



User Manual

Hotel Management System
v3.0

WinSaaS

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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.

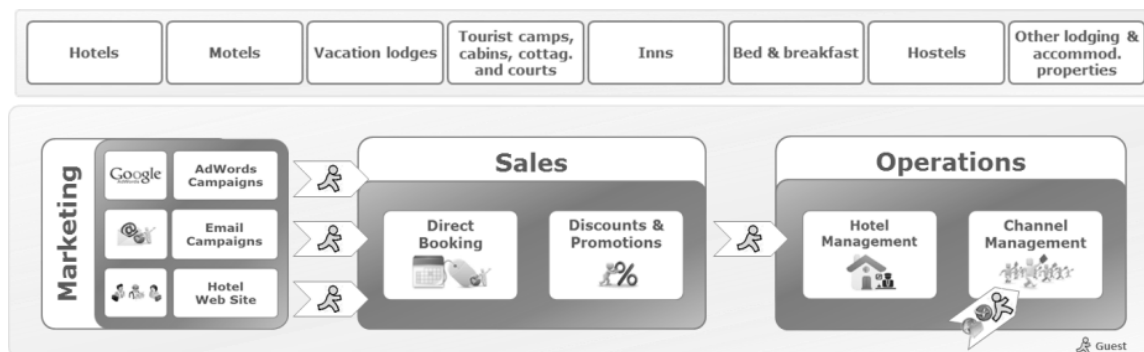


Figure 1 – HotelASP: Hotel Application Service Provider

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.

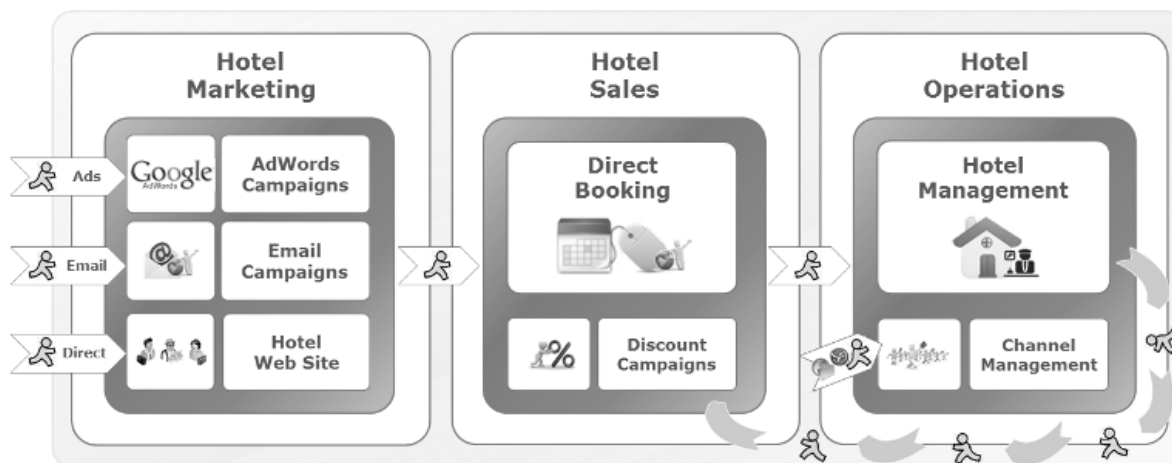


Figure 2 – HotelASP: Marketing, Sales and Operations

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.

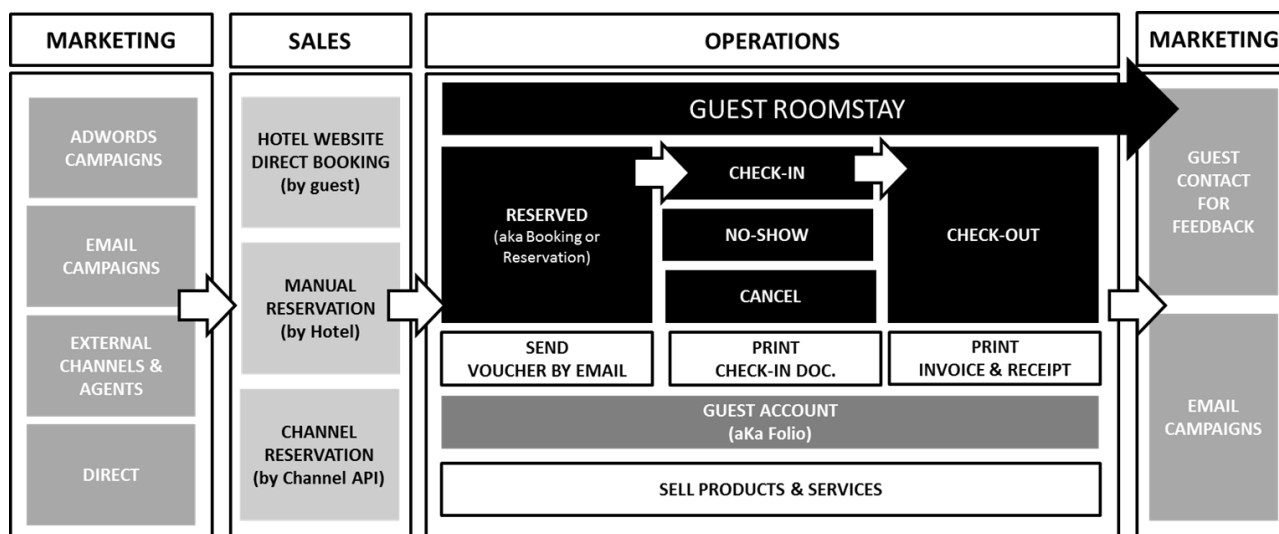


Figure 3 - HotelASP Main Features

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.

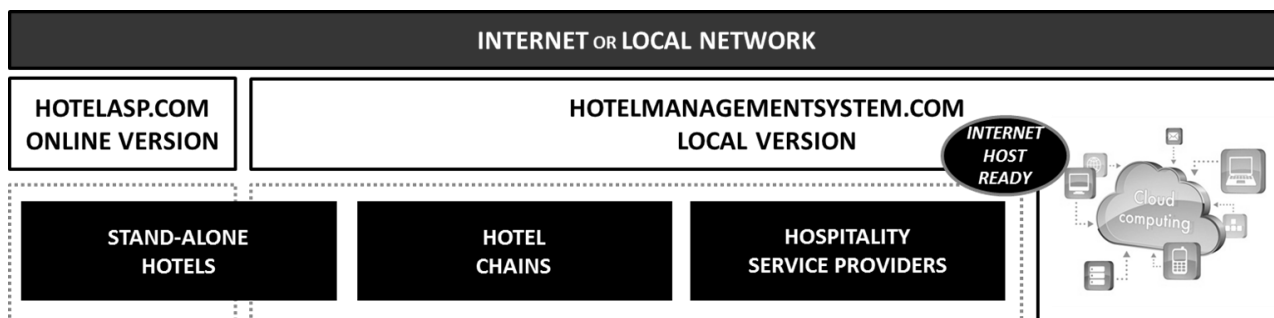


Figure 4 – HotelASP Customers: Stand-Alone Hotels, Hotel Chains and Hospitality Service Providers

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







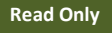

The manual is organized in a top-down approach by first addressing the main aspects of the system setup and then addressing the hotel management operations.



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:

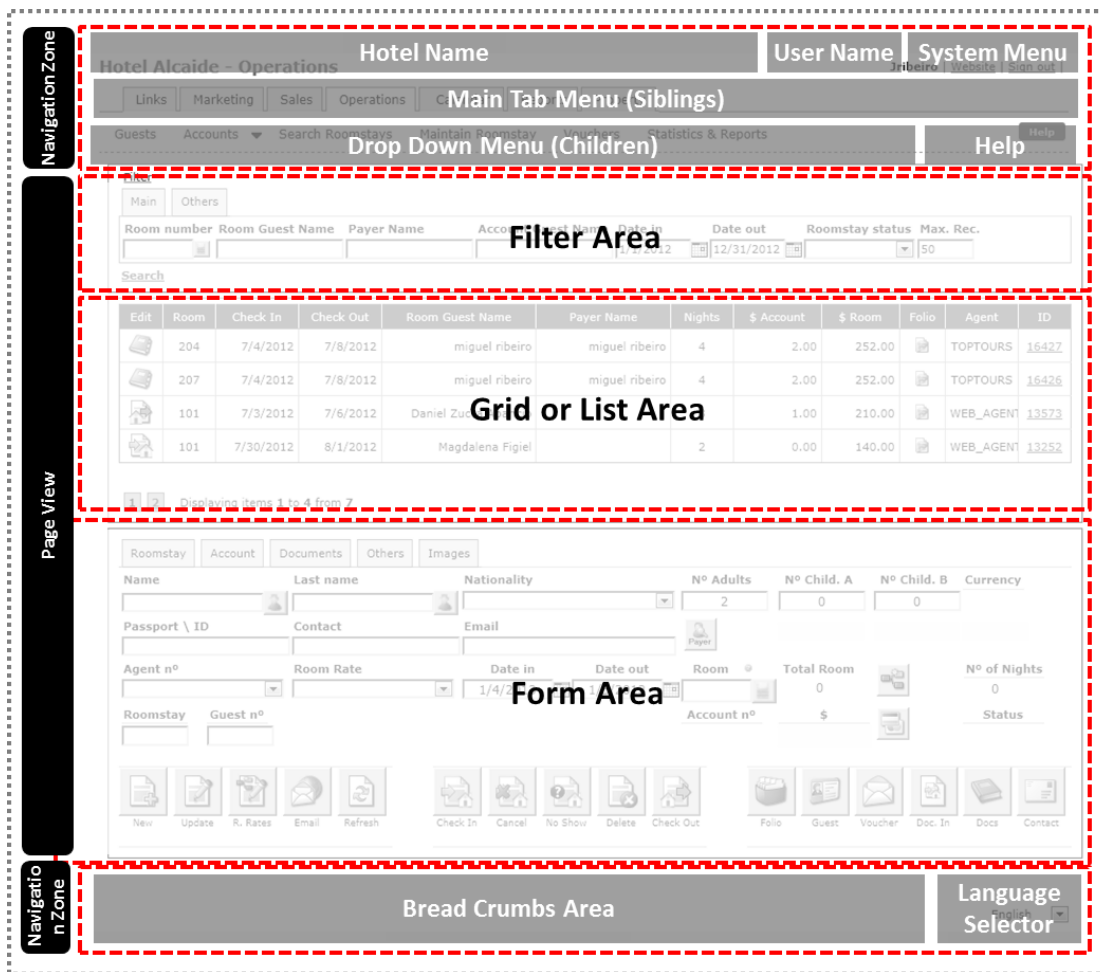
- **Introduction** – describes succinctly the web page.
- **Page Location** - the location of the page in the system by locating visually the page in the top navigation menu;
 -  **Locate** – the hand icon identifies the location of the page in the system.
- **Page Description** - a visual description of the page, including the use of the following objects:
 -  **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, ...).
 -  **Function** – identifies a page function. The **n** identifies the function.
 -  **Important Zone** – identifies an important area or zone of the page.
 -  **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 Field** – this field is required to fulfill the page main functions.
 -  **Read Only** – this field cannot be updated by the hotel.
 -  **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.



