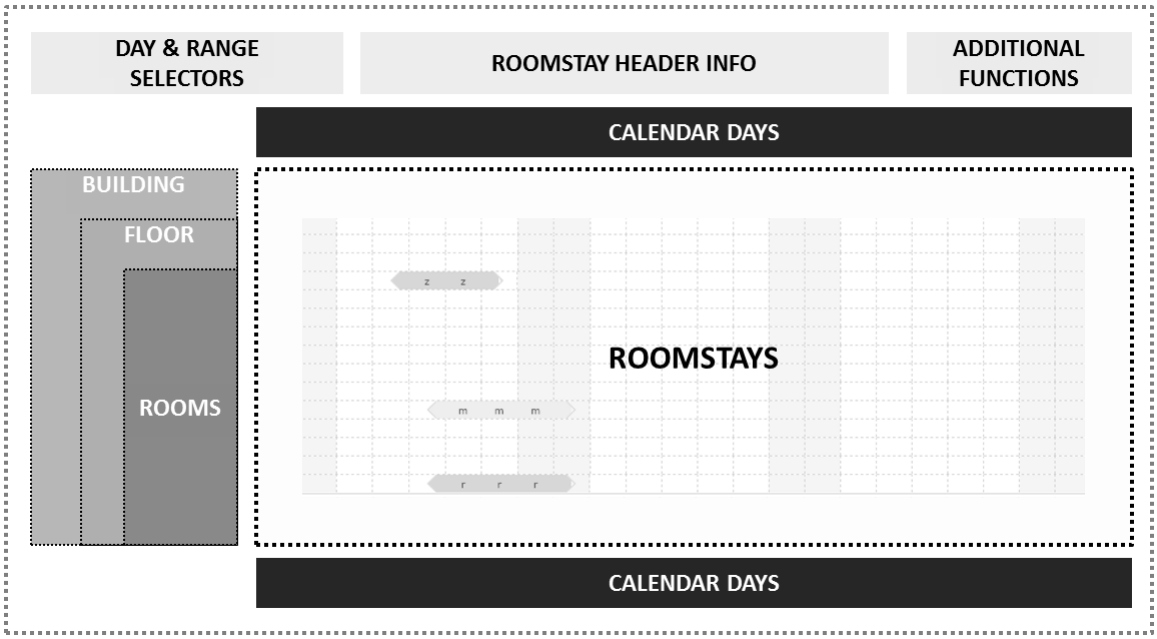
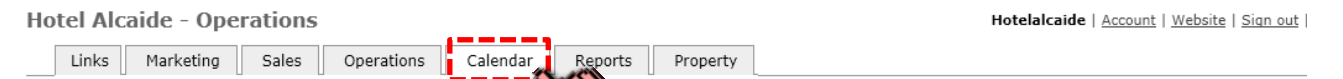


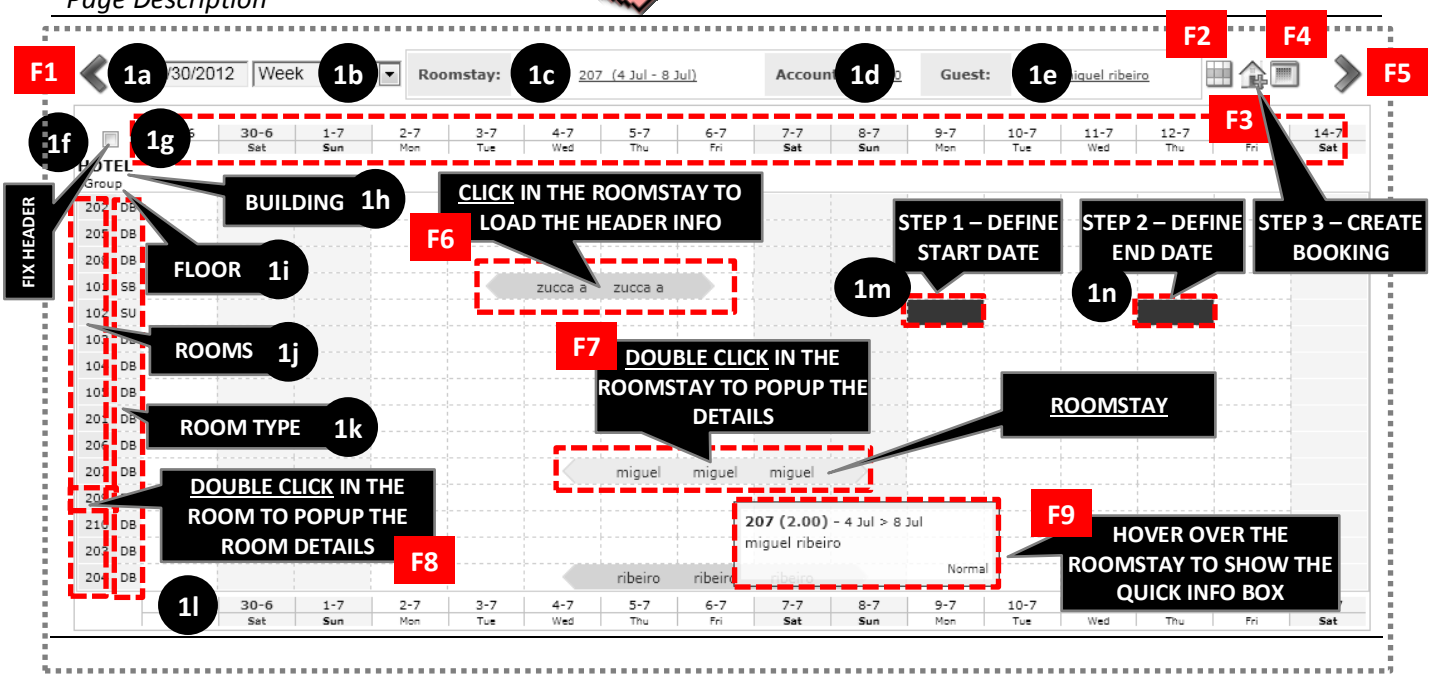
Figure 79 – Calendar Layout

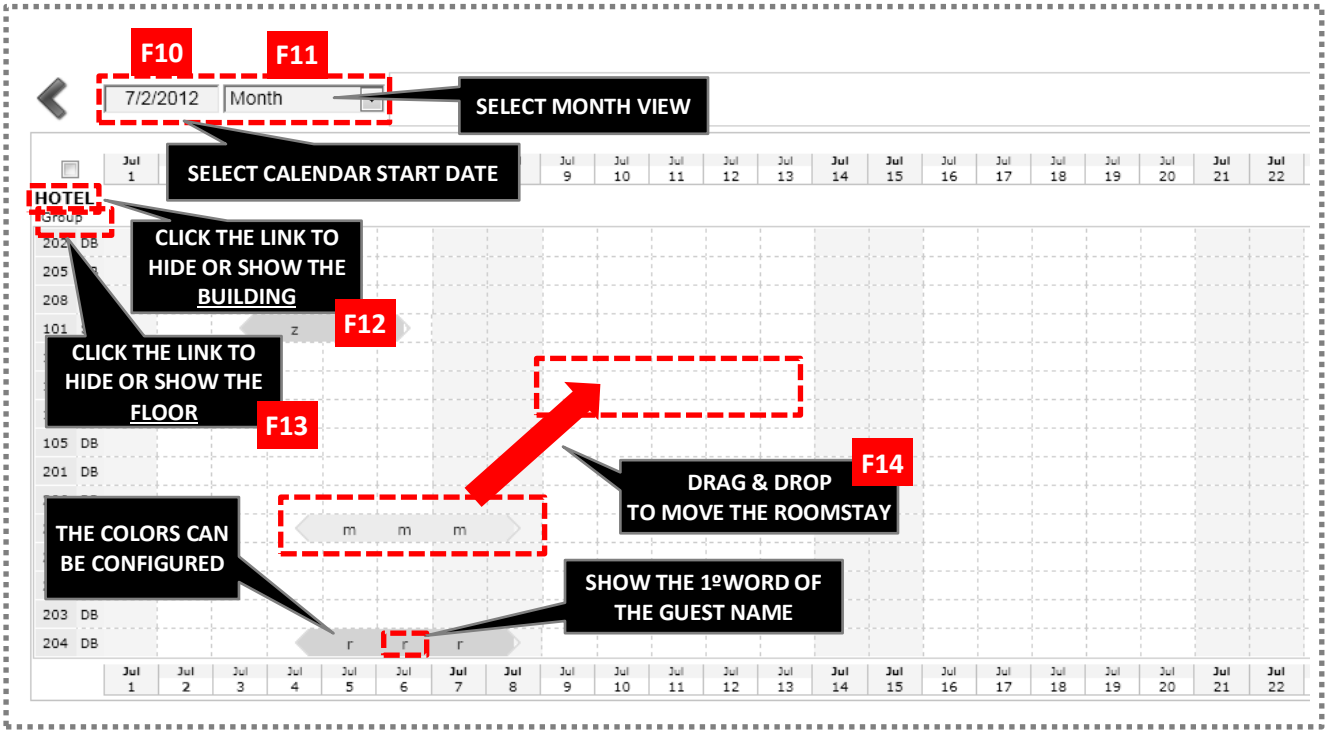
The calendar is organized in the vertical by buildings, floor and rooms and in the horizontal by days. The buildings contain all the floors and the floor contains all the rooms.

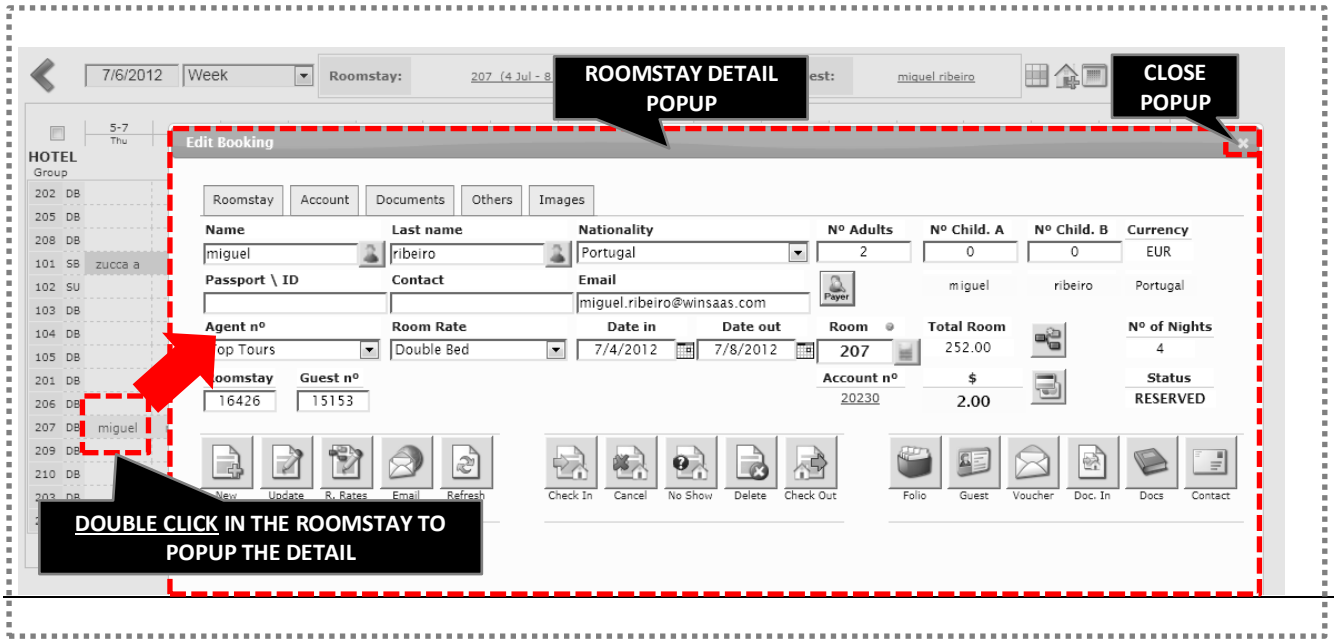
Page Location



Page Description




F10
F11
7/2/2012
Month
SELECT MONTH VIEW
SELECT CALENDAR START DATE
HOTEL
CLICK THE LINK TO HIDE OR SHOW THE BUILDING
F12
CLICK THE LINK TO HIDE OR SHOW THE FLOOR
F13
F14
DRAG & DROP TO MOVE THE ROOMSTAY
THE COLORS CAN BE CONFIGURED
SHOW THE 1ºWORD OF THE GUEST NAME


7/6/2012
Week
Roomstay:
ROOMSTAY DETAIL POPUP
CLOSE POPUP
Edit Booking
Roomstay
Account
Documents
Others
Images
Name
Last name
Nationality
Nº Adults
Nº Child. A
Nº Child. B
Currency
miguel
ribeiro
Portugal
2
0
0
EUR
Passport \ ID
Contact
Email
miguel.ribeiro@winsaas.com
Agent nº
Room Rate
Date in
Date out
Room
Total Room
Nº of Nights
Double Bed
7/4/2012
7/8/2012
207
252.00
4
Roomstay
Guest nº
Account nº
Status
16426
15153
20230
2.00
RESERVED
DOUBLE CLICK IN THE ROOMSTAY TO POPUP THE DETAIL

6.4.1 FIELDS

1) Main

a. ***Select start date*** – the calendar start date (*DATE_START*).
   i. The calendar shows data:
      - From *DATE_START* less 1 day
      - To *DATE_START* + number of days of *SELECTED_PERIOD*.

b. ***Selected period*** – the time period or range to show (*SELECTED_PERIOD*) in the calendar.

c. ***Header Info - Roomstay*** – the room number, check-in date and check-out date of the selected roomstay.
   i. The hotel must click in the roomstay cell to select the roomstay and load this information.

d. ***Header Info – Account*** – the account balance associated with the selected roomstay.

e. ***Header Info – Guest*** – the guest name associated with the selected roomstay.

f. ***Fix header*** – Fix the days header when scrolling down.
   i. It's used when the hotel have a significant number of rooms and want to fix the calendar day header bar.

g. ***Days header*** – a row with the calendar days.
   i. Top cell
      - The day and month in "*dd-mm*" format.
   ii. Bottom cell
      - The first 3 words of the day of the week.

h. ***Building box*** – a box containing all the floors associated with the hotel building.

i. ***Floors box*** – a box containing all the rooms associated with the floor.

j. ***Rooms column*** – a column with all the room numbers associated with a floor.

k. ***Rooms status column*** – a column with the room type of the rooms associated with the floor.

l. ***Days footer*** – a row with the calendar days.

m. ***Start date selection*** – the check-in date used to create a new booking.
   i. The user must click in an empty cell to select a date.

n. ***End date selection*** – the check-out date used to create a new booking.
   i. The user must click in an empty cell that is in the same row of the "*Start date selection*".

6.4.2 FUNCTIONS

1) **Move left** – move the "selected period" to the left.

2) **Day view** – navigate to the calendar day view.

3) **New booking** – select a new booking by clicking in an empty cell.
   a. The first cell will be the check-in date and the last cell will be the check-out date selection.
   b. The row identifies the room and the cells must be selected in the same row.
   c. The booking will preload the range of dates selected and also the room associated with the row where the dates are located.

4) **Color configuration** – changes the colors used in the calendar.

5) **Move right** – move the "selected period" to the right.

6) **Load header info** – click in a roomstay to load the header info with information about the guest, account and roomstay.

7) **Load roomstay detail** – double click in the roomstay to load a popup with the roomstay details.

8) **Load room detail** – double click in the room to load a popup with the room details.

9) **Load quick info** – hover over the roomstay to show a box with additional information about the roomstay.

10) **Select start date** – select a start date to update the calendar.

11) **Select period** – select a period to update the calendar.

12) **Hide or show building** – click in the building row to hide or show the building box.

13) **Hide or show floor** – click in the floor row to hide or show the floor box.

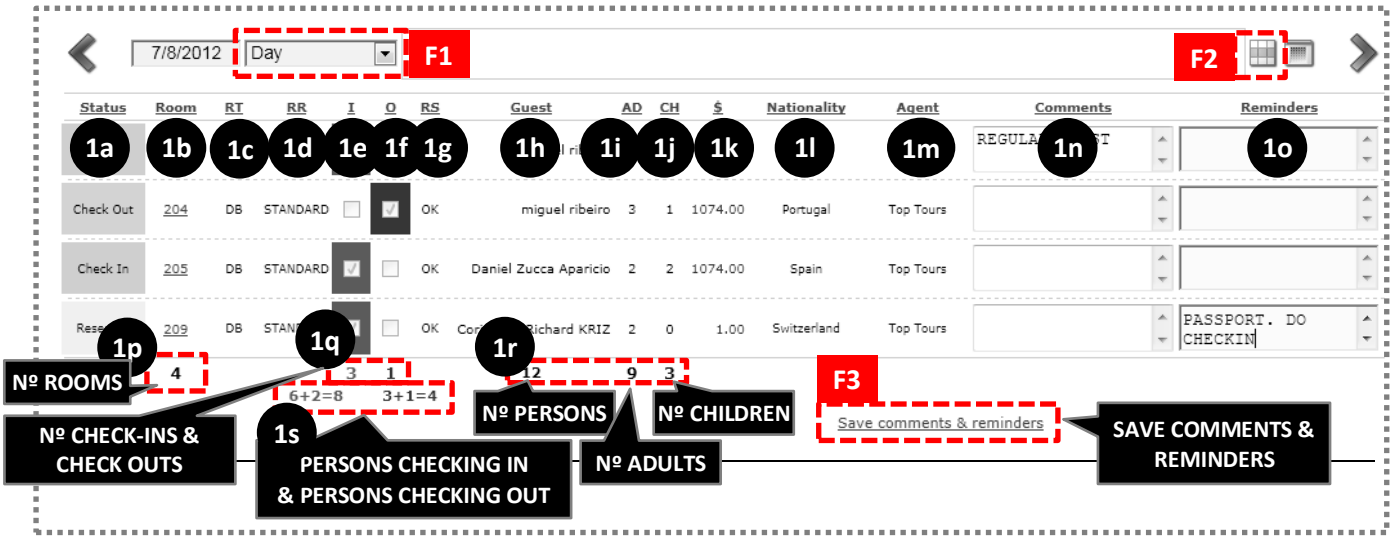
14) **Drag & drop roomstay** – drag and drop the roomstay over the calendar.
   a. This will change the room and the check-in and check-out dates accordingly to the new positioning of the roomstay.

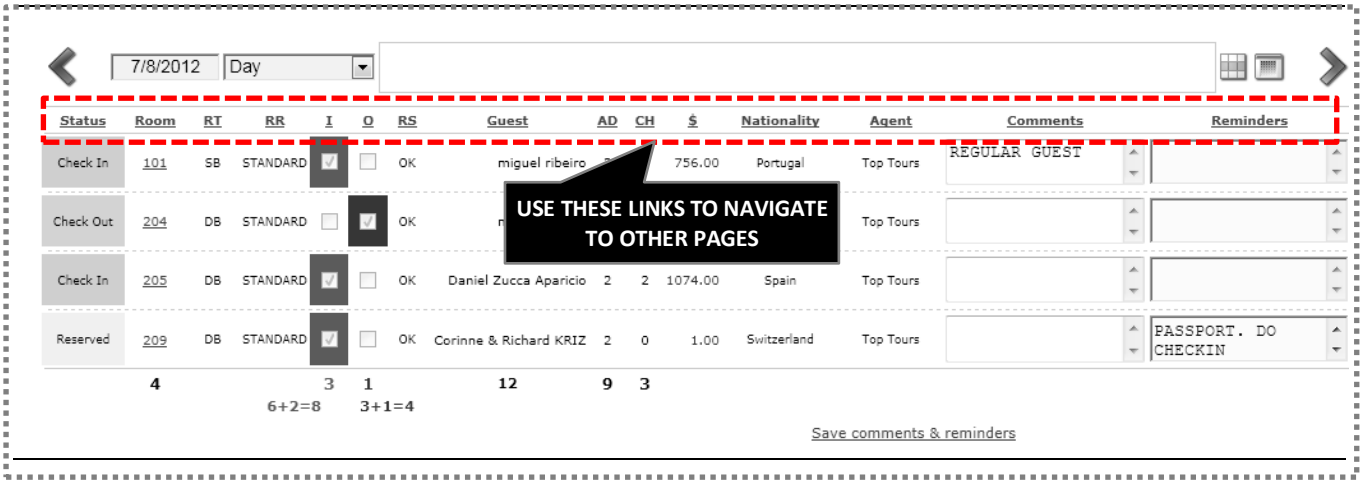
6.5 DAY VIEW AND HOUSEKEEPING

The calendar day view shows detailed information about the hotel operational status for a specific day, including the day check-ins and check-outs. The information shown is also used by the hotel housekeeping.

Page Location

Page Description





6.5.1 FIELDS

1) **Main – all the data shown is filtered accordingly to the selected day**
   a. ***Status*** – the status of the room.

   b. ***Room*** – the room number.

c. ***RT*** – the room type.

d. ***RR*** – the room rate.

e. ***I*** – checked if the guest is checking-in in the selected day.

f. ***O*** – checked if the guest is checking-out in the selected day.

g. ***RS*** – the room status.

h. ***Guest*** – the guest name.

i. ***AD*** – the number of adults.

j. ***CH*** – the number of children.

k. ***$*** - the account balance associated with the roomstay.

l. ***Nationality*** – the guest nationality.

m. ***Agent*** – the agent associated with the roomstay.

n. ***Comments*** – view and update the comments about the roomstay.
   i. This field can be edited.

o. ***Reminders*** – view and update the roomstay reminders.
   i. This field can be edited.

p. ***Nº rooms*** – the number of rooms with activity in the selected day.

q. ***Nº check-ins & check-outs*** – the number of check-ins and check-outs for the selected day.

r. ***Nº of guests*** – the total number of guests in the hotel, including the number of adults and children for the selected day.

s. ***Nº of persons checking in and out*** – the total of persons checking in the hotel and checking out from the hotel, including the number of adults and children for the selected day.
   i. TOTAL PERSONS = Nº ADULTS + Nº OF CHILDREN

6.5.2 FUNCTIONS

1) **Select period** – the hotel must select the "***Day***" period.

2) **Day view** – shows the day view for the selected day.

3) **Save comments & reminders** – save the comments and reminders in the database.

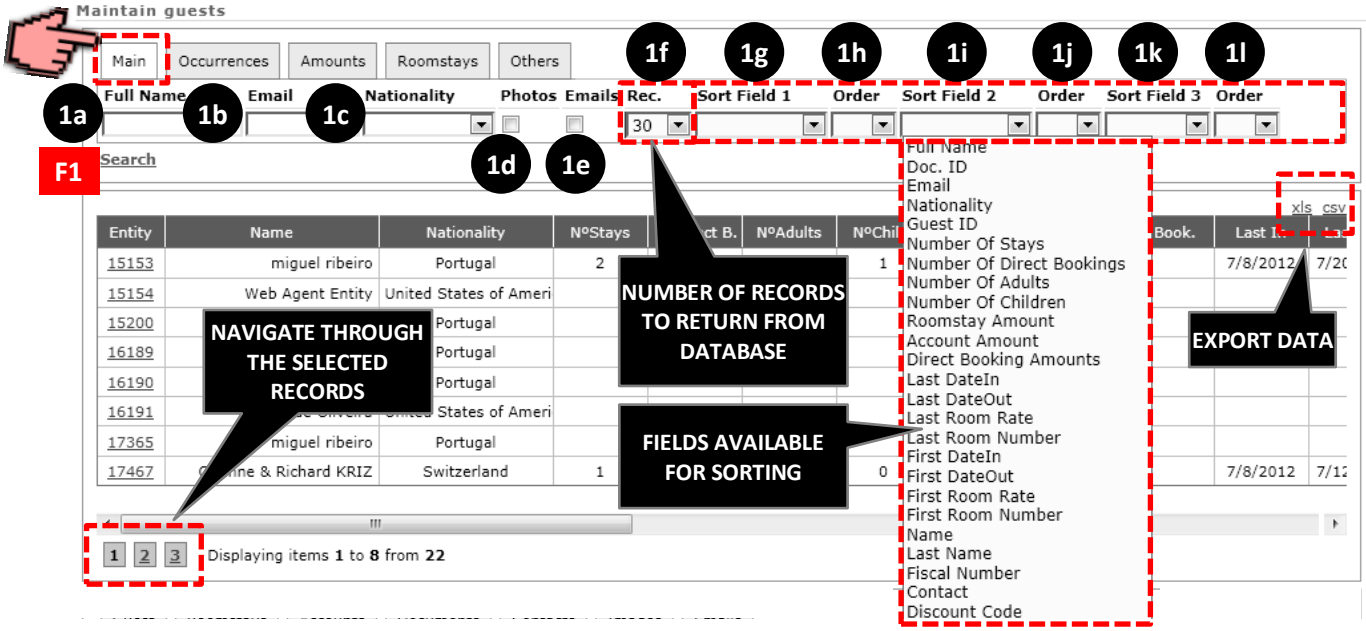
6.6 GUEST SEARCH

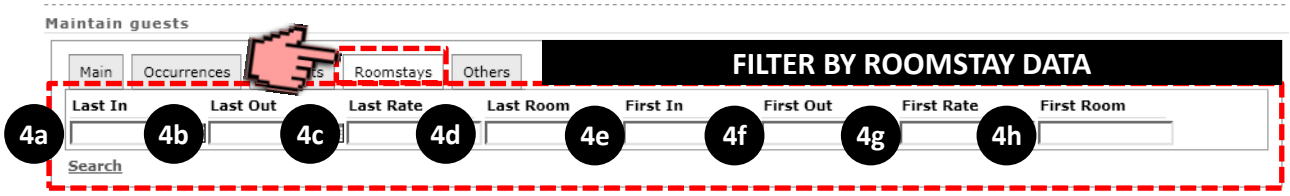
The guest search page allows the hotel to search and sort the guests using a significant set of criteria's. These criteria's are also used for the marketing segmentation in the email campaigns.

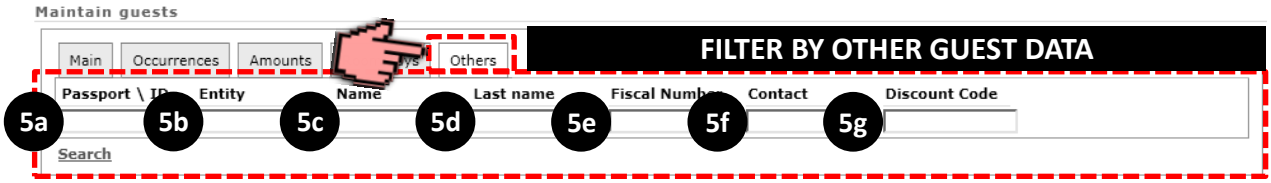
The hotel can search by roomstay, account or guest data.

Page Location

Page Description







6.6.1 FIELDS

1) **Main – Filter and order by guest data.**
   a. ***Full name*** – the full name of the guest.
      a. This includes the first and last name of the guest.
      b. The hotel can use the character ***%*** in the search.
      c. For example: ***john%*** searches all the guests that start with the word ***john***.
      d. For example: ***m%ribeiro*** searches all the guests that start with the word ***m*** and finishes with the word ***ribeiro***.

   b. ***Email*** – the guest email.

   c. ***Nationality*** – the guest nationality.

   d. ***Photos*** – selects the guests with at least one picture associated.

   e. ***Emails*** – selects the guests with emails.

   f. ***Rec***. – the maximum number of records to return from the database.

   g. ***Sort field 1*** – the name of the first field to sort.
      a. The guests are sorted first by this field.

   h. ***Order 1*** – the sort order of the "sort field 1".
      a. It can be ascending or descending order.

   i. ***Sort field 2*** – the name of the second field to sort.
      a. After sorting by the field "sort field 1" the guests are sorted by this second field.

   j. ***Order 2*** – the sort order of the "sort field 2".
      a. It can be ascending or descending order.

k. ***Sort field 3*** – the name of the third field to sort.
   a. After sorting by the field "sort field 2" the guests are sorted by this third field.

l. ***Order 3*** – the sort order of the "sort field 3".
   a. It can be ascending or descending order.

2) Occurrences – Filter by number of occurrences.

a. ***Nº stays*** – select the guests with at least a certain number of stays.

b. ***Nº direct b.*** – select the guests with at least a certain number of direct bookings
   a. It only considers bookings created via the hotel public site.

c. ***Nº adults*** – select the guests with at least a certain number of adults.

d. ***Nº child.*** – select the guests with at least a certain number of children.

3) Amounts – Filter by amounts.

a. ***Roomstay*** – select guests that spent at least a certain amount in room stays (only rooms).

b. ***Account*** – select guests that spent at least a certain total amount (rooms and other expenses).

c. ***D.book.*** – select guests that spent at least a certain amount in direct bookings via the hotel website.

4) Roomstay – Filter by roomstay data.

a. ***Last in*** – the check-in date of the last time the guest stayed at the hotel.

b. ***Last out*** – the check-out date of the last time the guest stayed at the hotel.

c. ***Last rate*** – the room rate of the last time the guest stayed at the hotel.

d. ***Last room*** – the room of the last time the guest stayed at the hotel.

e. ***First in*** – the check-in date of the first time the guest stayed at the hotel.

f. ***First out*** – the check-out date of the first time the guest stayed at the hotel.

g. ***First rate*** – the room rate of the first time the guest stayed at the hotel.

h. ***First room*** – the room of the first time the guest stayed at the hotel.

5) Others – Filter by other guest data.

a. ***Passport/ID*** – the guest passport or citizen ID.

b. ***Entity*** – the guest system ID.

c. ***Name*** – the guest first name.

d. ***Last name*** – the guest last name.

e. ***Fiscal number*** – the guest fiscal number.

f. ***Contact*** – the guest contact.

g. ***Discount code*** – the guest specific discount code.

6.6.2 FUNCTIONS

1) **Search** – execute the search using the criteria defined.

6.7 GUEST MANAGEMENT

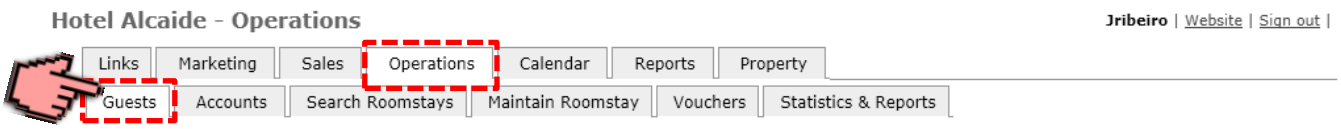
In the guest dashboard the hotel can find all information about the guest in one place. It shows all the roomstays, accounts, documents and data associated with one specific guest as shown in the figure below.

GUEST DASHBOARD						
GUEST BASIC DATA	GUEST ROOMSTAYS	GUEST ACCOUNTS	GUEST DOCUMENTS	GUEST ADDRESS & CONTACTS	GUEST PICTURES	GUEST EMAILS & HISTORY

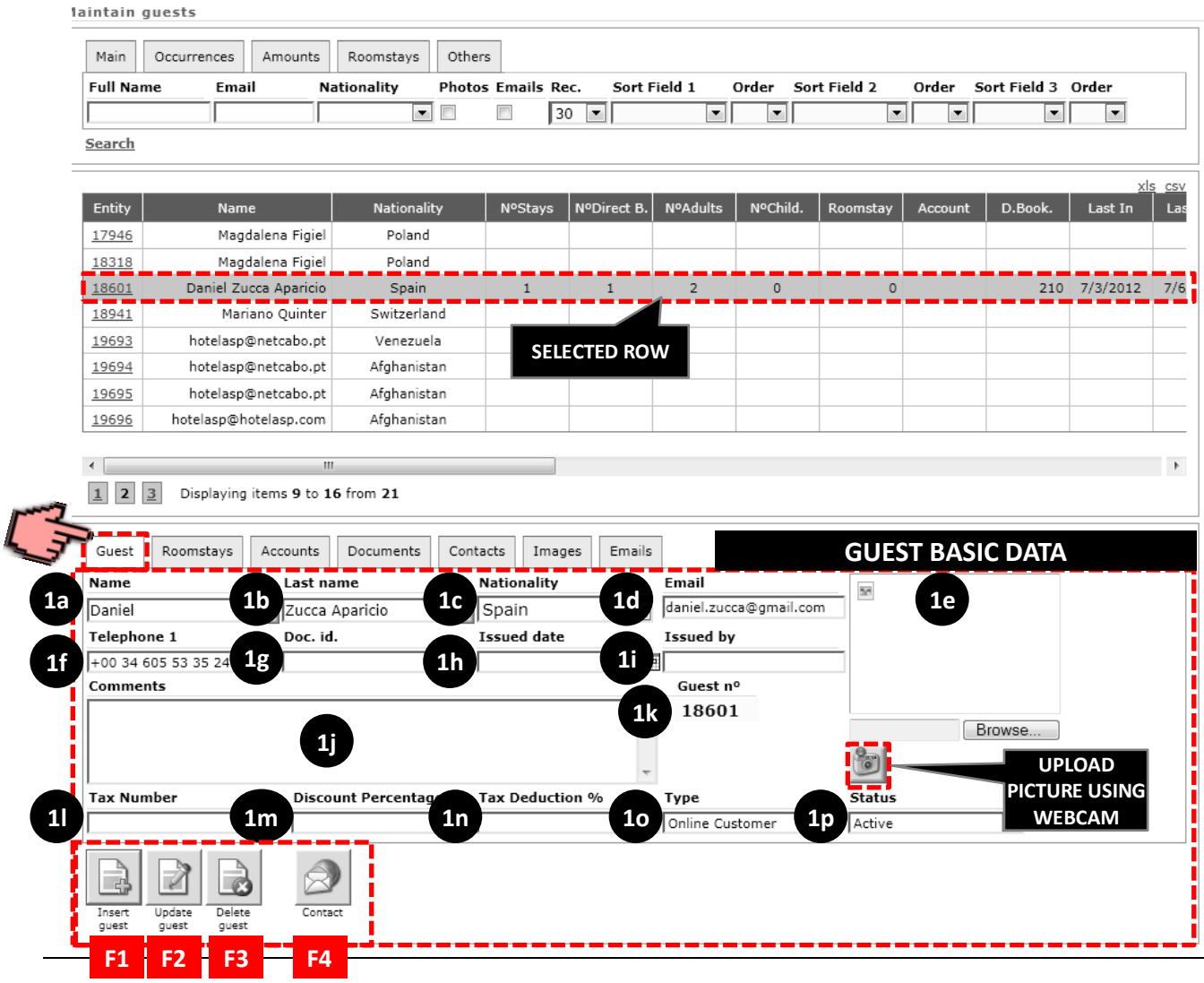
Figure 80 - Guest Dashboard

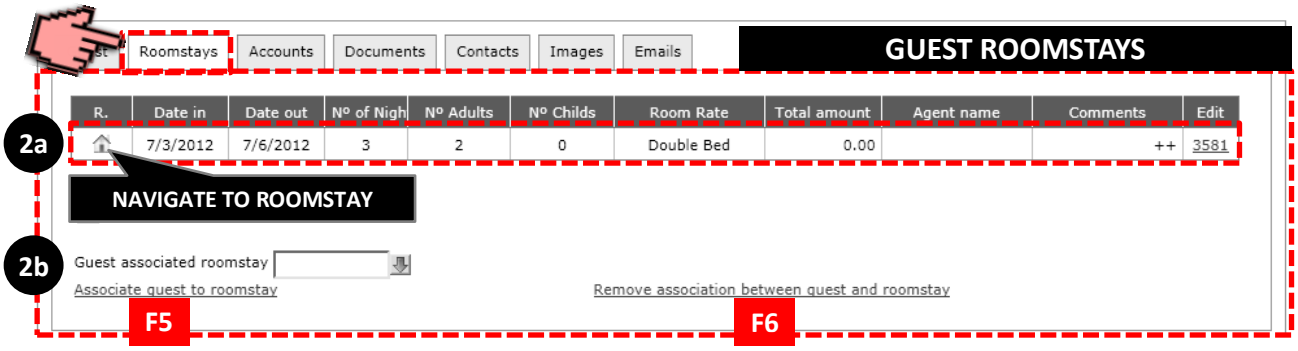
The hotel can search, update, delete and contact the guest.

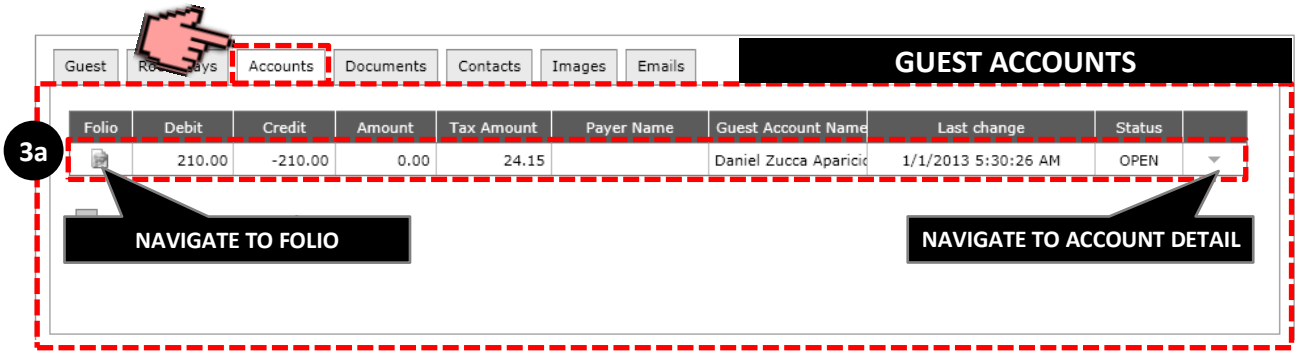
Page Location

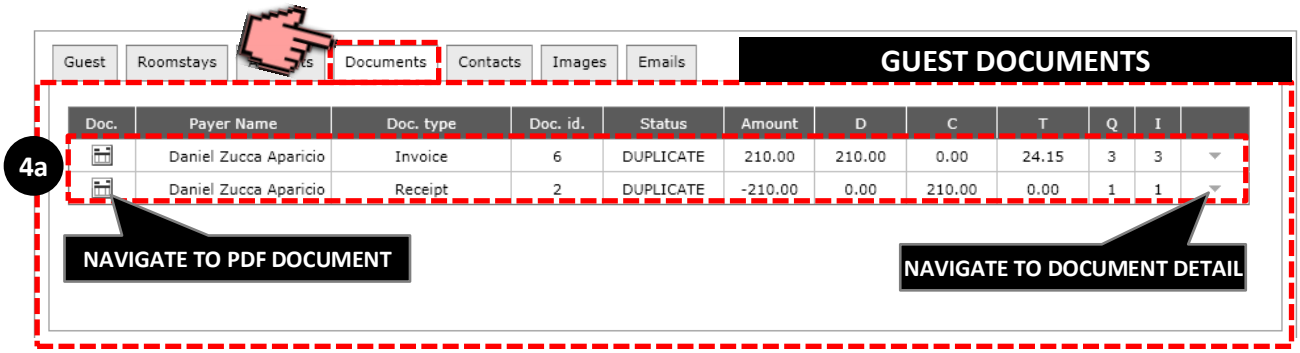


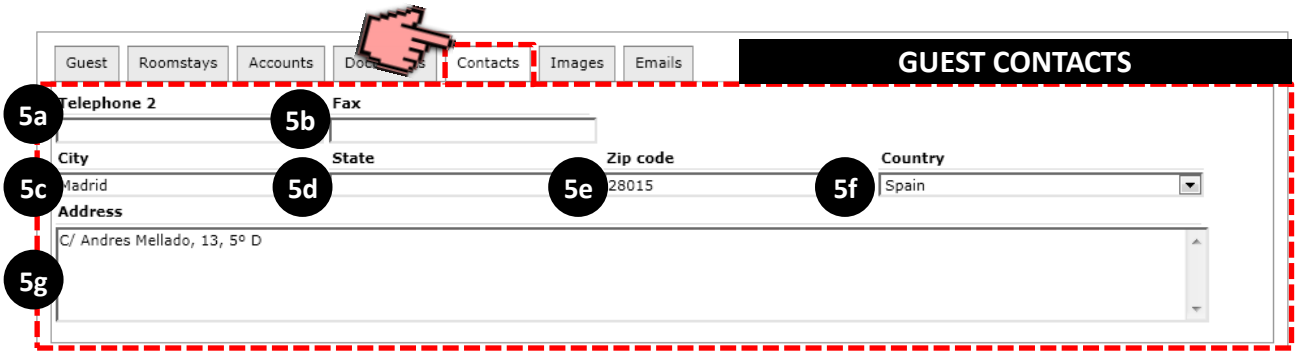
Page Description

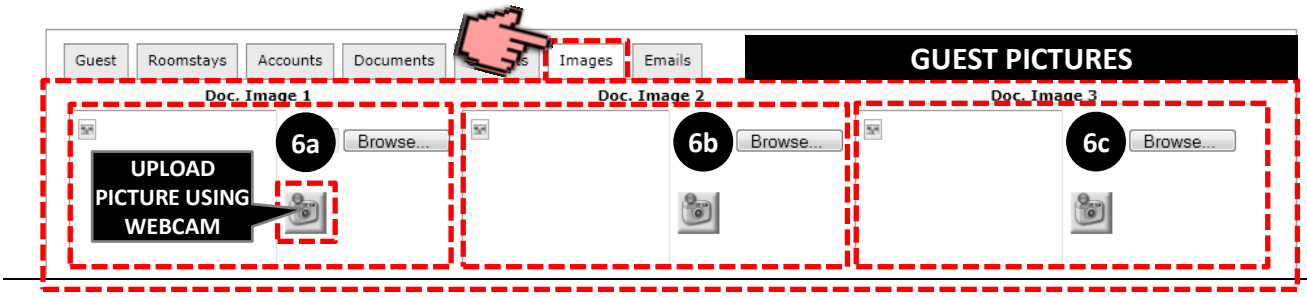


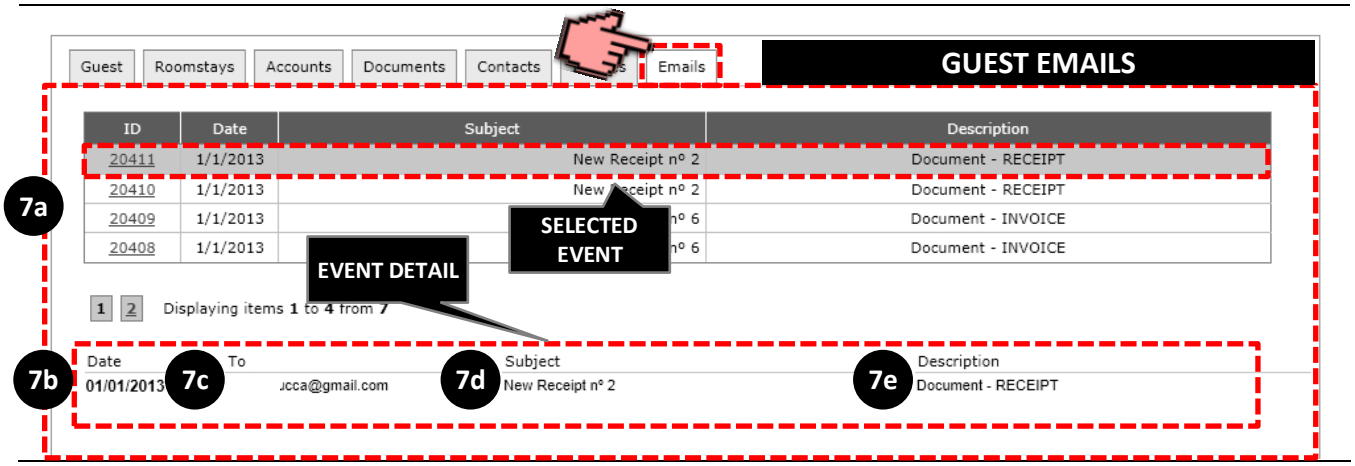

Roomstays
Accounts
Documents
Contacts
Images
Emails
GUEST ROOMSTAYS
R. | Date in | Date out | Nº of Nigh | Nº Adults | Nº Childs | Room Rate | Total amount | Agent name | Comments | Edit
2a
7/3/2012 | 7/6/2012 | 3 | 2 | 0 | Double Bed | 0.00 | ++ | 3581
NAVIGATE TO ROOMSTAY
2b
Guest associated roomstay
Associate guest to roomstay
Remove association between guest and roomstay
F5
F6


Guest
Accounts
Documents
Contacts
Images
Emails
GUEST ACCOUNTS
Folio | Debit | Credit | Amount | Tax Amount | Payer Name | Guest Account Name | Last change | Status
3a
210.00 | -210.00 | 0.00 | 24.15 | Daniel Zucca Aparicio | 1/1/2013 5:30:26 AM | OPEN
NAVIGATE TO FOLIO
NAVIGATE TO ACCOUNT DETAIL


Guest
Roomstays
Documents
Contacts
Images
Emails
GUEST DOCUMENTS
Doc. | Payer Name | Doc. type | Doc. id. | Status | Amount | D | C | T | Q | I
4a
Daniel Zucca Aparicio | Invoice | 6 | DUPLICATE | 210.00 | 210.00 | 0.00 | 24.15 | 3 | 3
Daniel Zucca Aparicio | Receipt | 2 | DUPLICATE | -210.00 | 0.00 | 210.00 | 0.00 | 1 | 1
NAVIGATE TO PDF DOCUMENT
NAVIGATE TO DOCUMENT DETAIL


Guest
Roomstays
Accounts
Contacts
Images
Emails
GUEST CONTACTS
5a
Telephone 2
5b
Fax
5c
City
Madrid
5d
State
5e
Zip code
28015
5f
Country
Spain
Address
5g
C/ Andres Mellado, 13, 5º D


Guest
Roomstays
Accounts
Documents
Images
Emails
GUEST PICTURES
Doc. Image 1
Doc. Image 2
Doc. Image 3
6a
6b
6c
Browse...
UPLOAD PICTURE USING WEBCAM



6.7.1 FIELDS

1) Guest

Required a. ***Name*** – the guest first name.