The screenshot illustrates the standard web page layout of HotelASP, divided into three main zones:

- Navigation Zone (Left):** Contains a vertical menu with 'Main' and 'Others' tabs, and a 'Page View' section.
- Header Navigation Zone (Top):** Includes 'Hotel Name' (Hotel Alcaide - Operations), 'User Name' (iribeiro), 'System Menu', and a 'Main Tab Menu (Siblings)' with links like 'Links', 'Marketing', 'Sales', 'Operations', 'Guests', 'Accounts', 'Search Roomstays', 'Maintain Roomstay', 'Vouchers', 'Statistics & Reports', and 'Help'.
- Drop Down Menu (Children):** A menu below the header navigation zone.
- Filter Area:** A section for filtering data, including fields for 'Room number', 'Room Guest Name', 'Payer Name', 'Account', 'Date in', 'Date out', 'Roomstay status', and 'Max. Rec.'.
- Grid or List Area:** A table displaying data with columns: Edit, Room, Check In, Check Out, Room Guest Name, Payer Name, Nights, \$ Account, \$ Room, Folio, Agent, and ID. The table shows four rows of data.
- Form Area:** A section for entering or editing data, including fields for 'Name', 'Last name', 'Nationality', 'N° Adults', 'N° Child. A', 'N° Child. B', 'Currency', 'Passport \ ID', 'Contact', 'Email', 'Agent n°', 'Room Rate', 'Date in', 'Date out', 'Room', 'Total Room', 'N° of Nights', 'Roomstay', 'Guest n°', 'Account n°', and 'Status'. It also includes a 'Paper' icon and a 'Status' dropdown.
- Bread Crumbs Area:** A section at the bottom for navigation.
- Language Selector:** A dropdown menu for selecting the language.

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.

Entity	Name	Nationality	NºStays	NºDirect B.	NºAdults	NºChild.	Roomstay	Account	D.Book.	Last In	Last
15153	miguel ribeiro	Portugal	2	0	4	0	4	2		7/4/2012	7/8
15154	Web Agent Entity	United States of Ameri									
15200		Portugal									
16189		Portugal						-120			
16190		Portugal						9			
16191	Mou da Oliveira	United States of Ameri									
17365		Portugal									
17467		Switzerland									

Figure 8 – Web Page Layout: List Area

Rooms	Room	Date in	Date out	Room Guest Name	Payer Name					Folio	Agent
	20	12		miguel ribeiro	miguel ribeiro					0.00	TOPTOU
	2	12		miguel ribeiro	miguel ribeiro					0.00	TOPTOU
	101	7/3/2012	7/6/2012	Daniel Zucca Aparicio		3	2	0	1.00	210.00	WEB_AG
	101	7/30/2012	8/1/2012	Magdalena Figiel		2	2	0	0.00	140.00	WEB_AG
	101	5/21/2012	5/22/2012	Magdalena Figiel		1	2	0	0.00	45.00	WEB_AG
	101	6/16/2012	6/23/2012	Corinne & Richard KRIZ		7	2	0	315.00	315.00	WEB_AG
	101	5/1/2012	5/2/2012	miguel ribeiro					40.00	40.00	WEB_AG
									360.00	1,254.00	

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.

The screenshot shows the report interface with the following components:

- Filters:** Doc. type, Start date (1/31/2013), End date, Guest Account Name, Payer ID, Guest Account ID.
- Buttons:** UPDATE REPORT, Refresh, FILTER REPORT.
- REPORT FUNCTIONS:** 1 of 1, 100%, Next, and other navigation icons.
- Invoice Table:**

ID	Date	Payer	Notes	Net	Tax	Total	Payments
6	01/01/13	Daniel Zucca Aparicio	REPORT	185.85	24.15	210.00	0.00
7	01/01/13	miguel ribeiro		1.62	0.38	2.00	0.00
				187.47	24.53	212.00	0.00
- Receipt Table:**

ID	Date	Payer	Notes	Net	Tax	Total	Payments
2	01/01/13	Daniel Zucca Aparicio		0.00	0.00	0.00	210.00
				0.00	0.00	0.00	210.00

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.

The screenshot shows a form with fields for Name, Last name, Nationality, Passport, ID, Rate, Date in, and Room. A lookup table is displayed for the Room field. Annotations explain the functionality:

- LOOKUP BUTTON:** THE TEXT FILLED IS USED TO FILTER THE LOOKUP TABLE.
- LOOKUP TABLE:** A table showing filtered results for the Room field.
- CLICK IN LOOKUP BUTTON TO MAKE THE TABLE APPEAR OR CLICK A 2º TIME TO REMOVE THE TABLE.**
- CLICK IN THE HEADER OF THE TABLE TO REMOVE THE TABLE.**

The lookup table data is as follows:

Score	Room	Room Type	Status
0	101	Alcaide Single Bed	OK
0	102	Alcaide Suite	OK
0	103	Alcaide Room	OK
0	104	Alcaide Room	OK
0	105	Alcaide Room	OK
0	201	Alcaide Room	OK
0	202	Alcaide Room	OK

Figure 14 – Special Fields: Lookup

1.2.5.2 CALENDAR FIELD

The calendar field allows the user to select a date.

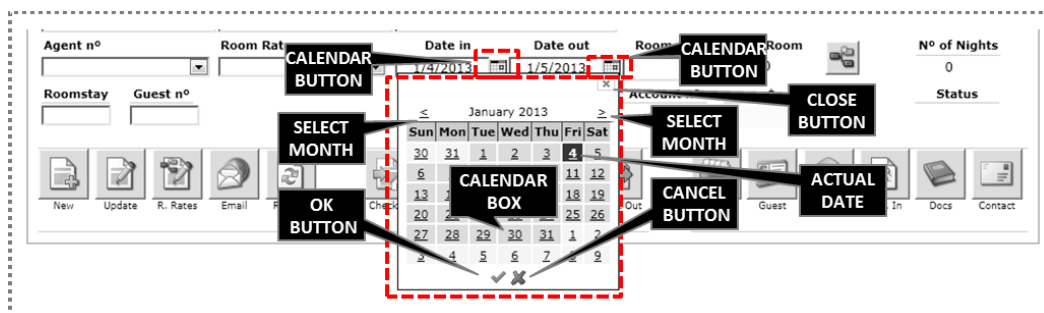


Figure 15 – Special Fields: Calendar

1.2.5.3 COLOR FIELD

The color field allows the user to select a color.

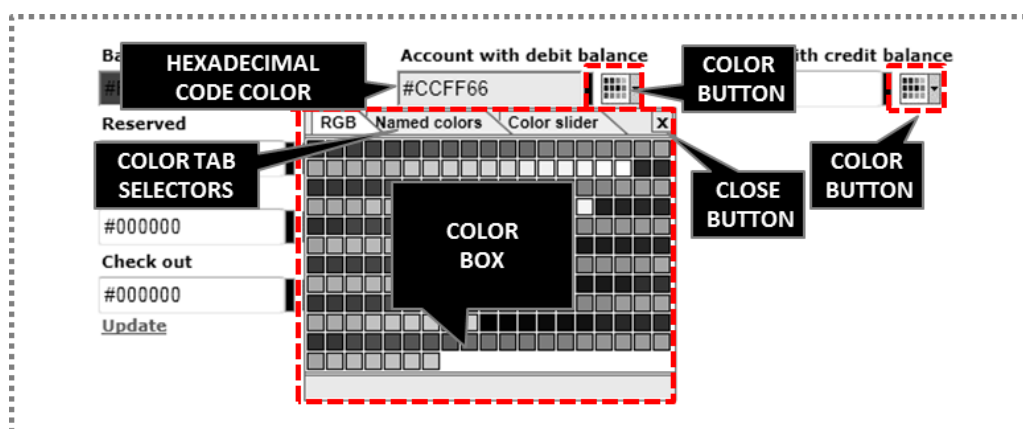


Figure 16 – Special Fields: Color Selector

1.2.5.4 POPUP BUTTON

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

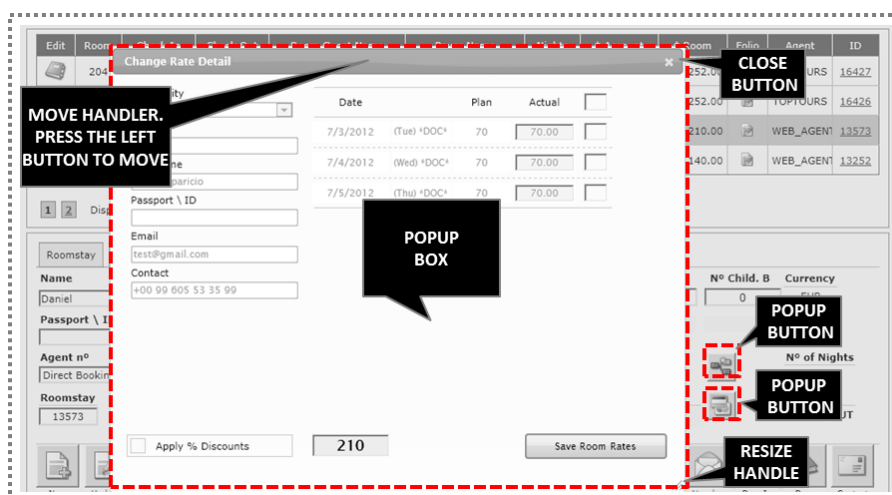


Figure 17 – Special Fields: Popup

1.2.5.5 HTML EDITOR & FILE MANAGEMENT FIELD

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

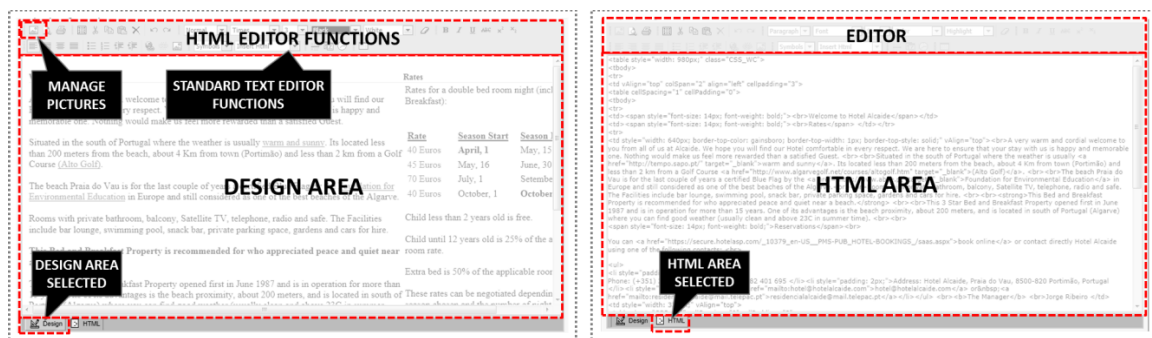


Figure 18 – Special Fields: Html Editor

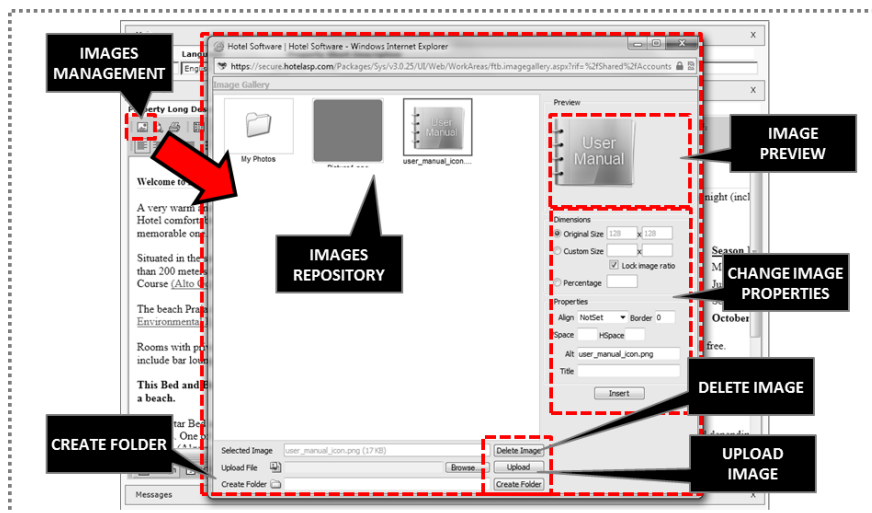


Figure 19 – Special Fields: Picture File Management

1.2.5.6 UPLOAD PICTURE FIELD

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

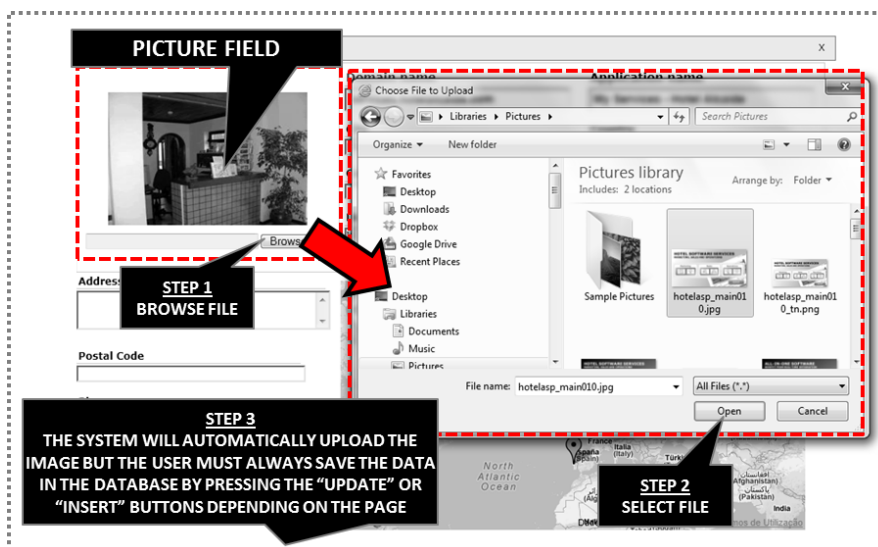


Figure 20 - Special Fields: Upload Picture

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.

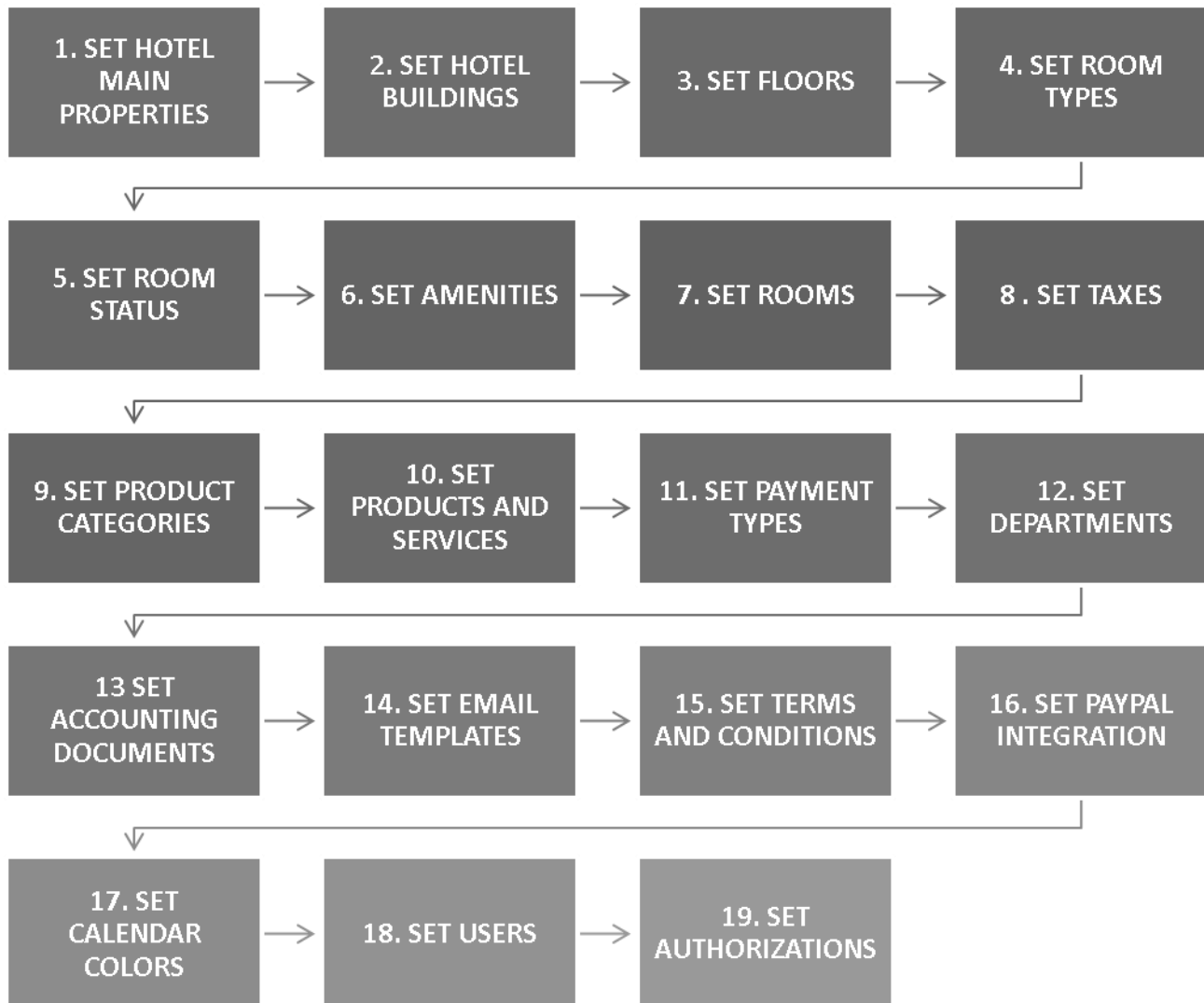


Figure 21 – Hotel Setup: Basic Steps to Configure the Hotel

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

Hotel Alcaide - Operations

Jribeiro | [Website](#) | [Sign out](#) |

Links | Marketing | Sales | Operations | Calendar | Reports | **Property**

Page Description

Configure Hotel main settings

Main				X
1a	Name Hotel Alcaide		1b	Currency Euro
Reservations				
2a	Extra Type A - Child Start Age 0	2b	Extra Type A - Child End Age 2	
2c	Extra Type B - Child Start Age 3	2d	Extra Type B - Child End Age 12	
Credit Card Management				
3a	Credit Card Access Password	3b	Repeat Password	3c
3d	Is CC Password Active <input checked="" type="checkbox"/>	3e	Enable booking by VISA <input checked="" type="checkbox"/>	3f
	Enable booking by AMEX <input checked="" type="checkbox"/>	3g	Enable booking by MASTER CARD <input type="checkbox"/>	Enable booking by DINERS <input type="checkbox"/>
Folio & Accounts				
4a	Room charge in Reservation <input type="checkbox"/>			
4b	Room Charge Description Day Room Charge	4c	Room Charge Tax Description Day Room Tax Charge	4d
			Default Tax Deduction % 0.00	
Channel Manager				
5a	User name	5b	Password	5c
			Key	5d
			Filter	
F1 Update				