Required b. ***Last name*** – the guest last name.

Required c. ***Nationality*** – the guest nationality.

d. ***Email*** – the guest email.

e. ***Picture*** – the guest picture.
   i. The hotel can use the webcam to take the guest picture.

f. ***Telephone 1*** – the guest main telephone.

g. ***Doc. id.*** – the guest identification document.
   i. For example: a passport or a citizen card.

h. ***Issued date*** – the issued date of the guest identification document ("Doc. Id.").

i. ***Issued by*** – the issuer of the guest identification document.

j. ***Comments*** – comments about the guest.

Read Only k. ***Guest nº*** - the guest system id.

l. ***Tax number*** – the guest fiscal identification number.
   i. It's used in the accounting documents, namely the invoices and receipts.

m. ***Discount percentage*** – a discount percentage to apply to the guest bookings.
   i. This discount applies only when the guest books using his guest private website.
   ii. The guest must be authenticated to benefit from this discount.

n. ***Tax deduction %*** - a tax deduction to be applied to all account entries associated with the guest.

Read Only o. ***Type*** – the guest type.

Read Only p. ***Status*** – the guest system status.

2) Roomstays – shows all the room stays associated with the selected guest

a. ***Room stay list*** – the guest room stay list.

b. ***Guest associated roomstay*** – the roomstay ID to be associated with the guest.

i. This is used to associate the guest to a roomstay.

ii. After filling the roomstay ID the hotel must click the "Associate guest to roomstay" to update the database.

3) Accounts – shows all the accounts associated with the selected guest

a. ***Account list*** – the guest account list.

4) Documents – shows all the documents associated with the selected guest

a. ***Document list*** – the guest documents list.

5) Contacts – the address and contacts of the guest

a. ***Telephone 2*** – a secondary telephone or mobile to contact the guest.

b. ***Fax*** – the guest fax number.

c. ***City*** – the guest city address.

d. ***State*** – the guest state address.

e. ***Zip code*** – the guest zip or postal code address.

f. ***Country*** – the guest country address.

g. ***Address*** – the guest full address.

6) Images – shows additional pictures associated with the guest

a. ***Picture 1*** – a picture associated with the guest.

b. ***Picture 2*** – a picture associated with the guest.

c. ***Picture 3*** – a picture associated with the guest.

7) Emails

a. ***Events list*** – the guest event list.

i. This is a log or history of all the events related with the selected guest.

b. ***Date*** – the event date of the select event.

c. ***To*** – the target of the select event.

d. ***Subject*** – the subject of the select event.

e. ***Description*** – the description of the select event.

6.7.2 FUNCTIONS

1) **Insert guest** – create a new guest.

2) **Update guest** – saves the guest data.

3) **Delete guest** – deletes the guest if the guest is not associated with any other database object.

4) **Contact** – navigates to the guest contact popup.

5) **Associate guest to roomstay** – associate the selected roomstay to the guest.

6) **Remove association between guest and roomstay** – remove the association between the guest and the roomstay.

6.8 POINT OF SALE

This page allows the hotel to manage the guest account, charge products and services, receive payments or create documents, such as invoices or receipts. The page is organized accordingly to the following layout.

Figure 81 – Point of Sale Page Layout

The point of sale page is organized accordingly to the following areas or sections:

1) ***Selection Area*** - the selection area allows the hotel to select the roomstay account.
    a. 1º Selection - the selection is first filtered by roomstay state:
        i. **Bookings** – select roomstays that are booked but are not check-ins;
        ii. **Check-ins** – select roomstays that are in check-in state;
        iii. **Check-outs** – select roomstays that are in check-out state.
    b. 2º Selection – select the roomstay from the second drop box of the selection area.
        i. This drop box shows only the first 100 roomstay associated with open accounts.
        ii. To show more roomstays we recommend the hotel to close accounts and therefore reduce the number of roomstays shown.

2) ***Information Area*** - the information area shows the room and amount associated with the selected roomstay account.

3) ***Transaction Type Area*** - the transaction type area is where the hotel selects the type of transactions to execute, namely:
    a. Products – products or services provided by the hotel;
    b. Payments – payments received by the hotel;
    c. Credit note – credit notes issued by the hotel. The guest receives a credit from the hotel;
    d. Refund note – refund notes issued by the hotel. The hotel refunds the guest.

4) ***Items Area*** - the items area. This is the place where the hotel selects the products or payments that will be submitted to the guest account. The selected item will be added to the basket area.

5) ***Shopping Basket Area*** –The basket area is a temporary items storage.
    a. The hotel needs to click the button "Save" for the items in the basket area to be saved in the database. In this way the hotel can confirm the items to be submitted before they are saved in the database.

6) ***Account Area*** - the account area shows information and operations related with the selected account.

7) ***Submit Button*** - save the basket items in the database and update the selected account.

The picture below illustrates in more detail the layout of the point of sale or account page.

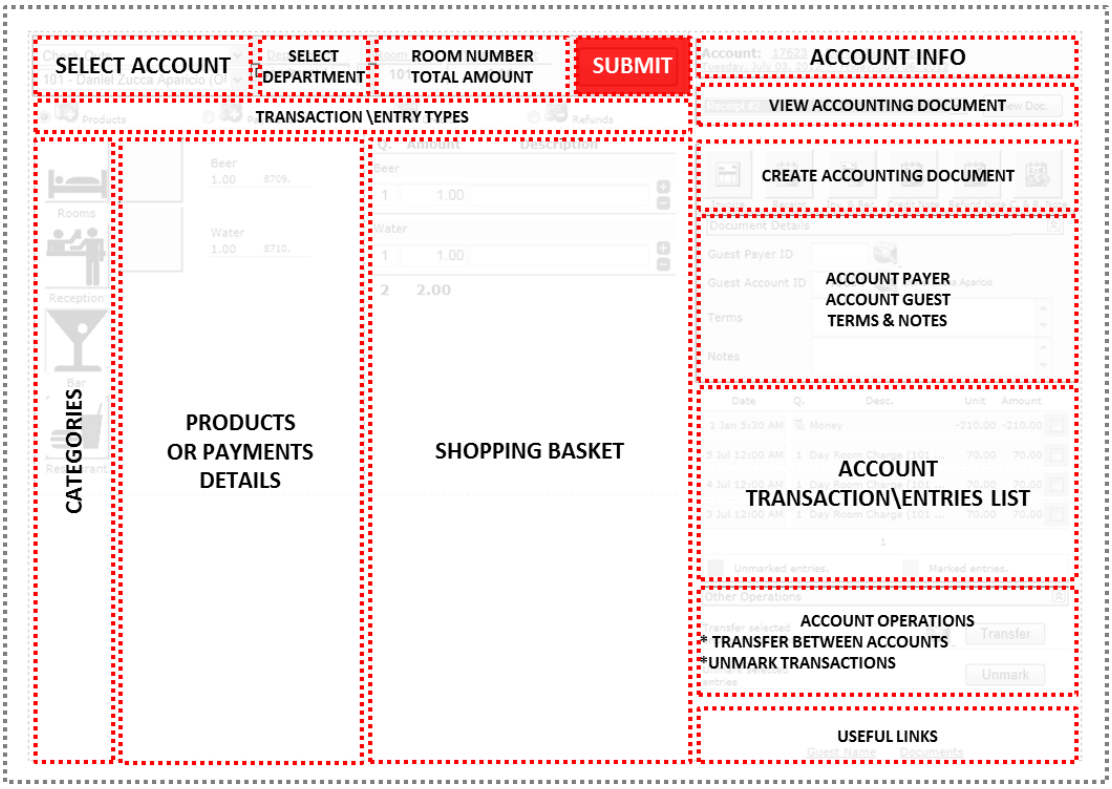


Figure 82 – Point of Sale Page Detailed Layout

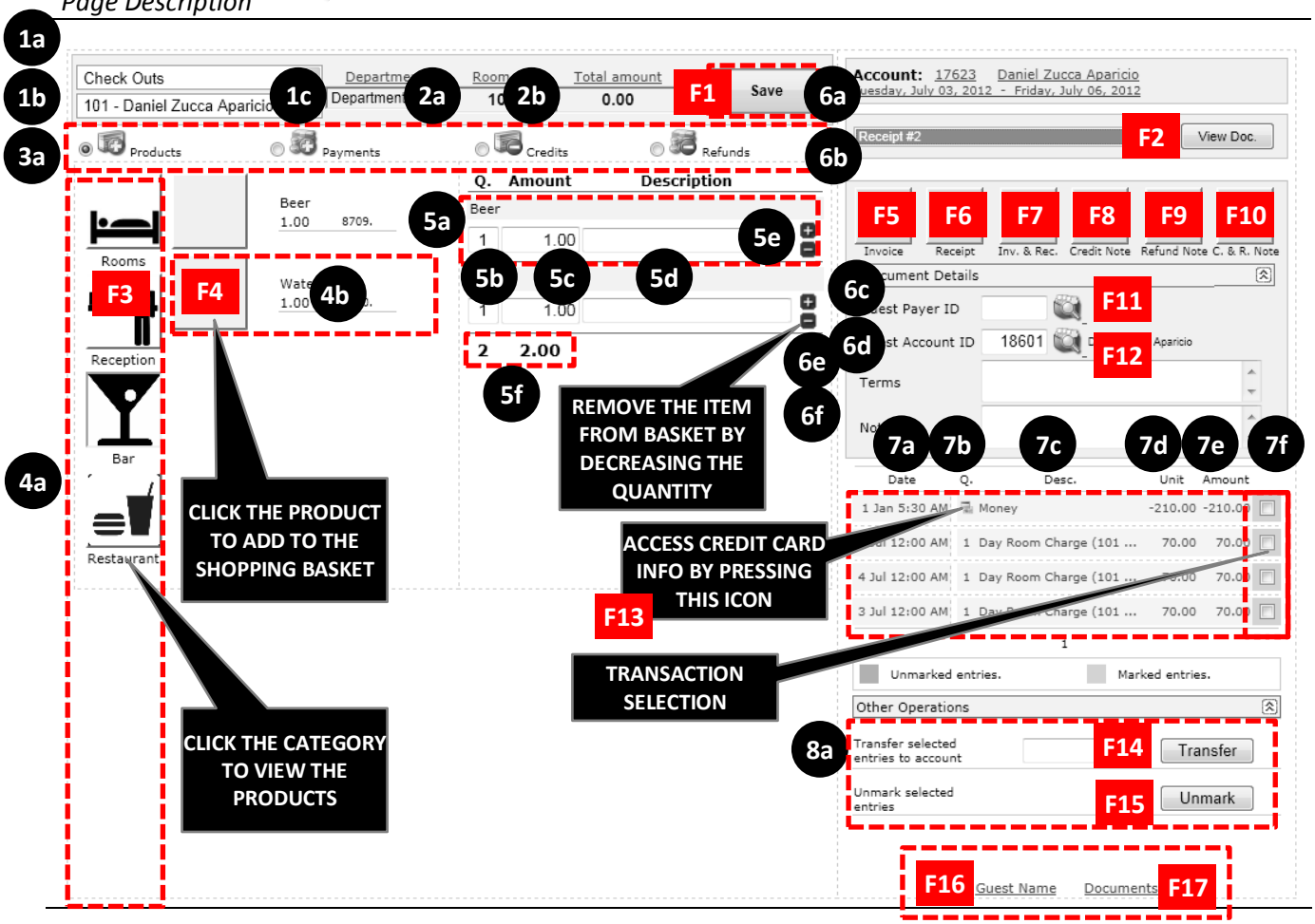
The basic steps for the hotel to charge a guest account are the following:

1) Select a roomstay account;
2) Select the transaction type;
3) Add items to the basket;
4) Review the basket;
   - The basket area allows the hotel to review the items before they are submitted to the guest account.
   - To remove a basket item the hotel must decrease the quantity to zero by using the minus icon.
5) Submit the basket items to the guest account.
   - The hotel must click in the button “Save” for the basket items to be saved in the database.

The hotel should read the HOW TO USE THE POINT OF SALE chapter for additional information in how to charge products to the guest account.

Page Location

Page Description



6.8.1 FIELDS

1) Selection Area

Required a. ***Roomstay types*** – select the roomstay types.

- i. "Bookings" – select roomstays that are booked but are not checked in.
- ii. "Check ins" – select roomstays that are in check-in state.
- iii. "Check outs" – select roomstays that are in check-out state.

Required b. ***Roomstays*** – the selected roomstay.

- i. This field depends on the selection of the "Roomstay types".
- ii. The system shows only the first 100 roomstays associated with open accounts.
  1. If the hotel needs to access more than 100 active roomstays we recommend closing the accounts that are not needed.

Required c. ***Department*** – select the department to be associated with the account entries.

i. Read SET DEPARTMENTS chapter for more information.

2) Information Area

Read Only a. ***Room*** – the room associated with the selected roomstay.

Read Only b. ***Total amount*** – the total amount associated with the selected account.

i. This is the account associated with the selected roomstay.

3) Transaction types to be submitted

Required a. ***Transaction types*** – select the type of transactions that will be submitted to the account.

i. ***Products*** – submit products or services.
ii. ***Payments*** – submit payments.
iii. ***Credits*** – submit credits of products or services.
iv. ***Debits*** – submits refunds of payments.

4) Items Area

Read Only a. ***Categories*** – select the item category. Read SET PRODUCT CATEGORIES for more information.

Read Only b. ***Item*** – select the product or payment. Read SET PRODUCTS AND SERVICES for more information.

i. ***Picture*** – the picture associated with the item.
   1. The hotel needs to click the picture to add a product or payment to the shopping basket temporary storage.
   2. The items are only saved in the database when the hotel clicks in "Save".
ii. ***Description*** – the description associated with the item.
iii. ***Value*** – the item amount.
   1. This is applicable only to products or services.
   2. The payments have this field always equal to 1.
iv. ***Product ID*** – the product or payment identifier.
v. ***Notes*** – notes about the item.

5) Shopping Basket Area – the temporary storage that contains the selected items. The items are saved in the database after clicking the "Save" button.

Required a. ***Item name*** – the name of the basket item.

i. The item can be a product or a payment.

Required b. ***Q***. – the quantity of the item.

i. This is applicable only to products or services.
ii. The payments have this field equal to 1.

Required c. ***Amount*** – the unit price or value of the item.

d. ***Description*** – the hotel can override the "Item name" by writing a new description for the item.

i. This is the description that will be used in the accounting documents.

e. ***(+) add or (-) remove quantity*** -Increase or remove the item quantity.
   i. If the quantity is zero the item will be removed from the basket list.

Read Only f. ***Totals*** – the total number of items and total quantity of items in the basket.

6) Account Area

Read Only a. ***Basic info*** – basic information about the selected roomstay account.

Read Only b. ***Documents*** – the documents associated with the account.
   i. Select the document and click the "View Doc." button to view the document.

c. ***Guest payer ID*** – the guest payer associated with the selected account.

d. ***Guest account ID*** – the booking guest associated with the selected account.

e. ***Terms*** – the document terms to be used when the hotel creates a new document.

f. ***Notes*** – the document notes to be used when the hotel creates a new document.

7) Account transactions\entries Area

Read Only a. ***Date*** – the date of the account entry.

Read Only b. ***Q***. – the item quantity of the entry.

Read Only c. ***Desc.*** – the description of the entry.

Read Only d. ***Unit*** – the unit amount.

Read Only e. ***Amount*** – the total amount.

Read Only f. ***Flag and a Selection check box***
   i. The color of the box indicates the transaction accounting flag status. The entry can be marked or unmarked if the entry is used in an accounting document or not. This flag avoids the same transaction to be used in two different invoices.
      - Unmarked entries – the check boxes are painted with red color.
        a. These entriers will be used in the next invoice or receipt.
      - Marked entries – the check boxes are painted with green color.
        a. These entries are already associated with invoices or receipts and cannot be used in new documents unless the hotel unmarks the entries with the "Unmark" button or cancels the corresponding documents.
        b. To use the unmark button the hotel must previously select the entries using the "**Selection check box**" and then click the button "Unmark".

ii. The check boxes are used to select the transactions to be unmarked or to be transferred to another account.

8) **Other operations**
   a. ***Transfer selected entries to account*** – the account id that will receive the selected transactions.

6.8.2 FUNCTIONS

1) **Save** – saves the basket items in the database and update the account.

2) **View Doc.** – view the selected document.
   a. The hotel must select a document from the documents drop box.

3) **Category** – select the active category and show all the products associated.

4) **Product** – add an item to the shopping basket.
   a. It can be a product or a payment.

5) **New invoice** – creates and previews a draft invoice document.

6) **Receipt** – creates and previews a draft receipt document.

7) **Inv. & Rec.** – creates and previews a draft invoice\receipt document.

8) **Credit note** – creates and previews a draft credit note document.

9) **Refund note** – creates and previews a draft refund note document.

10) **C. & R. note** – creates and previews a draft credit\refund document.

11) **Payer selection** – selects a new guest payer to be associated with a new document.
   a. It's used only when creating a new document.

12) **Guest selection** – selects a new guest to be associated with a new document.
   a. It's used only when creating a new document.

13) **Credit Card info** – show the credit card info associated with the transaction.

14) **Transfer** – transfer the selected transactions to another account.

15) **Unmark** – unmarks the selected transactions and make them available to be used again in accounting documents.
   a. This function should be used with care because it can create situations where the same transaction is present in two or more accounting documents.

16) **Guest name** – navigates to the guest detail.

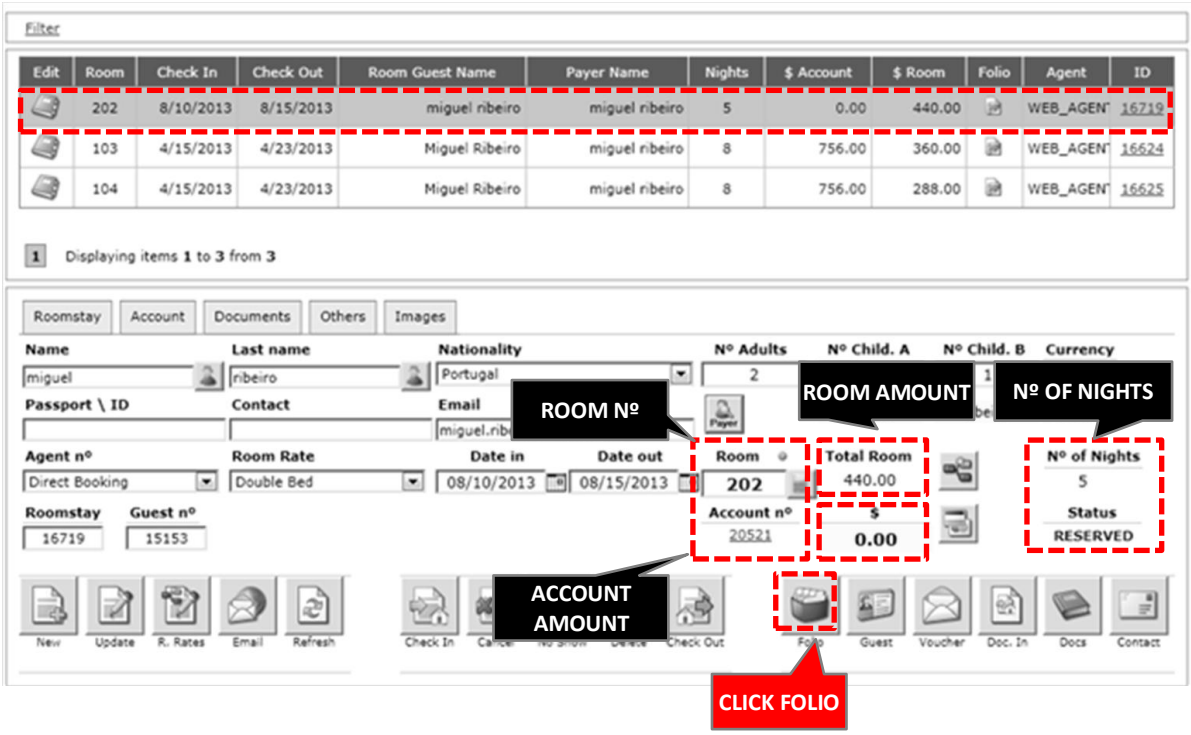
17) **Documents** – navigates to the documents detail associated with the account.

6.8.3 HOW TO USE THE POINT OF SALE

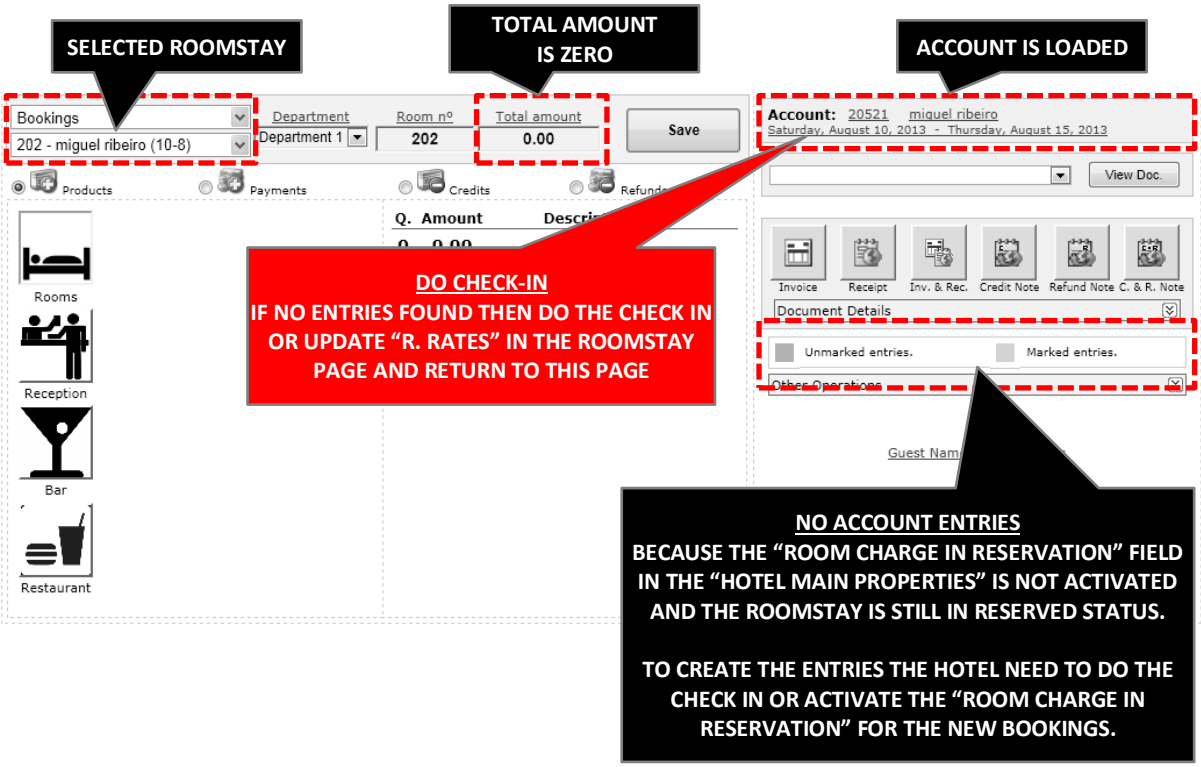
The following steps exemplify the main functionalities of the point of sale or account page.

Figure 83 – Account Page: How to Use Examples

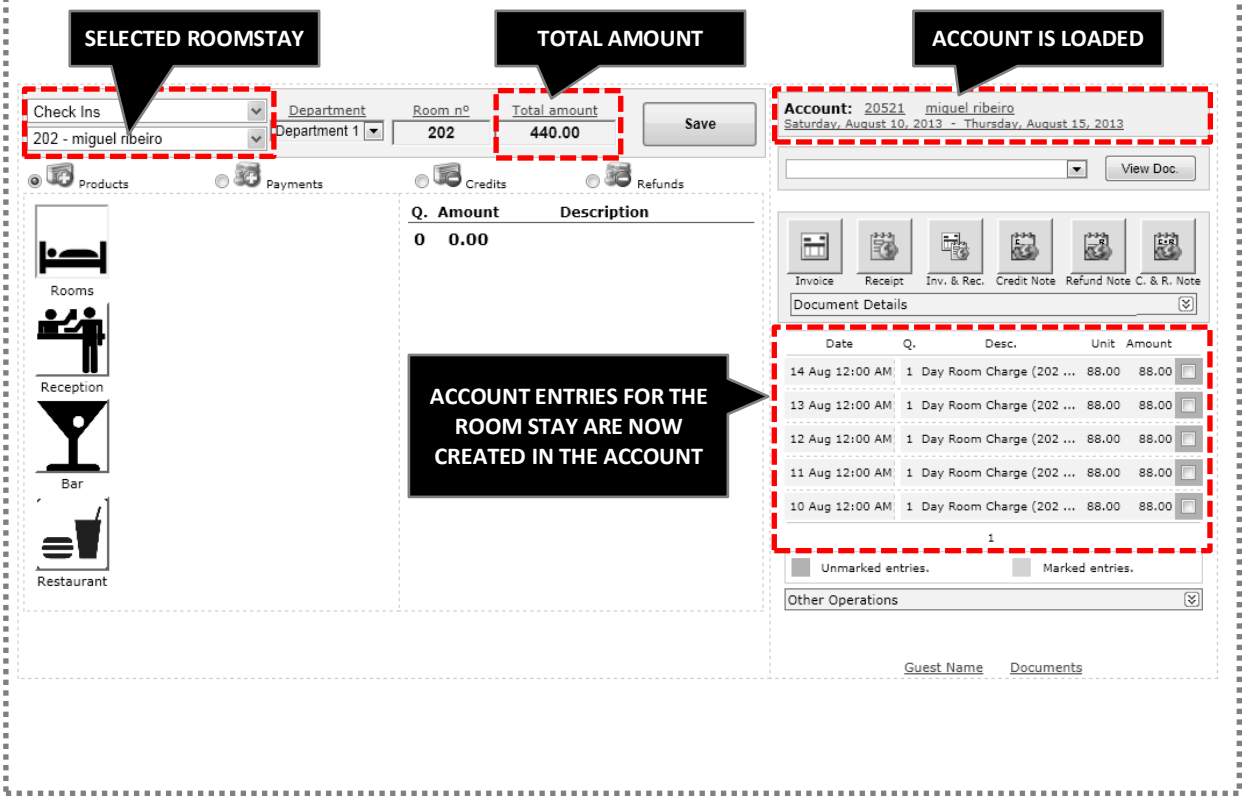
STEP 1 CREATE A NEW BOOKING



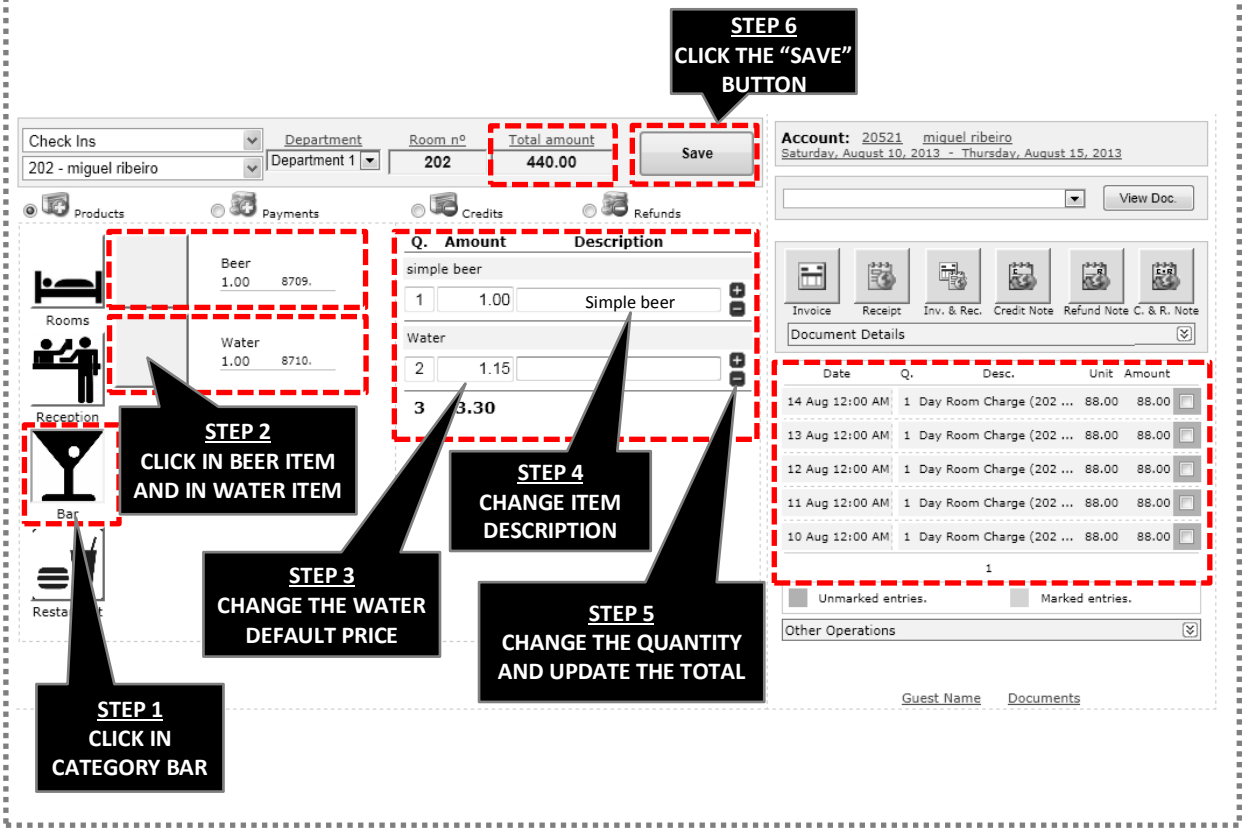
STEP 2 VIEW ROOMSTAY ACCOUNT – NO CHECK-IN



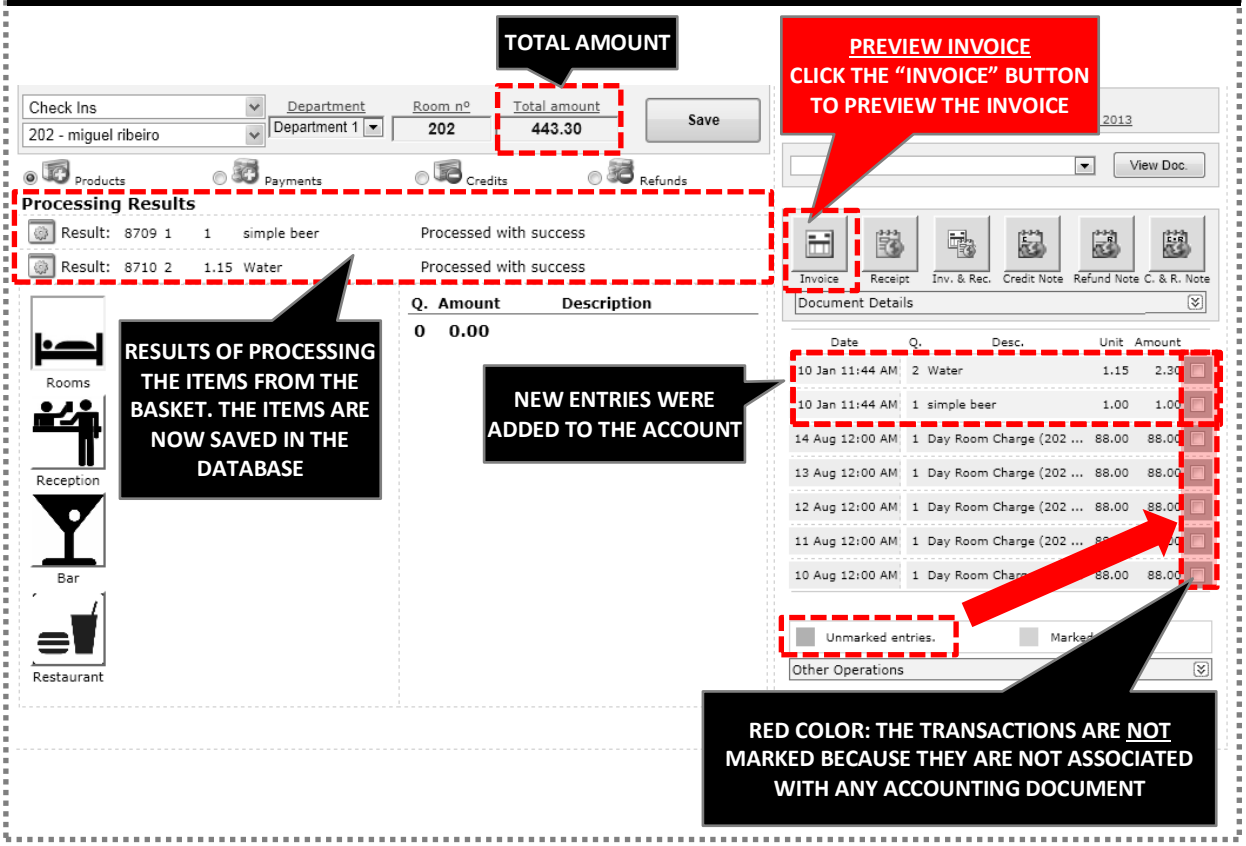
STEP 3 VIEW ROOMSTAY ACCOUNT – WITH CHECK-IN