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

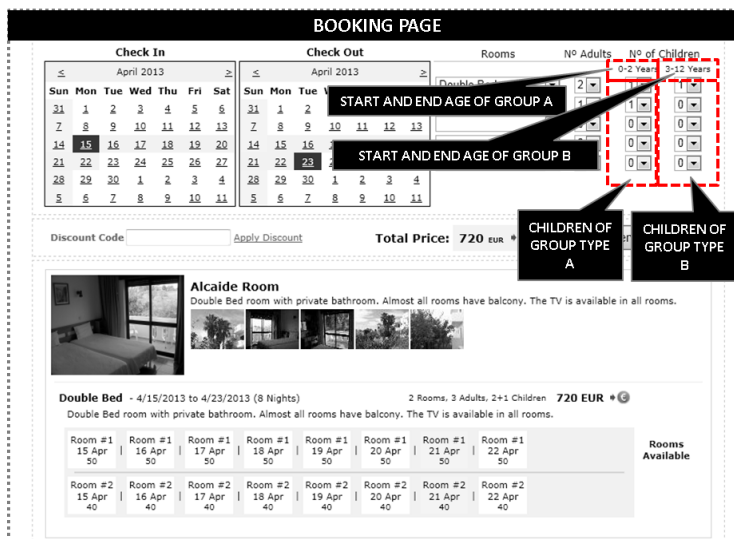


Figure 22 – Hotel Website: Booking Page Example

3) Credit Card Management

- Credit Card Access password** – the access password to protect the credit card information.
 - Fill the password to protect the access to the credit card information in the booking, reservations and folio pages.
 - 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.
 - If the hotel changes the password then the data saved with the previous password will not be accessible anymore.
 - This field is always blank even if the hotel already changed the password.
- Repeat password** – repeat the password filled in “access password” field.
- Is CC Password Active** – is checked if the credit card password is active.
 - This field is active if the hotel already saved an access password.
 - After the hotel created an access password the system will encrypt the new credit card data with the new password.
 - 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.

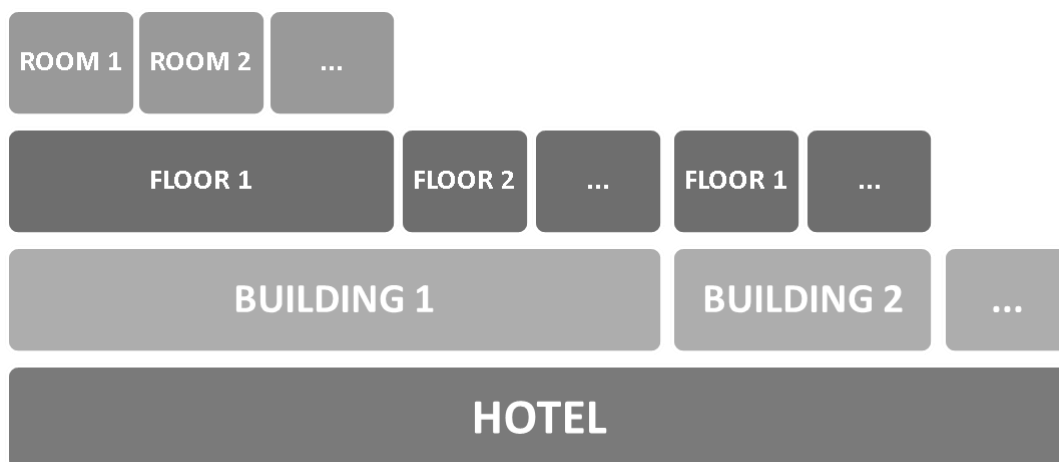


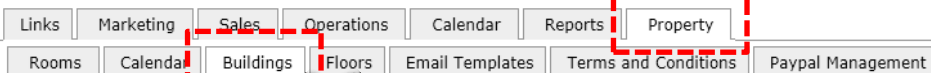
Figure 23 – Hotel Rooms Hierarchical Structure

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

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |



Page Description

Manage buildings

Filter

Main

Others

Code

Search

Edit

Code

Comments

Active

1009

HOTEL

Hotel

☒

1

Display items 1 to 1 from 1

Main

Code

Comments

Active

HOTEL

Hotel

☒

F1

F2

F3

F4

1a

1b

1c

Select

Insert

Update

Delete

Filter Zone

List Zone

Form Zone

Func tions

TO EDIT THE DEFAULT BUILDING YOU NEED TO SELECT THE CORRESPONDENT LINE IN THE LIST GRID AS SHOWN BELOW

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

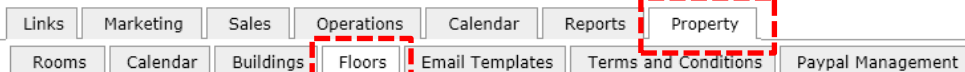
- 1) **Select** – get the data from the database that is associated with the selected row.
 - a. It's used to refresh the data loaded into the form.
 - b. The same function can be accomplished by clicking in the "Edit" cell of the selected row.
- 2) **Insert** – creates a new building in the system and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

Hotel Alcaide - Operations

 Jribeiro | [Website](#) | [Sign out](#) |


Page Description

Manage floors

Filter

Edit	Building	Code	Comments	Active
1451	HOTEL	Group	Group	<input checked="" type="checkbox"/>

1 Displaying items 1 to 1 from 1

1a

1d

1b

1c

F1

F2

F3

F4

Main
 Building nº HOTEL
 Code Group
 Comments Group
 Active ☒
 Select Insert Update Delete

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.

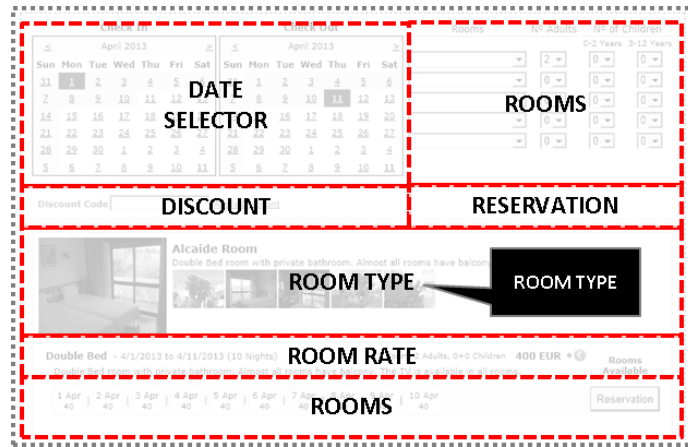
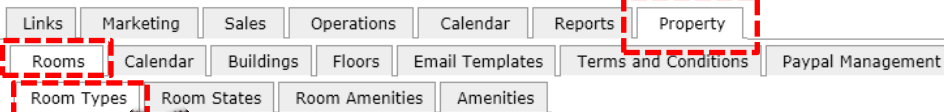


Figure 24- Room Type in the Hotel Booking Page

Page Location

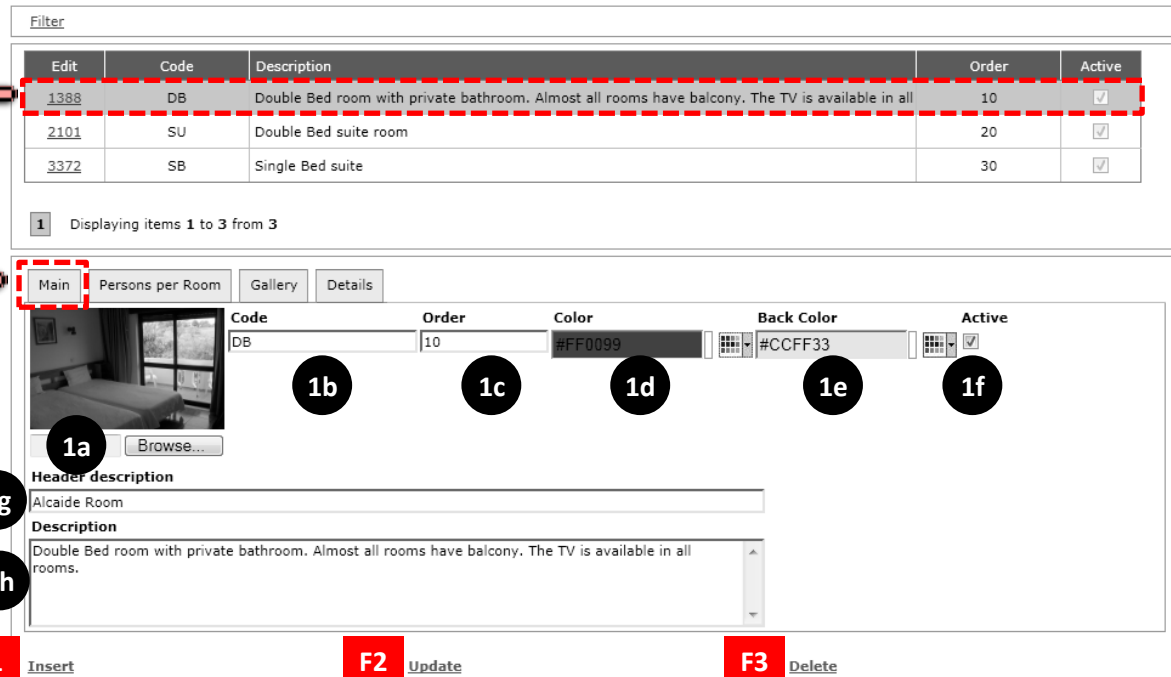
Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |



Page Description

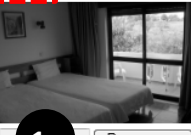
Manage room types



Edit	Code	Description	Order	Active
1388	DB	Double Bed room with private bathroom. Almost all rooms have balcony. The TV is available in all	10	<input checked="" type="checkbox"/>
2101	SU	Double Bed suite room	20	<input checked="" type="checkbox"/>
3372	SB	Single Bed suite	30	<input checked="" type="checkbox"/>

1 Displaying items 1 to 3 from 3

Main | Persons per Room | Gallery | Details

1a  Browse...

1b Code: DB

1c Order: 10

1d Color: #FF0099

1e Back Color: #CCFF33

1f Active: ☒

1g Header description: Alcaide Room

1h Description: Double Bed room with private bathroom. Almost all rooms have balcony. The TV is available in all rooms.