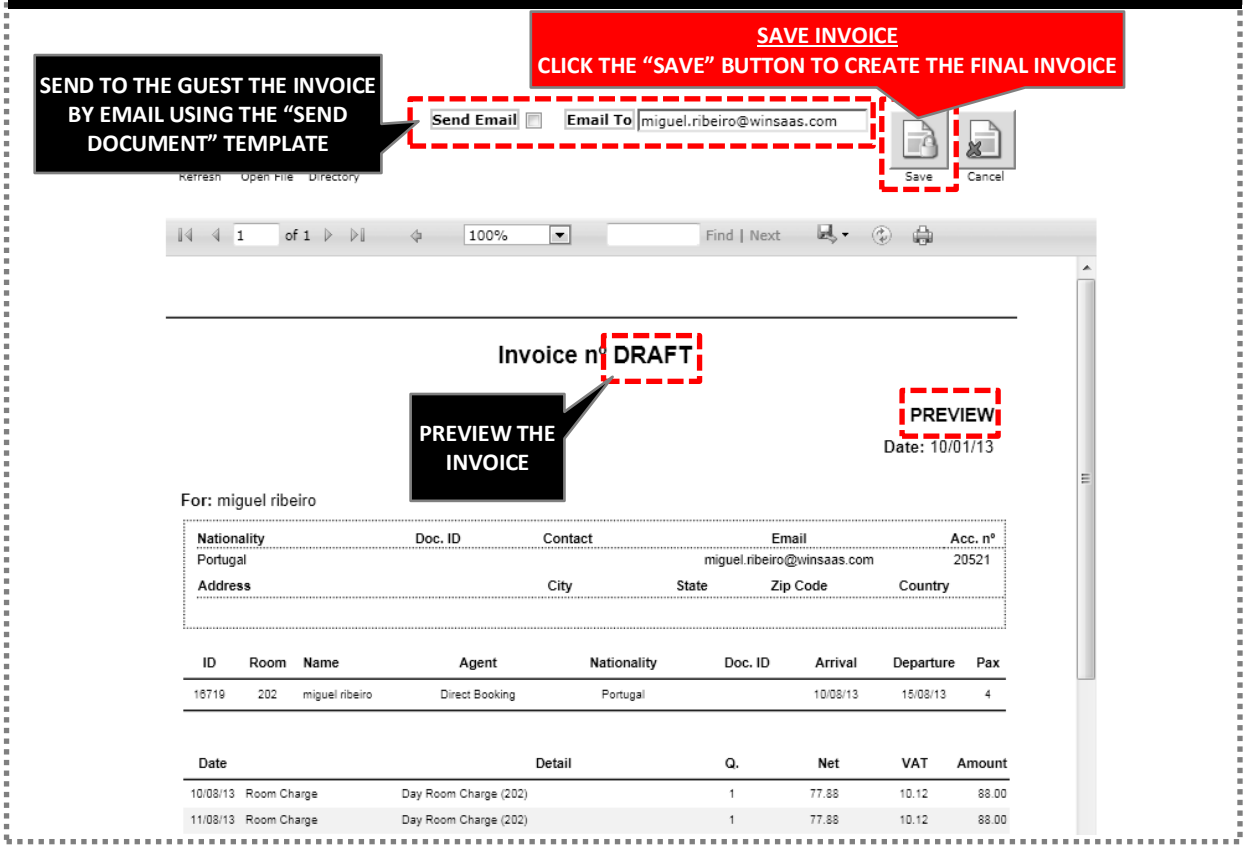
STEP 4 ADD ITEMS TO THE SHOPPING BASKET



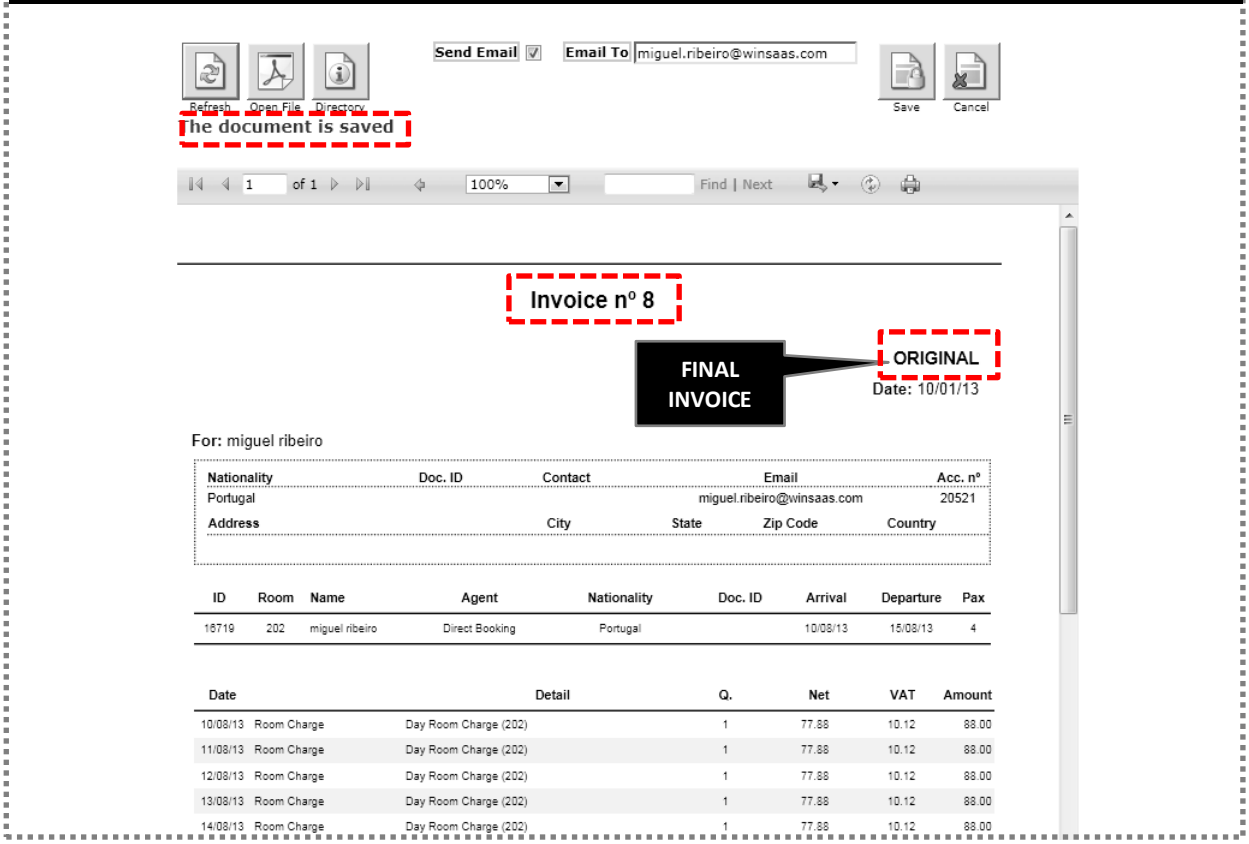
STEP 5 SAVES ITEMS IN THE ACCOUNT



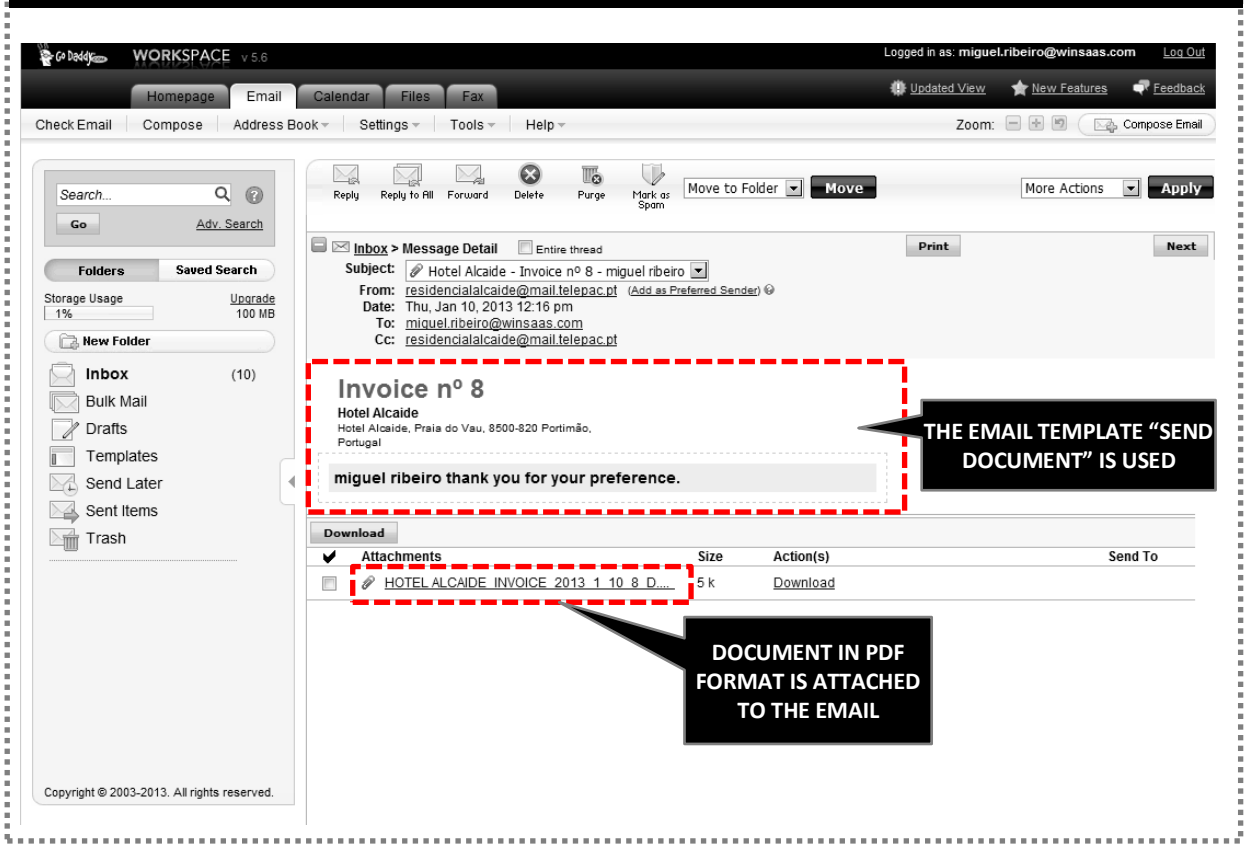
STEP 6 PREVIEW THE INVOICE



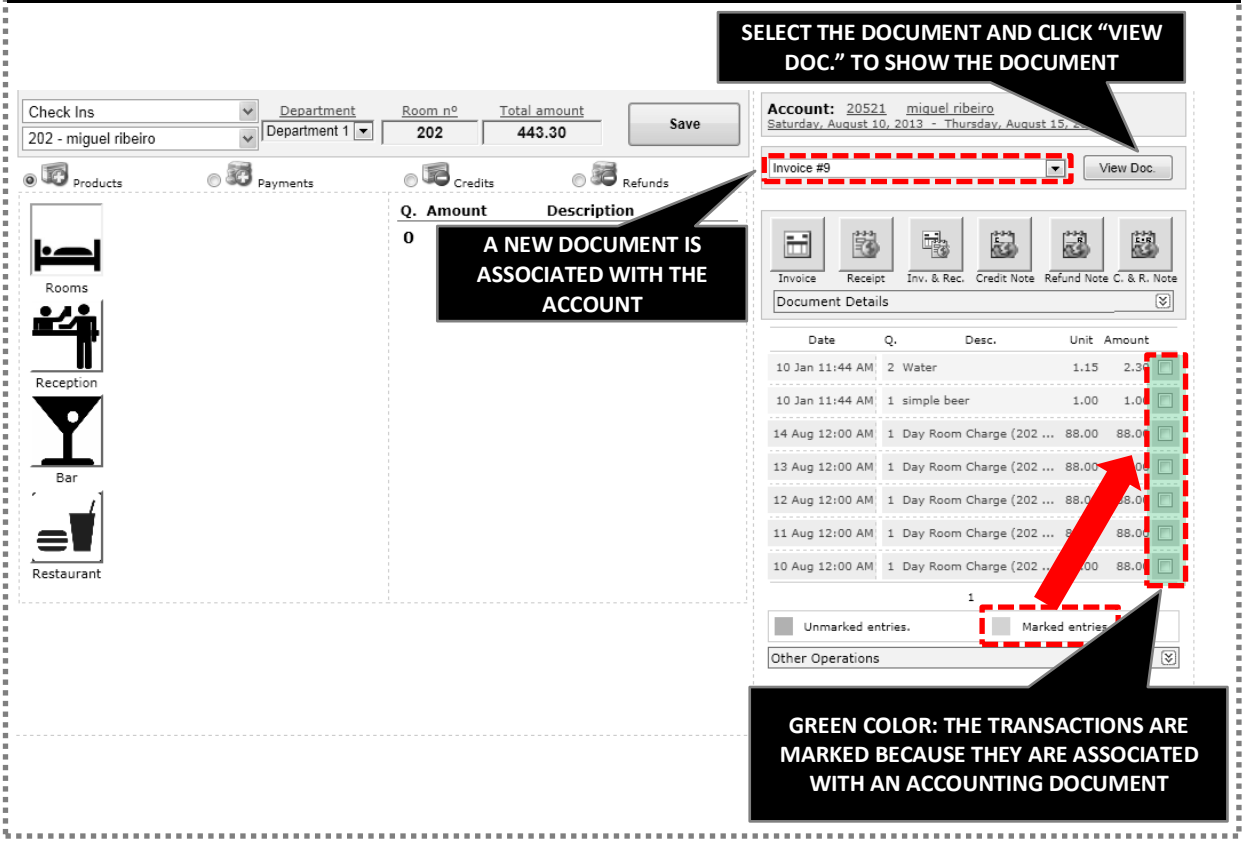
STEP 7 FINALIZE THE INVOICE



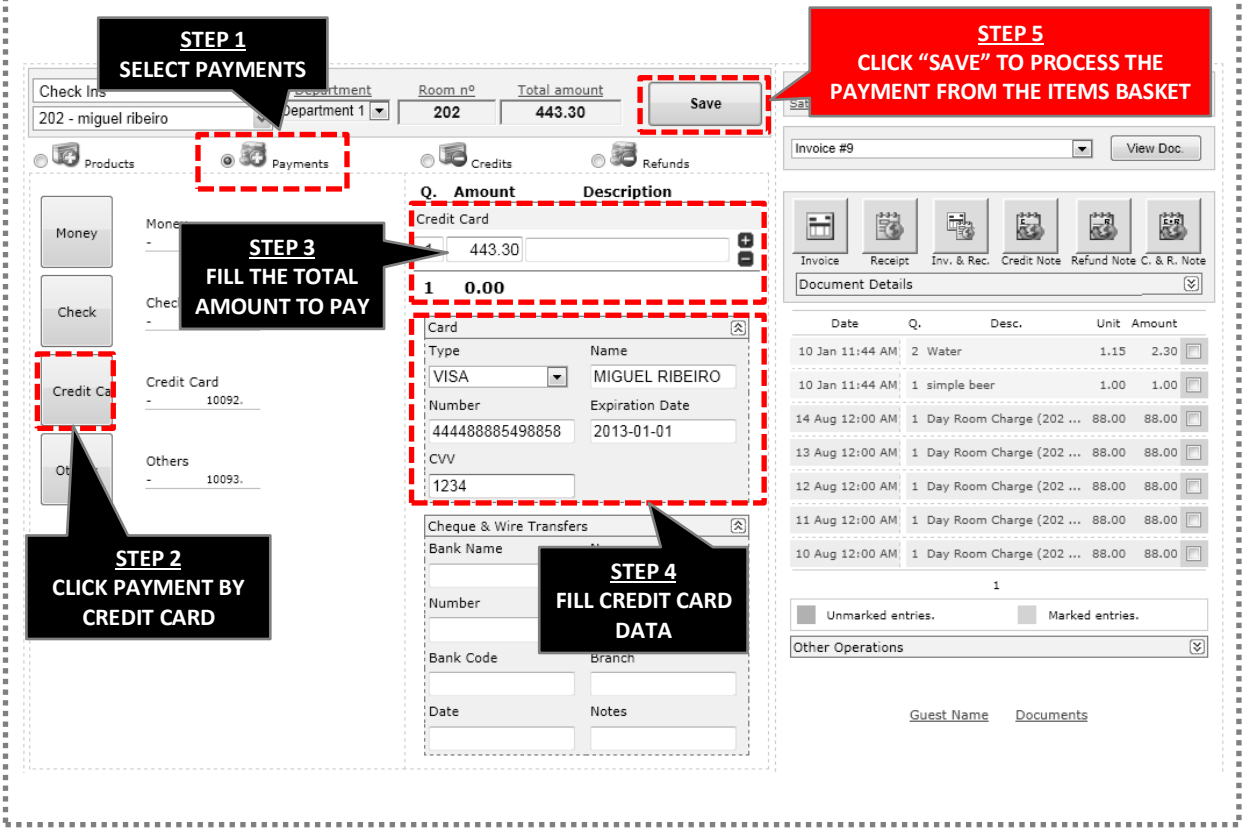
STEP 8 GUESTS CONFIRMS THE INVOICE IN HIS EMAIL



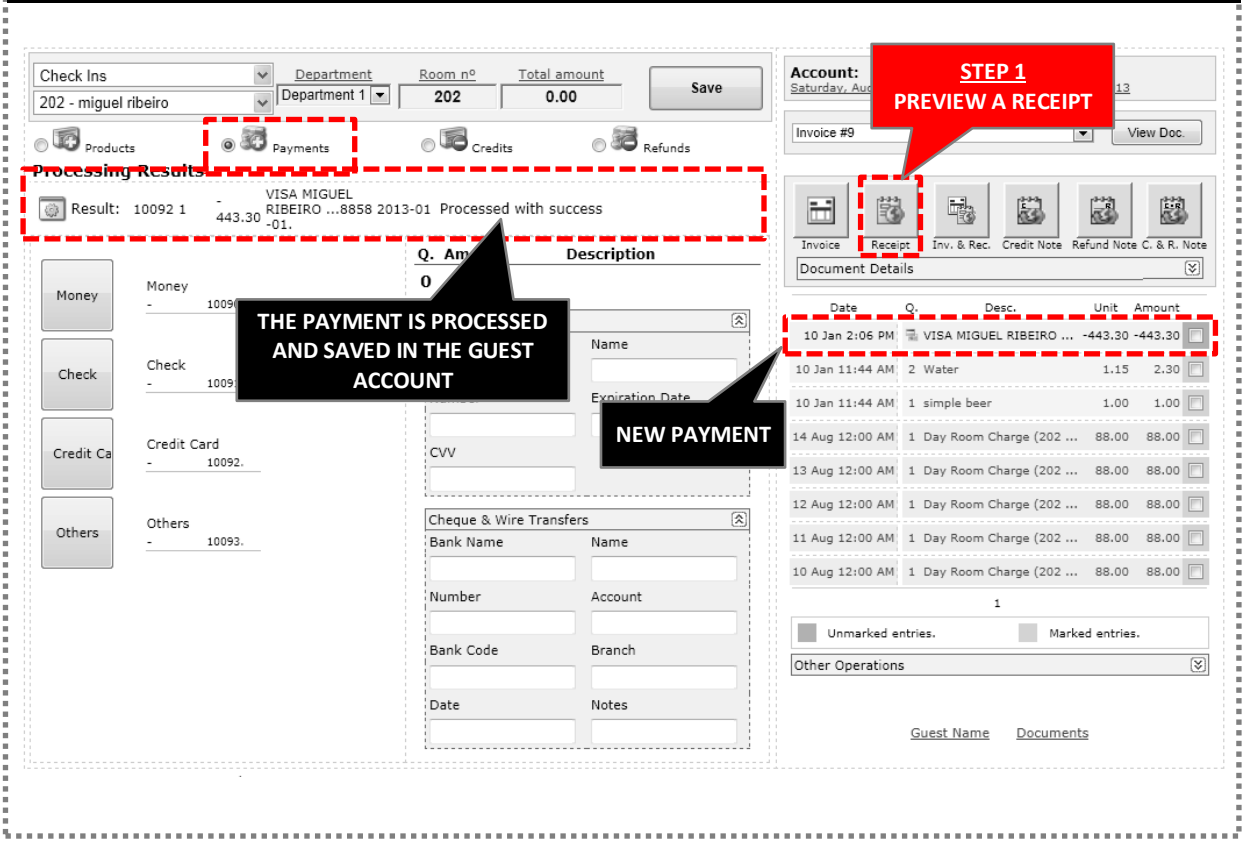
STEP 9 VIEW ROOMSTAY ACCOUNT – BEFORE PAYMENT



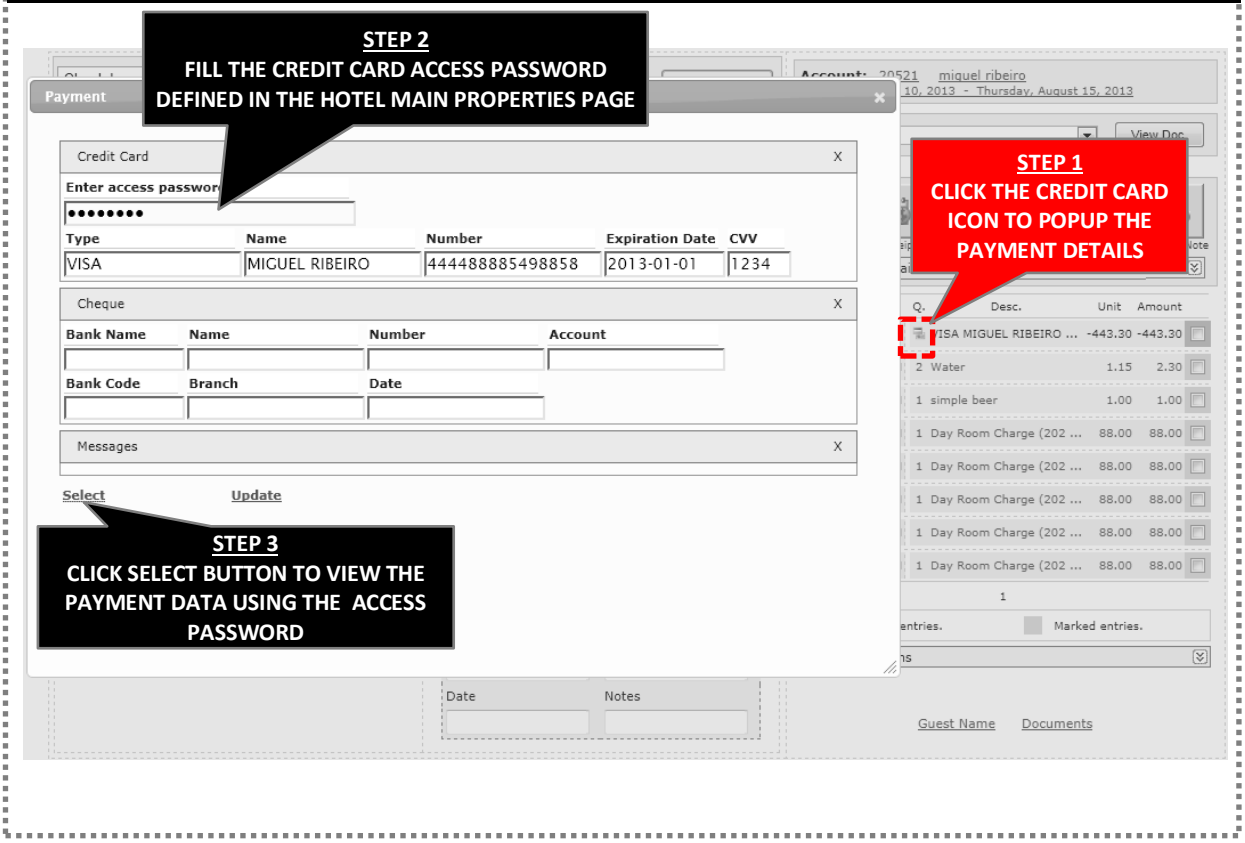
STEP 10 MAKE A PAYMENT



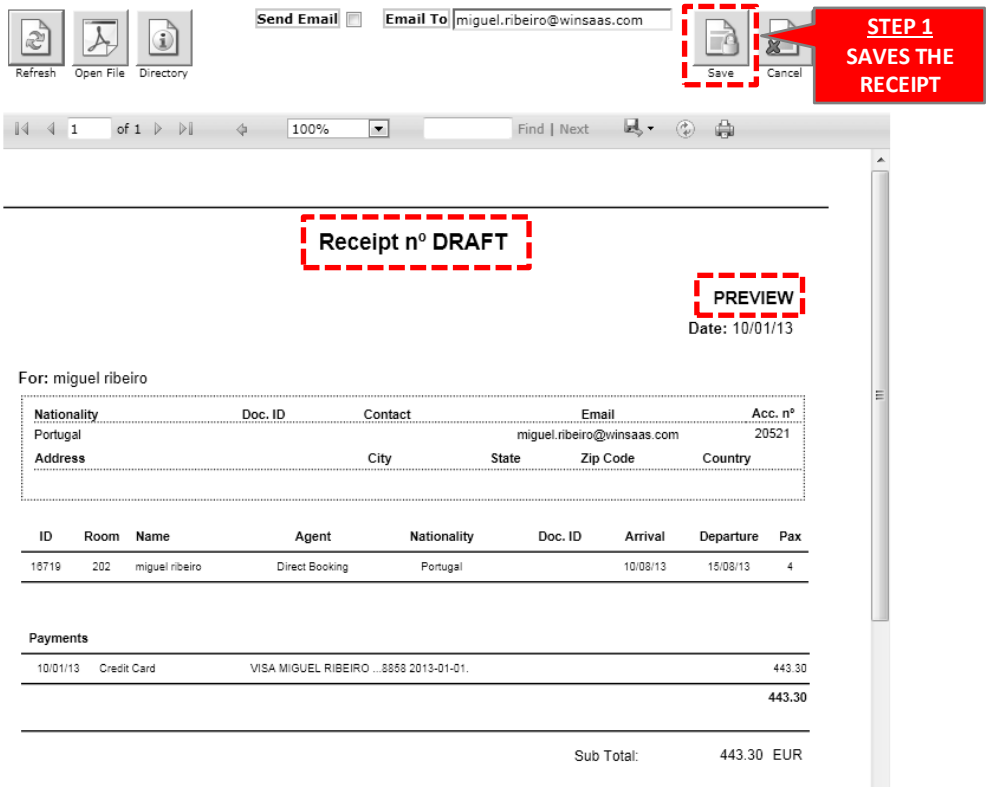
STEP 11 PREVIEW A RECEIPT



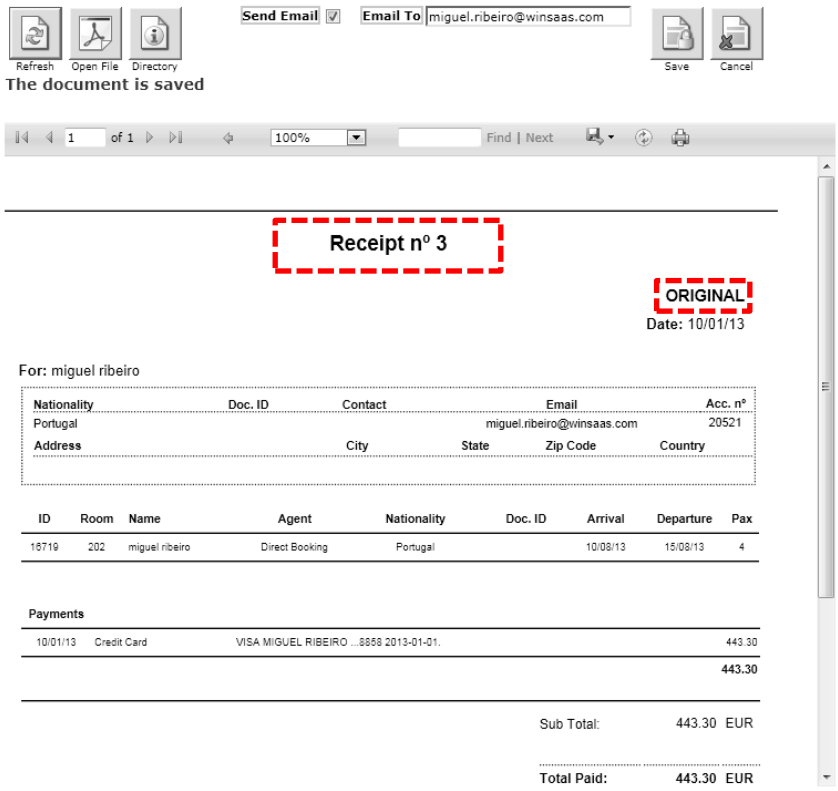
STEP 12 VIEW PAYMENT DETAILS



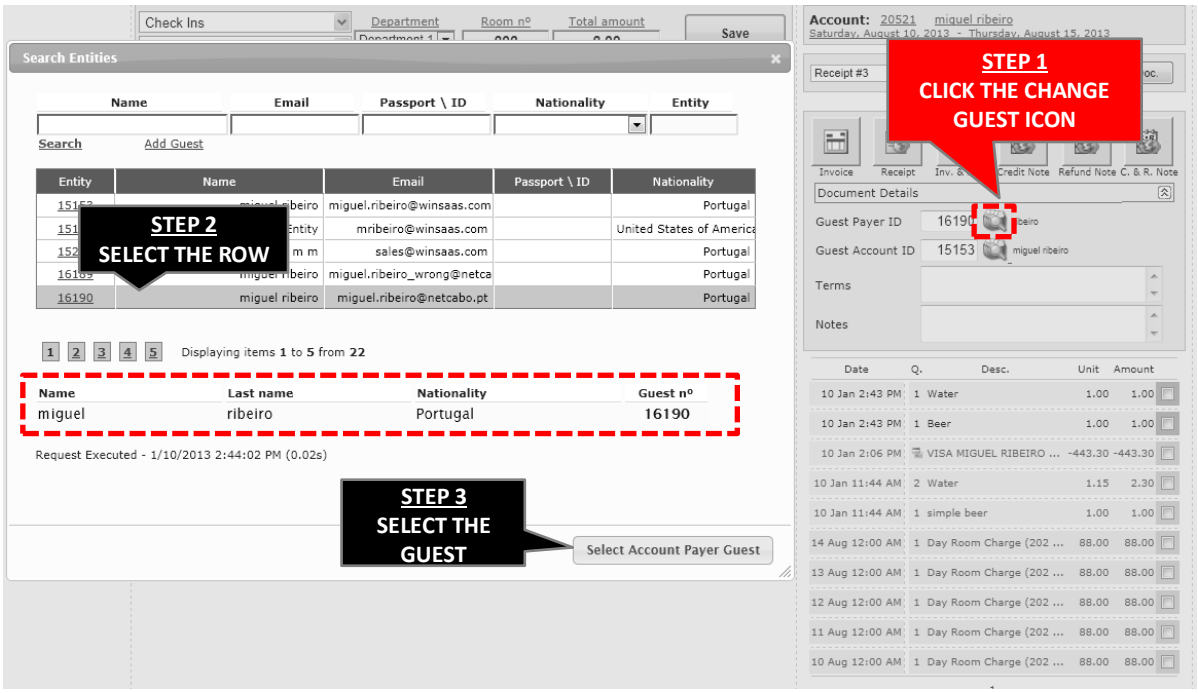
STEP 13 RECEIPT PREVIEW



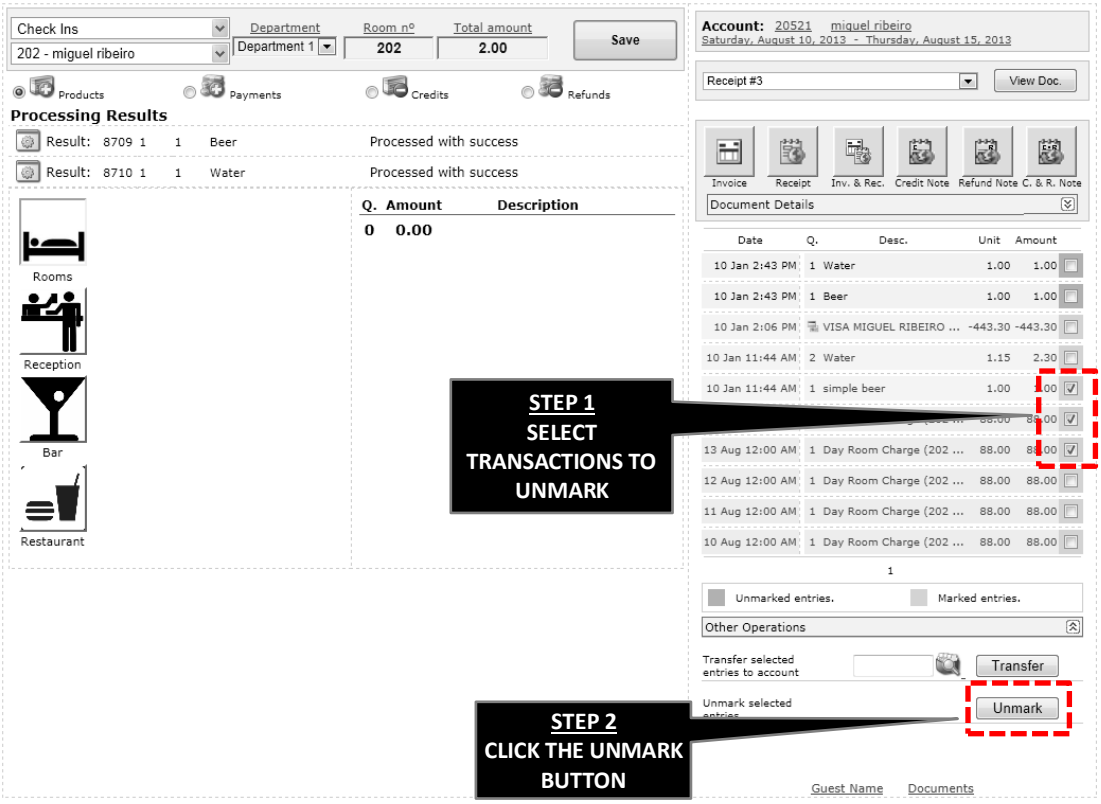
STEP 14 FINAL RECEIPT



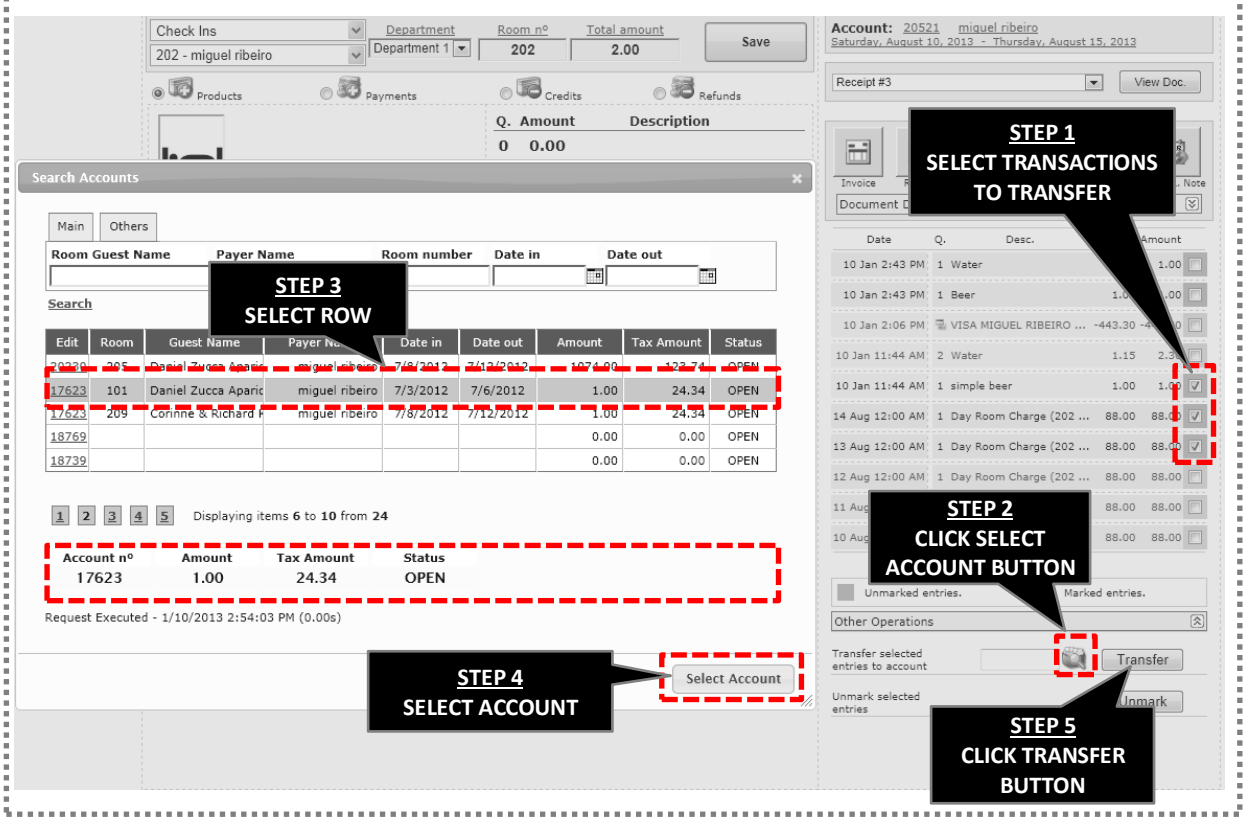
STEP 15 CHANGE THE PAYER



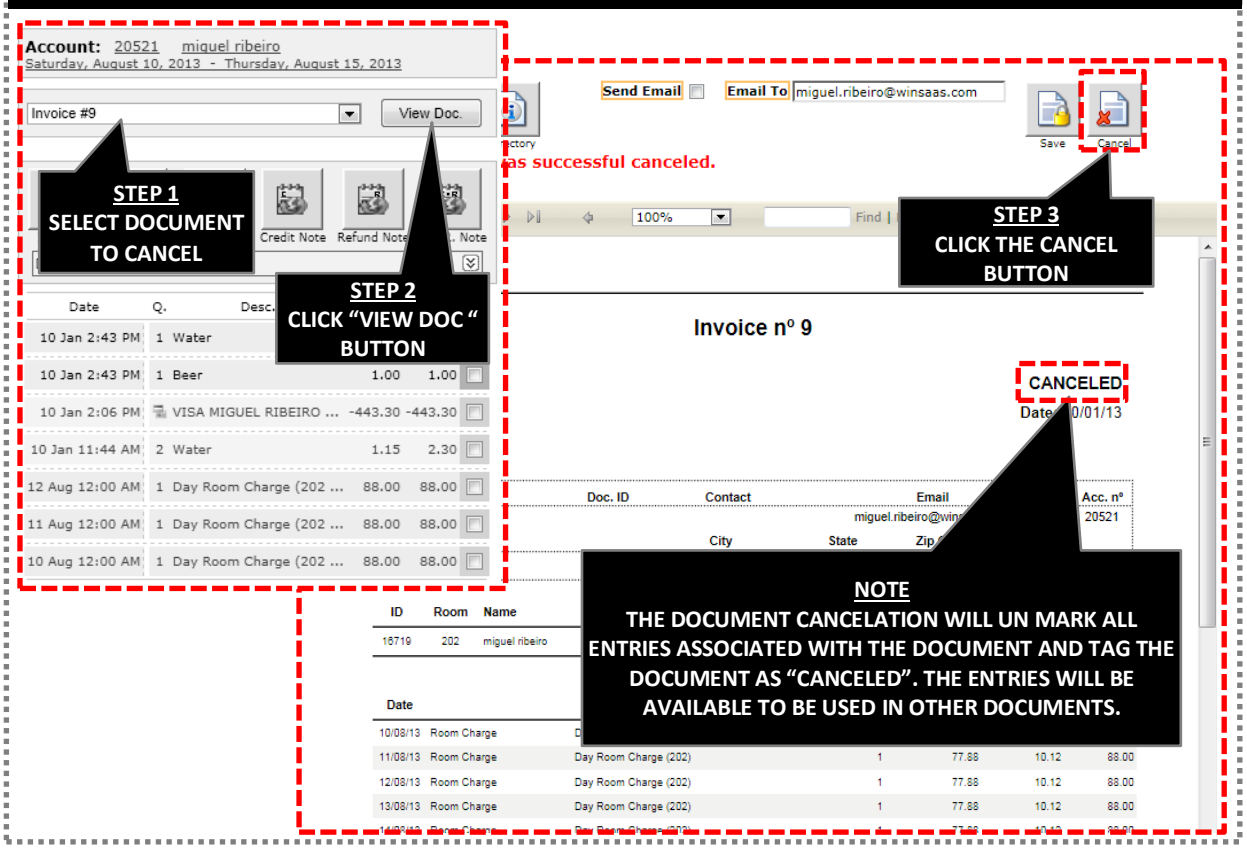
STEP 16 UNMARK TRANSACTIONS



STEP 17 TRANSFER TRANSACTIONS TO ANOTHER ACCOUNT



STEP 18 CANCEL A DOCUMENT

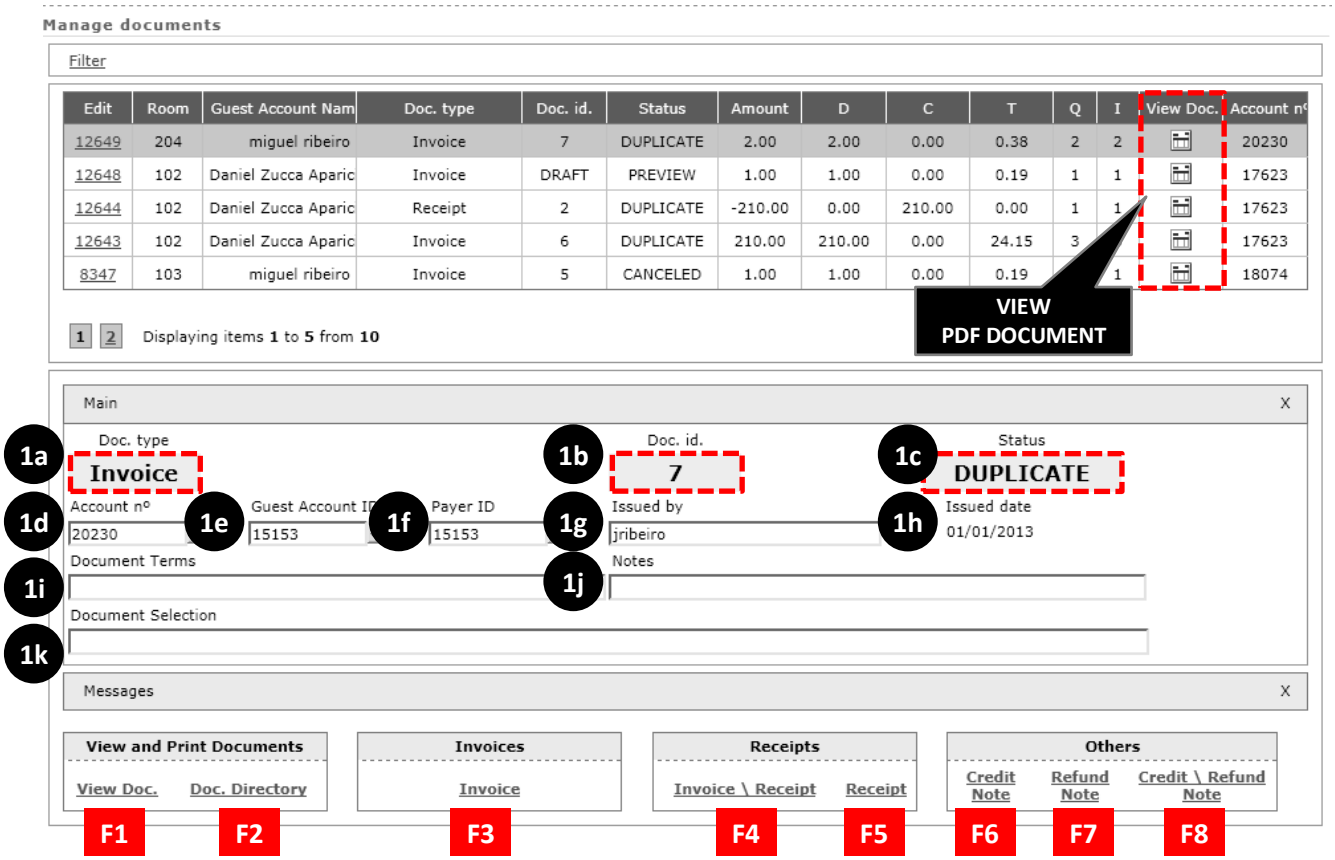


6.9 ACCOUNTING DOCUMENTS

This page allows the hotel to view and manage the accounting documents created in the POINT OF SALE page. The hotel should use the POINT OF SALE to create and view documents and the SET DOCUMENTS page to configure the document types.

Page Location

Page Description



6.9.1 FIELDS

1) Main

Required a. ***Doc. type*** – the document type.

i. Read the chapter the SET DOCUMENTS chapter for more information.

Required b. ***Doc. id*** - the accounting sequential ID assigned to the documents.

i. This is the number used by the accounting department.

Required c. ***Status*** – the status of the document.
   i. A code that is used to distinguish between the first and following copies of the document. Read the chapter the SET DOCUMENTS chapter for more information.

Required d. ***Account nº*** - the account associated with the document.

Required e. ***Guest account ID*** – the guest associated with the account.

Required f. ***Payer ID*** – the customer who pays the invoices.
   i. It can be different from the "guest account id".

g. ***Issued by*** – the user that issued the document.

h. ***Issued date*** – the creation date of the document.

i. ***Document terms*** – the terms of the document.
   i. Read the SET DOCUMENTS chapter for determining the positioning of this field in the document.

j. ***Notes*** – the notes of the documents.
   i. Read the SET DOCUMENTS chapter for determining the positioning of this field in the document.

k. ***Document selection*** – The manual selection of account transactions to be included in the document.
   i. The account entries system ID should be separated by a semi colon.
   ii. For example selecting 4 entries could be "1080006;1080007;1080008;1080009".

6.9.2 FUNCTIONS

1) **View Doc.** – view the PDF file of the selected document.

2) **Doc. Directory** – navigate to the PDF file directory.

3) **Invoice** – preview an invoice document.

4) **Invoice \ Receipt** – preview an invoice and receipt document.

5) **Receipt** – preview a receipt document.

6) **Credit Note** – preview a credit note document.

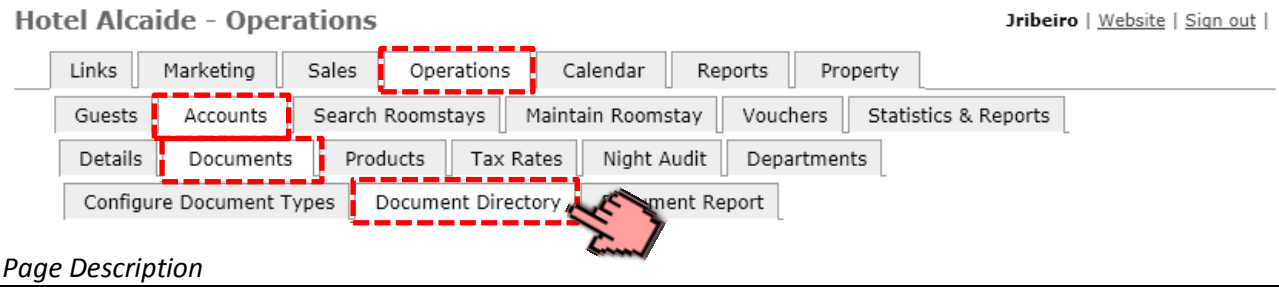
7) **Refund Note** – preview a refund note document.

8) **Credit \ Refund Note** – preview a credit and refund note document.

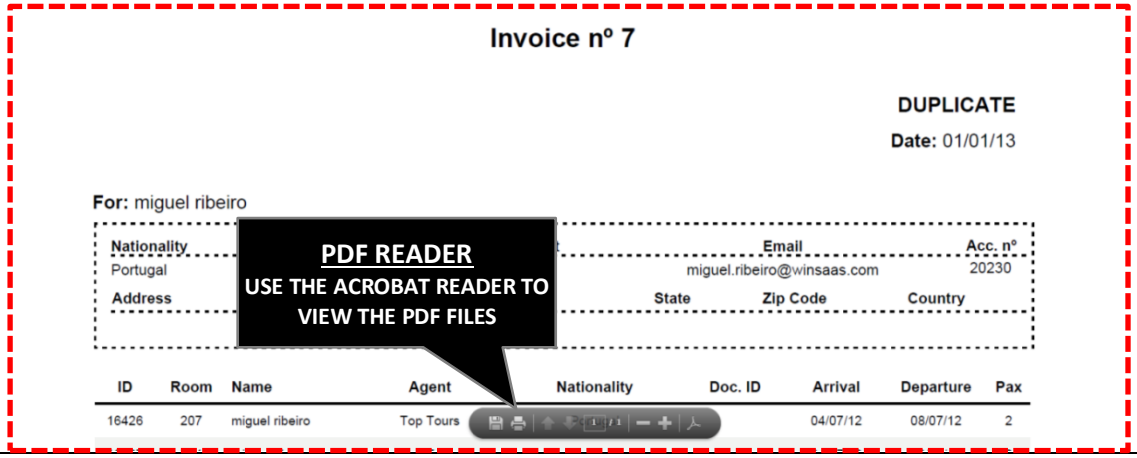
6.10 ACCOUNTING PDF REPOSITORY

This page is a file repository of the accounting documents and shows all the saved accounting documents in PDF format. The PDF document repository is sorted by issued date in descending order.

Page Location



Page Description



6.10.1 FIELDS

1) Main

Read Only a. ***Date*** – the date of the file creation.

Read Only b. ***File*** – a link to the pdf file.

6.10.2 FUNCTIONS

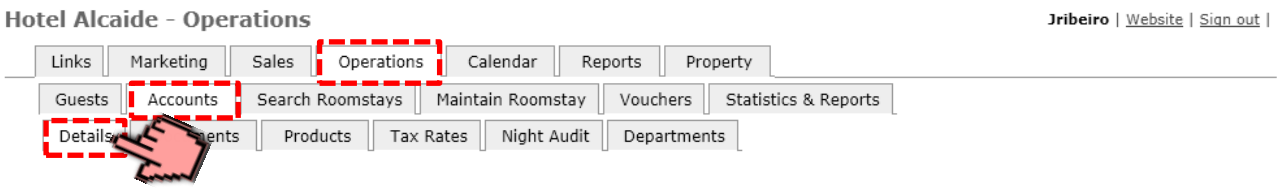
1) File – click in the link to download the pdf file.

6.11 ACCOUNT MANAGEMENT

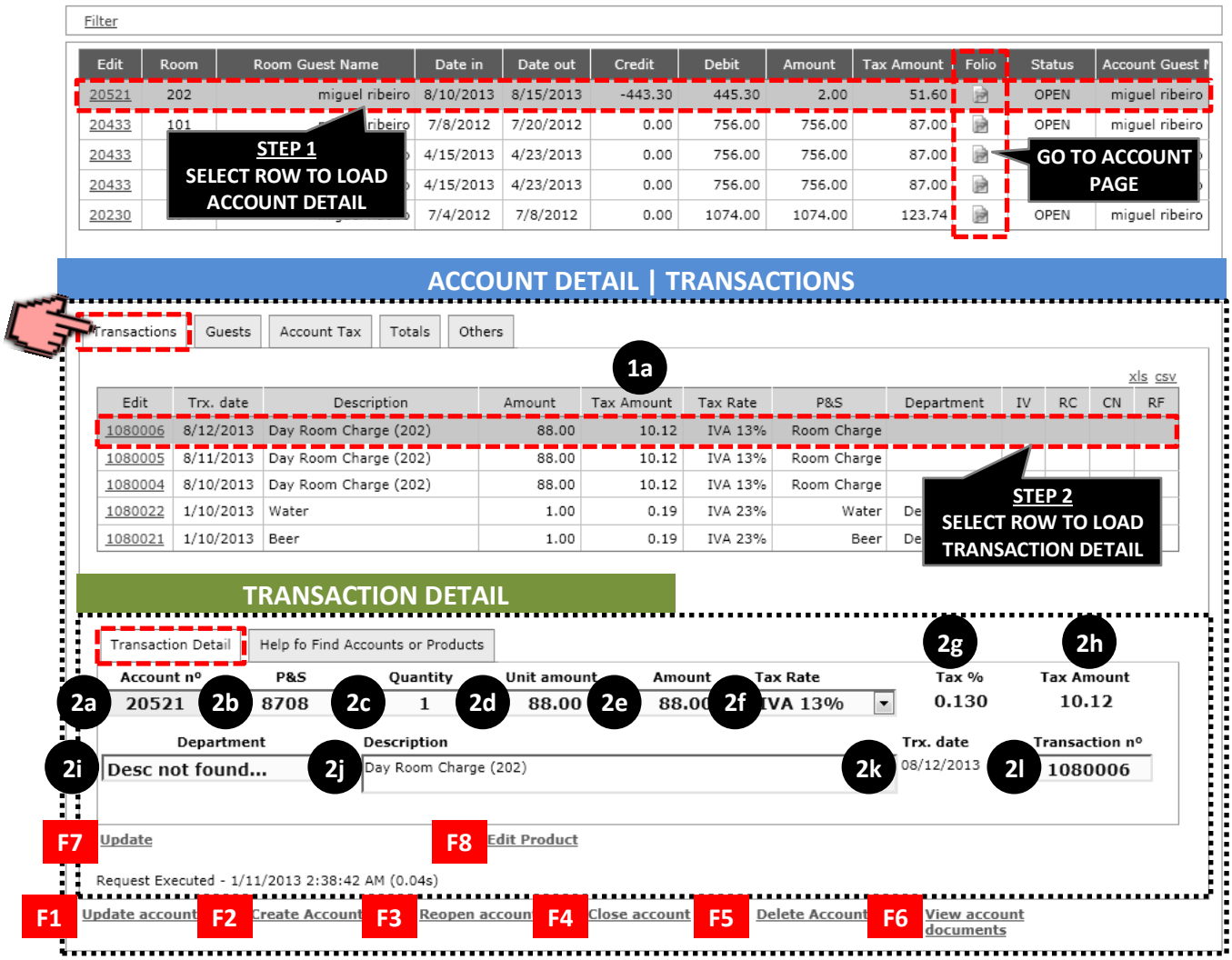
This page allows the hotel to view and manage the accounts. The transactions are created by using the POINT OF SALE page.

The hotel can use this page to create, update, delete, close and reopen accounts. The hotel can manually add transactions (also called account entries) to an account and also manually update the transaction data.

Page Location



Page Description



ACCOUNT DETAIL | TRANSACTIONS

Transactions | Guests | Account Tax | Totals | Others

xls csv

Edit	Trx. date	Description	Amount	Tax Amount	Tax Rate	P&S	Department	IV	RC	CN	RF
1080006	8/12/2013	Day Room Charge (202)	88.00	10.12	IVA 13%	Room Charge					
1080005	8/11/2013	Day Room Charge (202)	88.00	10.12	IVA 13%	Room Charge					
1080004	8/10/2013	Day Room Charge (202)	88.00	10.12	IVA 13%	Room Charge					
1080022	1/10/2013	Water	1.00	0.19	IVA 23%	Water	Department 1				
1080021	1/10/2013	Beer	1.00	0.19	IVA 23%	Beer	Department 1				

TRANSACTION DETAIL

Transactions | Help fo Find Accounts or Products

3a Room number | 3b Guest Name | 3c Product Name

Update | Edit Product

Request Executed - 1/11/2013 2:58:39 AM (0.03s)

ACCOUNT DETAIL | CUSTOMERS

Edit	Room	Room Guest Name	Date in	Date out	Credit	Debit	Amount	Tax Amount	Folio	Status	Account Guest N
20521	202	miguel ribeiro	8/10/2013	8/15/2013	-443.30	445.30	2.00	51.60		OPEN	miguel ribeiro
20433	101	miguel ribeiro	7/8/2012	7/20/2012	0.00	756.00	756.00	87.00		OPEN	miguel ribeiro
20433	103	Miguel Ribeiro	4/15/2013	4/23/2013	0.00	756.00	756.00	87.00		OPEN	miguel ribeiro
20433	104	Miguel Ribeiro	4/15/2013	4/23/2013	0.00	756.00	756.00	87.00		OPEN	miguel ribeiro
20230	204	miguel ribeiro	7/4/2012	7/8/2012	0.00	1074.00	1074.00	123.74		OPEN	miguel ribeiro

1 2 3 4 5 Displaying items **1** to **5** from **24**

Tran... | Guests | Account Tax | Totals | Others

4a Payer ID: 15153 | 4b Payer Name: miguel ribeiro

4c Guest Account ID: 15153 | 4d Guest Account Name: miguel ribeiro

Update account | Create Account | Reopen account | Close account | Delete Account | View account documents

ACCOUNT DETAIL | TAXES

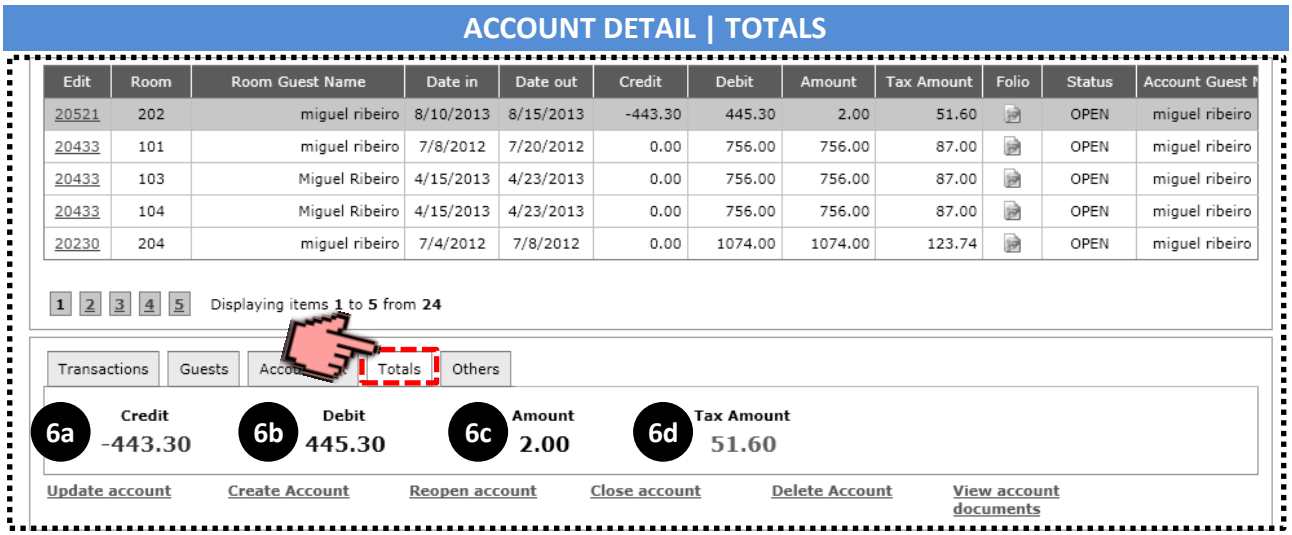
Edit	Room	Room Guest Name	Date in	Date out	Credit	Debit	Amount	Tax Amount	Folio	Status	Account Guest N
20521	202	miguel ribeiro	8/10/2013	8/15/2013	-443.30	445.30	2.00	51.60		OPEN	miguel ribeiro
20433	101	miguel ribeiro	7/8/2012	7/20/2012	0.00	756.00	756.00	87.00		OPEN	miguel ribeiro
20433	103	Miguel Ribeiro	4/15/2013	4/23/2013	0.00	756.00	756.00	87.00		OPEN	miguel ribeiro
20433	104	Miguel Ribeiro	4/15/2013	4/23/2013	0.00	756.00	756.00	87.00		OPEN	miguel ribeiro
20230	204	miguel ribeiro	7/4/2012	7/8/2012	0.00	1074.00	1074.00	123.74		OPEN	miguel ribeiro

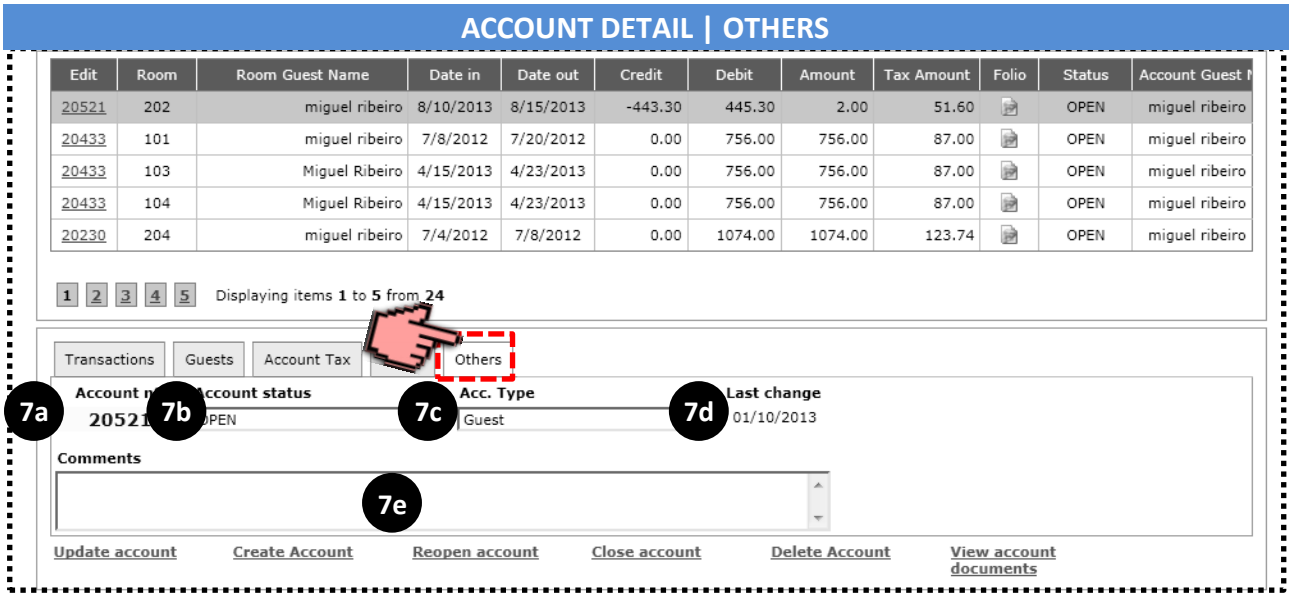
1 2 3 4 5 Displaying items **1** to **5** from **24**

Transactions | Account Tax | Totals | Others

5a Room Tax Rate | 5b Product Tax Rate

Update account | Create Account | Reopen account | Close account | Delete Account | View account documents





6.11.1 FIELDS

1) **<u>ACCOUNT</u> | Transactions – shows the list of transactions associated with the account and shows the detail of the selected transaction.**
   a. ***Transactions*** – the transactions (i.e. account entries) associated with the selected account.

2) **ACCOUNT | <u>TRANSACTION</u> | Transaction detail – show the detail of the selected transaction**

Required a. ***Account nº*** – the account id of the transaction.

Required b. ***P&S*** – the product or payment id associated with the transaction.

Required c. ***Quantity*** – the quantity of units sold.
   i. Applies only to products.

Required d. ***Unit amount*** – the amount per unit.

Required e. ***Amount*** – the total amount of the transaction.

Required f. ***Tax rate*** – the tax rate associated with the transaction.

Read Only g. ***Tax %*** - the tax percentage applied in the transaction tax calculation.

Read Only h. ***Tax amount*** – the transaction tax amount.

Required i. ***Department*** – the department associated with the transaction.

   i. It can be used to identify where the transaction took place or to be used as a cost center.

j. ***Description*** – the transaction description.

   i. This is the description shown in the accounting documents.

Read Only k. ***Trx. Date*** – the transaction creation date.

Read Only l. ***Transaction nº*** - the transaction system id.

3) ACCOUNT | <u>TRANSACTION</u> | Help to find account or products – this tab is a helper and is used to get the system ids of the accounts and products.

a. ***Room number*** – loads the field "Account nº" with the account id associated with the room number.

b. ***Guest name*** – loads the field "Account nº" with the account id associated with the guest name.

c. ***Product name*** – loads the field "P&S" with the product id associated with the product name.

4) <u>ACCOUNT</u> | Guests – the payer and the account owner guests associated with the account

Required a. ***Payer ID*** – the guest id responsible for the account payments.

b. ***Payer name*** – the guest name responsible for the account payments.

   i. This field loads the "Payer ID" field with the associated guest id.

Required c. ***Guest account ID*** – the guest id that owns the account.

d. ***Guest account name*** – the guest name that owns the account.

   i. This field loads the "Guest account ID" field with the associated guest id.

5) <u>ACCOUNT</u> | Account Tax – overrides the room tax rate and product tax rates of the account

a. ***Room tax rate*** – overrides the tax rates of the account transaction related with the room stay.

b. ***Product tax rate*** – overrides the tax rates of the account transactions.

6) **ACCOUNT | Totals – account totalizers**

Read Only a. ***Credit*** – the total amount of credit entries.
   i. The hotel owes the guest. It's negative for the hotel balance.

Read Only b. ***Debit*** – the total amount of debit entries.
   i. The guest owes the hotel. It's positive for the hotel balance.

Read Only c. ***Amount*** – the total amount of the account.
   i. It's equivalent to the difference between the debits and the credits.

Read Only d. ***Tax amount*** – the total tax amount of the account.

7) **ACCOUNT | Others**

Read Only a. ***Account nº*** – the account system id.

Read Only b. ***Account status*** – the account status.

Read Only c. ***Acc. Type*** – the account type.

Read Only d. ***Last change*** – the last account update.

e. ***Comments*** – comments about the account.

6.11.2 FUNCTIONS

1) **ACCOUNT | Update account** – updates the account data.

2) **ACCOUNT | Create account** – creates a new account.

3) **ACCOUNT | Reopen account** – opens a closed account.

4) **ACCOUNT | Close account** – closes an account.

5) **ACCOUNT | Delete account** – deletes the account from the database.
   a. The account cannot be connected to any other database object.

6) **ACCOUNT | View account documents** – view the documents associated with the selected account.

7) **TRANSACTION | Update** – update the select transaction.
   a. This function is executed in the context of the transaction.

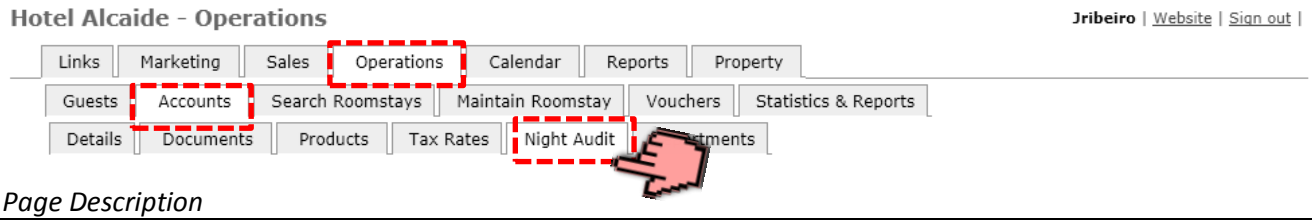
8) **TRANSACTION | Edit product** – view the product detail associated with the selected transaction.

6.12 NIGHT AUDIT

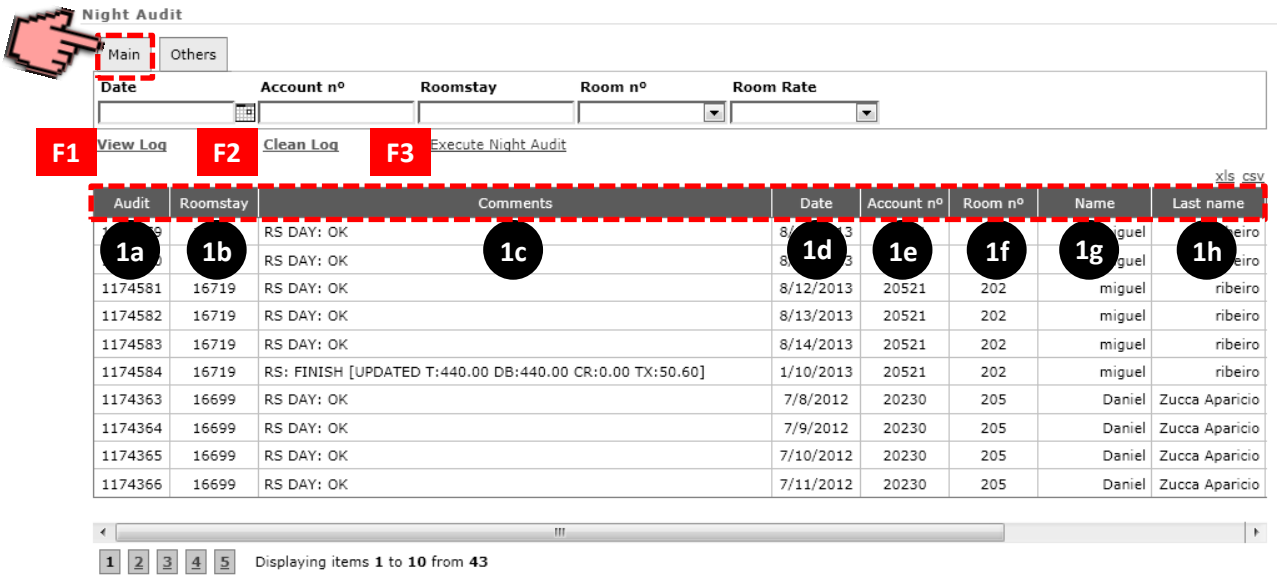
This page shows the log or history of the roomstay transactions processed automatically by the system. The night audit is a batch process that is automatically executed by the system that creates all the account entries for the room stay transactions.

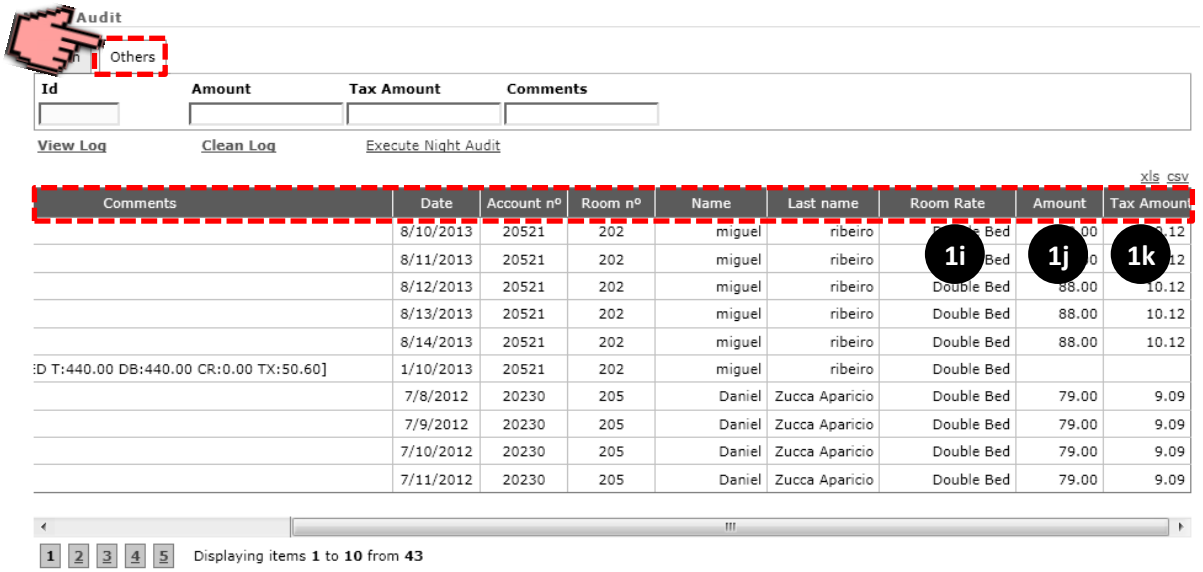
This page is useful when the hotel finds problems with the roomstay entries and wants to understand what happened. The hotel can analyze the log to find problems or request to re-execute the night-audit.

Page Location



Page Description





6.12.1 FIELDS

1) **Audit record – each row represent an audit record associated with the roomstay transaction batch process.**
    a. ***Audit*** – system audit id.

    b. ***Roomstay*** – the roomstay id associated with the audit record.

    c. ***Comments*** – the results of the execution.
        i. For example: "RS DAY:OK" means the account transaction for a certain date of a roomstay was processed successfully. "RS" refers to roomstay.

    d. ***Date*** – the date associated with the execution.
        i. In the case of the roomstays the date corresponds to each day of the room stay.

    e. ***Account nº*** - the account id that is associated with the transactions.

    f. ***Room nº*** - the room number associated with the roomstay.

    g. ***Name*** – the first name of the guest associated with the roomstay.

    h. ***Last name*** – the last name of the guest associated with the roomstay.

    i. ***Room rate*** – the room rate associated with the roomstay.

    j. ***Amount*** – the amount processed.

    k. ***Tax amount*** – the tax amount processed.

6.12.2 FUNCTIONS

1) **View log** – refreshes and gets the log from the database accordingly to the filters.

2) **Clean log** – deletes the log from the database.

3) **Execute night audit** – executes the night audit batch process.

6.13 INTERFACES WITH EXTERNAL DEVICES

This applies only to the Hotels that downloaded and installed the local version of HotelASP. The hotel to integrate external devices (telephony, POS, room access control, etc) need to develop a software interface program to upload account transactions into the HotelASP database using the data model provided.

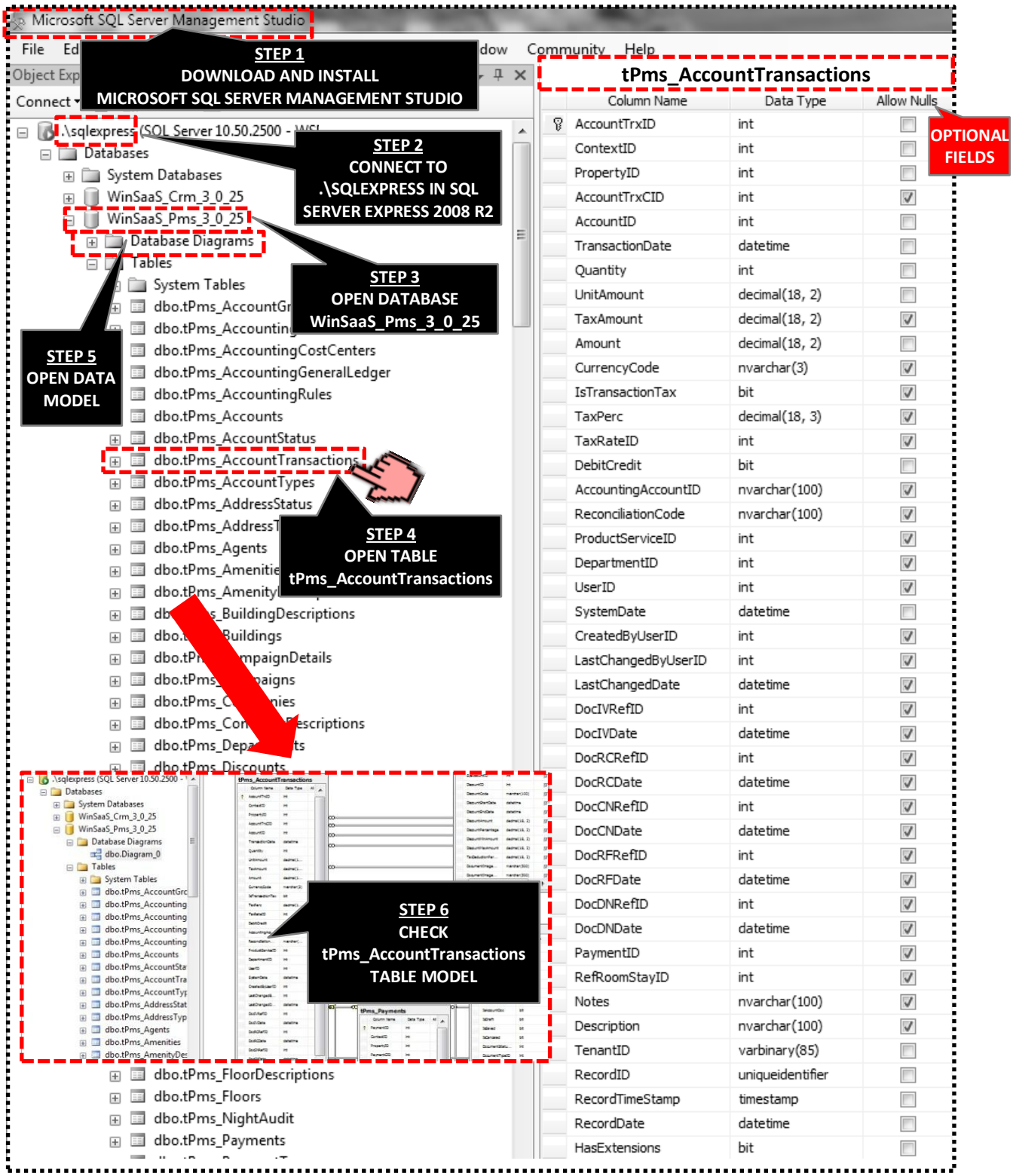


Figure 84 – Account Transaction Data Model

The HotelASP database ("WinSaaS_Pms_3_0_25") is open and can be easily accessed by a SQL server database connection. The task of developing an interface program requires knowledge of information technologies, programming skills and SQL server database know-how.

7 HOTEL REPORTS

The hotel reports are organized in four main areas as described in the figure below, namely: accounting reports, roomstays reports, accounts reports and guest reports.

Figure 85 - Main Reports

The main guest reports can be found at the Hotel operations chapter. The REPORT FUNCTIONS header bar is available in many of the main documents and includes the following functions.

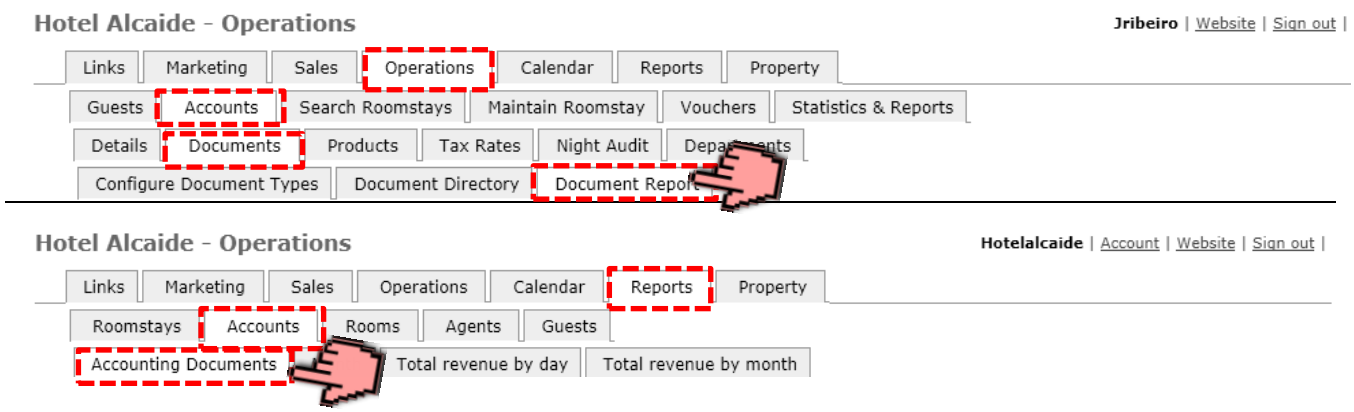
Figure 86 – Report Header: Print and Export to PDF, Word and Excel

There are some situations where the browser chrome and Firefox don't show the "Print" button. In those cases you need to export the document to PDF and then print the document.

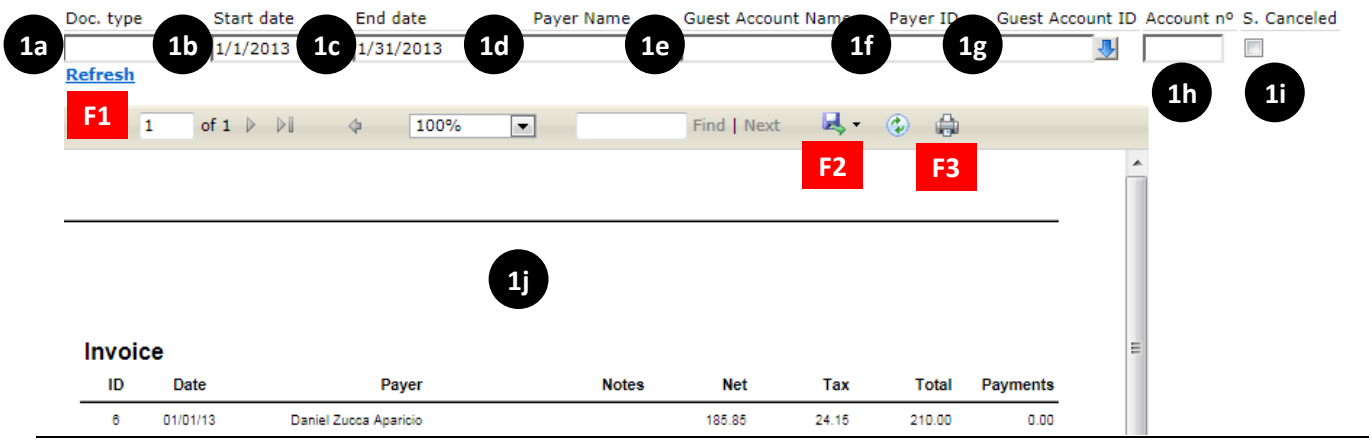
7.1 ACCOUNTING REPORTS

This page shows a summary report of the accounting documents issued. The report can be filtered by document type, dates and other type of criteria as explained below.

Report Location



Report Description



7.1.1 FIELDS

1) Filtering fields

a. ***Doc. Type*** – filter by document type. For example: invoice, receipt, credit note, refund note, credit\refund note and invoice\receipt.

b. ***Start date*** – select all documents with issue date equal or higher than the start date.

c. ***End date*** – select all documents with issue date equal or lower than the end date

d. ***Payer name*** - filter by payer name.

e. ***Guest account name*** – filter by guest account name.

f. ***Payer id*** – filter by the guest payer id.

g. ***Guest account id*** – filter by the guest id.

h. ***Account nº*** - filter by account id.

i. ***Canceled*** – select all canceled documents.

j. ***REPORT*** – the account report generated accordingly to the filled criteria's.

7.1.2 FUNCTIONS

1) **Refresh** – refreshes and updates the report.

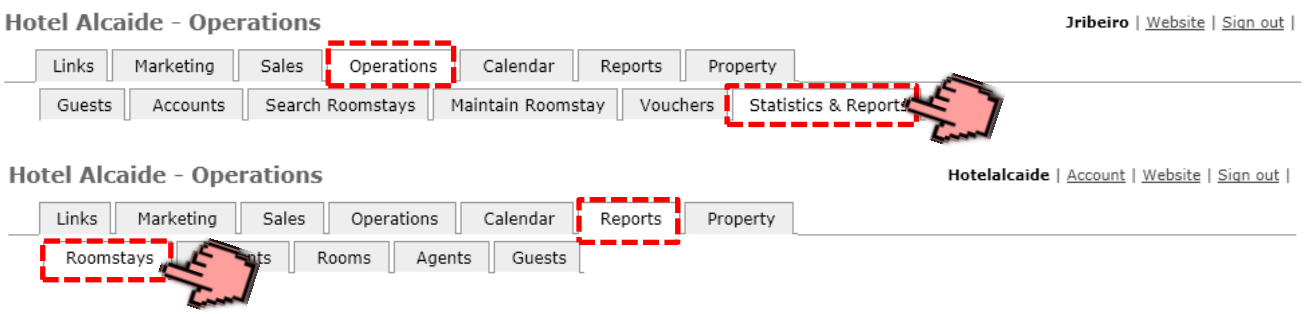
2) **Export PDF** – export the report to PDF, word or excel.

3) **Print** – print the document. If this button is not available use the "Export PDF" button to export the report to PDF and print the PDF file

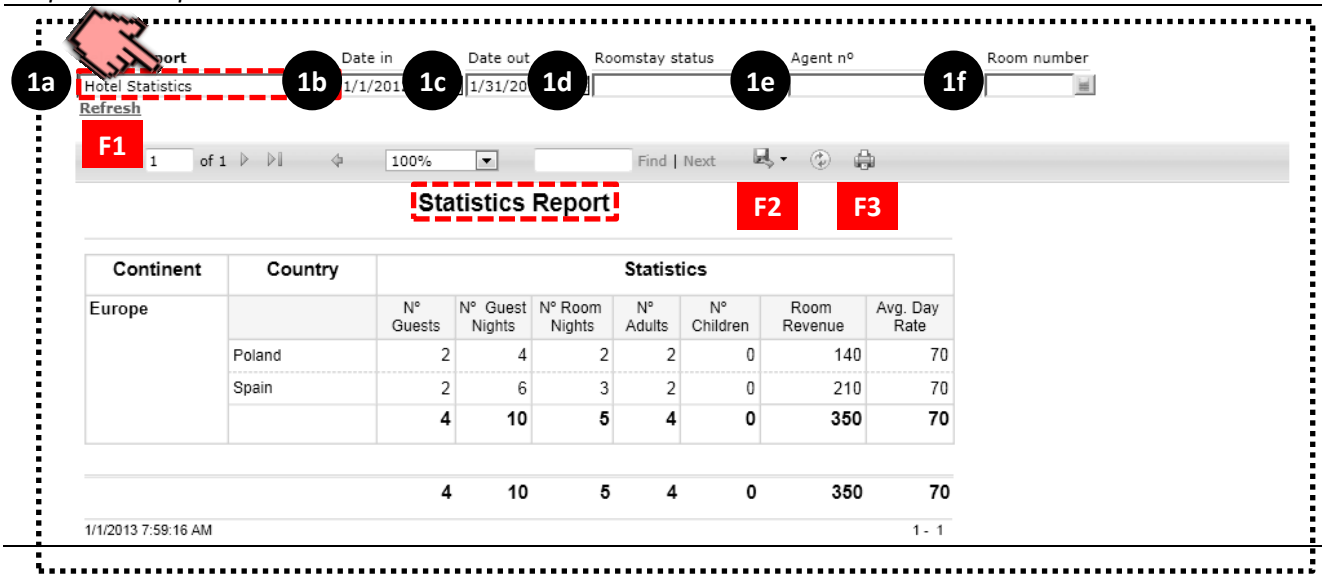
7.2 ROOMSTAY REPORTS

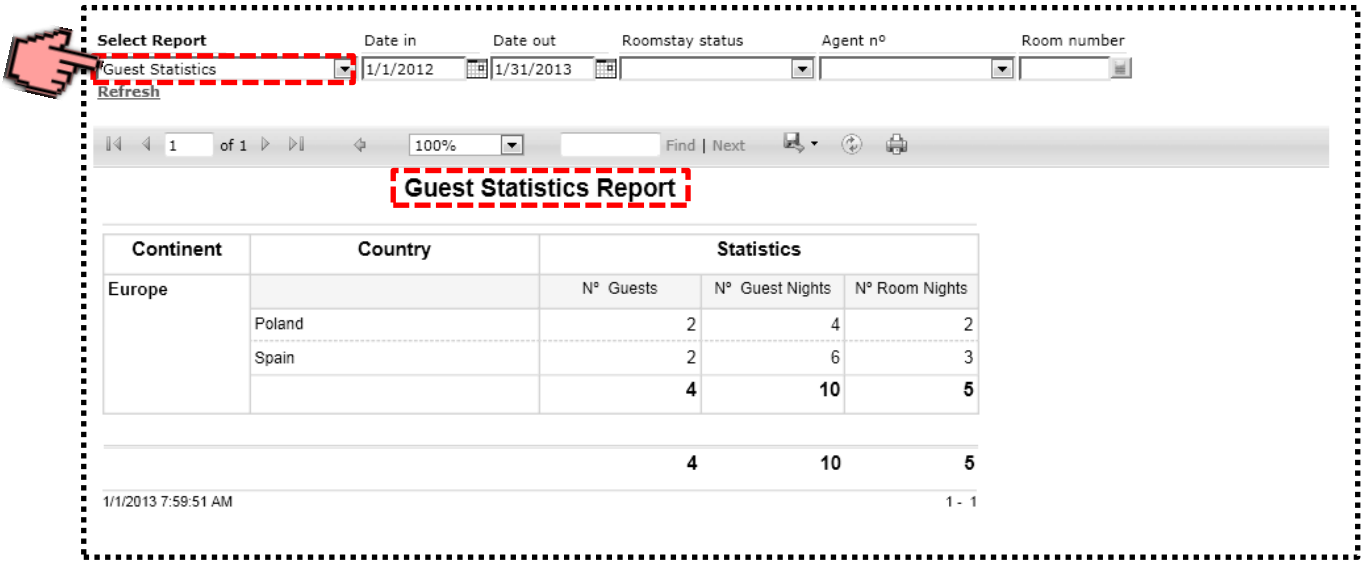
This report page includes reports such as "Hotel Statistics", "Guest Statistics", "Revenue by Agent", "Revenue by Month" and "Room stay list". These reports can be exported to Excel, Word or PDF. The structure and content of the mentioned reports are illustrated in the following figures.

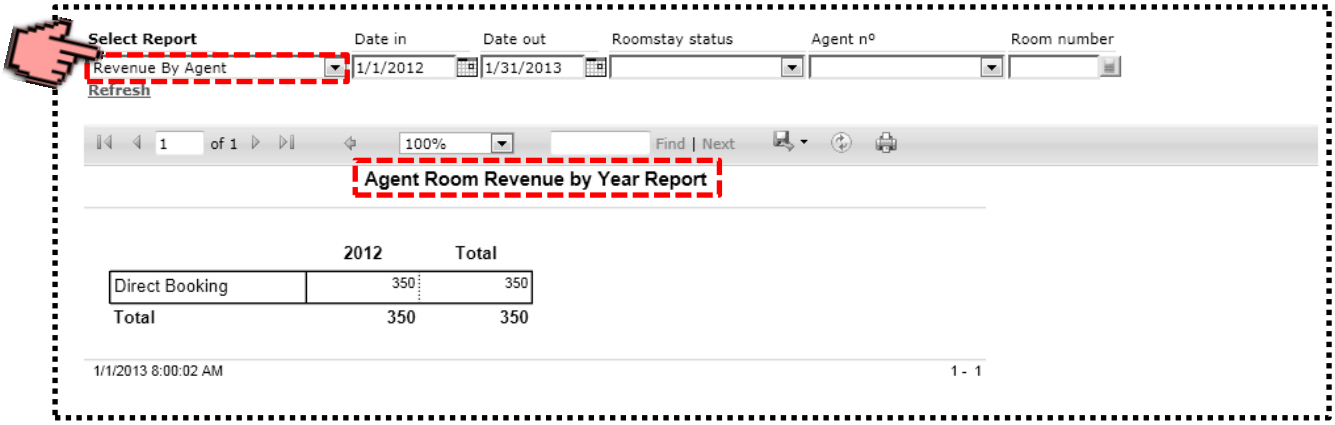
Report Location

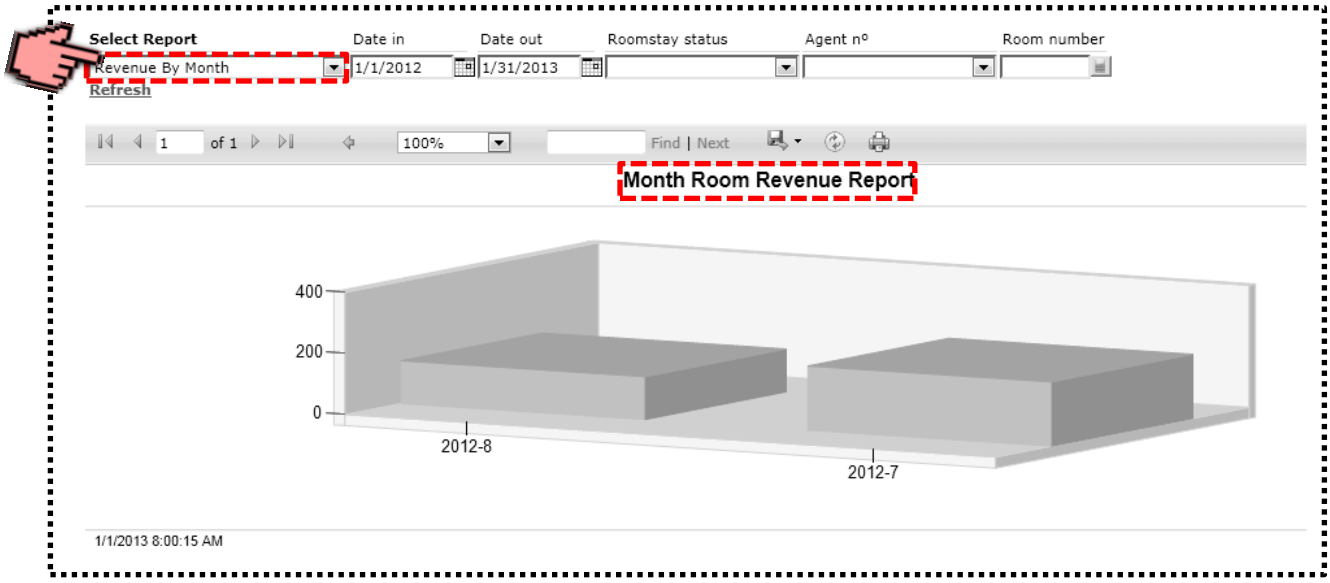


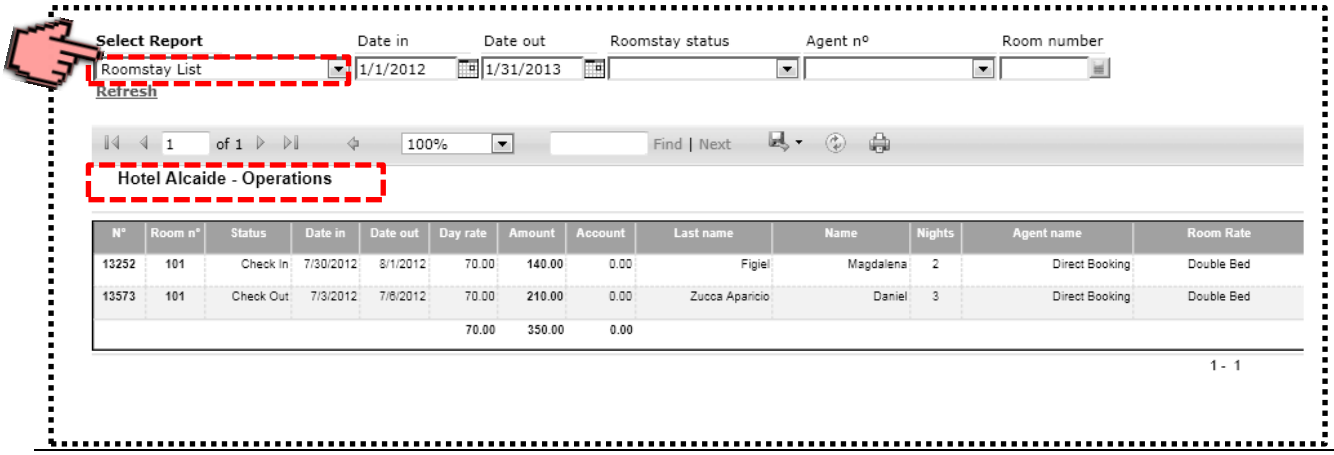
Report Description




Select Report
Date in
Date out
Roomstay status
Agent nº
Room number
Guest Statistics
1/1/2012
1/31/2013
Refresh
1
of 1
100%
Find | Next
Guest Statistics Report
Continent
Country
Statistics
Europe
Nº Guests
Nº Guest Nights
Nº Room Nights
Poland
2
4
2
Spain
2
6
3
4
10
5
4
10
5
1/1/2013 7:59:51 AM
1 - 1


Select Report
Date in
Date out
Roomstay status
Agent nº
Room number
Revenue By Agent
1/1/2012
1/31/2013
Refresh
1
of 1
100%
Find | Next
Agent Room Revenue by Year Report
2012
Total
Direct Booking
350
350
Total
350
350
1/1/2013 8:00:02 AM
1 - 1


Select Report
Date in
Date out
Roomstay status
Agent nº
Room number
Revenue By Month
1/1/2012
1/31/2013
Refresh
1
of 1
100%
Find | Next
Month Room Revenue Report
400
200
0
2012-8
2012-7
1/1/2013 8:00:15 AM



7.2.1 FIELDS

1) **Filters**
   a. ***Select report*** – select the report to load and view.

   b. ***Date in*** – filter by check-in date.

   c. ***Date out*** – filter by check-out date.

   d. ***Roomstay status*** – filter by room status.

   e. ***Agent nº*** - filter by agent.

   f. ***Room number*** – filter by room number.

7.2.2 FUNCTIONS

1) **Refresh** – refreshes and updates the report accordingly to the selected filters.

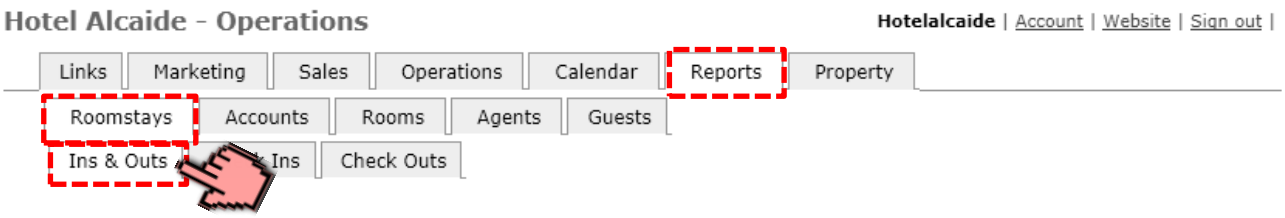
2) **Export PDF** – export the report to PDF, word or excel.