F1 Insert F2 Update F3 Delete

Persons per Room Gallery Details

Max Total Persons Per Room 4 Max. Adults Per Room 2 Max. Children Per Room 2

Standard Number of Beds Per Room 2 Minimum Number of Adults per Room 1

Insert Update Delete

Main Person Gallery Details

3a 3b 3c 3d 3e

Description Description Description Description Description

Hotel east view 1st Floor room with balcony 1st Floor room with balcony Hotel east view. Rooms with balcony Hotel west garden floor.

3f 3g 3h 3i 3j

Insert Update Delete

Main Person Room Details

Details

4a

Design HTML

Insert Update Delete

2.4.1 FIELDS

1) Main

Required

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

Public

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

Public i. It's used in the booking page.

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

Public 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.
- This information is accessible by the user by clicking in the “+ info” button that is located below the pictures gallery.

2.4.2 FUNCTIONS

- Insert** – creates a new room type.
- Update** – saves the form data in the database.
- Delete** – deletes the record from the system if the room type is not connected to any rooms.

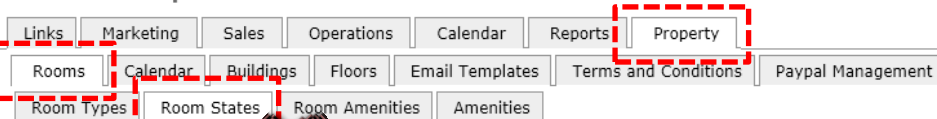
2.5 SET ROOM STATUS

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

Page Location

Hotel Alcaide – Operations

Jrubeiro | [Website](#) | [Sign out](#) |



Page Description

Manage room states

Filter

Edit	Code	Description
982	Not OK	Not OK
983	OK	OK

1 Displaying items 1 to 2 from 2

Main

Code	Color	Back Color	Description	Active
OK			OK	<input checked="" type="checkbox"/>

1a

Messages

1b

1c

1d

1e

F1

Select

F2

Insert

F3

Update

F4

Delete

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.

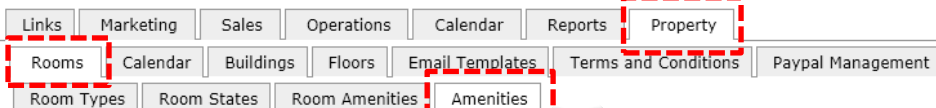
2.6 SET ROOM AMENITIES

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

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |



Page Description

Manage amenities

Filter

Edit	Code	Comments	Active
1371	TV		<input checked="" type="checkbox"/>
1372	AC		<input checked="" type="checkbox"/>

1 Displaying items 1 to 2 from 2

1a

1c

1b

F1 Select F2 Insert F3 Update F4 Delete

2.6.1 FIELDS

1) Main

- Required**
- Code** – a short code to identify the amenity.
 - Active** – shows or hides the amenity.
 - Comments** – comments about the amenity.

2.6.2 FUNCTIONS

- Select** – refresh the form data from the database.
- Insert** – creates a new record in the system.
- Update** – saves the form data in the database.
- Delete** – deletes the record from the system if the record is not connected to other objects.

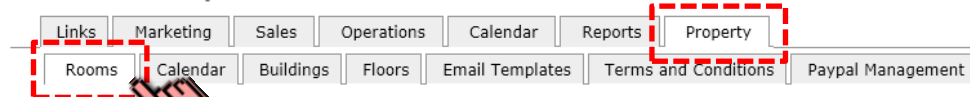
2.7 SET ROOMS

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

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |



Page Description

Manage Rooms

Filter

Edit	Room number	Room type	Room status	Floor	Building	Online Rese	Active
5839	101	Alcaide Room	OK	Group	HOTEL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5840	102	Alcaide Room	OK	Group	HOTEL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5841	103	Alcaide Room	OK	Group	HOTEL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5842	104	Alcaide Room	OK	Group	HOTEL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5843	105	Alcaide Room	OK	Group	HOTEL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5844	201	Alcaide Room	OK	Group	HOTEL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4956	202	Alcaide Room	OK	Group	HOTEL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5849	203	Alcaide Room	OK	Group	HOTEL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5850	204	Alcaide Room	OK	Group	HOTEL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4957	205	Alcaide Room	OK	Group	HOTEL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

1 2 Displaying items 1 to 10 from 15

Main

1a Room number **1b** Room type **1c** Room status **1d** Floor
 101 Double Bed room with private bathr OK HOTEL - Group

1e Comments **1f** Online Reservation **1g** Active
 Double Bed ☒ ☒

Amenities

2a Amenity nº
☒ TV ☒ AC

Messages

F1 Insert **F2** Update **F3** Delete

2.7.1 FIELDS

1) Main

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

- A human readable and easy to understand number or code that identifies uniquely the room in the hotel.
- This number is used in reports and in the accounting documents such as invoices or receipts.

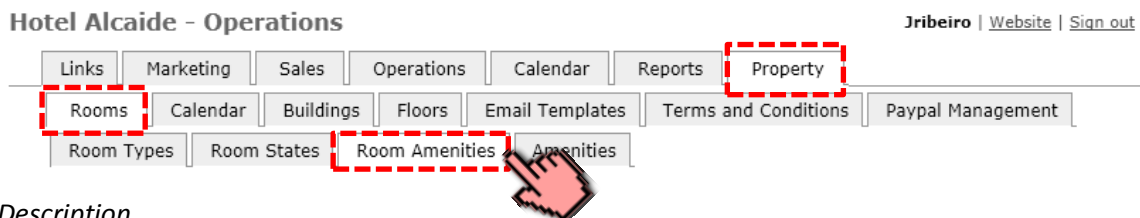
Requiredb. **Room Type** – the room type connected with the room.**Required**c. **Room Status** – the room status.**Required**d. **Floor** – the floor associated with the room.e. **Comments** – comments about the room.f. **Online Reservation** – allow or disable the room to be booked via the hotel website.g. **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

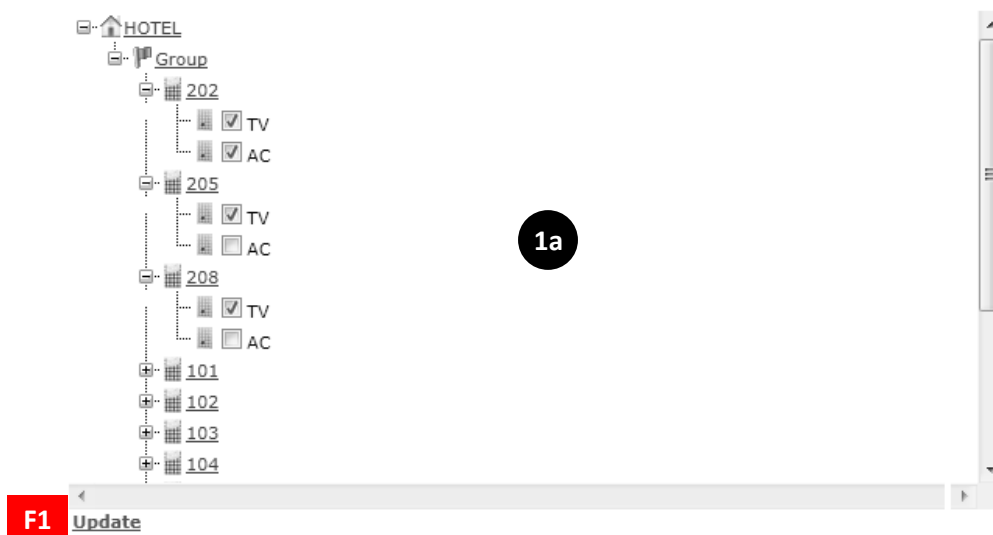
The amenities can be associated to the room using this page or using the SET ROOMS page. This page offers a quick way to connect the rooms with amenities by selecting which amenities are linked to the room.

Page Location



Page Description

Room amenities



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.

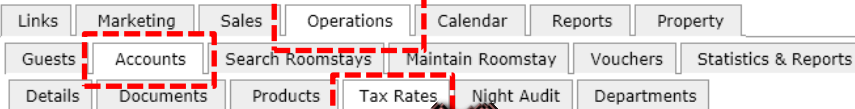
2.8 SET TAXES

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

Hotel Alcaide - Operations

Jrbeiro | [Website](#) | [Sign out](#) |



Page Description

Manage Tax Rates

Filter

Edit	Description	Tax %	Rule 1 - Country	Rule 1 - Tax %	Active
1462	IVA 6%	0.06			<input checked="" type="checkbox"/>
1463	IVA 23%	0.23			<input checked="" type="checkbox"/>
2145	IVA 13%	0.13			<input checked="" type="checkbox"/>

1 Displaying items 1 to 3 from 3

Main			X
Description	Default Tax %	Active	
1a IVA 23%	1b 0.230	1c <input checked="" type="checkbox"/>	
Specific Tax Rules			X
Rule 1 - Override Tax for Guest Country		Rule 1 - Override Tax for Guest Country (%)	
2a	2b		
Messages			X

F1 Insert F2 Update F3 Delete

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.

- 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

- 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.

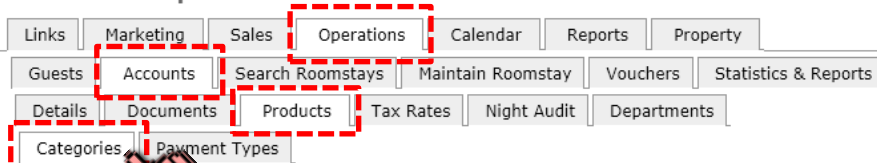
2.9 SET PRODUCT CATEGORIES

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

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#)




Page Description

Manage product and service categories

Filter

Edit	Description	Order	Active
3083	Bar	0	<input checked="" type="checkbox"/>
3082	Reception	0	<input checked="" type="checkbox"/>
3084	Restaurant	0	<input checked="" type="checkbox"/>
3081	Rooms	0	<input checked="" type="checkbox"/>

1
Displaying items 1 to 4 from 4

1a

1b
Description
Bar

1c
Order
0

1d
Active
☒

Browse...

F1 Insert F2 Update F3 Delete

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

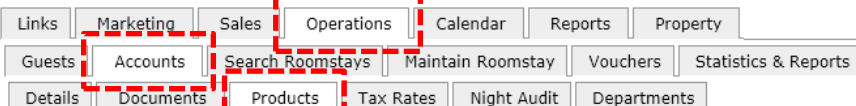
This page allows the hotel to create and manage the products and services used in the POINT OF SALE page.

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

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |



Page Description

Manage products and services

Filter

Edit	Category	Short Description	Amount	Tax Rate	Order	Is Room Charge	Active
8709	Bar	Beer	1.00	IVA 23%	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8711	Restaurant	Food	1.00	IVA 23%	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8708	Rooms	Room Charge	1.00	IVA 13%	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8710	Bar	Water	1.00	IVA 23%	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>

1 Displaying items 1 to 4 from 4

1a

1b

1c

1d

1e

1f

1g

1h

1i

Category

Short Description

Sales price

Tax Rate

Active

Order

Is Room Charge Product

Last Update

Bar

Beer

1.00

IVA 23%

☒

0

☐

12/26/2012

Browse...

Messages

F1 Insert F2 Update F3 Delete

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.

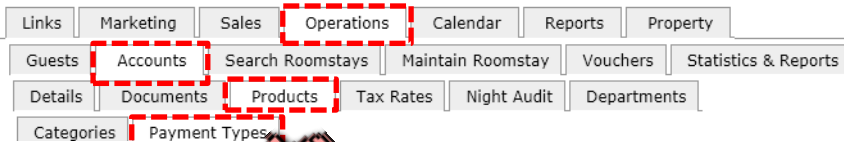
2.11 SET PAYMENT TYPES

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

Page Location

Hotel Alcaide - Operations

Jribeiro | [Website](#) | [Sign out](#) |



Page Description



Payment Types

Filter

Edit	Description	Order	Active
10090	Money	1	<input checked="" type="checkbox"/>
10091	Check	2	<input checked="" type="checkbox"/>
10092	Credit Card	3	<input checked="" type="checkbox"/>
10093	Others	4	<input checked="" type="checkbox"/>

1 Displaying items 1 to 4 from 4

Main

Description	Order	Active	Last Update
<div>  <input type="text" value="Money"/> </div> <div>  <input type="button" value="Browse..."/> </div>	<div> <input type="text" value="1"/> </div>	<div> <input checked="" type="checkbox"/> </div>	<div> 12/26/2012 </div>

Messages

F1 [Insert](#) **F2** [Update](#) **F3** [Delete](#)

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.

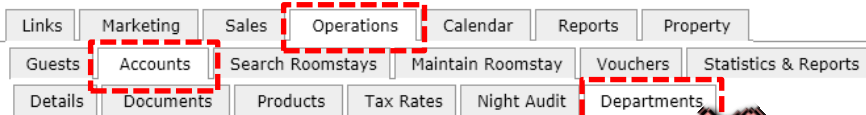
2.12 SET DEPARTMENTS

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

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |



Page Description

Manage departments

Filter

Edit	Code	Description	Active
968	DEPARTMENT1	Department 1	<input checked="" type="checkbox"/>

1 Displaying items 1 to 1 from 1

1a Code
 DEPARTMENT1

1b Description
 Department 1

1c Active
☒

F1 Insert
 F2 Update
 F3 Delete

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 Note (Accounting Document)
- 3) Invoice\Receipt & Credit\Refund Note (Accounting Document)
- 4) Document Summary (Accounting Document)
- 5) Check In (Operations Document)

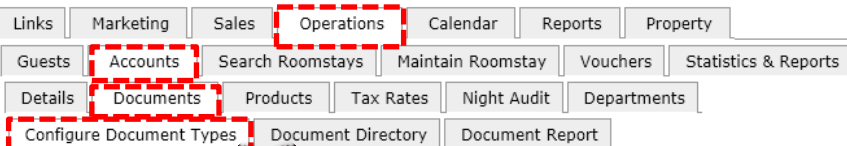
The document template layouts are illustrated and detailed in the STANDARD DOCUMENT TEMPLATE LAYOUTS chapter.

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

Hotel Alcaide - Operations

 Jribeiro | [Website](#) | [Sign out](#) |


Page Description

Filter

Edit	Code	Name	Template	Next ID
3434	INVOICE	Invoice	Templates\Invoice1.rdlc	6
3435	RECEIPT	Receipt	\Pms\UI\Views\Documents\Templates\Receipt1.rdlc	2
3440	INVOICE_RECEIPT	Invoice \ Receipt	\Pms\UI\Views\Documents\Templates\InvoiceReceipt1.rdlc	1
3436	CREDIT_NOTE	Credit Note	\Pms\UI\Views\Documents\Templates\Invoice1.rdlc	1
3438	REFUND_NOTE	Refund Note	\Pms\UI\Views\Documents\Templates\Receipt1.rdlc	1
3439	CREDIT_REFUND_NOTE	Credit\Refund Note	\Pms\UI\Views\Documents\Templates\InvoiceReceipt1.rdlc	1
3437	CHECKIN	Check In	\Pms\UI\Views\Roomstays\Reports\CheckIn.rdlc	1
3441	DOC_REPORT	Doc. Report	\Pms\UI\Views\Documents\Templates\DocList1.rdlc	0

1 Displaying items 1 to 8 from 8

DOCUMENT TYPES AVAILABLE BY DEFAULT

1a

1b

1c

1d

1e

1f

1g

1h

Code: INVOICE

Name: Invoice

1° Print Code: ORIGINAL

2° Print Code (and others): DUPLICATE

Template: 100. Invoice

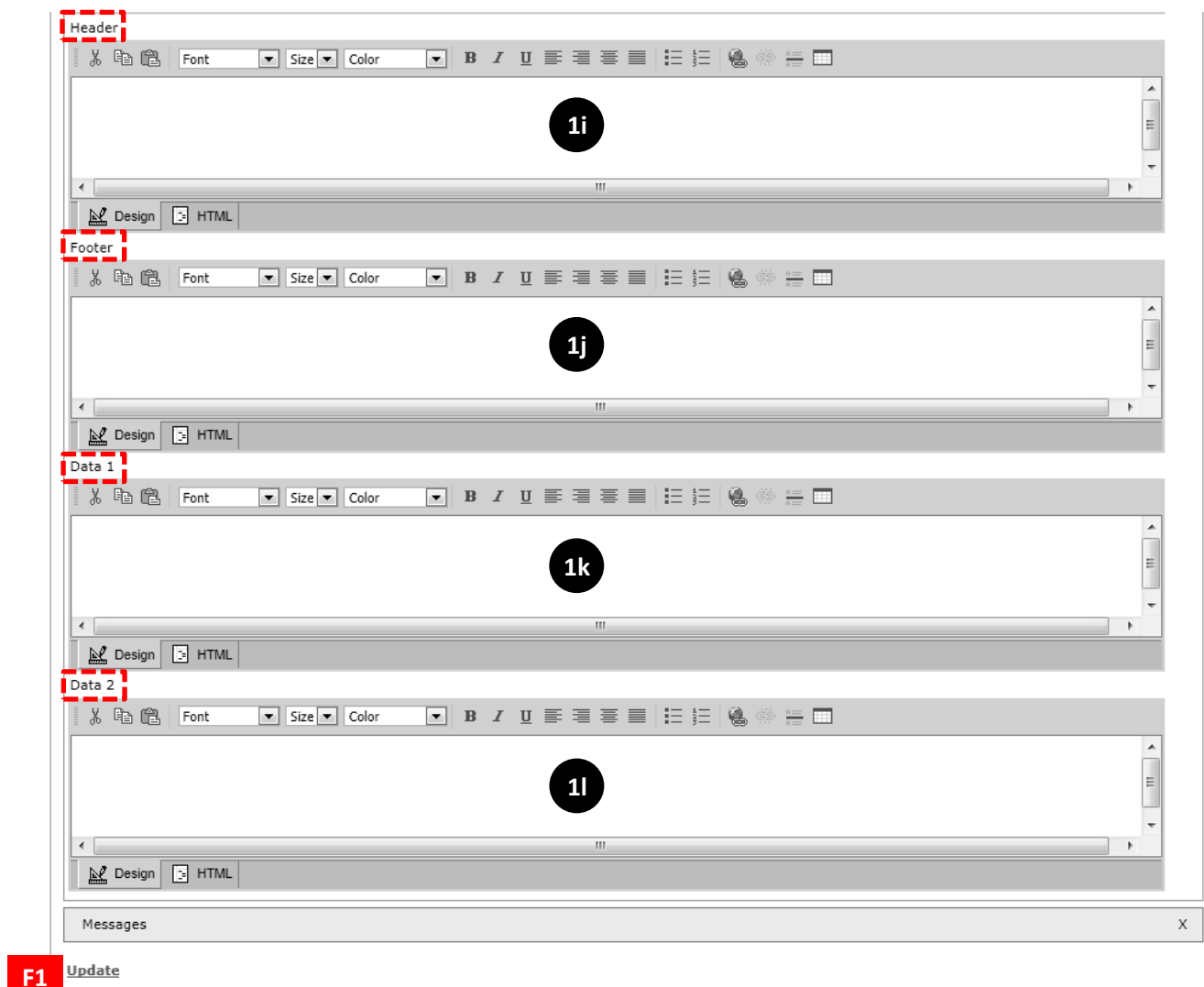
Next ID: 6

Notes

Terms

30 Days

Design HTML



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.
- The template can be changed using the instructions defined in the CONFIGURE REPORT TEMPLATE FILES chapter.
 - 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.
- This is typical the number used by the accounting department.
- g. **Notes** – a text field used to define notes.
- 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.
- The field is located in the template with the tag “TERMS”.
- i. **Header** – the header of the document.
- The field is located in the template with the tag “HEADER”.
- j. **Footer** – the footer of the document.
- 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.
- 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.
- 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