3) **Print** – print the document. If this button is not available use the "Export PDF" button to export the report to PDF and print the PDF file.

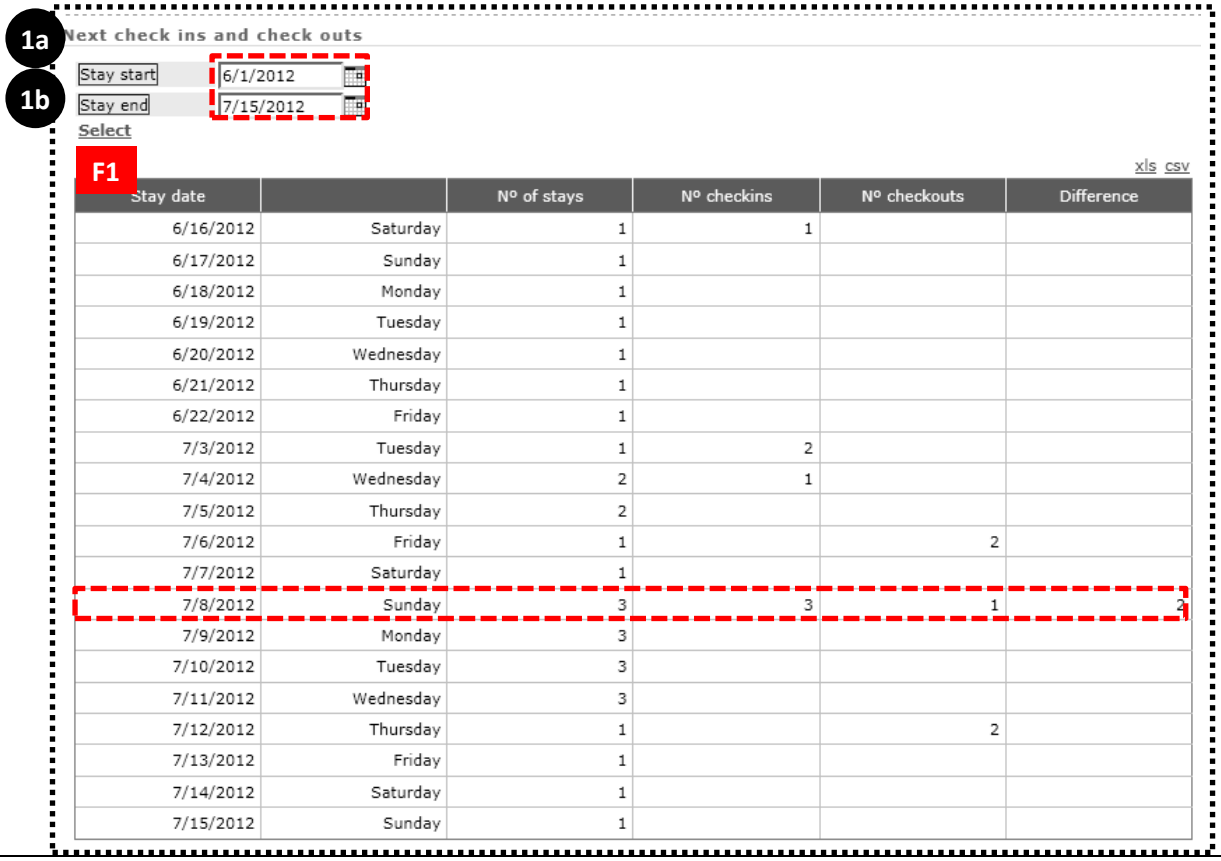
7.3 CHECK-INS & CHECK-OUTS REPORT

This report shows the check-ins and check-outs between a date range.

Report Location



Report Description



Stay date		Nº of stays	Nº checkins	Nº checkouts	Difference
6/16/2012	Saturday	1	1		
6/17/2012	Sunday	1			
6/18/2012	Monday	1			
6/19/2012	Tuesday	1			
6/20/2012	Wednesday	1			
6/21/2012	Thursday	1			
6/22/2012	Friday	1			
7/3/2012	Tuesday	1	2		
7/4/2012	Wednesday	2	1		
7/5/2012	Thursday	2			
7/6/2012	Friday	1		2	
7/7/2012	Saturday	1			
7/8/2012	Sunday	3	3	1	2
7/9/2012	Monday	3			
7/10/2012	Tuesday	3			
7/11/2012	Wednesday	3			
7/12/2012	Thursday	1		2	
7/13/2012	Friday	1			
7/14/2012	Saturday	1			
7/15/2012	Sunday	1			

7.3.1 FIELDS

1) **Main**
   a. ***Stay start*** – filter by check in date.

   b. ***Stay end*** – filter by check out date.

7.3.2 FUNCTIONS

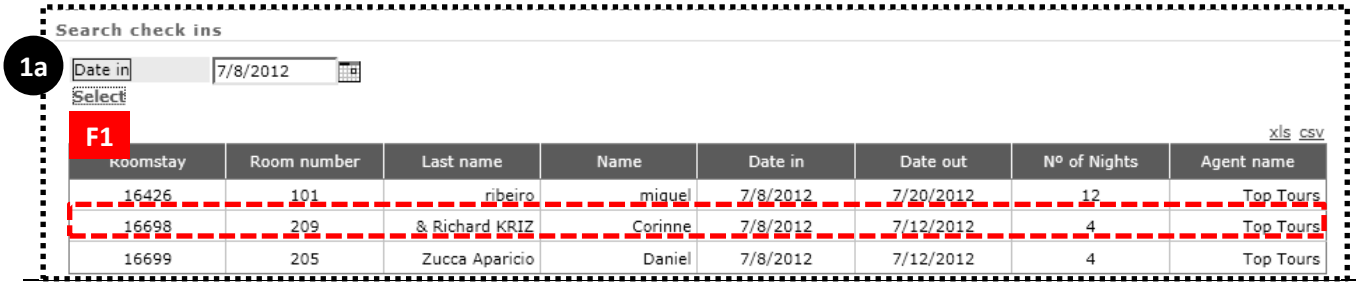
1) **Refresh** – refresh and updates the report using the selected filters.

7.4 CHECK-INS REPORT

This report shows the check-ins for a certain date.

Report Location

Report Description



7.4.1 FIELDS

1) **Main**
   a. ***Date in*** – select all the check-ins that occurred in this date.

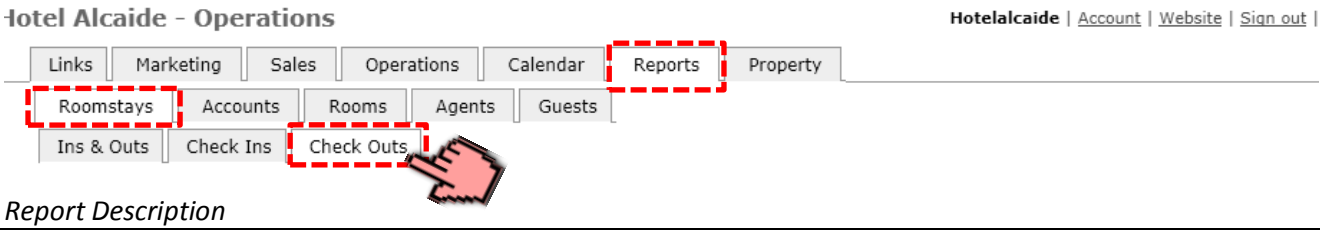
7.4.2 FUNCTIONS

1) **Refresh** – refresh and updates the report using the selected filters.

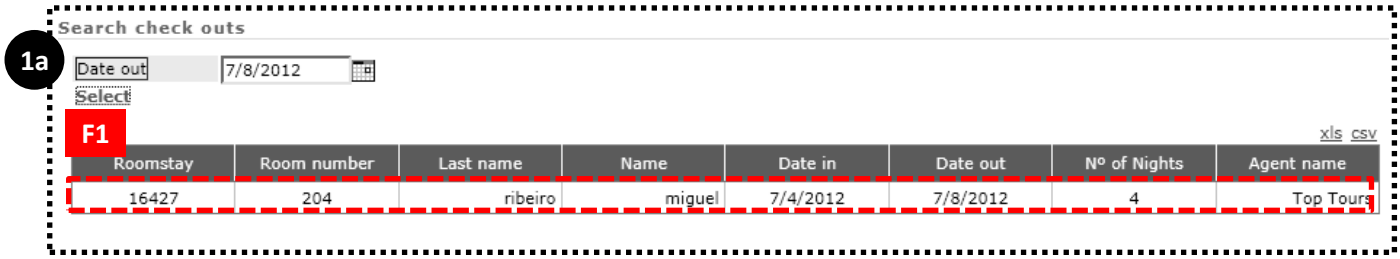
7.5 CHECK-OUTS REPORT

This report shows all the check-outs for a certain date.

Report Location



Report Description



7.5.1 FIELDS

1) **Main**
   a. ***Date out*** – select all the check-outs that occurred in this date.

7.5.2 FUNCTIONS

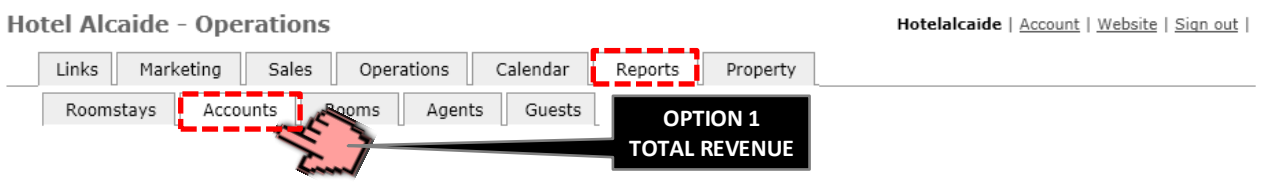
1) **Refresh** – refresh and updates the report using the selected filters.

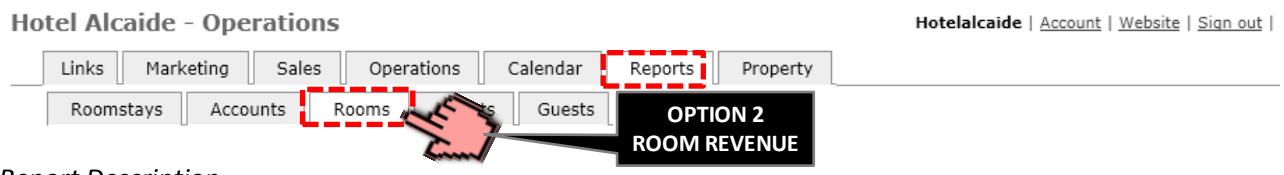
7.6 ACCOUNT REPORTS

This page shows several reports related to the hotel total revenue and to the hotel room revenue.

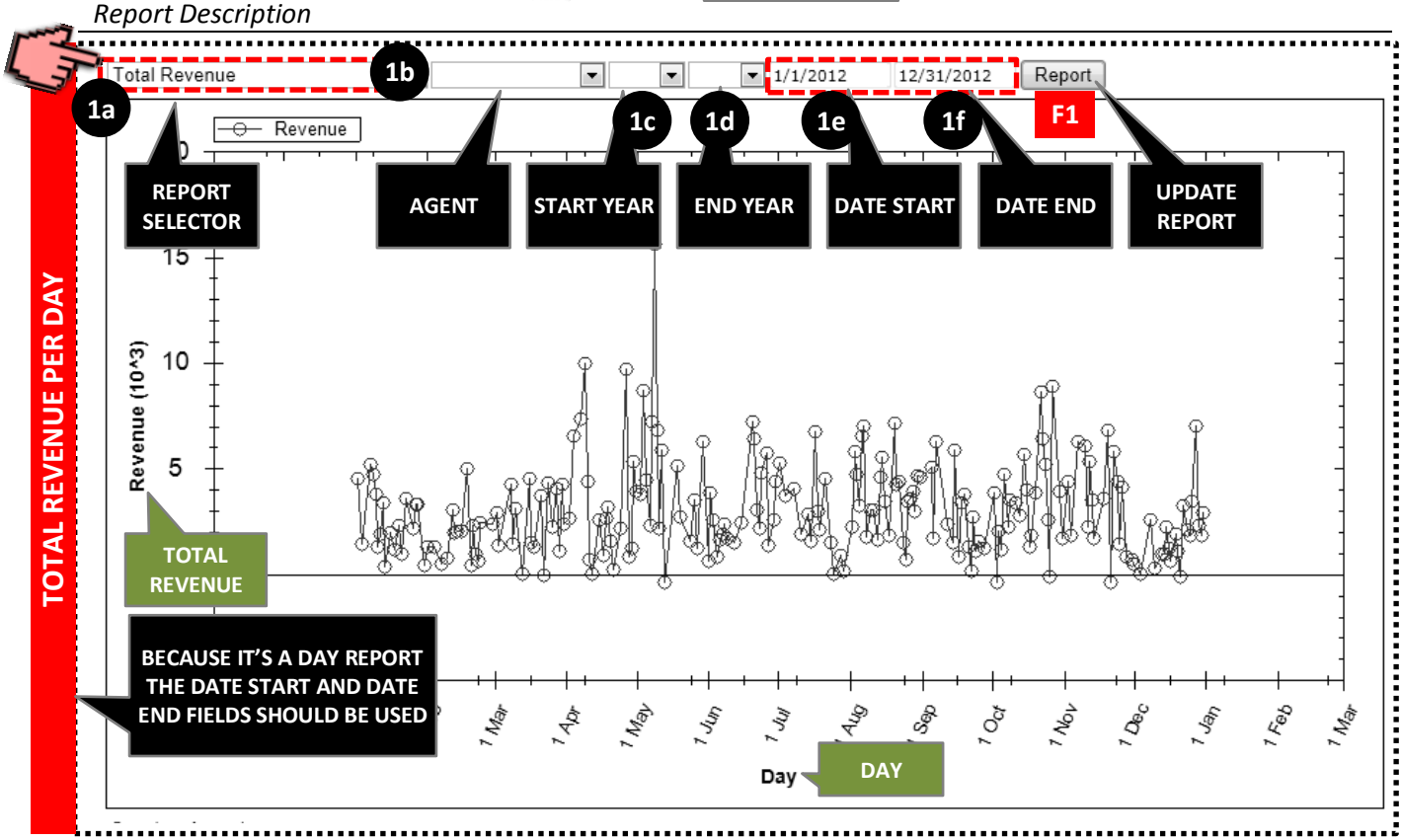
The total revenue includes the room revenue and revenue generated from other services. The reports available are shown in the next pages including the criteria's that must be selected for the reports to be properly shown.

Report Location

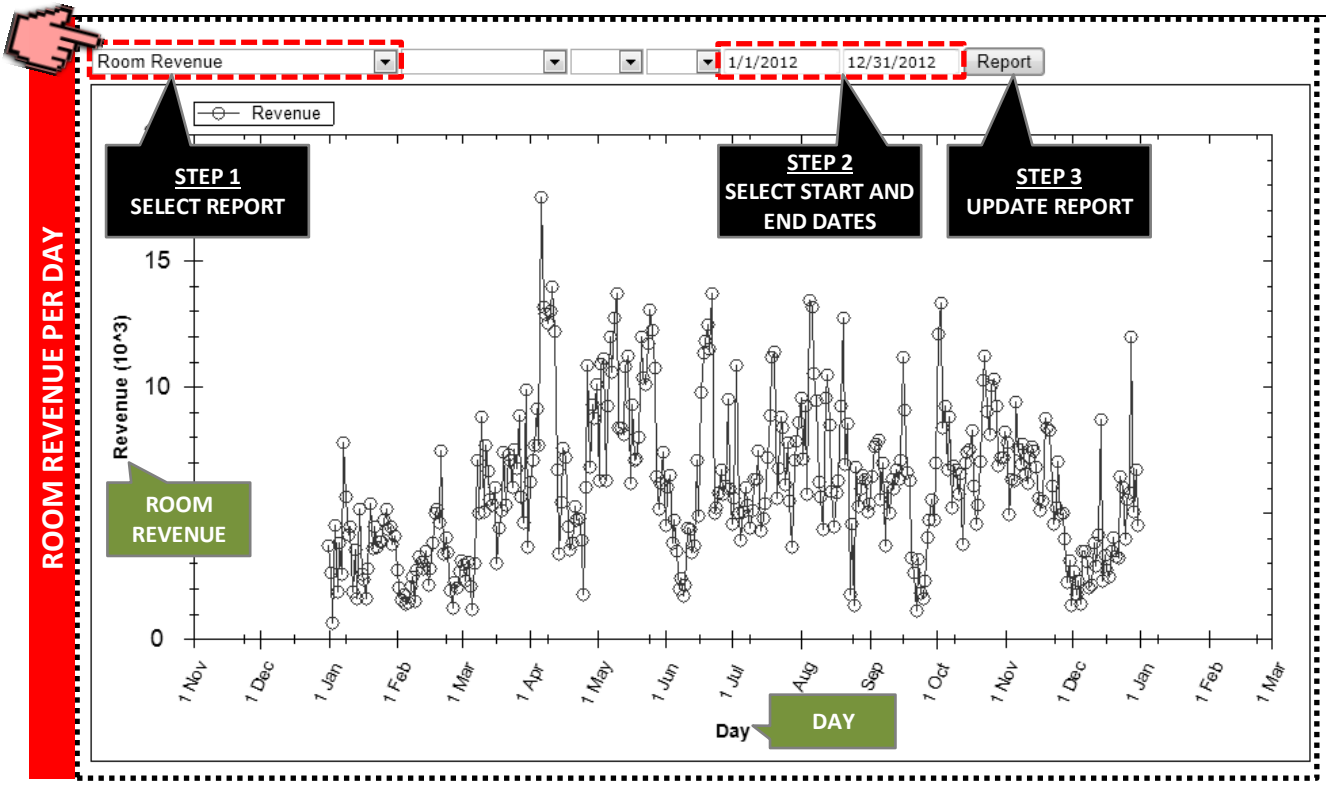




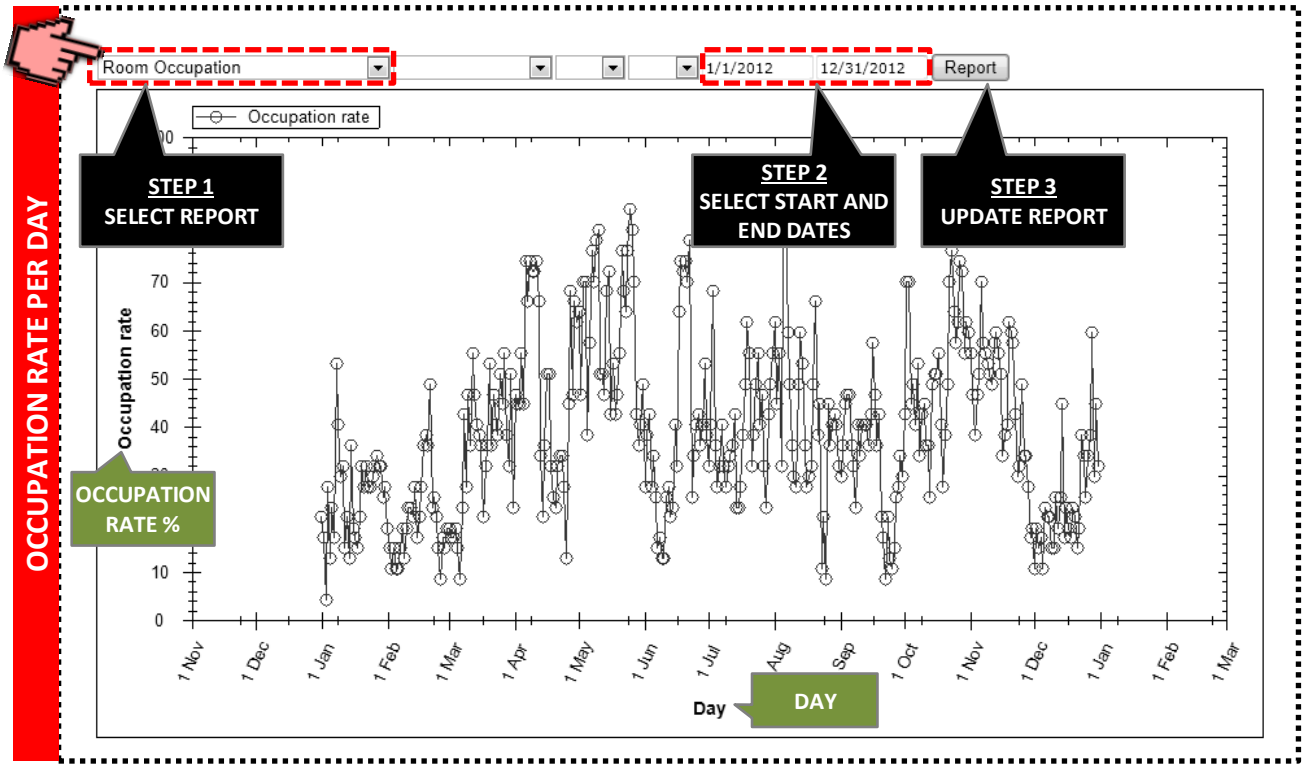
Report Description



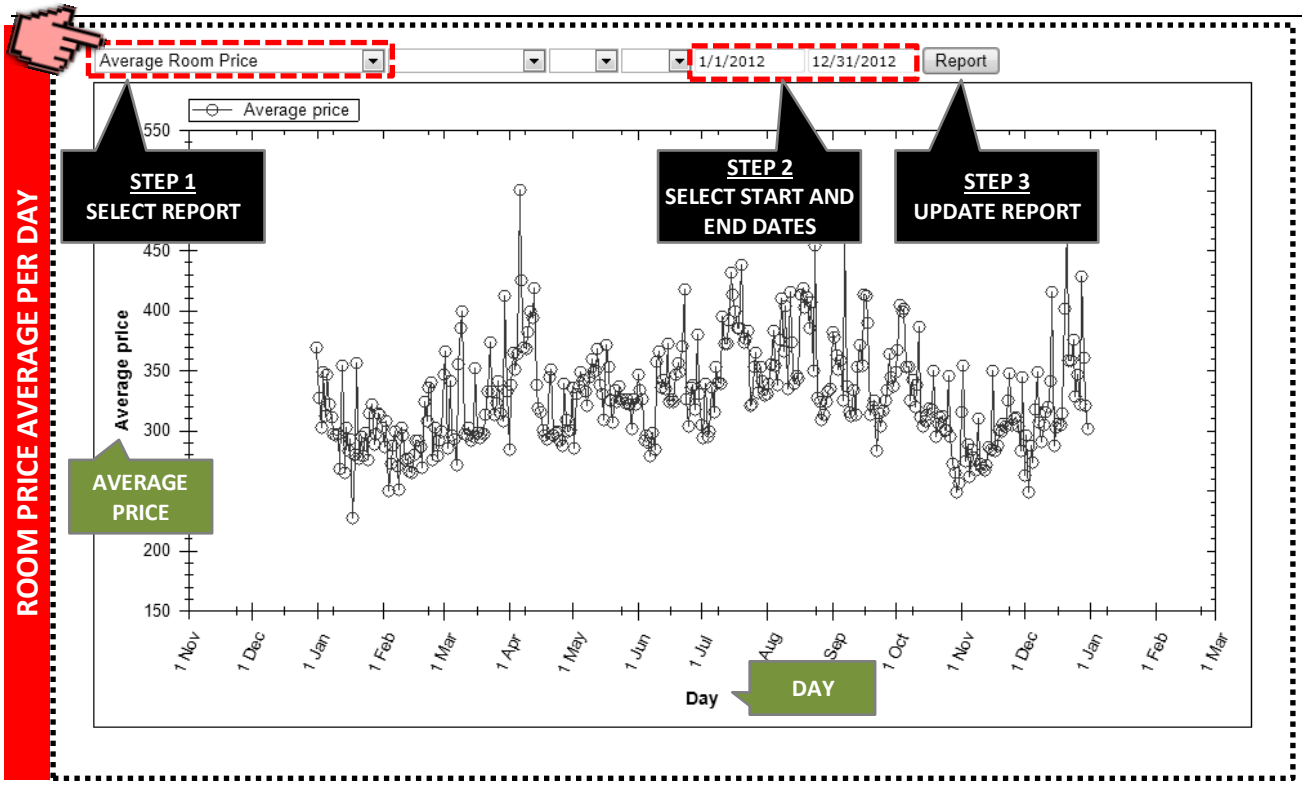
ROOM REVENUE PER DAY



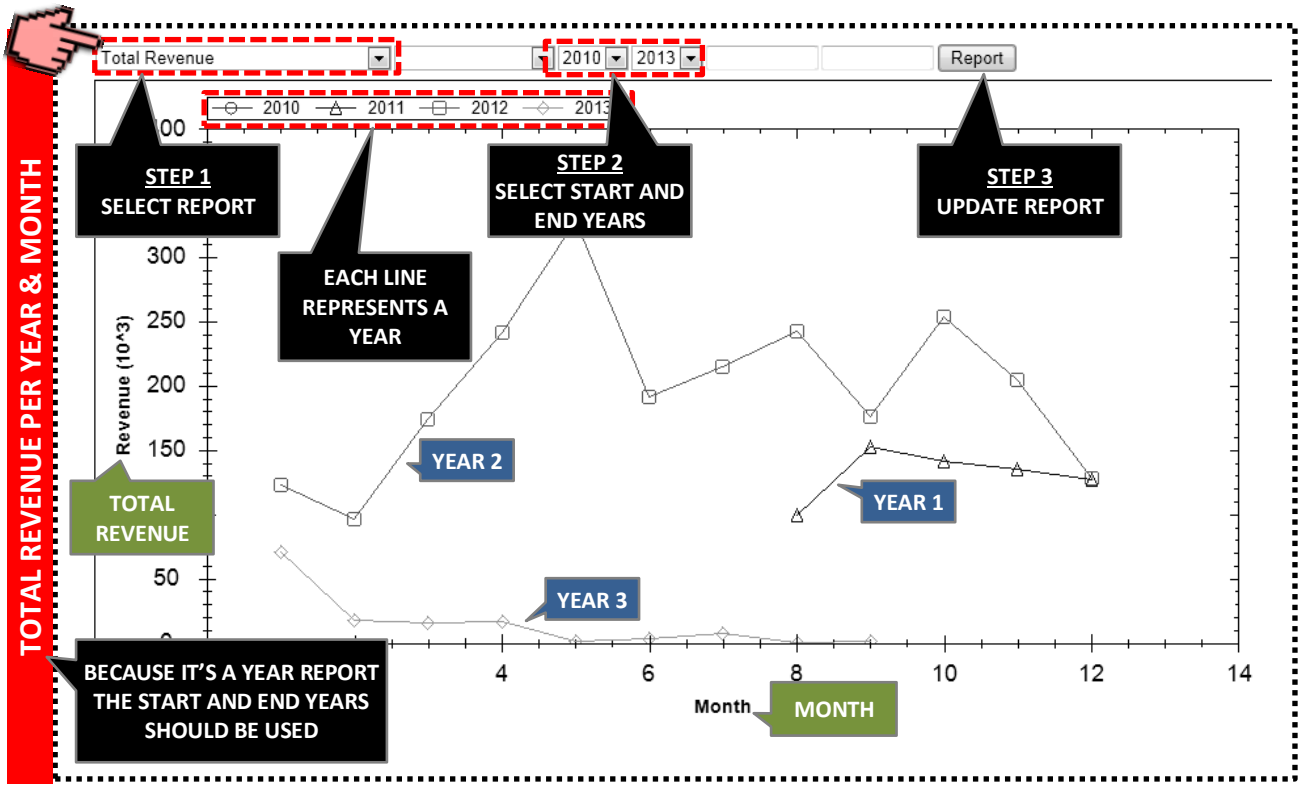
OCCUPATION RATE PER DAY

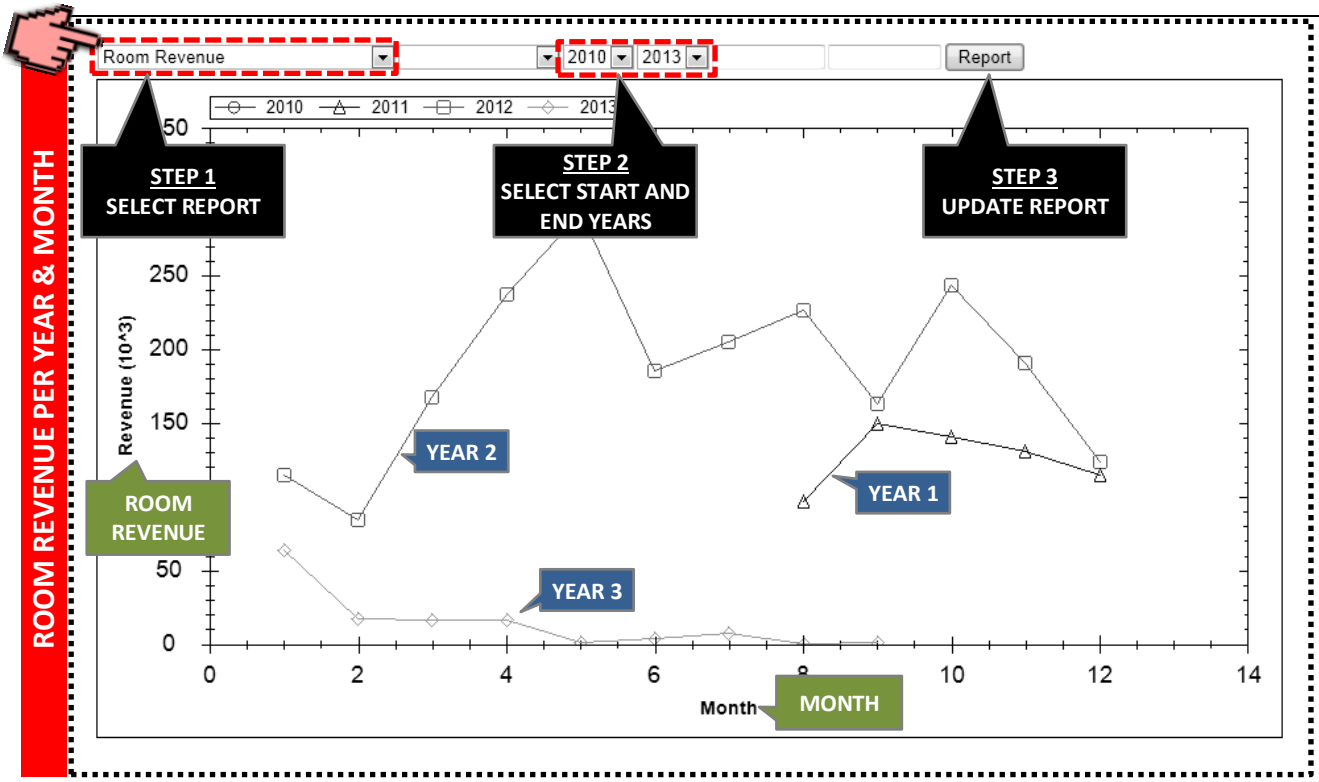


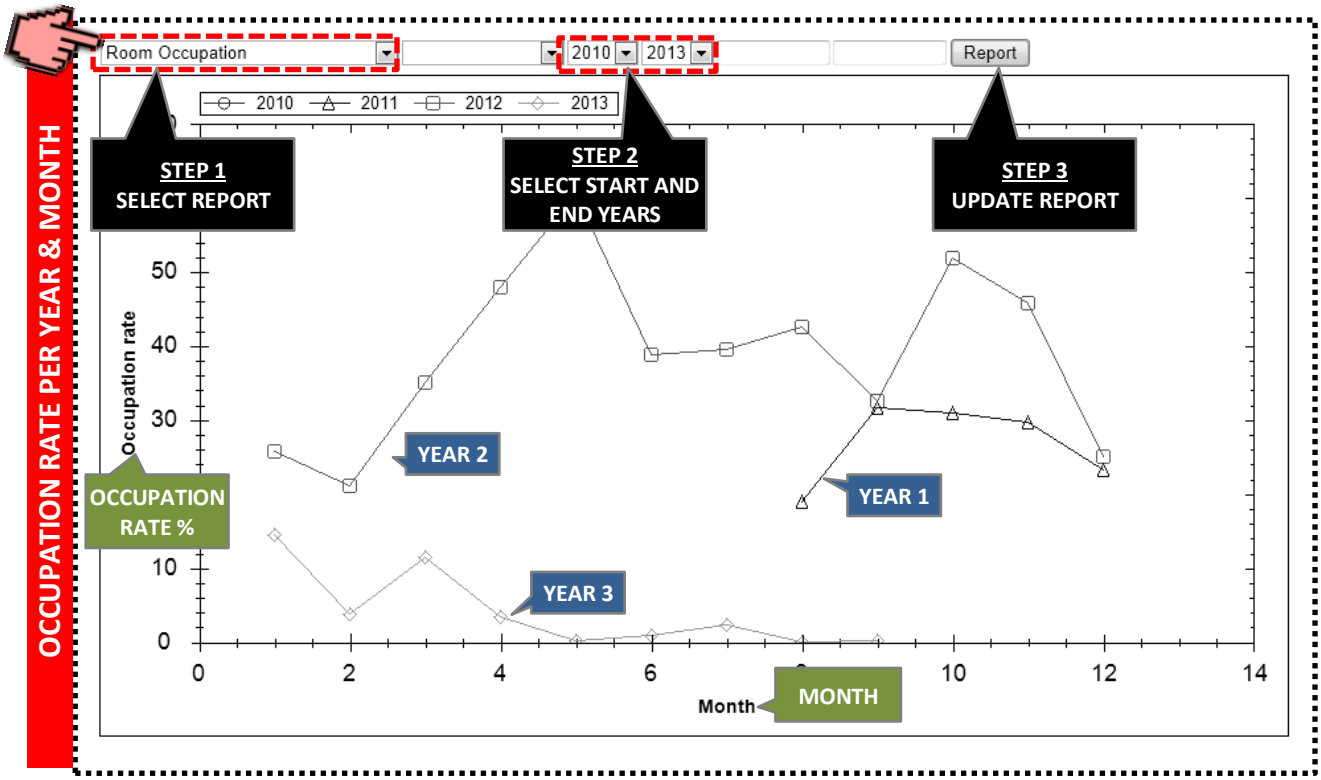
ROOM PRICE AVERAGE PER DAY

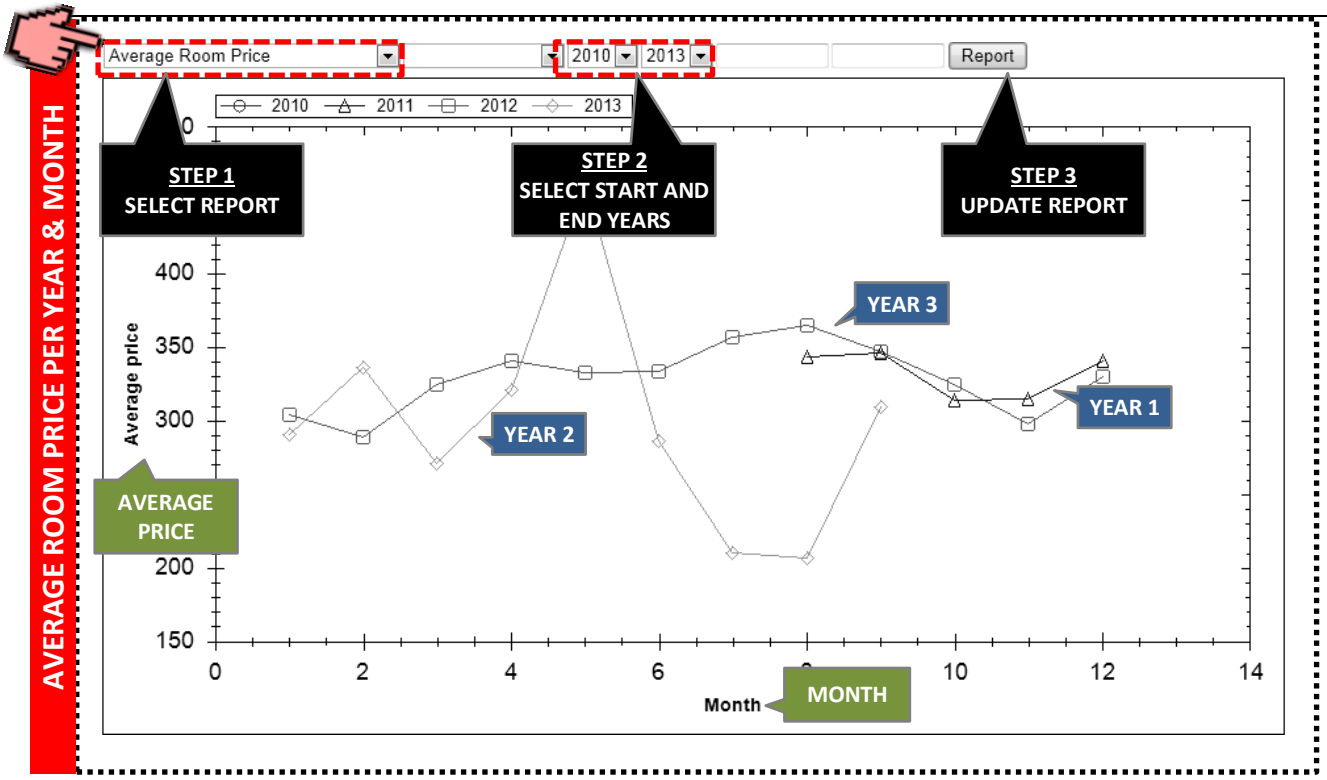


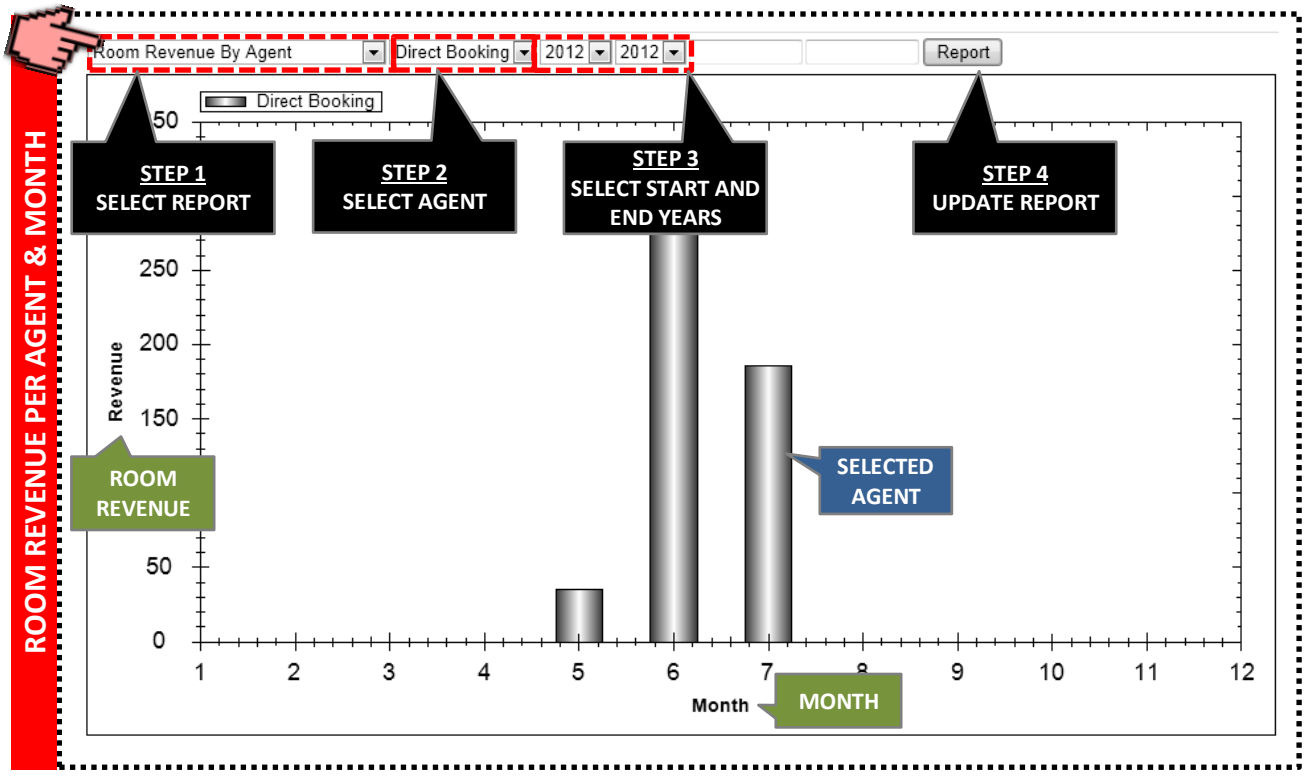
TOTAL REVENUE PER YEAR & MONTH

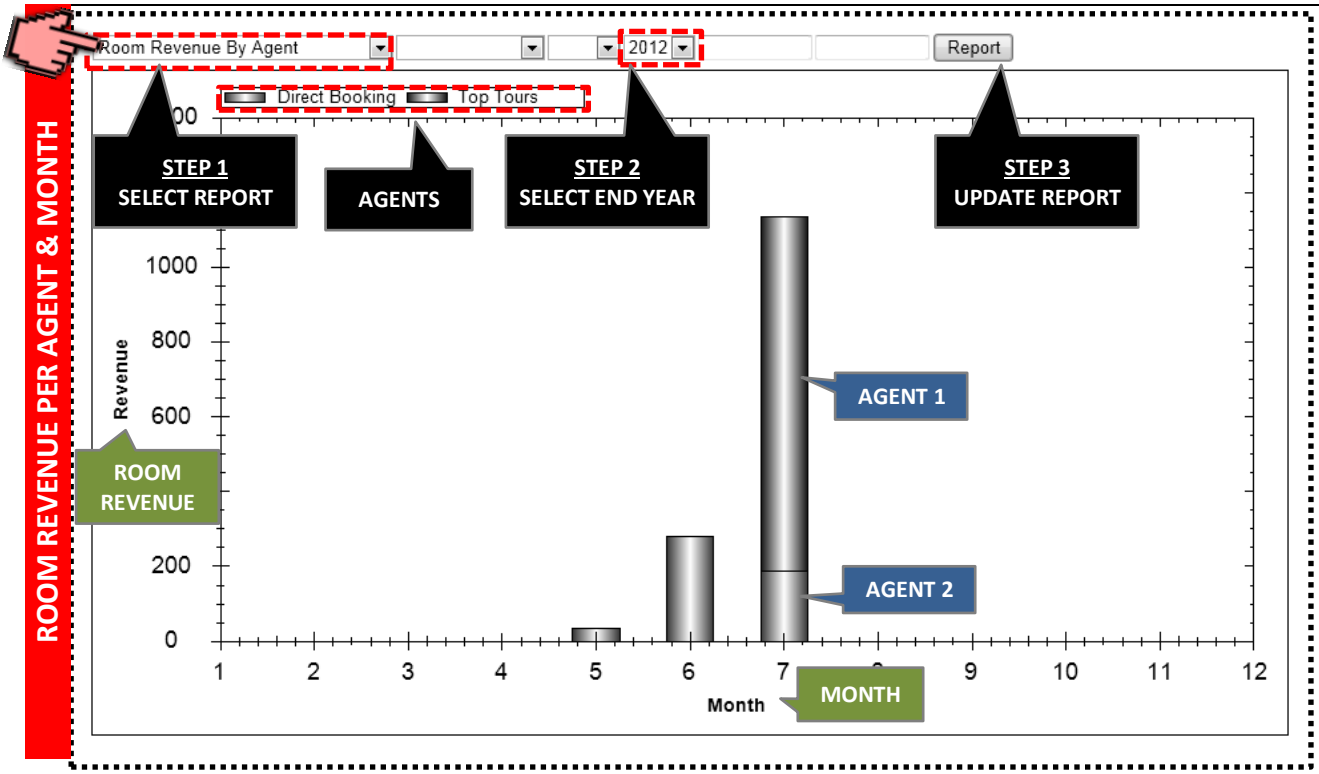


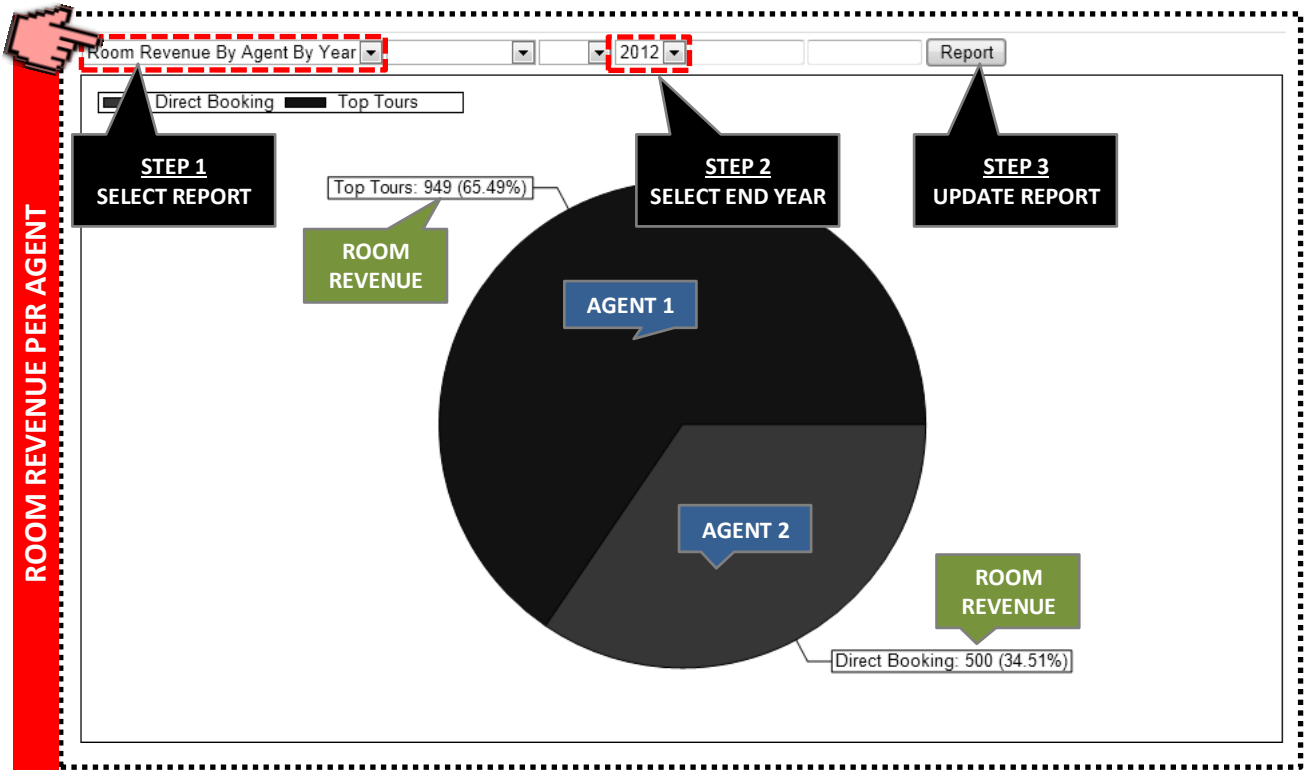

ROOM REVENUE PER YEAR & MONTH
Room Revenue
2010
2013
Report
2010
2011
2012
2013
STEP 1
SELECT REPORT
STEP 2
SELECT START AND END YEARS
STEP 3
UPDATE REPORT
Revenue (10^3)
ROOM REVENUE
YEAR 2
YEAR 1
YEAR 3
Month
MONTH


OCCUPATION RATE PER YEAR & MONTH
Room Occupation
2010
2013
Report
2010
2011
2012
2013
STEP 1
SELECT REPORT
STEP 2
SELECT START AND END YEARS
STEP 3
UPDATE REPORT
Occupation rate
OCCUPATION RATE %
YEAR 2
YEAR 1
YEAR 3
Month
MONTH


AVERAGE ROOM PRICE PER YEAR & MONTH
Average Room Price
2010
2013
Report
2010
2011
2012
2013
STEP 1
SELECT REPORT
STEP 2
SELECT START AND END YEARS
STEP 3
UPDATE REPORT
YEAR 3
YEAR 2
YEAR 1
AVERAGE PRICE
Average price
400
350
300
200
150
0
2
4
6
10
12
14
Month
MONTH


ROOM REVENUE PER AGENT & MONTH
Room Revenue By Agent
Direct Booking
2012
2012
Report
Direct Booking
STEP 1
SELECT REPORT
STEP 2
SELECT AGENT
STEP 3
SELECT START AND END YEARS
STEP 4
UPDATE REPORT
SELECTED AGENT
ROOM REVENUE
Revenue
250
200
150
50
0
1
2
3
4
5
6
7
9
10
11
12
Month
MONTH





7.6.1 FIELDS

1) Main

a. ***Report selection*** – select the report to show.

b. ***Agent*** – filter by agent.

c. ***Start year*** – filter by starting year.

d. ***End year*** – filter by ending year.

e. ***Date start*** – filter by starting date.

f. ***Date end*** – filter by ending date.

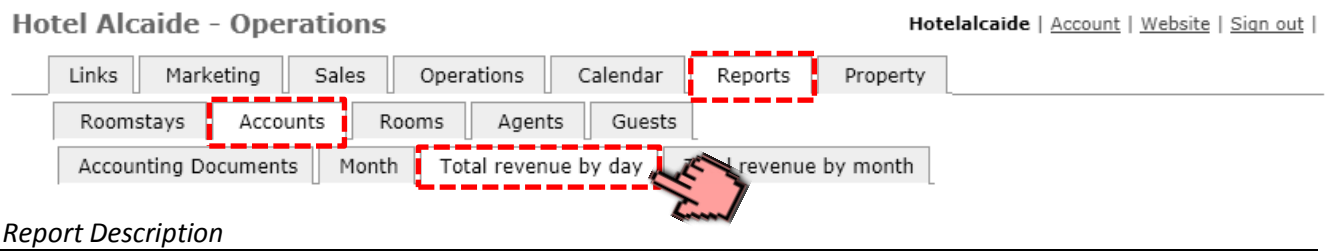
7.6.2 FUNCTIONS

1) **Refresh** – refresh and updates the report using the selected filters.

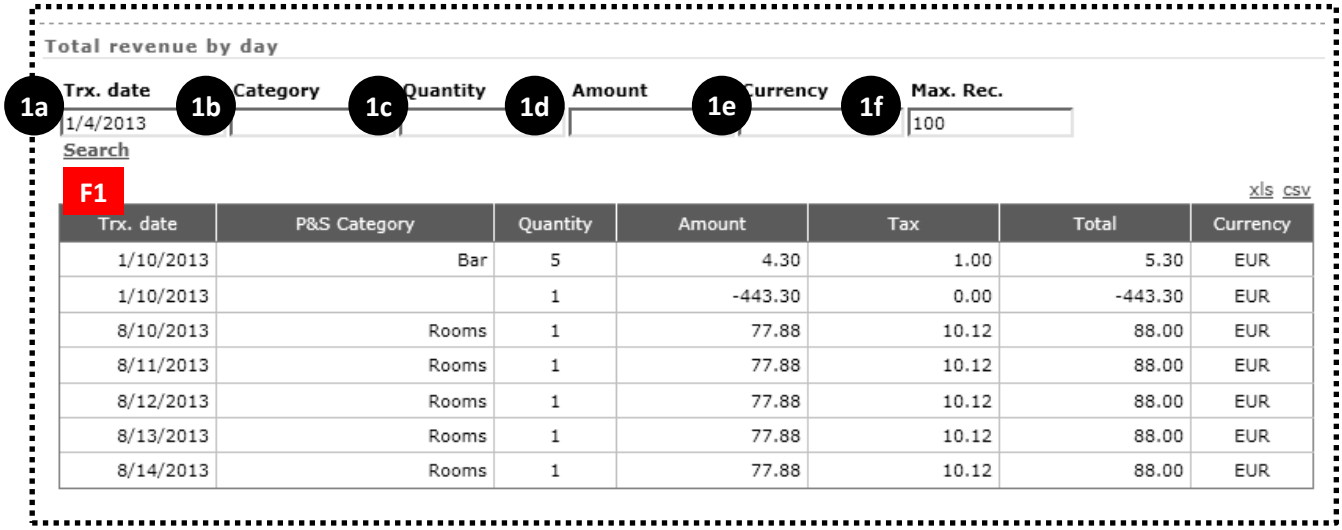
7.7 TOTAL REVENUE PER DAY REPORT

This report shows the total revenue amounts per day.

Report Location



Report Description



Trx. date	P&S Category	Quantity	Amount	Tax	Total	Currency
1/10/2013	Bar	5	4.30	1.00	5.30	EUR
1/10/2013		1	-443.30	0.00	-443.30	EUR
8/10/2013	Rooms	1	77.88	10.12	88.00	EUR
8/11/2013	Rooms	1	77.88	10.12	88.00	EUR
8/12/2013	Rooms	1	77.88	10.12	88.00	EUR
8/13/2013	Rooms	1	77.88	10.12	88.00	EUR
8/14/2013	Rooms	1	77.88	10.12	88.00	EUR

7.7.1 FIELDS

1) **Main**

a. ***Trx. date*** – select all records that are equal or higher than the selected date.

b. ***Category*** – filter by category name.

c. ***Quantity*** – filter by quantity.

d. ***Amount*** – filter by amount.

e. ***Currency*** – filter by currency.

f. ***Max Rec*** – the maximum number of record to return from the database.

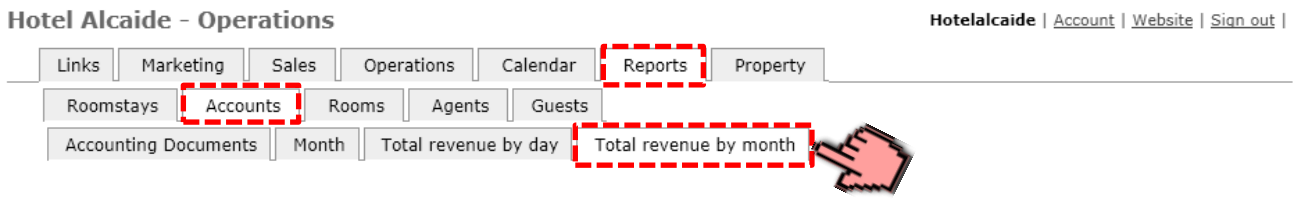
7.7.2 FUNCTIONS

1) Search – refresh and updates the report using the selected filters.

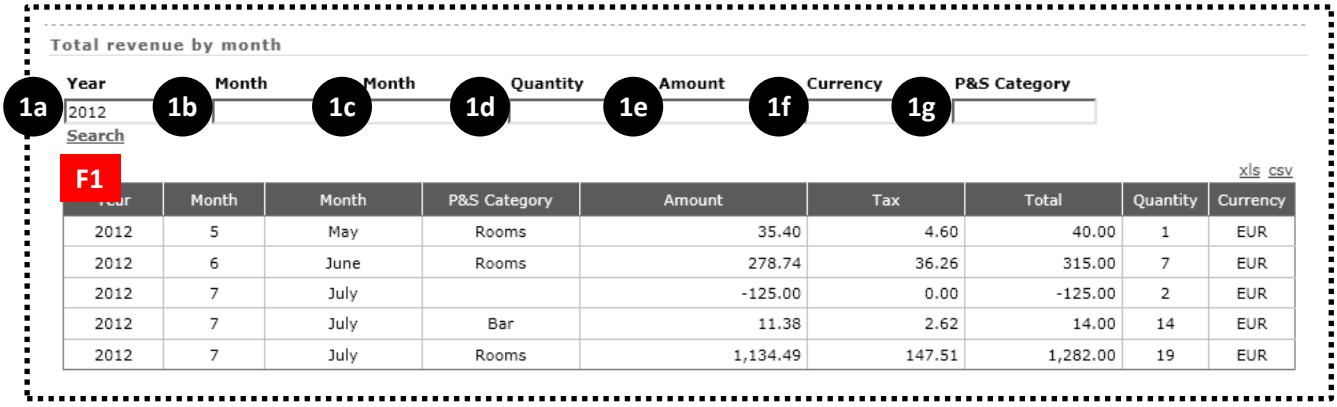
7.8 TOTAL REVENUE PER MONTH REPORT

This report shows the total revenue per month.

Report Location



Report Description



Year	Month	Month	P&S Category	Amount	Tax	Total	Quantity	Currency
2012	5	May	Rooms	35.40	4.60	40.00	1	EUR
2012	6	June	Rooms	278.74	36.26	315.00	7	EUR
2012	7	July		-125.00	0.00	-125.00	2	EUR
2012	7	July	Bar	11.38	2.62	14.00	14	EUR
2012	7	July	Rooms	1,134.49	147.51	1,282.00	19	EUR

7.8.1 FIELDS

1) Main

a. ***Year*** – filter by year.

b. ***Start Month*** – filter by start month.

c. ***End Month*** – filter by end month.

d. ***Quantity*** – filter by quantity.

e. ***Amount*** – filter by amount.

f. ***Currency*** – filter by currency.

g. ***P&S Category*** – filter by product or service category.

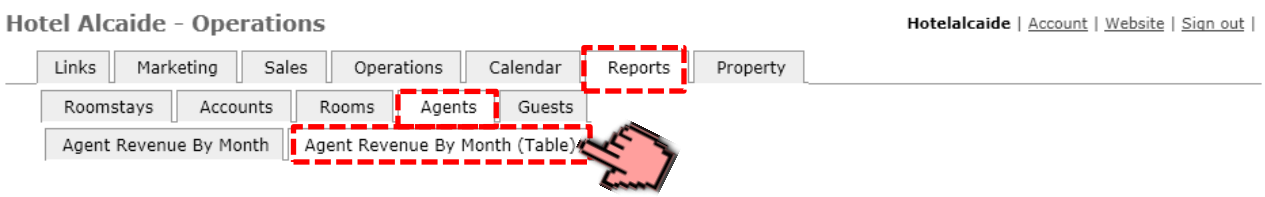
7.8.2 FUNCTIONS

1) **Search** – refresh and updates the report using the selected filters.

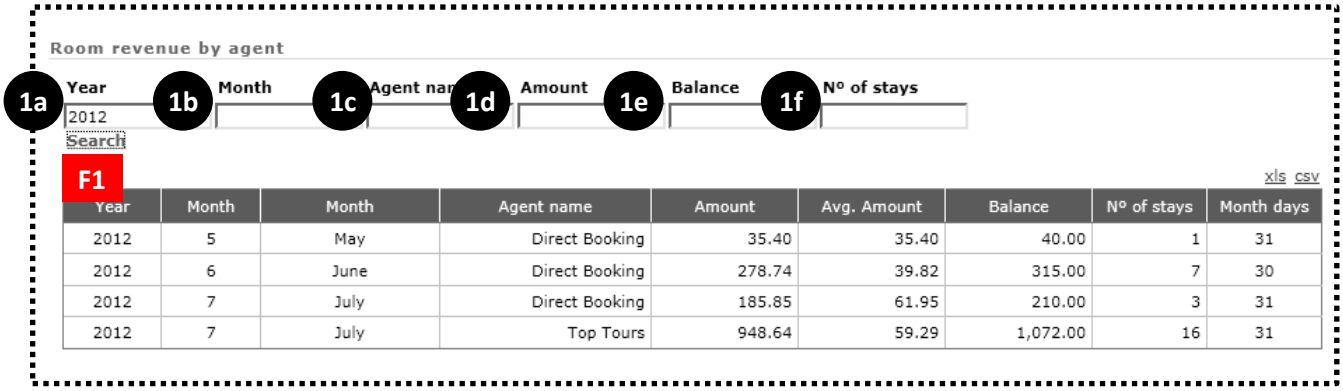
7.9 AGENT REVENUE PER MONTH REPORT

This report shows the total revenue per agent.

Report Location



Report Description



Year	Month	Month	Agent name	Amount	Avg. Amount	Balance	Nº of stays	Month days
2012	5	May	Direct Booking	35.40	35.40	40.00	1	31
2012	6	June	Direct Booking	278.74	39.82	315.00	7	30
2012	7	July	Direct Booking	185.85	61.95	210.00	3	31
2012	7	July	Top Tours	948.64	59.29	1,072.00	16	31

7.9.1 FIELDS

1) **Main**
   a. ***Year*** – filter by year.
   b. ***Month*** – filter by month.
   c. ***Agent name*** – filter by agent name.
   d. ***Amount*** – filter by amount.
   e. ***Balance*** – filter by balance amount.
   f. ***Nº of stays*** – filter by number of stays.

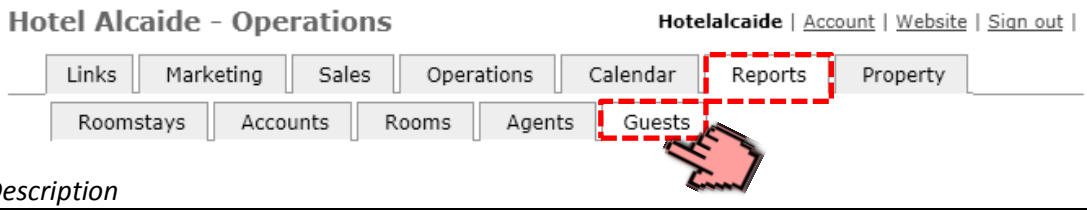
7.9.2 FUNCTIONS

1) **Search** – refresh and updates the report using the selected filters.

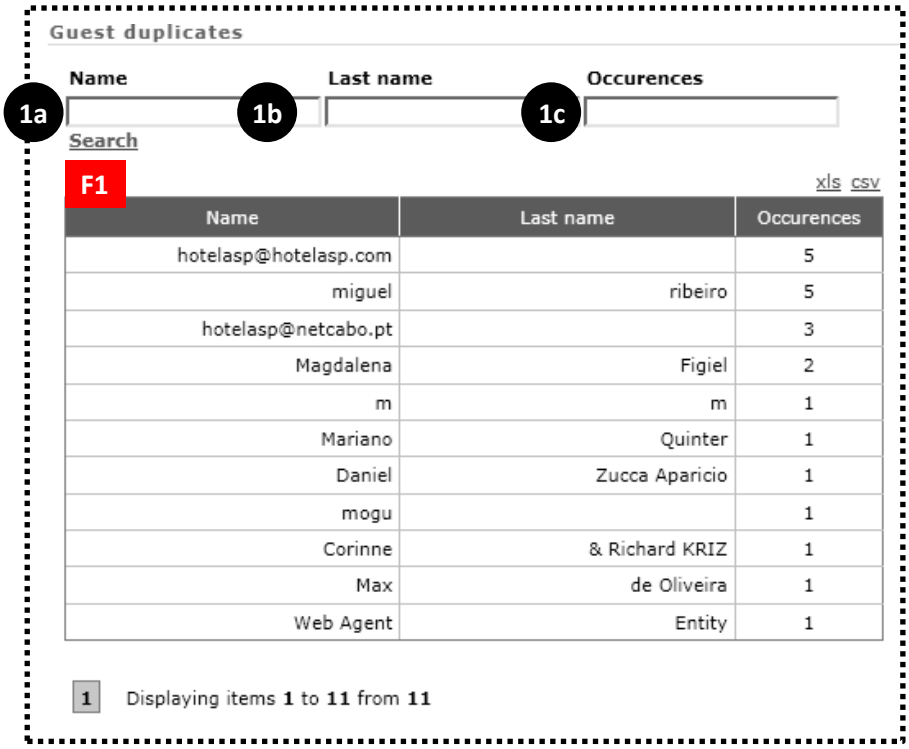
7.10 DUPLICATED GUESTS REPORT

This report shows the guests that could be duplicated in the system.

Report Location



Report Description



7.10.1 FIELDS

1) **Main**
   a. ***Name*** – filter by guest first name.

   b. ***Last name*** – filter by guest last name.

   c. ***Occurrences*** – filter by number of occurrences.

7.10.2 FUNCTIONS

1) **Search** – refresh and updates the report using the selected filters.

8 CONFIGURE LOCAL VERSION

This chapter addresses advanced and technical aspects related with the local version. This chapter requires information technology know-how.

The main configuration steps for the local version are setting the database, the web server and the email server. The configuration of the XML files and the report template files are optional and require advanced IT skills. The configuration for multi-accounts is required only for the companies that have more than one hotel and want to have an account for each hotel.

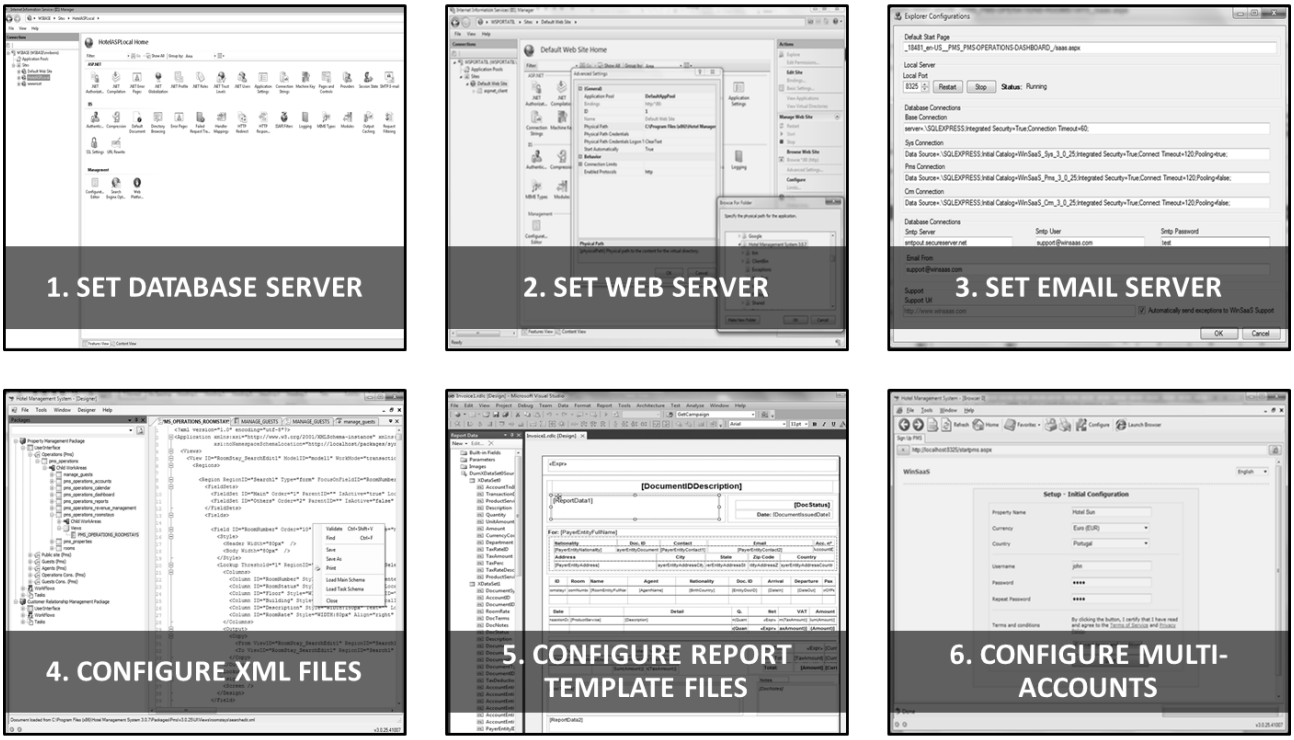


Figure 87 - Configure Local Version: Main Steps

The hotel can decide because of performance and security reasons to use the windows internet information server (IIS) instead of the *Hotel Explorer* web server. The configuration of the IIS requires the following steps:

1. ***Attach databases*** – Read and execute the ATTACH DATABASES HELP CARDS chapter.
   - The databases by default are not attached to the SQL server.
   - The *Hotel Explorer* when executed attaches the databases and when is closed detaches the databases.
   - The help cards explain how the user can attach the databases to the SQL server.

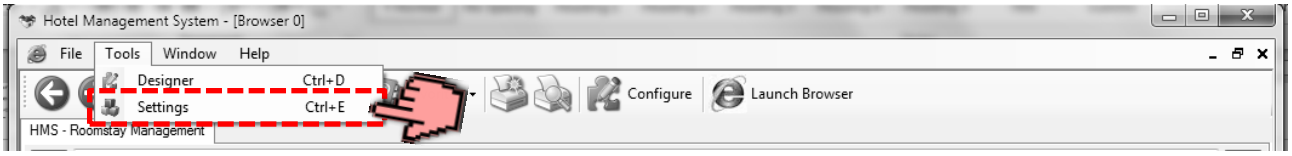
2. ***Configure IIS*** – Read and execute the CONFIGURE IIS HELP CARDS chapter.

If the hotel decides to use the IIS instead of the *Hotel Explorer* take in consideration that each time the hotel executes the *Hotel Explorer* the system will detach the databases. This implies that to continue using the IIS the hotel needs again to reattach the databases to the SQL server using the ATTACH DATABASES HELP CARDS and the SQL Management Studio.

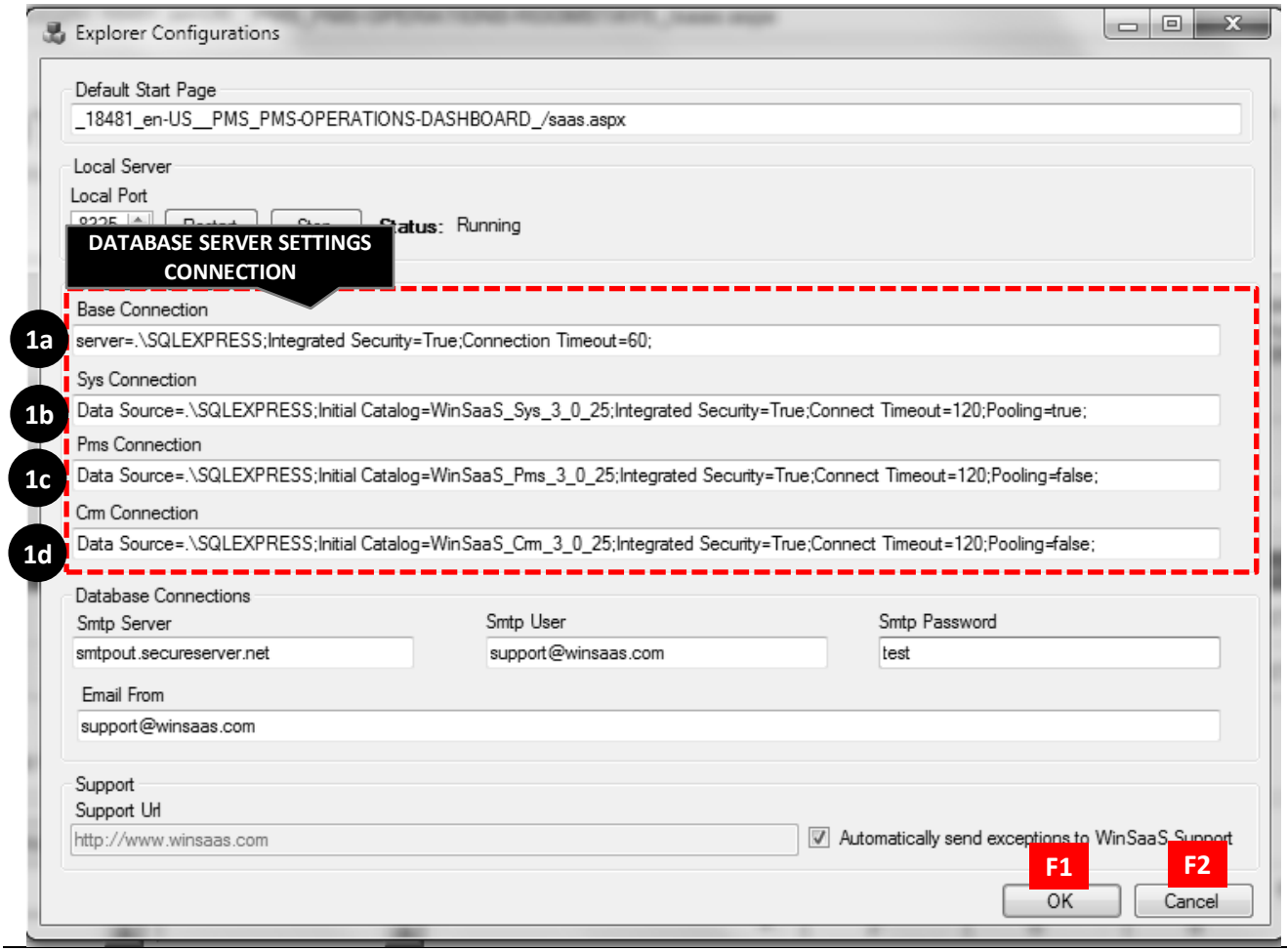
8.1 SET DATABASE SERVER

This page allows the hotel to set the database server settings. We recommend the hotel to search the internet for "*SQL server connection strings*" for additional information about SQL server connections.

Feature Location



Feature Description



8.1.1 FIELDS

1) Database Connections

Required a. ***Base Connection*** – the SQL server connection string.

i. We recommend the hotel to search in the internet for "SQL *server connection strings*" for additional information about SQL server connections.

Required b. ***Sys Connection*** – the SQL connection string to the system database (**WinSaaS_Sys_3_0_25**).

Required c. ***Pms Connection*** – the SQL connection string to the property management system database (**WinSaaS_Pms_3_0_25**).

Required d. ***Crm Connection*** – the SQL connection string to the CRM database (**WinSaaS_Crm_3_0_25**).

8.1.2 FUNCTIONS

1) **OK** – saves the data in the database.

2) **Cancel** – cancels the operation and returns to the previous page.

8.1.3 MANUAL SETTINGS

These settings can also be changed by manually editing and saving the following configuration files and corresponding keys:

- ***CONFIGURATION FILE – WEB.CONFIG***
  - ***PATH:*** *C:\PROGRAM FILES (X86)\HOTEL MANAGEMENT SYSTEM 3.0.X*WEB.CONFIG
  - **<APPSETTINGS>**
    - i. **KEY** ="***WinSaaS.Database.Multi.Connection***"
      - **VALUE ="SQL_CONNECTION"**
    - ii. **KEY** =" ***WinSaaS.Database.SqlConnection.WinSaaS_Sys_3_0_25***"
      - **VALUE ="SQL_CONNECTION_TO_SYSTEM_DATABASE"**
    - iii. **KEY** ="***WinSaaS.Database.SqlConnection.WinSaaS_Pms_3_0_25***"
      - **VALUE =" SQL_CONNECTION_TO_PMS_DATABASE"**
    - iv. **KEY** ="***WinSaaS.Database.SqlConnection.WinSaaS_Crm_3_0_25***"
      - **VALUE =" SQL_CONNECTION_TO_CRM_DATABASE"**

- ***CONFIGURATION FILE – HOTELEXPLORER.EXE.CONFIG***
  - ***PATH:*** *C:\PROGRAM FILES (X86)\HOTEL MANAGEMENT SYSTEM 3.0.X\BIN\HOTELEXPLORER.EXE.CONFIG*
  - **<APPSETTINGS>**
    - i. **KEY** ="***WinSaaS.Database.Multi.Connection***"
      - **VALUE ="SQL_CONNECTION"**
    - ii. **KEY** =" ***WinSaaS.Database.SqlConnection.WinSaaS_Sys_3_0_25***"
      - **VALUE ="SQL_CONNECTION_TO_SYSTEM_DATABASE"**
    - iii. **KEY** ="***WinSaaS.Database.SqlConnection.WinSaaS_Pms_3_0_25***"
      - **VALUE =" SQL_CONNECTION_TO_PMS_DATABASE"**
    - iv. **KEY** ="***WinSaaS.Database.SqlConnection.WinSaaS_Crm_3_0_25***"

- **VALUE =" SQL_CONNECTION_TO_CRM_DATABASE"**

The setting **SQL_CONNECTION** should be configured to connect to the SQL Server database.

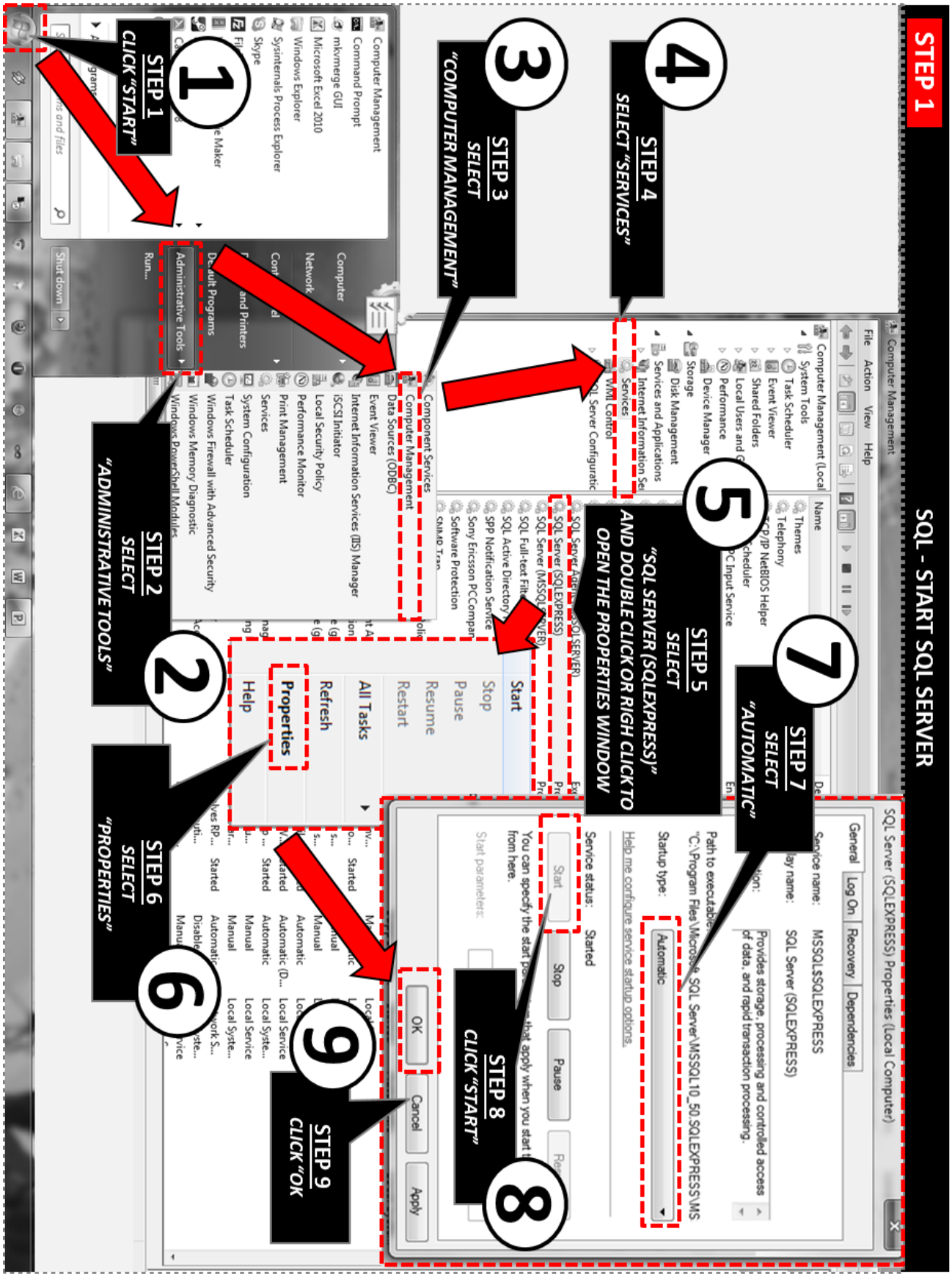
The **SQL_CONNECTION_TO_SYSTEM_DATABASE** is the SQL connection to the system database (*WinSaaS_Sys_3_0_25*).

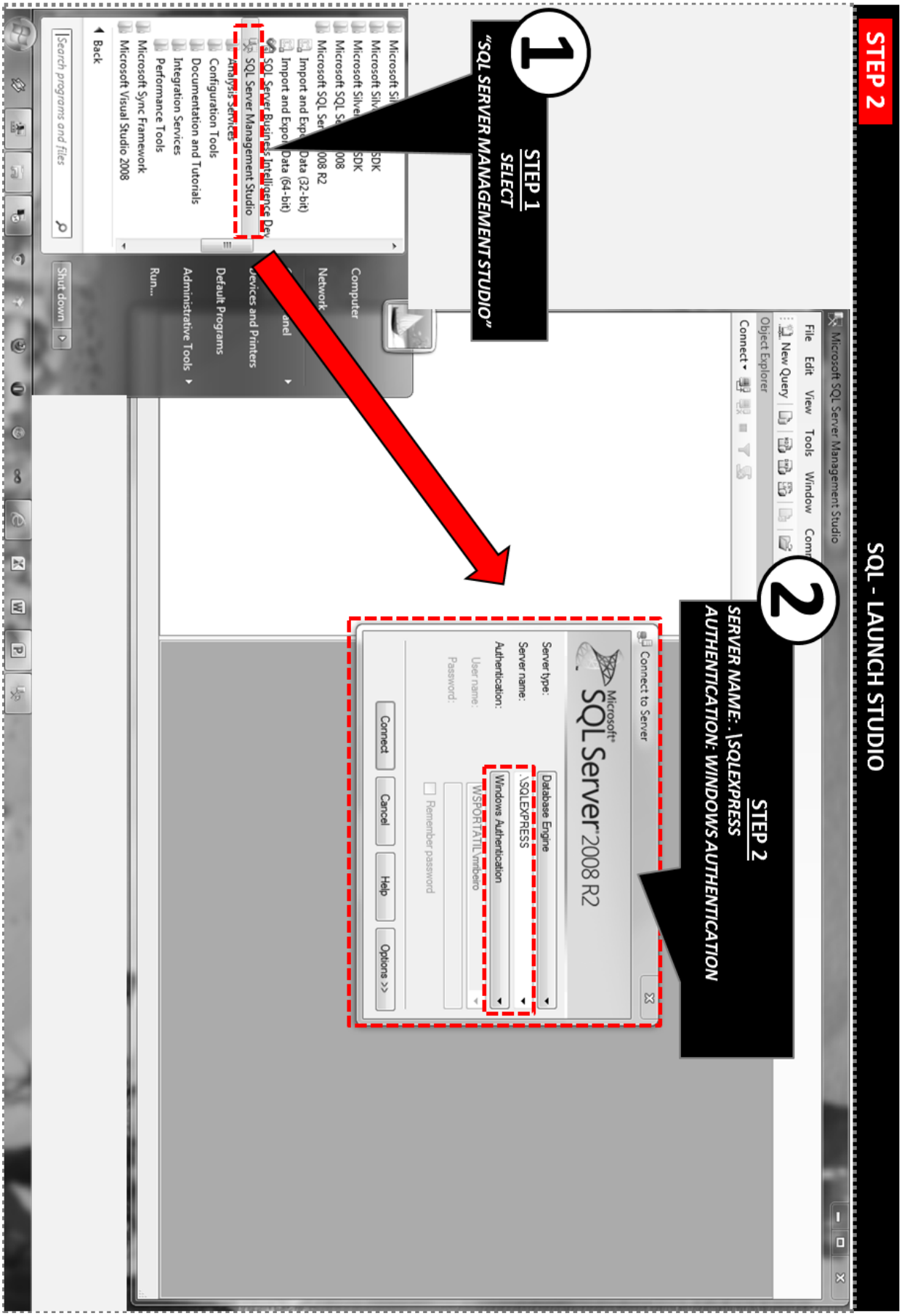
The **SQL_CONNECTION_TO_PMS_DATABASE** is the SQL connection to the property management system database (*WinSaaS_Pms_3_0_25*).

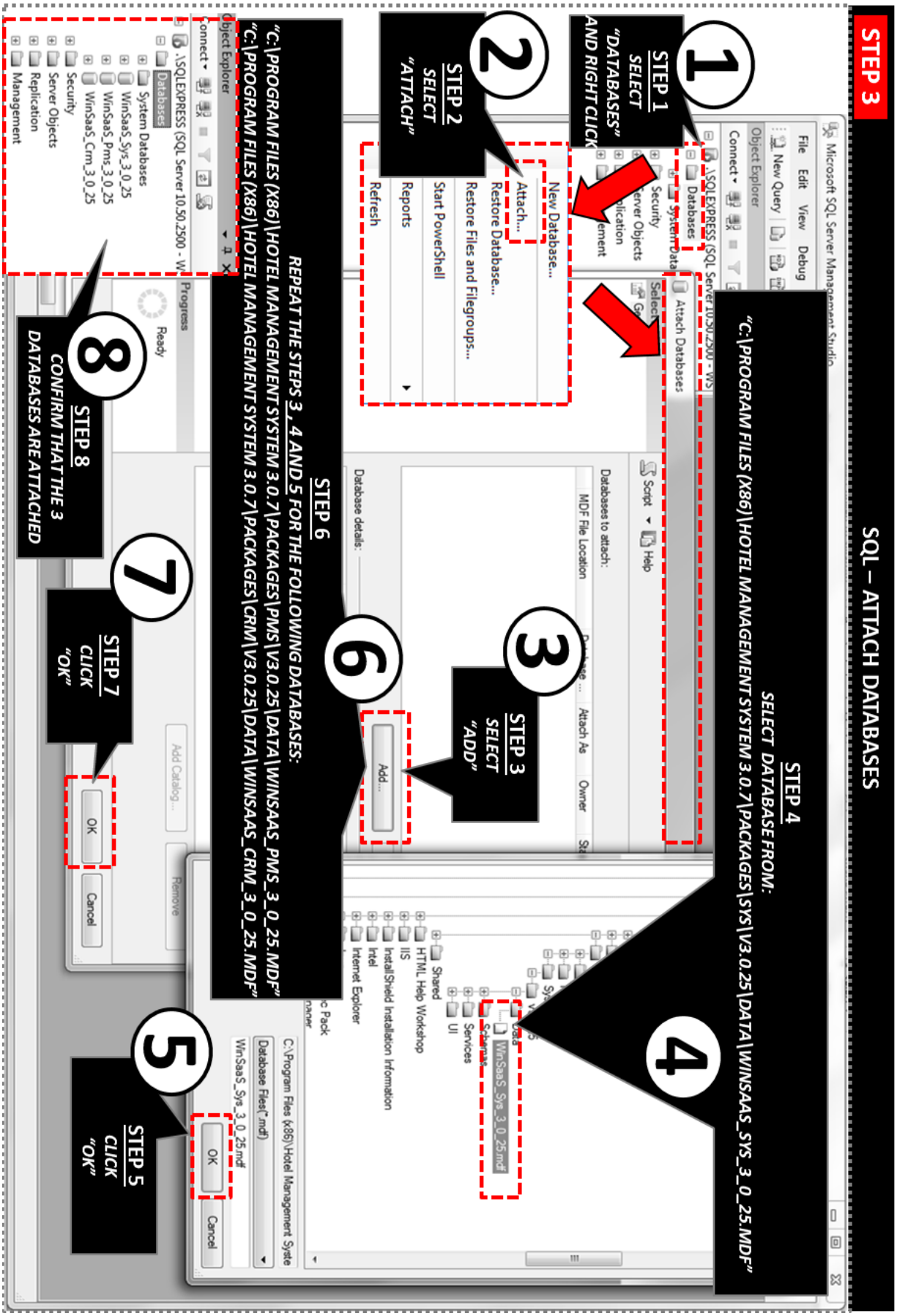
The **SQL_CONNECTION_TO_CRM_DATABASE** is the SQL connection to the CRM database (*WinSaaS_Crm_3_0_25*).

8.1.4 ATTACH DATABASES HELP CARDS

The *Hotel Explorer* when executed attaches the databases and when is closed detaches the databases. These help cards explains how the user can attach the databases to the SQL server.