<div>«Expr»</div> <div>HEADER</div>																																																	
<div>NAME: «currentID» «Description»</div> <div>[ReportData1]</div> <div>DATA 1</div>						<div>NEXT ID</div> <div>PRINT CODE: «Status»</div> <div>ISSUE DATE</div>																																											
<div>For: [PlayerEntityFullName]</div> <table border="1"> <tr> <td>Nationality</td> <td>Doc. ID</td> <td colspan="3">Contact</td> <td colspan="2">Email</td> <td colspan="3">Acc. #</td> </tr> <tr> <td>[PlayerEntityNationality]</td> <td>[PlayerEntityDocumentID]</td> <td colspan="3">PLAYER INFO</td> <td colspan="2">[PlayerEntityContact2]</td> <td colspan="3">[AccountID]</td> </tr> <tr> <td>Address</td> <td></td> <td>City</td> <td>State</td> <td>Zip Code</td> <td colspan="5">Country</td> </tr> <tr> <td>[PlayerEntityAddress]</td> <td></td> <td>[PlayerEntityAddressCity]</td> <td>[PlayerEntityAddressState]</td> <td>[PlayerEntityAddressZip]</td> <td colspan="5">[PlayerEntityAddressCountry]</td> </tr> </table>										Nationality	Doc. ID	Contact			Email		Acc. #			[PlayerEntityNationality]	[PlayerEntityDocumentID]	PLAYER INFO			[PlayerEntityContact2]		[AccountID]			Address		City	State	Zip Code	Country					[PlayerEntityAddress]		[PlayerEntityAddressCity]	[PlayerEntityAddressState]	[PlayerEntityAddressZip]	[PlayerEntityAddressCountry]				
Nationality	Doc. ID	Contact			Email		Acc. #																																										
[PlayerEntityNationality]	[PlayerEntityDocumentID]	PLAYER INFO			[PlayerEntityContact2]		[AccountID]																																										
Address		City	State	Zip Code	Country																																												
[PlayerEntityAddress]		[PlayerEntityAddressCity]	[PlayerEntityAddressState]	[PlayerEntityAddressZip]	[PlayerEntityAddressCountry]																																												
ID	Room	Name	Agent	Nationality	Doc. ID	Arrival	Departure	Pax																																									
[roomstayID]	[roomNumber]	[RoomEntityFullName]	[AgentName]	ROOM STAY	[EntityCoolID]	[DateIn]	[DateOut]	[roomPax]																																									
<div>Payments</div> <table border="1"> <tr> <td>[transactionData]</td> <td>[ProductService]</td> <td>[Description]</td> <td colspan="4">PAYMENT TRANSACTIONS</td> <td colspan="3">[unitAmount]</td> </tr> <tr> <td colspan="7"></td> <td colspan="3">(Amount)</td> </tr> </table>										[transactionData]	[ProductService]	[Description]	PAYMENT TRANSACTIONS				[unitAmount]										(Amount)																						
[transactionData]	[ProductService]	[Description]	PAYMENT TRANSACTIONS				[unitAmount]																																										
							(Amount)																																										
						<div>Sub Total: «Expr» [Curr]</div> <div>«Expr» [Curr]</div> <div>TOTALS</div> <div>Total Paid: «Expr» [Curr]</div>																																											
<div>Terms</div> <div>[DocTerms]</div> <div>TERMS</div>					<div>Notes</div> <div>[DocNotes]</div> <div>NOTES</div>																																												
<div>[ReportData2]</div> <div>DATA 2</div>																																																	
<div>«Expr»</div> <div>FOOTER</div> <div>«Expr»</div>																																																	

Last Revision
2013-01-26

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

HEADER																																	
NAME DocumentIDDescription					NEXT ID																												
[ReportData1]					DATA 1																												
					PRINT CODE [DocStatus] ISSUE DATE [IssuedDate]																												
For: [PayerEntityFullName]																																	
<table border="1"> <thead> <tr> <th>Nationality</th> <th>Doc. ID</th> <th>Contact</th> <th>Email</th> <th>Acc. n°</th> </tr> </thead> <tbody> <tr> <td>[PayerEntityNationality]</td> <td>[PayerEntityDocument]</td> <td>[PayerEntityContact2]</td> <td>[PayerEntityContact2]</td> <td>[PayerEntityAccountID]</td> </tr> <tr> <th colspan="2">Address</th> <th>City</th> <th>State</th> <th>Zip Code</th> </tr> <tr> <td colspan="2">[PayerEntityAddress]</td> <td>[PayerEntityAddressCity]</td> <td>[PayerEntityAddressState]</td> <td>[PayerEntityAddressCountry]</td> </tr> </tbody> </table>										Nationality	Doc. ID	Contact	Email	Acc. n°	[PayerEntityNationality]	[PayerEntityDocument]	[PayerEntityContact2]	[PayerEntityContact2]	[PayerEntityAccountID]	Address		City	State	Zip Code	[PayerEntityAddress]		[PayerEntityAddressCity]	[PayerEntityAddressState]	[PayerEntityAddressCountry]				
Nationality	Doc. ID	Contact	Email	Acc. n°																													
[PayerEntityNationality]	[PayerEntityDocument]	[PayerEntityContact2]	[PayerEntityContact2]	[PayerEntityAccountID]																													
Address		City	State	Zip Code																													
[PayerEntityAddress]		[PayerEntityAddressCity]	[PayerEntityAddressState]	[PayerEntityAddressCountry]																													
PAYER INFO																																	
<table border="1"> <thead> <tr> <th>ID</th> <th>Room</th> <th>Name</th> <th>Agent</th> <th>Locality</th> <th>Doc. ID</th> <th>Arrival</th> <th>Departure</th> <th>Pax</th> </tr> </thead> <tbody> <tr> <td>[RoomstayID]</td> <td>[RoomNumber]</td> <td>[RoomEntityFullName]</td> <td>[AgentName]</td> <td>[BirthCountry]</td> <td>[EntityDocID]</td> <td>[DateIn]</td> <td>[DateOut]</td> <td>[NoOfPax]</td> </tr> </tbody> </table>										ID	Room	Name	Agent	Locality	Doc. ID	Arrival	Departure	Pax	[RoomstayID]	[RoomNumber]	[RoomEntityFullName]	[AgentName]	[BirthCountry]	[EntityDocID]	[DateIn]	[DateOut]	[NoOfPax]						
ID	Room	Name	Agent	Locality	Doc. ID	Arrival	Departure	Pax																									
[RoomstayID]	[RoomNumber]	[RoomEntityFullName]	[AgentName]	[BirthCountry]	[EntityDocID]	[DateIn]	[DateOut]	[NoOfPax]																									
ROOM STAY																																	
<table border="1"> <thead> <tr> <th>Date</th> <th>Detail</th> <th>Q.</th> <th>Net</th> <th>VAT</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>[TransactionDate]</td> <td>[ProductService]</td> <td></td> <td>«Expr»</td> <td>[TaxAmount]</td> <td>[Amount]</td> </tr> <tr> <td></td> <td></td> <td>[Quantity]</td> <td>«Expr»</td> <td>[TaxAmount]</td> <td>[Amount]</td> </tr> </tbody> </table>										Date	Detail	Q.	Net	VAT	Amount	[TransactionDate]	[ProductService]		«Expr»	[TaxAmount]	[Amount]			[Quantity]	«Expr»	[TaxAmount]	[Amount]						
Date	Detail	Q.	Net	VAT	Amount																												
[TransactionDate]	[ProductService]		«Expr»	[TaxAmount]	[Amount]																												
		[Quantity]	«Expr»	[TaxAmount]	[Amount]																												
ACCOUNT\FOLIO TRANSACTIONS																																	
<table border="1"> <thead> <tr> <th>Tax</th> <th>TAX ZONE</th> <th>Total</th> <th>VAT Amount</th> </tr> </thead> <tbody> <tr> <td>[TaxRateDescription]</td> <td>«Expr»</td> <td>[SumAmount]</td> <td>[TaxAmount]</td> </tr> </tbody> </table>					Tax	TAX ZONE	Total	VAT Amount	[TaxRateDescription]	«Expr»	[SumAmount]	[TaxAmount]	<table border="1"> <thead> <tr> <th>Net Total</th> <th>ACCOUNT</th> <th>Expr»</th> <th>Currency</th> </tr> </thead> <tbody> <tr> <td></td> <td>TOTALS</td> <td>«Expr»</td> <td>«Expr»</td> </tr> <tr> <td></td> <td>TOTALS</td> <td>«Expr»</td> <td>«Expr»</td> </tr> <tr> <td></td> <td>Total Paid</td> <td>«Expr»</td> <td>[Currency]</td> </tr> </tbody> </table>					Net Total	ACCOUNT	Expr»	Currency		TOTALS	«Expr»	«Expr»		TOTALS	«Expr»	«Expr»		Total Paid	«Expr»	[Currency]
Tax	TAX ZONE	Total	VAT Amount																														
[TaxRateDescription]	«Expr»	[SumAmount]	[TaxAmount]																														
Net Total	ACCOUNT	Expr»	Currency																														
	TOTALS	«Expr»	«Expr»																														
	TOTALS	«Expr»	«Expr»																														
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TAX ZONE					ACCOUNT																												
<table border="1"> <thead> <tr> <th>Payments</th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>[TransactionDate]</td> <td>[ProductService]</td> <td>[Description]</td> <td>[Amount]</td> </tr> </tbody> </table>										Payments				[TransactionDate]	[ProductService]	[Description]	[Amount]																
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[TransactionDate]	[ProductService]	[Description]	[Amount]																														
PAYMENTS TRANSACTIONS																																	
					<table border="1"> <thead> <tr> <th>Sub Total</th> <th>PAYMENT</th> <th>Expr»</th> <th>Currency</th> </tr> </thead> <tbody> <tr> <td>«Expr»</td> <td>TOTALS</td> <td>«Expr»</td> <td>«Expr»</td> </tr> <tr> <td>Total Paid</td> <td></td> <td>«Expr»</td> <td>[Currency]</td> </tr> </tbody> </table>					Sub Total	PAYMENT	Expr»	Currency	«Expr»	TOTALS	«Expr»	«Expr»	Total Paid		«Expr»	[Currency]												
Sub Total	PAYMENT	Expr»	Currency																														
«Expr»	TOTALS	«Expr»	«Expr»																														
Total Paid		«Expr»	[Currency]																														
[DocTerms]					[DocNotes]																												
TERMS					NOTES																												
[ReportData2]					DATA 2																												
FOOTER																																	

Figure 28 – Document Template: Invoice and Receipt

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

«Expr»									
HEADER									
[ReportData1]									
DATA 1									
[DocTypeDescription]									
NAME									
ID	Name	Payer	Notes	Net	Tax	Total	Payment		
[DocumentID]	[DocumentIssued]	[PayerEntityFullName]	[DocNotes]	«Expr»	[TaxAmount]	[DebitAmount]	[CreditAmount]		
DOCUMENT DETAILS									
				«Expr»	[TaxAmount]	[DebitAmount]	[CreditAmount]		
				«Expr»	[TaxAmount]	[DebitAmount]	[CreditAmount]		
[ReportData2]									
DATA 2									
«Expr»									
FOOTER									
«Expr»									

Figure 29 – Document Template: Documents Summary Report

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

«Expr»						HEADER					
[Document NAME Description]											
Guest Name			Nationality		Doc. ID		Contact		Email		
[EntityFullName]			[Nationality]		[GuestDocumentId]		[Contact1]		[Contact2]		
[Comments]											
Room		Arrival		Departure		Rate		Pax		Account n°	
RoomNumber		[DateIn]		[DateOut]		[RoomRate]		PerOfPer		[AccountID]	
ROOMSTAY											
«Expr»											
Guest Signature											
«Expr»											
FOOTER											

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.