STEP 2
SQL - LAUNCH STUDIO
1
STEP 1
SELECT
"SQL SERVER MANAGEMENT STUDIO"
2
STEP 2
SERVER NAME: .\SQLEXPRESS
AUTHENTICATION: WINDOWS AUTHENTICATION
Microsoft SQL Server Management Studio
File Edit View Tools Window
New Query
Object Explorer
Connect
Microsoft SQL Server Management Studio
Analysis Services
Configuration Tools
Documentation and Tutorials
Integration Services
Performance Tools
Microsoft Sync Framework
Microsoft Visual Studio 2008
Back
Search programs and files
Shut down
Computer
Network
Devices and Printers
Default Programs
Administrative Tools
Run...
Connect to Server
Microsoft SQL Server 2008 R2
Server type:
Database Engine
Server name:
.\SQLEXPRESS
Authentication:
Windows Authentication
User name:
WSPORTATIL\mribeiro
Password:
Remember password
Connect
Cancel
Help
Options >>

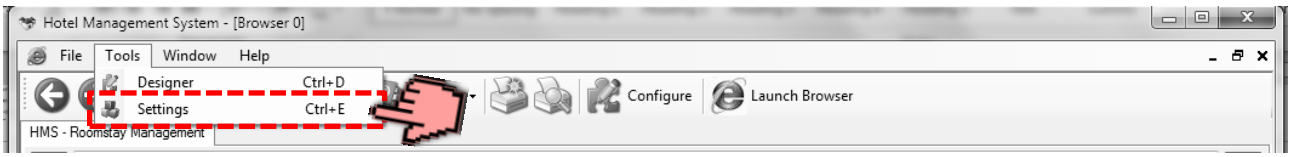

STEP 3
SQL – ATTACH DATABASES
1
STEP 1
SELECT
"DATABASES"
AND RIGHT CLICK
2
STEP 2
SELECT
"ATTACH"
3
STEP 3
SELECT
"ADD"
4
STEP 4
SELECT DATABASE FROM:
"C:\PROGRAM FILES (X86)\HOTEL MANAGEMENT SYSTEM 3.0.7\PACKAGES\SYS\V3.0.25\DATA\WINSAAS_SYS_3_0_25.MDF"
5
STEP 5
CLICK
"OK"
6
STEP 6
REPEAT THE STEPS 3, 4 AND 5 FOR THE FOLLOWING DATABASES:
"C:\PROGRAM FILES (X86)\HOTEL MANAGEMENT SYSTEM 3.0.7\PACKAGES\PMS\V3.0.25\DATA\WINSAAS_PMS_3_0_25.MDF"
"C:\PROGRAM FILES (X86)\HOTEL MANAGEMENT SYSTEM 3.0.7\PACKAGES\CRM\V3.0.25\DATA\WINSAAS_CRM_3_0_25.MDF"
7
STEP 7
CLICK
"OK"
8
STEP 8
CONFIRM THAT THE 3
DATABASES ARE ATTACHED

8.2 SET WEB SERVER

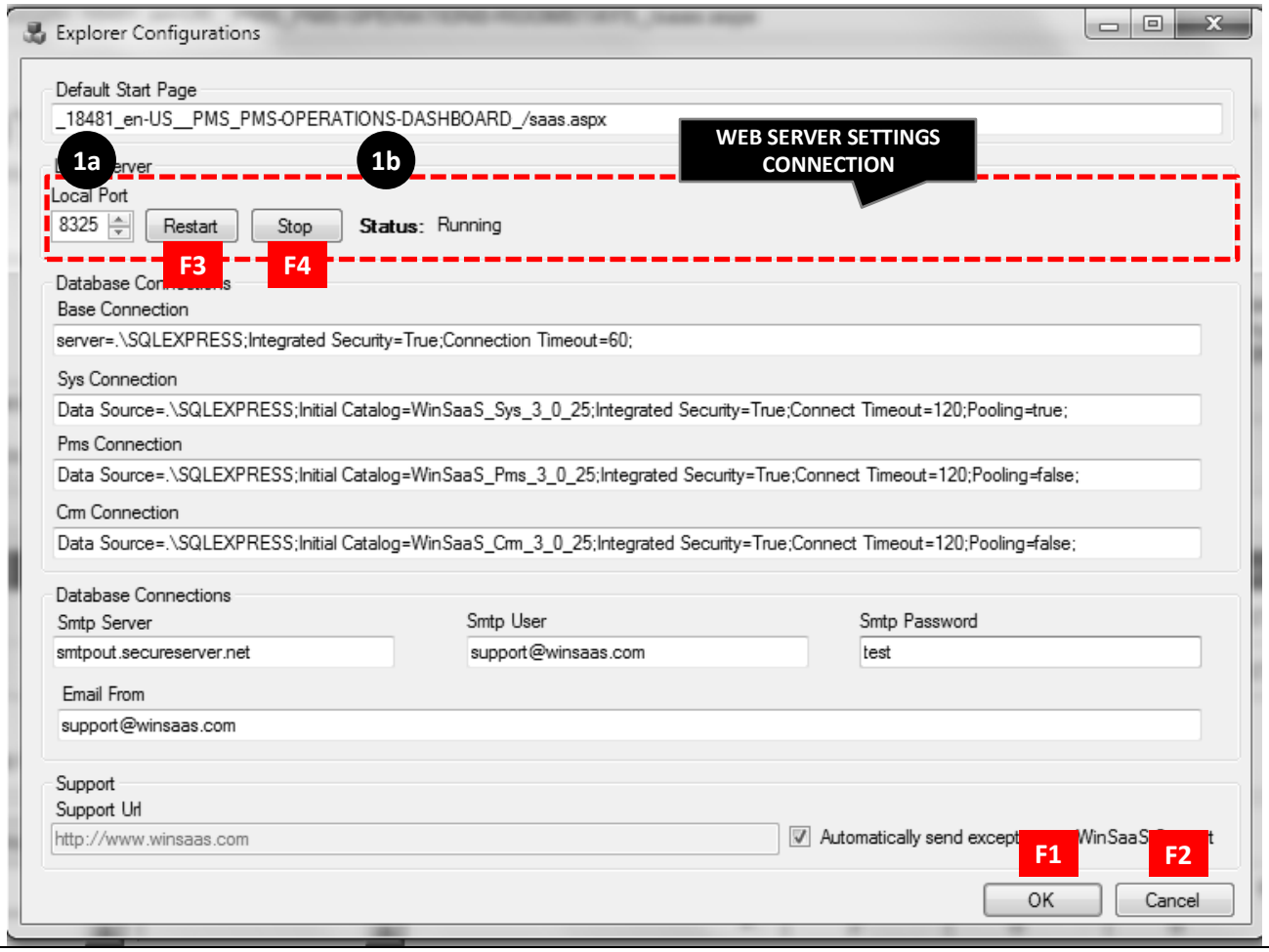
This page allows the hotel to set the *Hotel Explorer* web server settings. As an alternative web server the hotel can configure the *Internet Information Server* as explained in the CONFIGURE IIS HELP CARDS chapter.

The windows firewall must be configured to allow the web server port (the default port is 8325) for inbound traffic. The hotel can find help in how to set the firewall by searching the internet for "*how to configure the windows firewall*".

Setting Location



Setting Description



8.2.1 FIELDS

1) Web Server Settings

Required a. ***Local Port Server*** – the web server local port.

i. The firewall must be configured to allow the web server port for inbound traffic. We recommend the hotel to search the internet for “how to configure the windows firewall”.

b. ***Status*** – the web server status.

8.2.2 FUNCTIONS

1) **OK** – saves the local port in the database.

2) **Cancel** – cancels the operation and returns to the previous page.

3) **Restarts** – restarts the web server.

4) **Stop** – stops the web server.

8.2.3 MANUAL SETTINGS

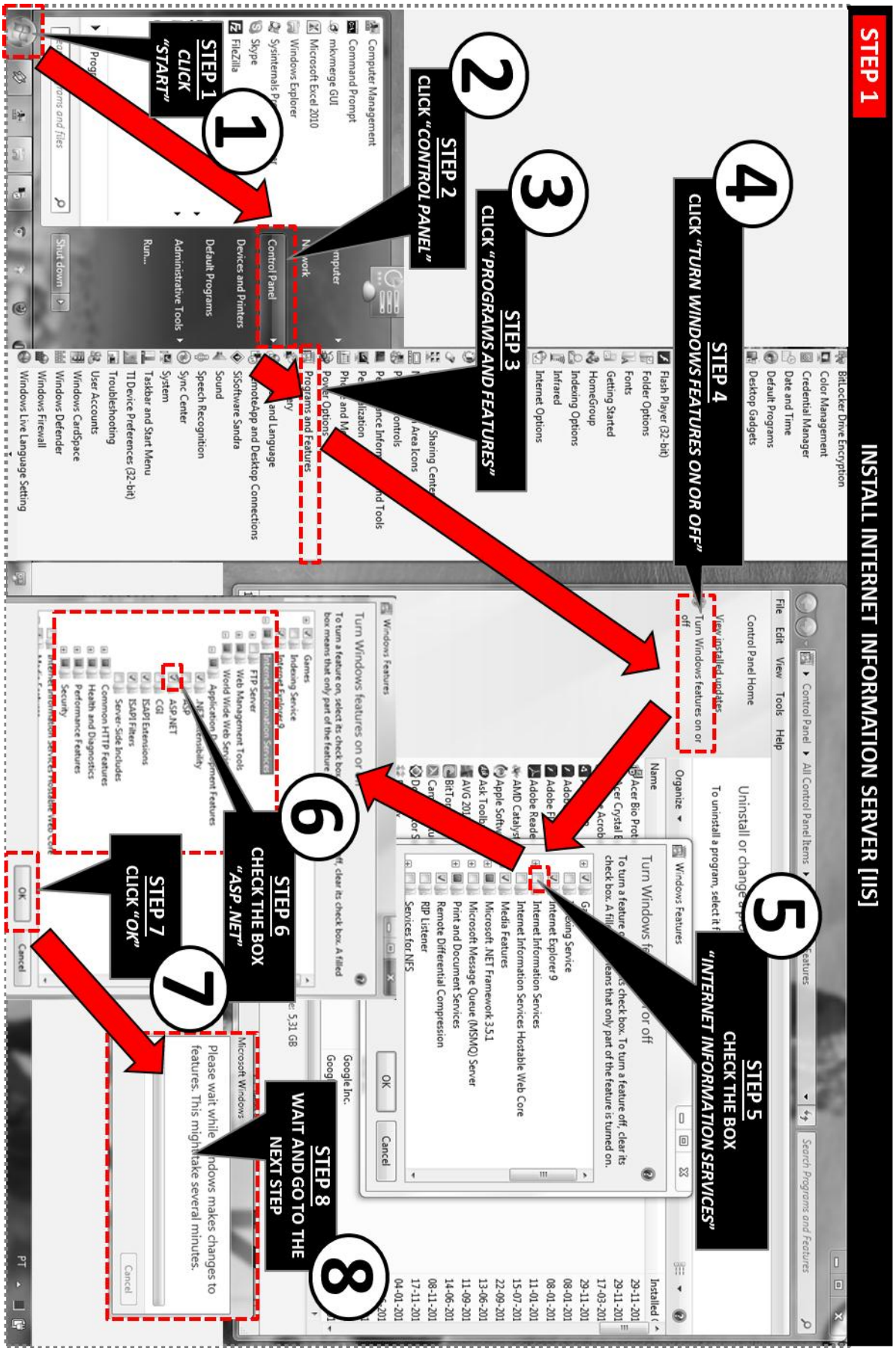
These settings can also be changed by manually editing and saving the following configuration file and corresponding key:

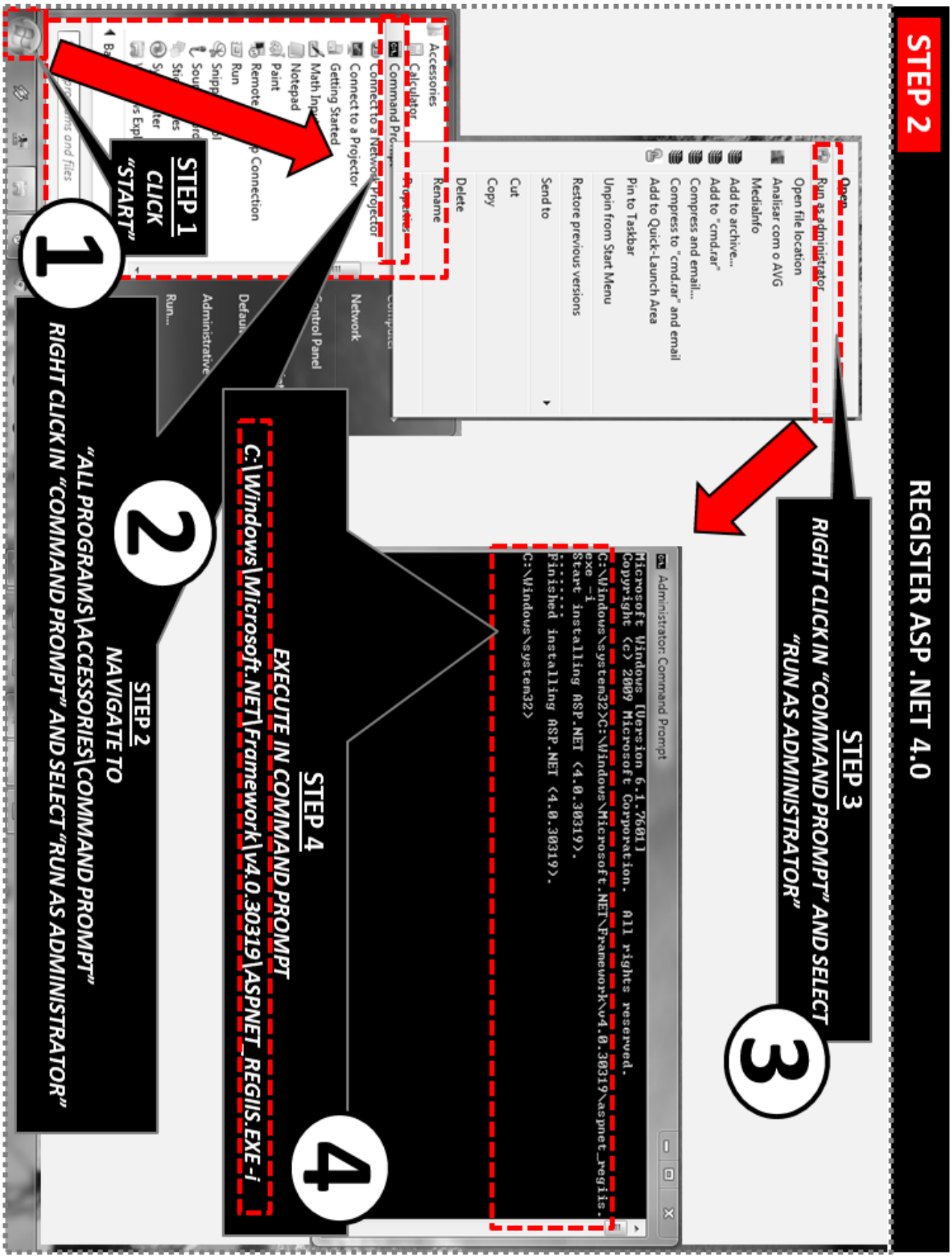
- ***CONFIGURATION FILE – HOTELEXPLORER.EXE.CONFIG***
  - ***PATH:*** *C:\PROGRAM FILES (X86)\HOTEL MANAGEMENT SYSTEM 3.0.X\BIN\HOTELEXPLORER.EXE.CONFIG*
  - **<WINSAAS>**
    - **<WEBSERVER>**
      - **PORT** ="**WEB_SERVER_PORT** "

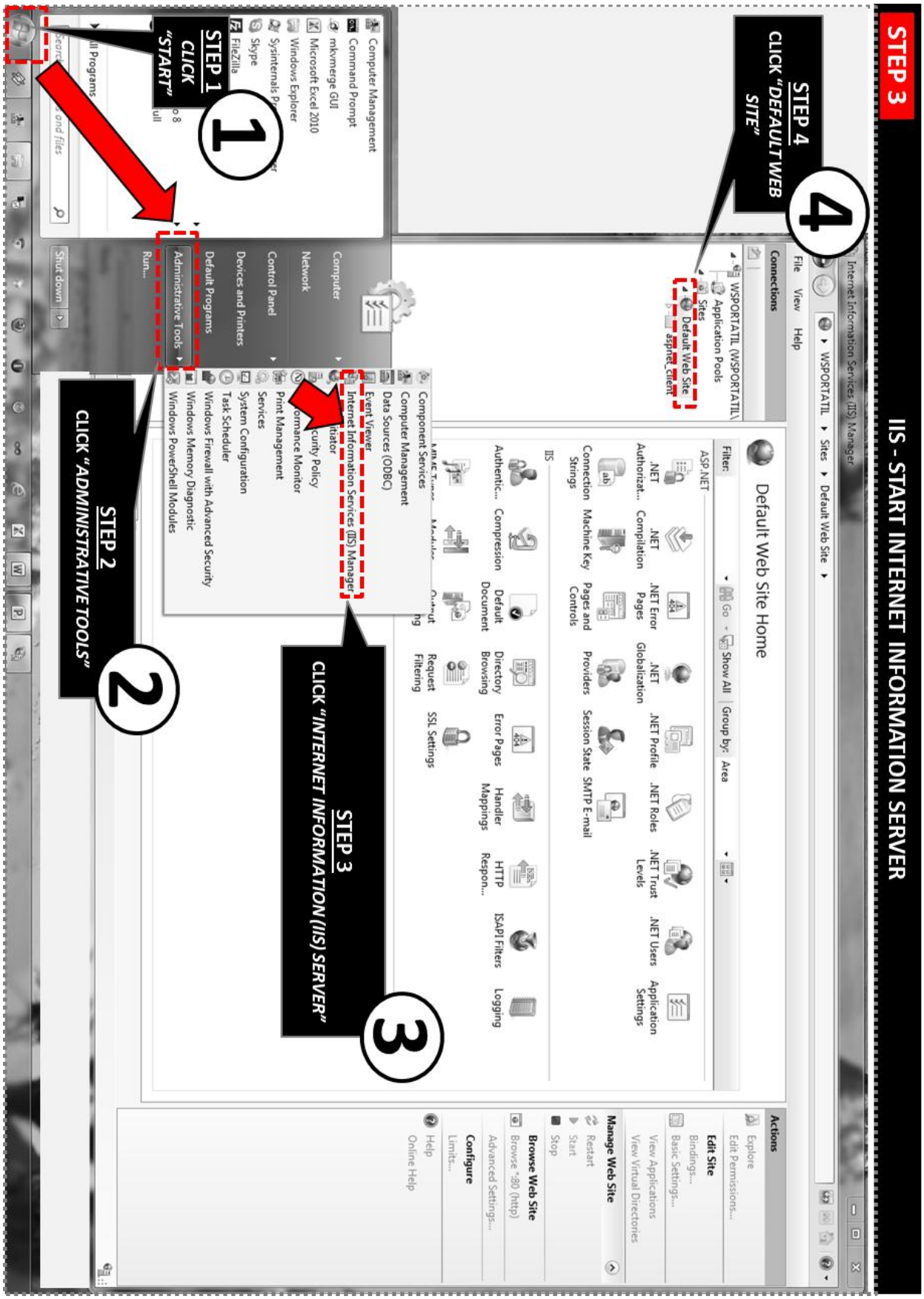
The setting **WEB_SERVER_PORT** should be changed to an available network port. The firewall must be configured to allow the selected web server port for inbound traffic.

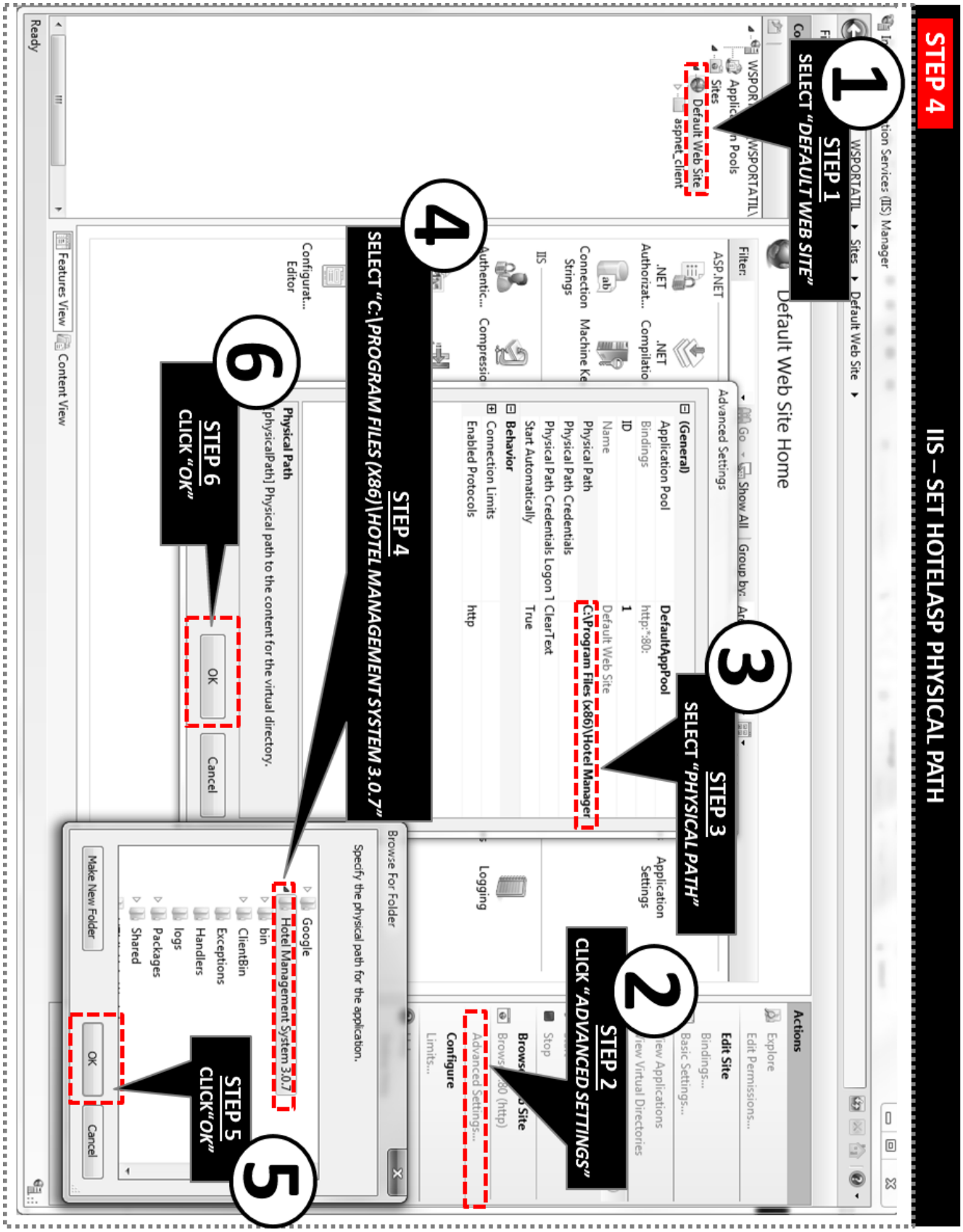
8.2.4 CONFIGURE IIS HELP CARDS

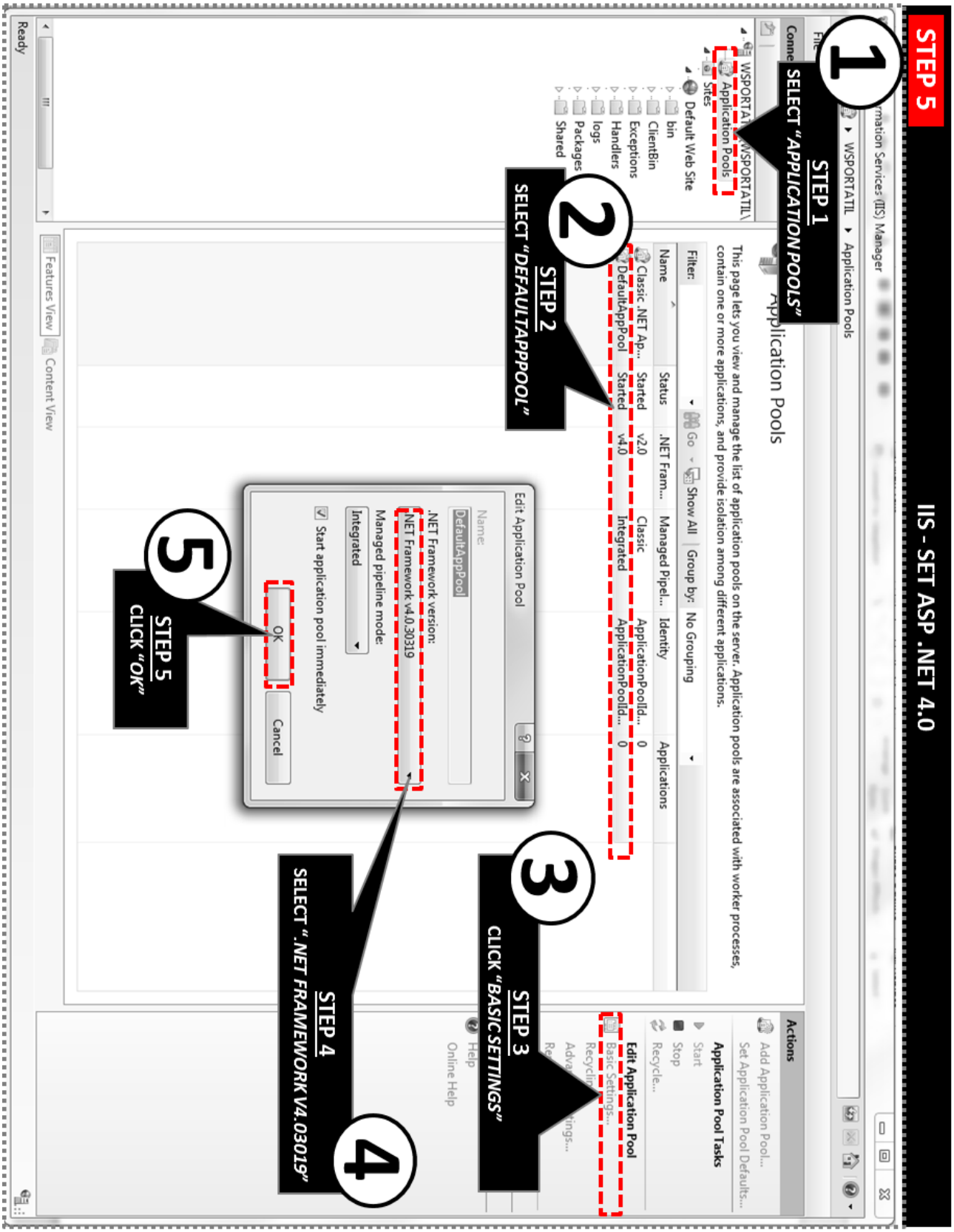
These help cards explain step by step how to configure the internet information server (IIS).

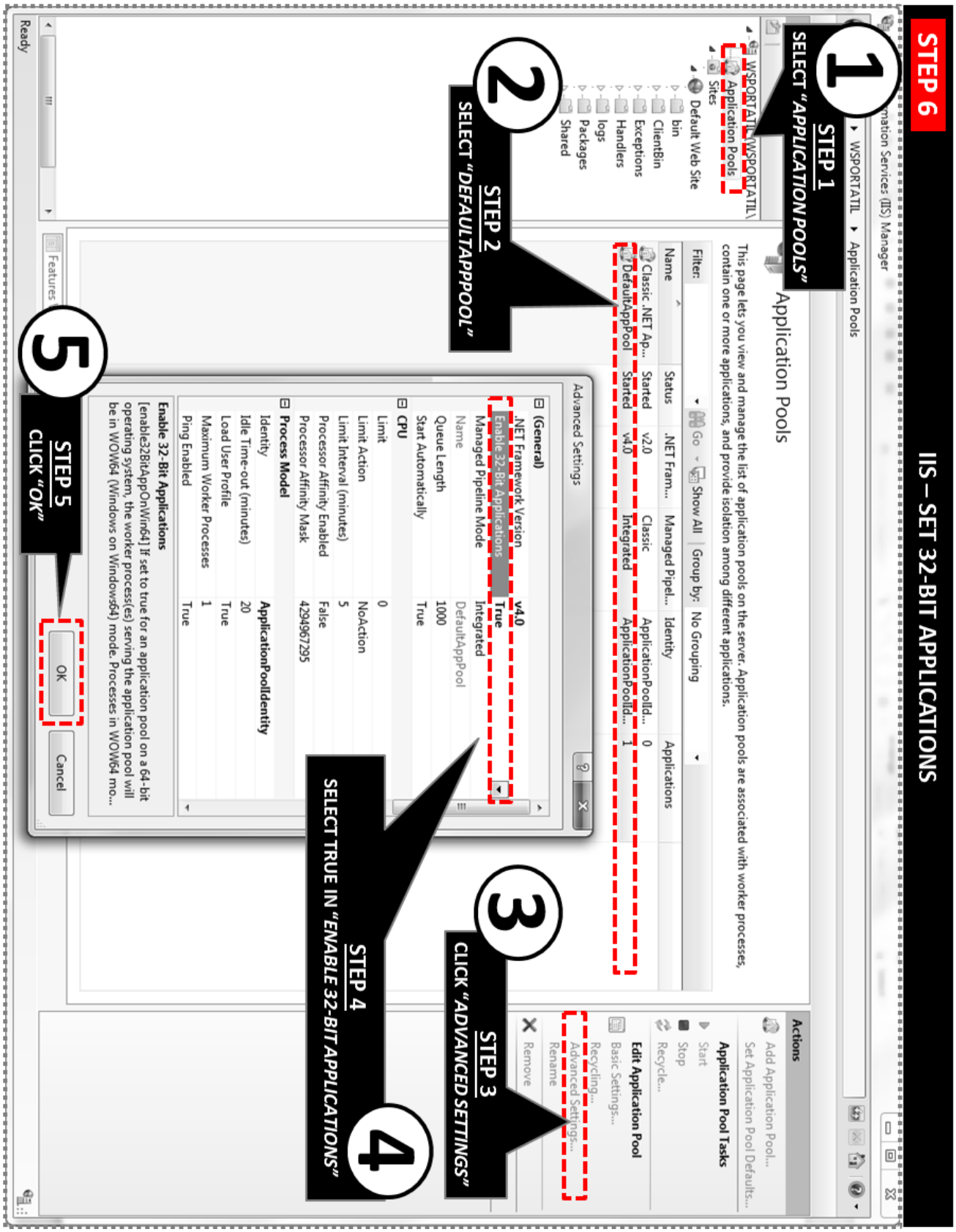


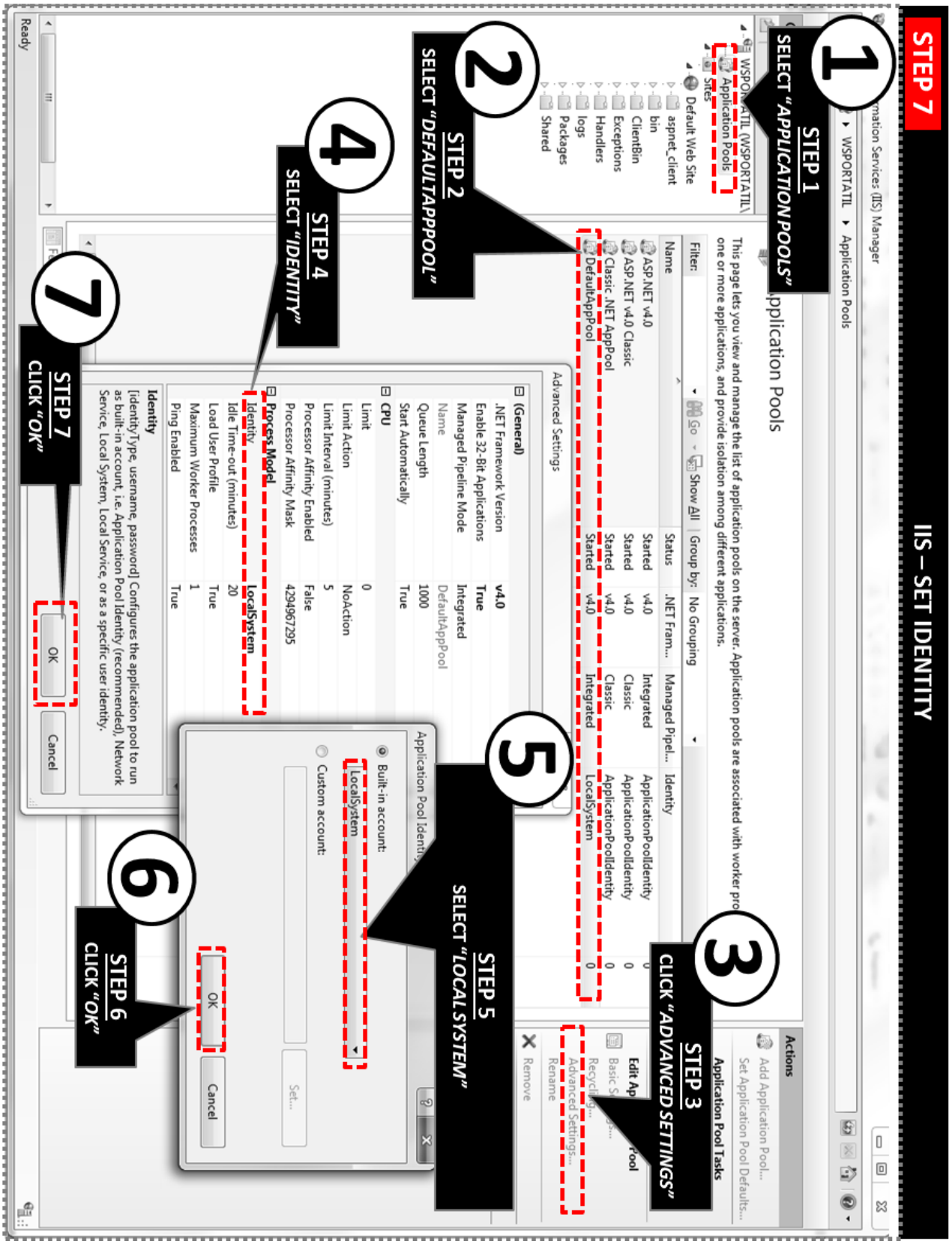

STEP 2
REGISTER ASP .NET 4.0
STEP 3
RIGHT CLICK IN "COMMAND PROMPT" AND SELECT "RUN AS ADMINISTRATOR"
3
Open
Run as administrator
Open file location
Analisar com o AVG
MediaInfo
Add to archive...
Add to "cmd.rar"
Compress and email...
Compress to "cmd.rar" and email
Add to Quick Launch Area
Pin to Taskbar
Unpin from Start Menu
Restore previous versions
Send to
Cut
Copy
Delete
Rename
Accessories
Calculator
Command Prompt
Connect to a Network Projector
Connect to a Projector
Getting Started
Math Input
Notepad
Paint
Remote
Run
Snipping
Network
Control Panel
Administrative
Run...
STEP 1
CLICK "START"
1
STEP 2
NAVIGATE TO "ALL PROGRAMS\ACCESSORIES\COMMAND PROMPT"
RIGHT CLICK IN "COMMAND PROMPT" AND SELECT "RUN AS ADMINISTRATOR"
2
Administrator: Command Prompt
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.
C:\Windows\system32>C:\Windows\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis.exe -i
Start installing ASP.NET (4.0.30319).
.....
Finished installing ASP.NET (4.0.30319).
C:\Windows\system32>
STEP 4
EXECUTE IN COMMAND PROMPT
C:\Windows\Microsoft.NET\Framework\v4.0.30319\ASPNET_REGIIS.EXE -i
4

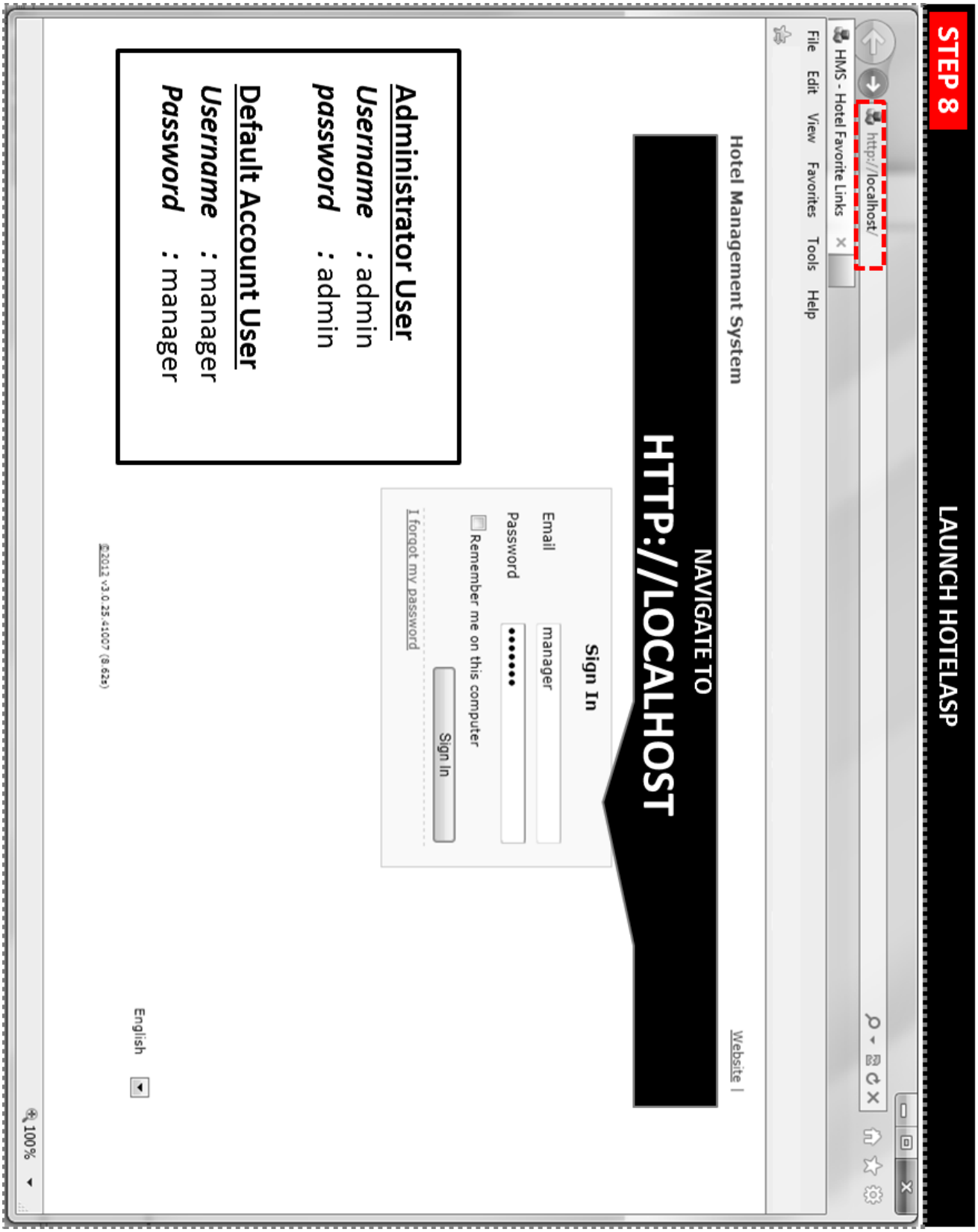

STEP 3
IIS - START INTERNET INFORMATION SERVER
STEP 4
CLICK "DEFAULT WEB SITE"
4
STEP 1
CLICK "START"
1
STEP 2
CLICK "ADMINISTRATIVE TOOLS"
2
STEP 3
CLICK "INTERNET INFORMATION (IIS) SERVER"
3


STEP 4
IIS – SET HOTELASP PHYSICAL PATH
1
STEP 1
SELECT "DEFAULT WEB SITE"
2
STEP 2
CLICK "ADVANCED SETTINGS"
3
STEP 3
SELECT "PHYSICAL PATH"
4
STEP 4
SELECT "C:\PROGRAM FILES (X86)\HOTEL MANAGEMENT SYSTEM 3.0.7"
5
STEP 5
CLICK "OK"
6
STEP 6
CLICK "OK"
Default Web Site Home
Advanced Settings
(General)
Application Pool
DefaultAppPool
Physical Path
C:\Program Files (x86)\Hotel Manager
Physical Path Credentials
Physical Path Credentials Logon T
ClearText
Start Automatically
True
Behavior
Connection Limits
Enabled Protocols
http
Physical Path
Physical path to the content for the virtual directory.
OK
Cancel
Browse For Folder
Specify the physical path for the application.
Google
Hotel Management System 3.0.7
bin
ClientBin
Exceptions
Handlers
logs
Packages
Shared
Make New Folder
OK
Cancel


STEP 5
IIS - SET ASP .NET 4.0
1
STEP 1
SELECT "APPLICATION POOLS"
2
STEP 2
SELECT "DEFAULTAPPPOOL"
3
STEP 3
CLICK "BASIC SETTINGS"
4
STEP 4
SELECT ".NET FRAMEWORK V4.03019"
5
STEP 5
CLICK "OK"


STEP 6
IIS – SET 32-BIT APPLICATIONS
1
STEP 1
SELECT "APPLICATION POOLS"
2
STEP 2
SELECT "DEFAULTAPPPOOL"
3
STEP 3
CLICK "ADVANCED SETTINGS"
4
STEP 4
SELECT TRUE IN "ENABLE 32-BIT APPLICATIONS"
5
STEP 5
CLICK "OK"
Application Pools
Advanced Settings
Enable 32-Bit Applications
True
OK
Cancel


STEP 7
IIS – SET IDENTITY
1
STEP 1
SELECT "APPLICATION POOLS"
2
STEP 2
SELECT "DEFAULTAPPPOOL"
3
STEP 3
CLICK "ADVANCED SETTINGS"
4
STEP 4
SELECT "IDENTITY"
5
STEP 5
SELECT "LOCAL SYSTEM"
6
STEP 6
CLICK "OK"
7
STEP 7
CLICK "OK"


STEP 8
LAUNCH HOTELASP
http://localhost/
HMS - Hotel Favorite Links
File Edit View Favorites Tools Help
Hotel Management System
Website |
NAVIGATE TO
HTTP://LOCALHOST
Sign In
Email
manager
Password
Remember me on this computer
Sign In
I forgot my password
Administrator User
Username : admin
password : admin
Default Account User
Username : manager
Password : manager
English
100%

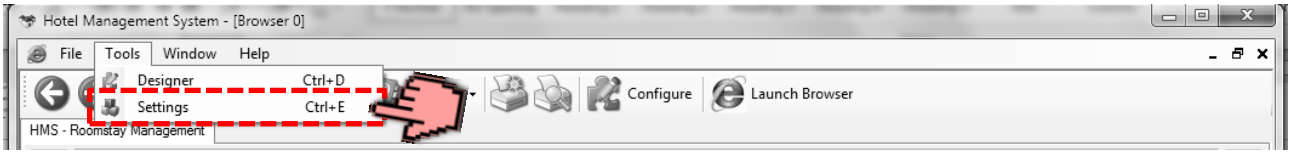
8.3 SET EMAIL SERVER

This page allows the hotel to set the email server settings. The hotel should change the email server settings and also the emails associated with the administrator user and the manager user. The email settings associated with these users can be changed at:

- HTTP://LOCALHOST:8325/_0_EN-US_23000___/SAAS.ASPX

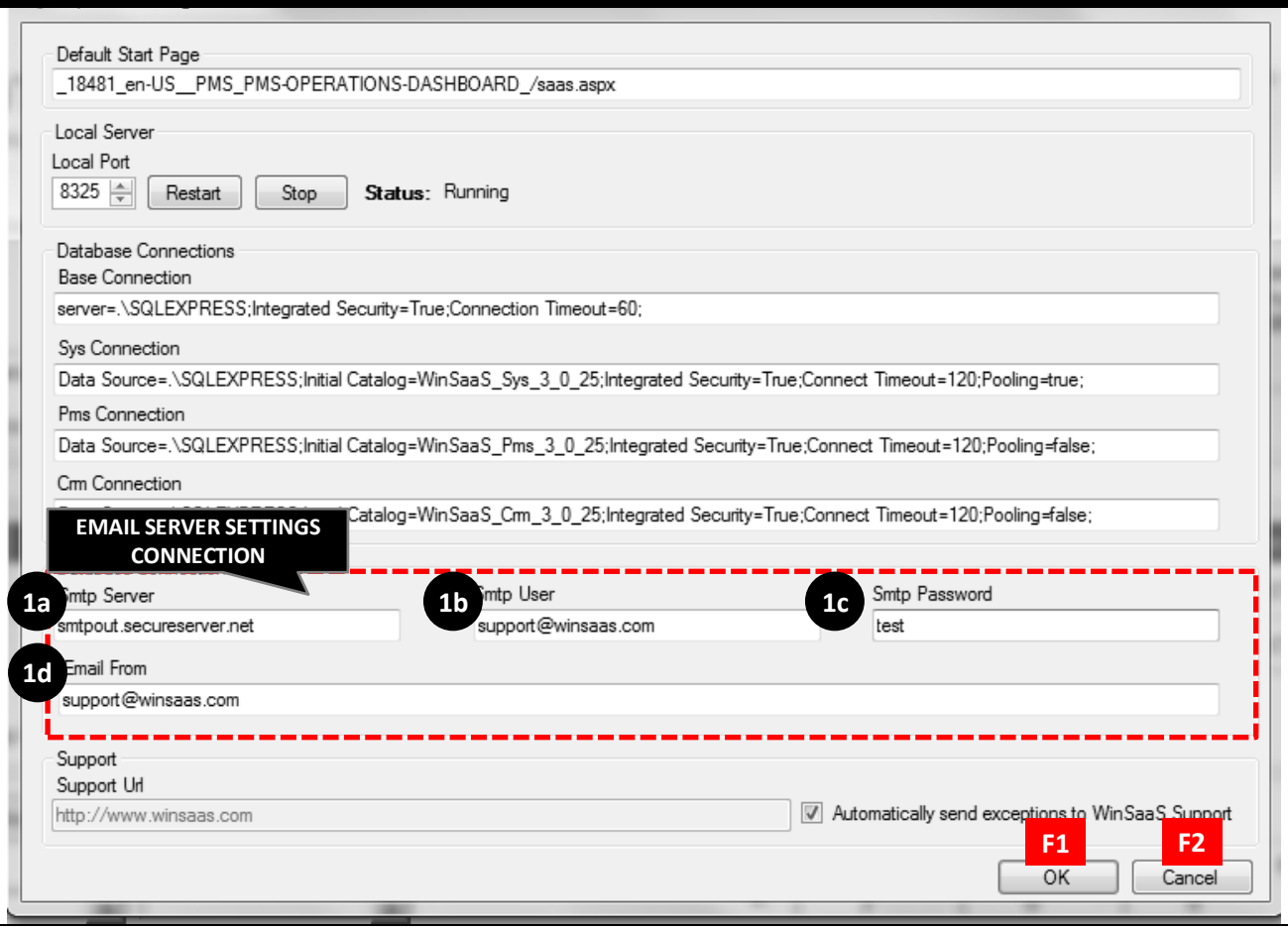
The following steps illustrate how to change the email server and the emails associated with the default system users.

Feature Location

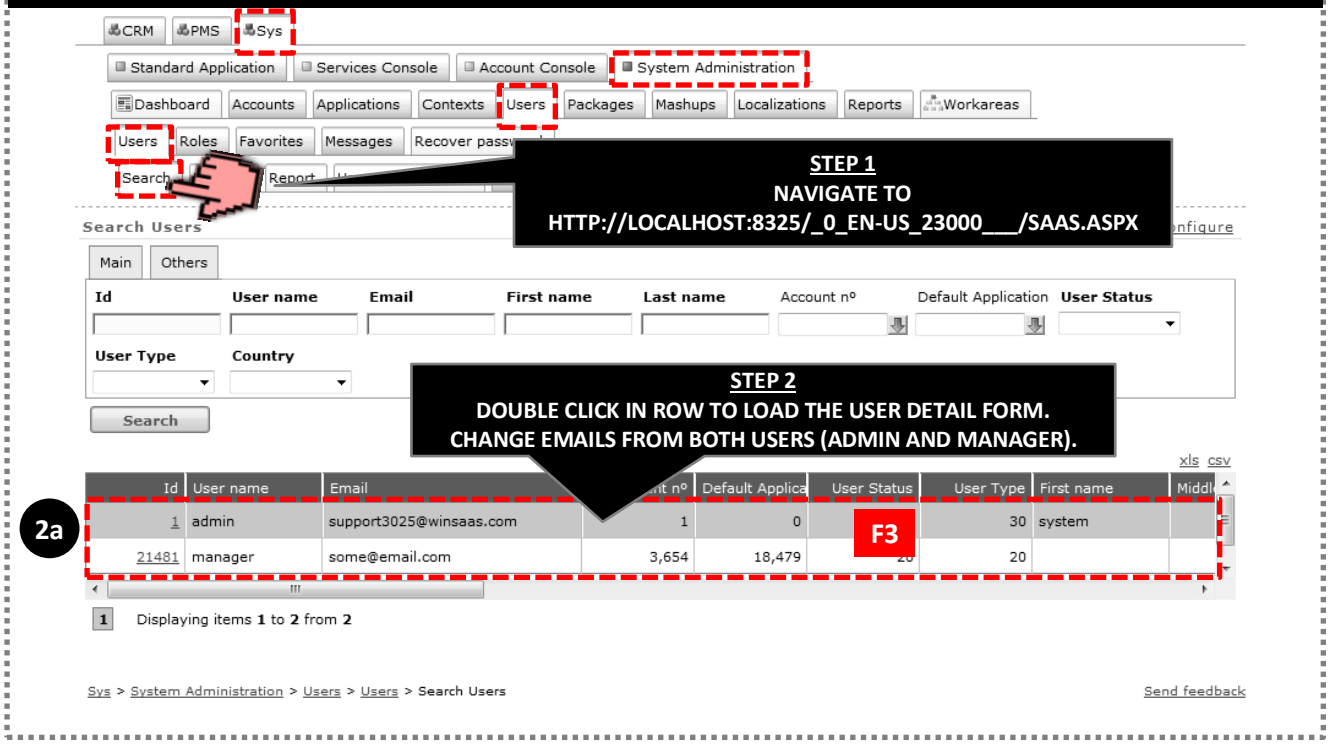


Feature Description

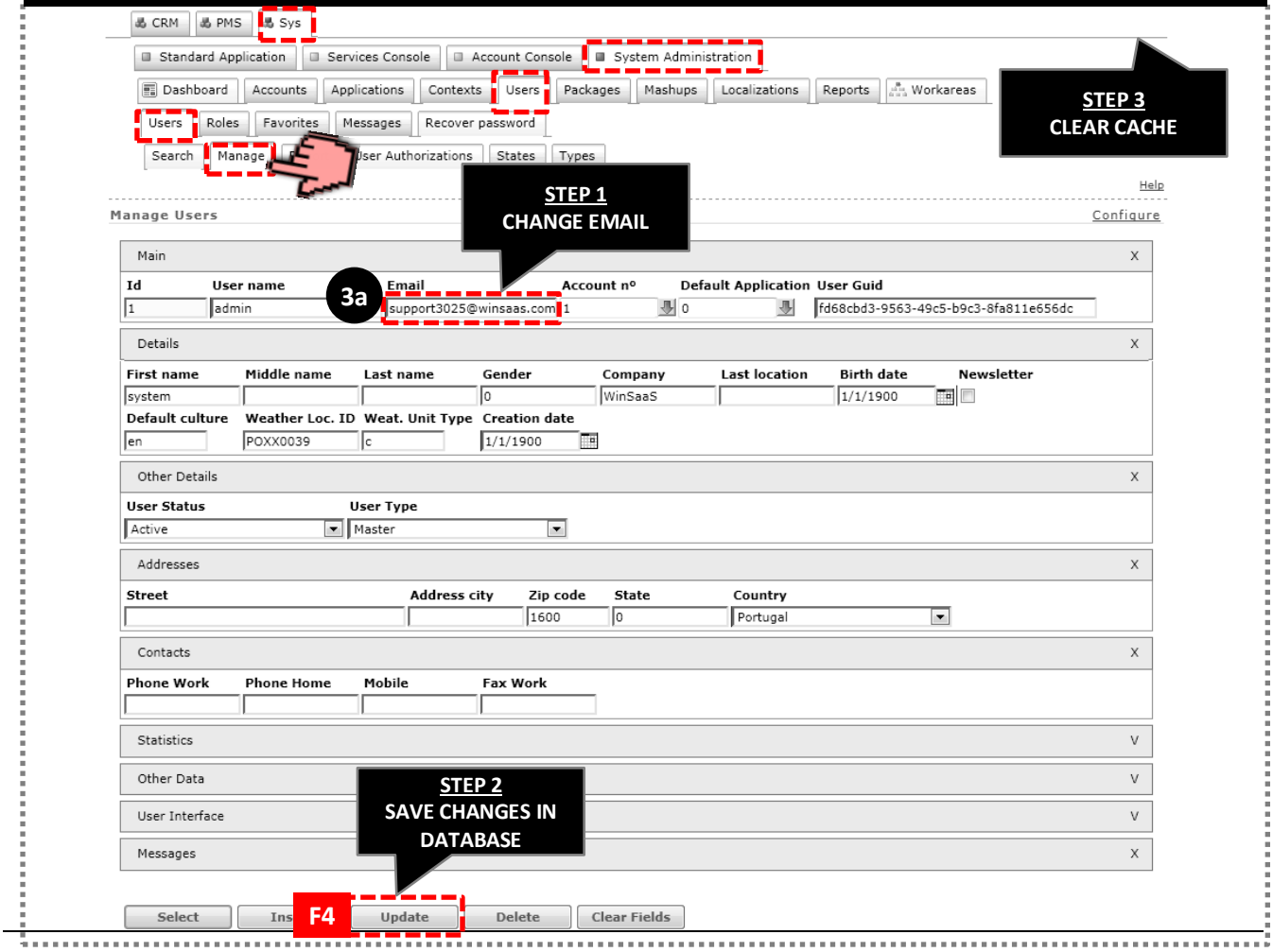
STEP 1 **CHANGE EMAIL SERVER**



STEP2 CHANGE USER EMAILS (ADMIN USER & MANAGER USER)



STEP 3 CHANGE USER EMAILS (ADMIN USER & MANAGER USER)



8.3.1 FIELDS

1) Email Connections

Required a. ***Smtp Server*** – the smtp server.

Required b. ***Smtp User*** – the username to access the smtp server.

Required c. ***Smtp Password*** – the password to access the smtp server.

Required d. ***Email From*** – the hotel main email.

2) User Search

a. ***Users*** – the user list.

i. Double click in the list to load the user detail form.

3) User Manage

Required a. ***Email*** – the user email.

8.3.2 FUNCTIONS

1) **OK** – saves the data in the database.

2) **Cancel** – cancels the operation and return to the previous page.

3) **Double Click** – double click in the row to load the detail form.

4) **Update** – update the user data.

8.3.3 MANUAL SETTINGS

These settings can also be changed by manually editing and saving the following configuration files and corresponding keys:

- ***CONFIGURATION FILE – WEB.CONFIG***
  - ***PATH:*** *C:\PROGRAM FILES (X86)\HOTEL MANAGEMENT SYSTEM 3.0.X*\WEB.CONFIG
  - **<APPSETTINGS>**
    - i. **KEY** =" ***WinSaaS.Email.Default***"
      - **VALUE** ="**DEFAULT_EMAIL**"
    - ii. **KEY** =" ***WinSaaS.Email.Default.BCC***"
      - **VALUE** ="**DEFAULT_EMAIL_BCC**"
    - iii. **KEY** =" ***WinSaaS.Email.Default.SmtpServer***"
      - **VALUE** ="**SMTP_SERVER** "

iv. **KEY** =" ***WinSaaS.Email.Default.SmtpServer.UserName***"
- **VALUE** ="**SMTP_SERVER_USERNAME**"

v. **KEY** =" ***WinSaaS.Email.Default.SmtpServer.UserPassword***"
- **VALUE** =" **SMTP_SERVER_USER_PASSWORD**"

- ***CONFIGURATION FILE – HOTELEXPLORER.EXE.CONFIG***
  - ***PATH:*** *C:\PROGRAM FILES (X86)\HOTEL MANAGEMENT SYSTEM 3.0.X\BIN\HOTELEXPLORER.EXE.CONFIG*

  - **<APPSETTINGS>**

i. **KEY** =" ***WinSaaS.Email.Default***"
- **VALUE** ="**DEFAULT_EMAIL**"

ii. **KEY** =" ***WinSaaS.Email.Default.BCC***"
- **VALUE** ="**DEFAULT_EMAIL_BCC**"

iii. **KEY** =" ***WinSaaS.Email.Default.SmtpServer***"
- **VALUE** ="**SMTP_SERVER**"

iv. **KEY** =" ***WinSaaS.Email.Default.SmtpServer.UserName***"
- **VALUE** ="**SMTP_SERVER_USERNAME**"

v. **KEY** =" ***WinSaaS.Email.Default.SmtpServer.UserPassword***"
- **VALUE** ="**SMTP_SERVER_USER_PASSWORD**"

The keys DEFAULT_EMAIL, DEFAULT_EMAIL_BCC, SMTP_SERVER, SMTP_SERVER_USERNAME and SMTP_SERVER_USER_PASSWORD can be changed by the hotel.

8.4 CONFIGURE XML FILES

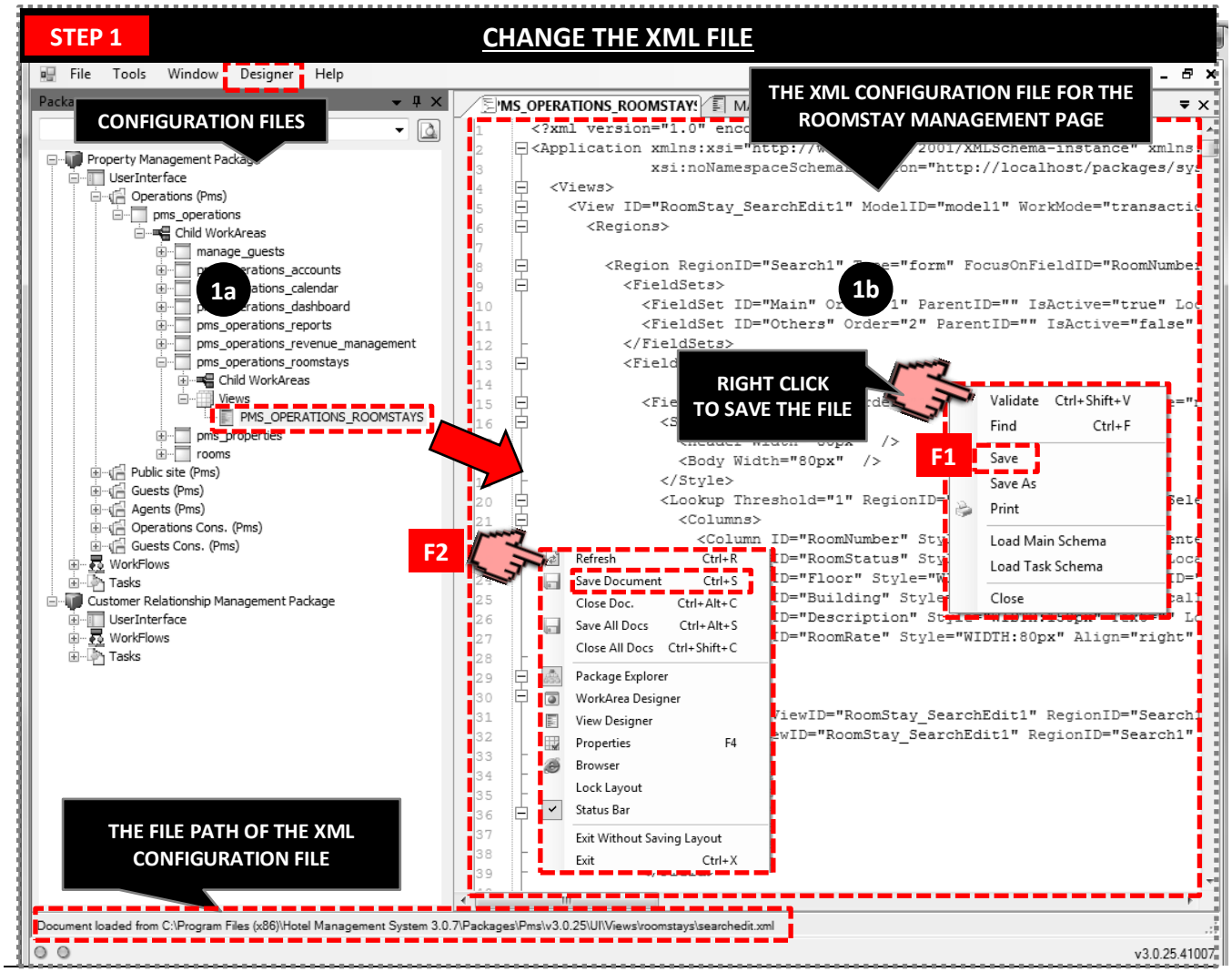
The designer allows the hotel to customize the webpages by editing the associated XML configuration file. The XML configuration file configures the fields, operations and tasks associated with a web page.

The location of the xml file can be found using the designer or using the path located in VIEW MANAGEMENT page. After changing the xml file the hotel must compile the file by executing the following steps:

- Navigate to the *SYSTEM ENGINE* page at:
  - HTTP://LOCALHOST:8325/_0_EN-US_22789___/SAAS.ASPX ;
- Enable the "*Compile All*" and "*Validate All*" fields;
- Click the "*Update*" button and the "*Clear Cache*" button.

Feature Location

Feature Description



STEP 2 — COMPILE THE XML CHANGES

http://localhost:8325/_0_en-US_22789___/saas.aspx

WinSaaS

Admin | Dashboard | Master Page | Clear cache | Sign out |

F4

STEP 3
CLEAR CACHE

CRM | PMS | Sys

Standard Application | Services Console | Account Console | System Administration

Dashboard | Accounts | Applications | Contexts | Users | Packages | Mashups | Localizations | Reports | Workareas

Search | Manage | Domains | Logs | Exclusions | Modules | Types | Batches | Advanced Management | Engine

Information — Edit Configure

1) **Production:** For maximum performance you should disable compilation and validation.

2) **Developer:** If you change the package configuration files you must enable compilation for the system to process your changes. Also you should activate validation to check if your changes are correct. After the first execution of your changes you can disable the compilation and validation. Also all the views and tasks specific account customizations (not package) are recompiled and revalidated every time regardless of the the checks below.

IMPORTANT INFORMATION

Master Engine Configurations — Configure

Main

Details

Master Next Check: 11/30/2035 — Batch Next Check: 1/25/2013

2a Compile All — 2b Validate All

Currency: Euro

STEP 1
ENABLE COMPILE ALL
ENABLE VALIDATE ALL

Messages

Select | Update | Translate | Message Mails

F3

STEP 2
UPDATE ENGINE SETTINGS

Sys > System Administration > Applications > Engine configuratio

Send feedback

EXAMPLE — FIELD XML CONFIGURATION

```
768        <Data ValueField="AgentID" TextField="Description" HasExtendedItems="true">
769          <Items>
770            <Item Enabled="true" Selected="true" Text="" Value=""/>
771          </Items>
772        </Data>
773
774      </List>
775      <Style>
776        <Header Width="160px"/>
777        <Body Width="160px" />
778        <Table ColumnSpan="2"/>
779      </Style>
780      <Events>
781        <Event Type="operation" OnEv[illegible]hange" Function="EventCalculateRoomPricing" />
782      </Events>
783    </Field>
784
785    <Field ID="RoomRateID" Order="410" FieldSetID="Main" FieldBoxID="pricing" FieldBoxPlace="left" Source="table" Type="list" HasEvents="true" IsReadOnly="fal
786      <List ServiceID="SRoomRateSelect[illegible]
787        <Data ValueField="RoomRateID" [illegible] HasExtendedItems="true">
788          <Items>
789            <Item Enabled="true" Sele[illegible]e="""/>
790          </Items>
791        </Data>
792      </List>
793      <Style>
794        <Header Width="160px"/>
795        <Body Width="160px" />
796        <Table ColumnSpan="2"/>
797      </Style>
798      <Events>
799        <Event Type="operation" OnEvent="onchange" Function="EventCalculateRoomPricing" />
800      </Events>
801    </Field>
802
803    <Field ID="DateIn" Order="420" FieldSetID="Main" Source="table" Type="shortdate" HasEvents="true" IsReadOnly="false" IsRequired="true" IsVisible="true" Def
804      <Events>
805        <Event Type="operation" OnEvent="onchange" Function="EventCalculateRoomPricing" />
806      </Events>
807      <Link>
808        <Target RegionID="" ServiceID="DateOut" WindowFeatures="1"/>
809      </Link>
810      <Style>
811        <Header Width="100px" Align="center" />
812        <Body Width="100px" CustomStyle="font-size:12px;text-align:center;color:#000000;font-weight:normal;" MaxLength="10" />
813      </Style>
814    </Field>
815
816    <Field ID="DateOut" Order="430" FieldSetID="Main" Source="table" Type="shortdate" HasEvents="true" IsReadOnly="false" IsRequired="true" IsVisible="true" De
```

HeaderTextDefault — The id must be unique in the view

ID
IsLink
IsLookup
IsReadOnly
IsRequired
IsVisible
KeyType
LocalID
Order

FIELD XML CONFIGURATION
THE "ROOM RATE" FIELD OF THE ROOMSTAY MANAGEMENT PAGE

THE HELP BOX APPEARS WHEN THE USER STARTS WRITING IN THE XML FILE

system 3.0.7\Packages\Pms\v3.0.25\UI\Views\roomstays\searchedit.xml

EXAMPLE

OPERATION XML CONFIGURATION

```
<Operation ID="CreateUpdateRoomstay" ButtonStyle="standard" ServiceID="SCreateUpdateRoomstay" RegionID="Form1" ServicePath="$SELF$"
           IsVisible="true" OperationSetID="Main" LocalID="LCL_OPERATIONS_CREATE_RESERVATION"
           ShortInfoLocalID="LCL_OPERATIONS_CREATE_RESERVATION_SINFO"
           ConfirmMessage="true" ConfirmMessageLocalID="LCL_OPERATIONS_CREATE_RESERVATION_CONFIRM" Validate="true"
           VerifyAuthAdd="true" />
  <Style>
    <Body Width="48px" Height="48px" />
    <Image Path="Pms/UI/Images/Pms32.png" />
  </Style>
  <Link Type="popup">
    <Target ModuleName="" WorkAreaName="$WORKAREA$" ViewName="PMS_OPERATIONS_RESERVATION"
            RegionID="Form1" Service="" Height="640" WindowTitle="$LOCALIZE$LCL_OPERATIONS_ROOMSTAY_NEWRESERVATION"
            WindowType="" CloseUrl="/Pms/UI/Views/RoomStay#_R_ROOMSTAY_SEARCHEDIT1_FORM1#&amp;serviceID=SRoomStaySelect&amp;servicePath=/Pms/UI/Views/rc
            WindowFeatures="dialogWidth: 680; dialogHeight: 6[illegible]nter: Yes; help: No; resizable: Yes; status: No; scrollbars: No;" />
    <Copy>
      <From ViewID="RoomStay_SearchEdit1" RegionID="Form1" FieldID="RoomStayID" />
      <To ViewID="Roomstay_New_WF_Start_Form1" RegionID="Form1" FieldID="RoomStayID" />
    </Copy>
  </Link>

  <Validations>
    <Validation FieldID="DateIn" RegionID="Form1" IsRequired="true" ValidateType="true" />
    <Validation FieldID="DateOut" RegionID="Form1" IsRequired="true" ValidateType="true" />
    <Validation FieldID="RoomNumber" RegionID="Form1" IsRequired="true" ValidateType="false" />
    <Validation FieldID="AgentID" RegionID="Form1" IsRequired="true" ValidateType="true" />
    <Validation FieldID="RoomRateID" RegionID="Form1" IsRequired="true" ValidateType="true" />
    <Validation FieldID="EntityID" RegionID="Form1" IsRequired="false" ValidateType="true" />

    <Validation FieldID="TotalAmount" RegionID="Form1" IsRequired="true" ValidateType="true" />

    <Validation FieldID="NumberOfAdults" RegionID="Form1" IsRequired="true" ValidateType="true" />
    <Validation FieldID="NumberOfTypeAChildren" RegionID="Form1" IsRequired="true" ValidateType="true" />
    <Validation FieldID="NumberOfTypeBChildren" RegionID="Form1" IsRequired="true" ValidateType="true" />

    <Validation FieldID="EntityName" RegionID="Form1" IsRequired="true" ValidateType="false" />
    <Validation FieldID="EntityLastName" RegionID="Form1" IsRequired="true" ValidateType="false" />

    <Validation FieldID="EntityCountryCode" RegionID="Form1" IsRequired="true" ValidateType="false" />

  </Validations>
</Operation>
```

ServiceID
ServicePath
ShortInfoLocalID
TextDefault
Validate
VerifyAuthAdd
VerifyAuthDelete
VerifyAuthEdit
VerifyAuthProperties
VerifyAuthRead

OPERATION XML CONFIGURATION THE "CREATE ROOMSTAY" FUNCTION OF THE ROOMSTAY MANAGEMENT PAGE

THE HELP BOX APPEARS WHEN THE USER STARTS WRITING IN THE XML FILE

EXAMPLE

TASK XML CONFIGURATION

Packages

- Property Management Package
  - UserInterface
    - Operations (Pms)
    - Public site (Pms)
    - Guests (Pms)
    - Agents (Pms)
    - Operations Cons. (Pms)
    - Guests Cons. (Pms)
  - WorkFlows
  - Tasks
    - Accounting
    - Accounts
    - Agents
    - Companies
    - Dashboards
    - Departments
      - DepartmentsDelete.xml
      - DepartmentSelect.xml
      - DepartmentsInsert.xml
      - DepartmentsSelect.xml
      - DepartmentsSelectByCustomFi
      - DepartmentsUpdate.xml
    - Documents
    - Entities
    - General
    - Marketing
    - NightAudit
    - PricingPlans
    - Properties
    - PropertyDescriptions
    - PropertyMedia
    - PropertyReviews
    - Public.Directory
    - Public.Site
    - Reports
    - Reservations
    - Rooms
    - RoomStays
    - SignUp
    - Vouchers

DepartmentsInsert.xml | DepartmentsSelectByCustomFields.x | DepartmentsSelect.xml | DepartmentsUpdate.xml

```
<Tasks xmlns:msdata="urn:schemas-microsoft-com:xml-msdata" xmlns:xsi="http://www.w3.org/2001/X
  <Task Package="Pms" ID="DepartmentsUpdate">
    <Source>
      <![CDATA[
          UPDATE zPms_Departments
          SET
              [Code] = @Code,
              [IsActive] = @IsActive,
              [Description] = @Description
          WHERE [DepartmentID] = @DepartmentID
          AND ContextID = @ContextID
]]>
    </Source>
    <Parameters>
      <Parameter ID="@DepartmentID" Type="int" Direction="input
      <Parameter ID="@Code" Type="nvarchar" Size="20" Direction
      <Parameter ID="@IsActive" Type="bit" Direction="input" Va
      <Parameter ID="@Description" Type="nvarchar" Size="200
      <Parameter ID="@ContextID" Type="int" Direction="input" V
    </Parameters>
    <Authorizations>
      <Authorization Type="S*" RoleID="0" RoleName="Admins" />
      <!--<Authorization Type="SX" RoleID="10" RoleName="AuthenticatedUsers" />-->
      <!--<Authorization Type="SX" RoleID="20" RoleName="UnAuthe
      <Authorization Type="SX" RoleID="100" RoleName="ASP Consol
      <Authorization Type="SX" RoleID="1000" RoleName="PMS_V
      <!--<Authorization Type="SX" RoleID="1010" RoleName="PMS_V
      <!--<Authorization Type="SX" RoleID="1020" RoleName="PMS_Customer" />-->
      <!--<Authorization Type="SX" RoleID="1030" RoleName="PMS_Agent" />-->
    </Authorizations>
  </Task>
</Tasks>
```

TASK NAME

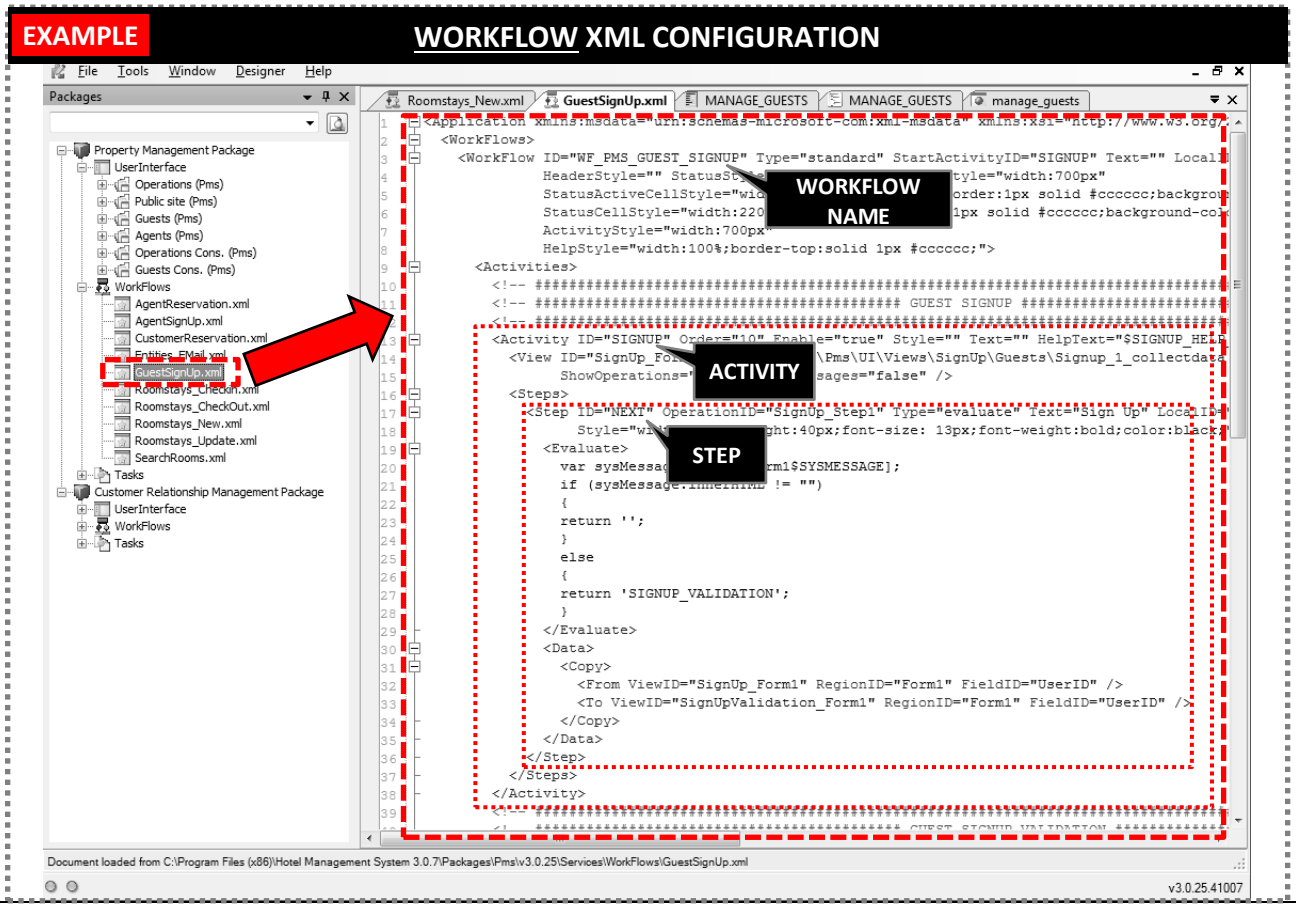
TASK SOURCE CODE

TASK PARAMETERS

TASK AUTHORIZATIONS

Document loaded from C:\Program Files (x86)\Hotel Management System 3.0.7\Packages\Pms\v3.0.25\Services\Tasks\Departments\DepartmentsUpdate.xml

v3.0.25.41007



8.4.1 FIELDS

1) **Designer**
   a. ***Navigation Tree*** – the tree view allows the hotel to view and select the configuration files associated with the webpages.

   b. ***XML File*** – the XML configuration file content.

2) **Engine Configuration**
   a. ***Compile All*** – compile the configuration file when the page is loaded.
      i. The compilation happens only when the hotel accesses the webpage.

   b. ***Validate All*** – validates the configuration before compiling the file.

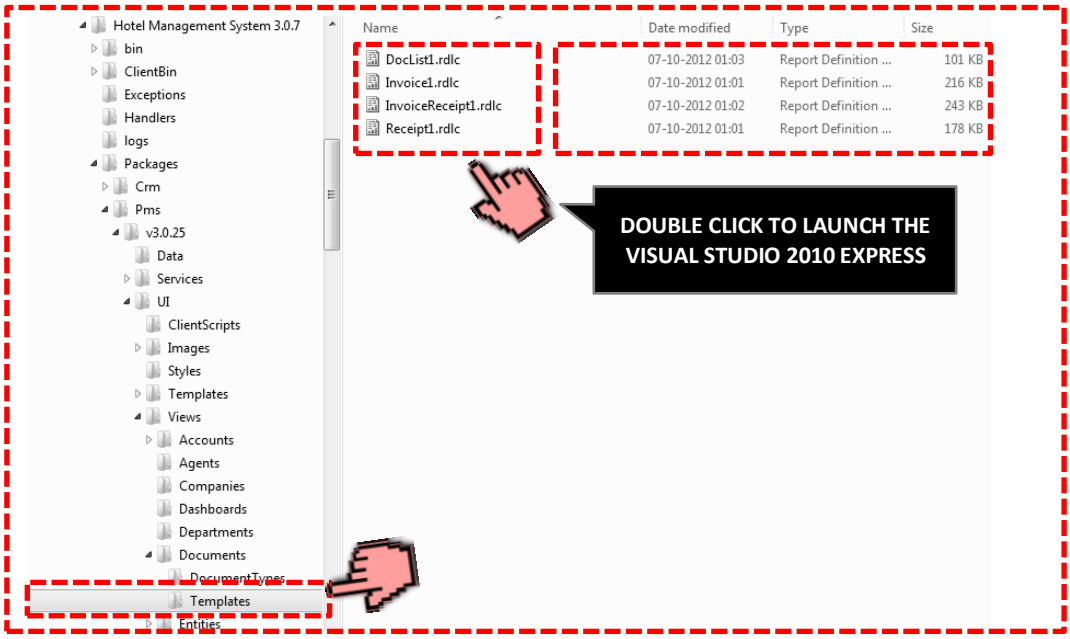
8.4.2 FUNCTIONS

1) **Save Document** – saves the xml configuration file in the disk.
   I. The physical location of the file is displayed in the window footer.
2) **Save** – saves the xml configuration file in the disk.
3) **Update** – saves the engine settings in the database.
4) **Clear Cache** – clear the configuration cache. This step is required for the new settings to be activated.

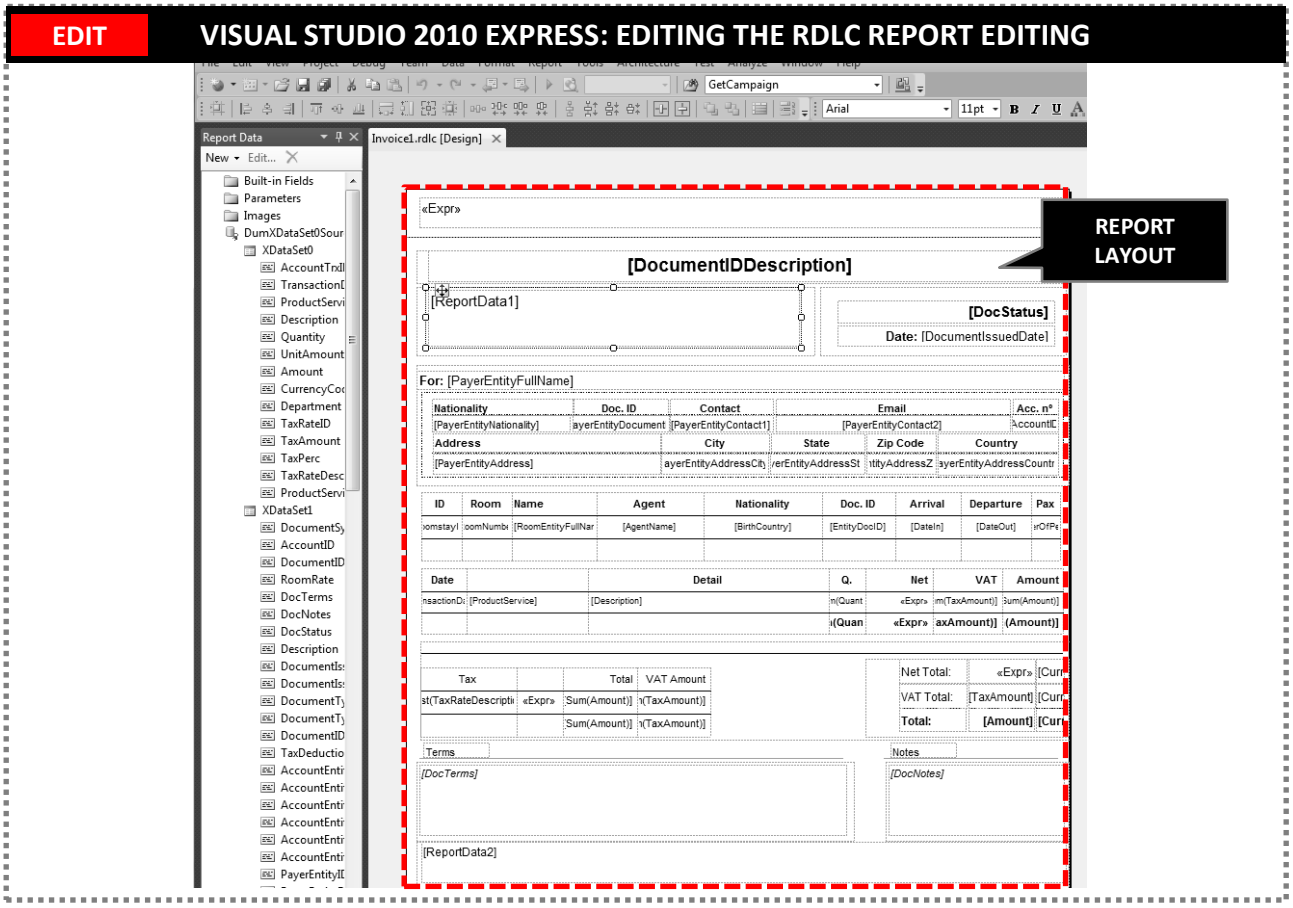
8.5 CONFIGURE REPORT TEMPLATE FILES

The report configuration files can be changed and edited by using the Visual Studio 2010 Express. The Visual Studio 2010 is a free tool and is available in the Microsoft site. The RDLC report files are located at: "***C:\Program Files (x86)\Hotel Management System 3.0.7\Packages\Pms\v3.0.25\UI\Views\Documents\Templates***".

Feature Location



Feature Description



8.6 CONFIGURE MULTI-ACCOUNTS

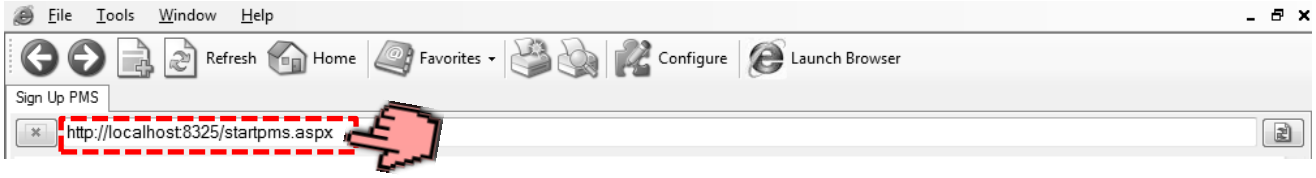
A hotel chain or a hospitality service provider can create additional accounts to each of their hotels or customers. The steps to configure the local system for multi-accounts are the following:

a. Change the web configuration file
   1. Edit the file C:\PROGRAM FILES (X86)\HOTEL MANAGEMENT SYSTEM 3.0.X\WEB.CONFIG
   2. Go to <APPSETTINGS> and KEY =" **WinSaaS.IsLocalMode**"
      i. Change the VALUE ="*true*" to VALUE ="**false**"

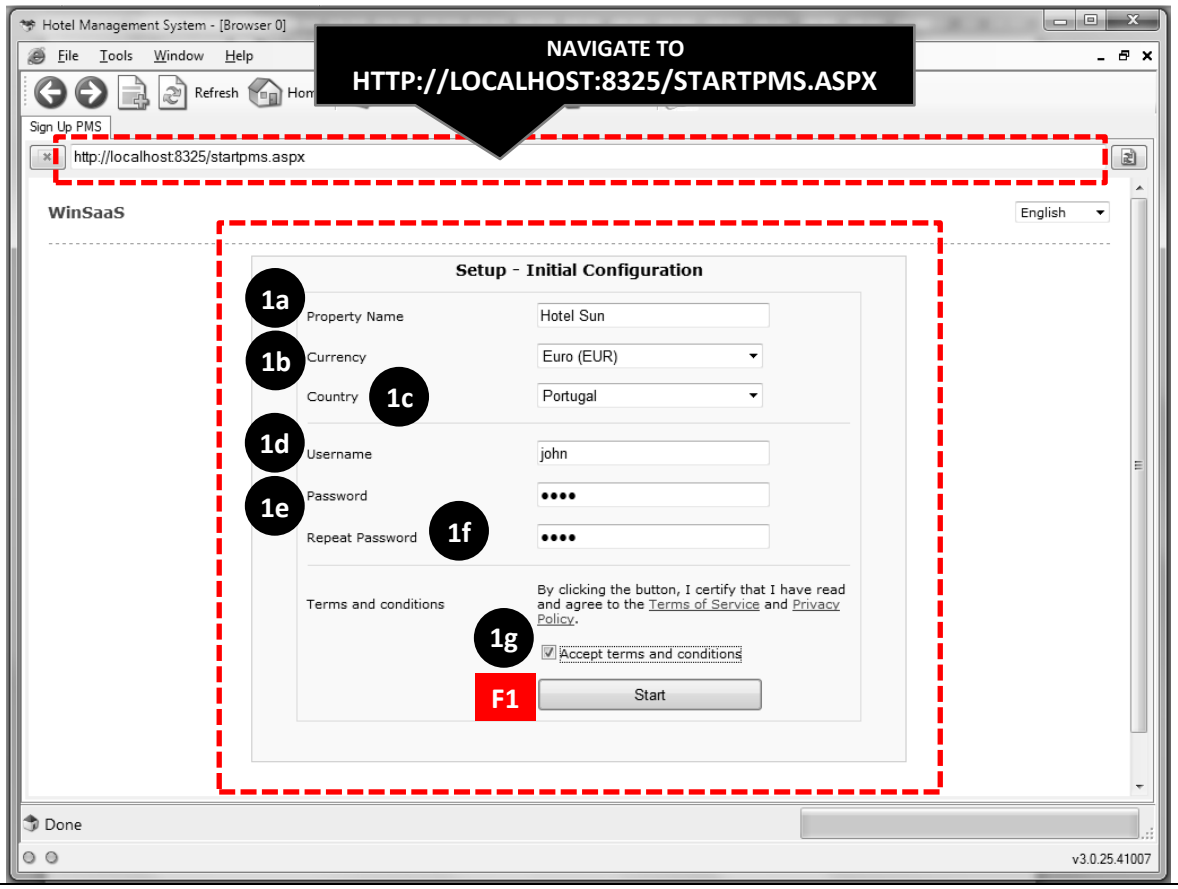
b. Create new account
   1. Navigate to **HTTP://LOCALHOST:8325/STARTPMS.ASPX** or go to
   2. HTTP://LOCALHOST:8325/DEFAULT.ASPX?AID=0&MODULENAME=SYS&WORKAREANAME=SYS_SIGN_UP_PMS&START=TRUE

c. Manage the new accounts using the system administrator credentials (***user***:admin ***password***:admin)
   1. Navigate to HTTP://LOCALHOST:8325/_0_EN-US_22584___/SAAS.ASPX

Feature Location



Feature Description



8.6.1 FIELDS

1) Create Account

Required a. ***Property Name*** – the hotel name.

Required b. ***Currency*** – the hotel currency.

Required c. ***Country*** – the country where the hotel is located.

Required d. ***Username*** – the username for the account administrator.

Required e. ***Password*** – the password for the account administrator.

Required f. ***Repeat Password*** – repeat the password of the account administrator.

Required g. ***Accept terms and conditions*** – accept the terms and conditions for the account.

8.6.2 FUNCTIONS

1) **Start** – creates a new property management system account.