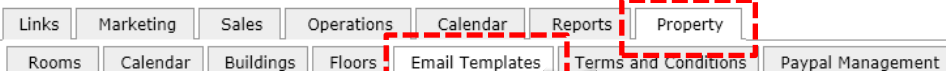
The templates use specific tokens (**@TOKEN**), as explained below, that are replaced by real data when the email is created and sent.

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

Page Location

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |



Page Description

1a

Roomstay Voucher (Management Site)

Voucher Standard - Subject
@PropertyName - Reservation for @GuestName

Voucher Standard - Body

Reservation
@PropertyName
@PropertyAddress

Confirmed

Voucher

@ResID
@ResDescription

Check In @DateInLong
Check Out @DateOutLong

For @NumberOfNights Night(s), @NumberOfAdults Adult (s), @NumberOfChildren Child(s)
@RoomRateVoucherDescription

@TotalAmount @CurrencyCode

EXAMPLE
@PROPERTYNAME – THIS TOKEN WILL BE REPLACED BY THE HOTEL NAME WHEN THE EMAIL IS CREATED BY THE SYSTEM

BOOKING BY HOTEL
EMAIL TEMPLATE USED WHEN THE HOTEL MANUALLY CREATES A BOOKING.

2a

Online Booking Voucher (Public Site)

Voucher Online - Subject
@PropertyName - Reservation for @PaymentPayerName

Voucher Online - Body

Reservation
@PropertyName
@PropertyAddress

@PaymentStatus

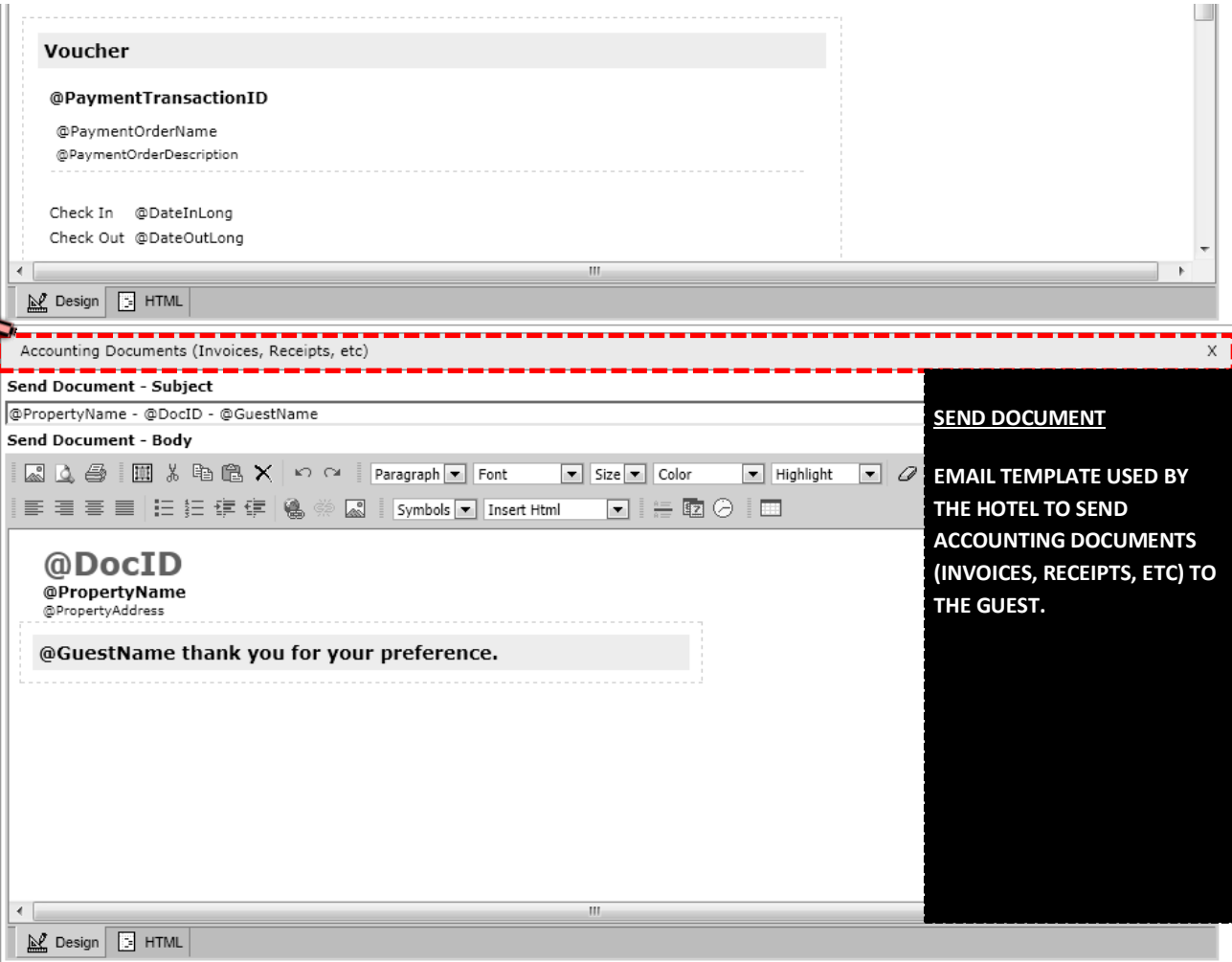
BOOKING BY GUEST
EMAIL TEMPLATE USED WHEN A CUSTOMER BOOKS IN THE HOTEL WEBSITE.

3a

3b

4a

4b

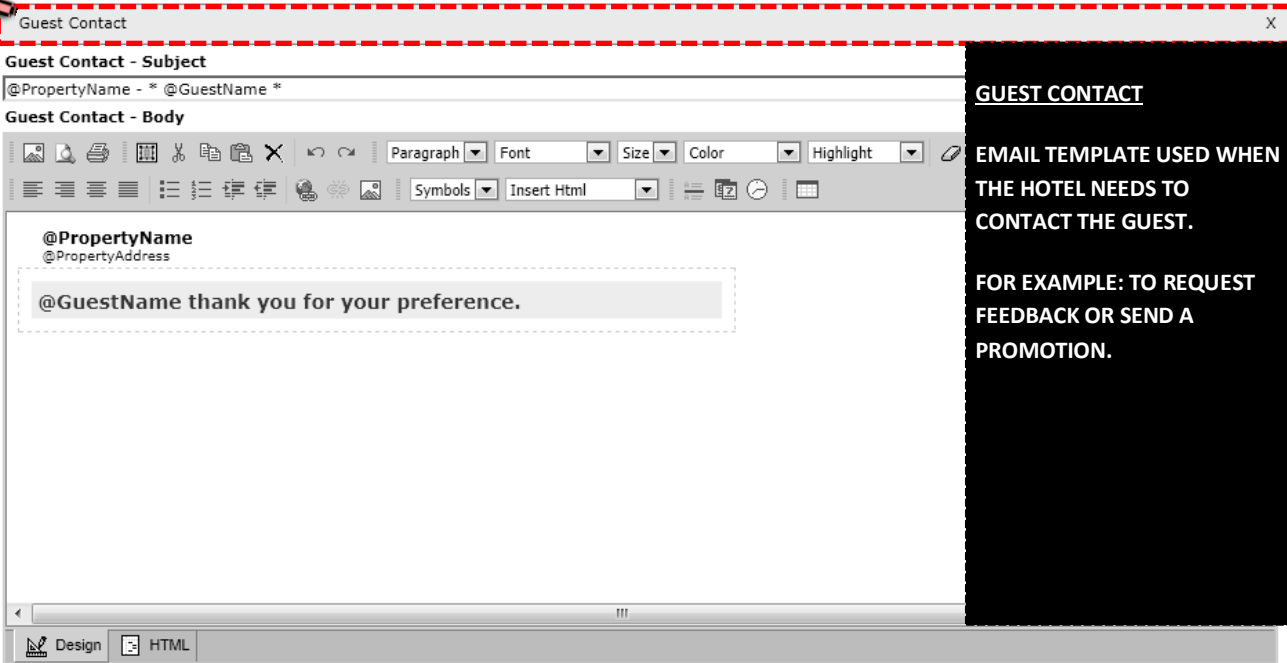


SEND DOCUMENT

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

4a

4b



GUEST CONTACT

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

FOR EXAMPLE: TO REQUEST FEEDBACK OR SEND A PROMOTION.

F1

F2

F3

F4

F5

Update

Reset Voucher Standard Template

Reset Voucher Online Template

Reset Send Document

Guest Contact - Reset

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 – N°_OF_ROOMS, N°_OF_ADULTS Adults, N°_OF_CHILDREN_TYPE_A + N°_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.

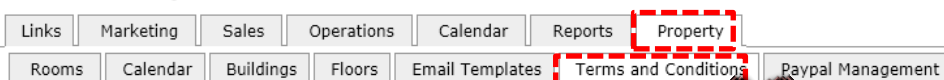
2.15 SET BOOKING TERMS AND CONDITIONS

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**.

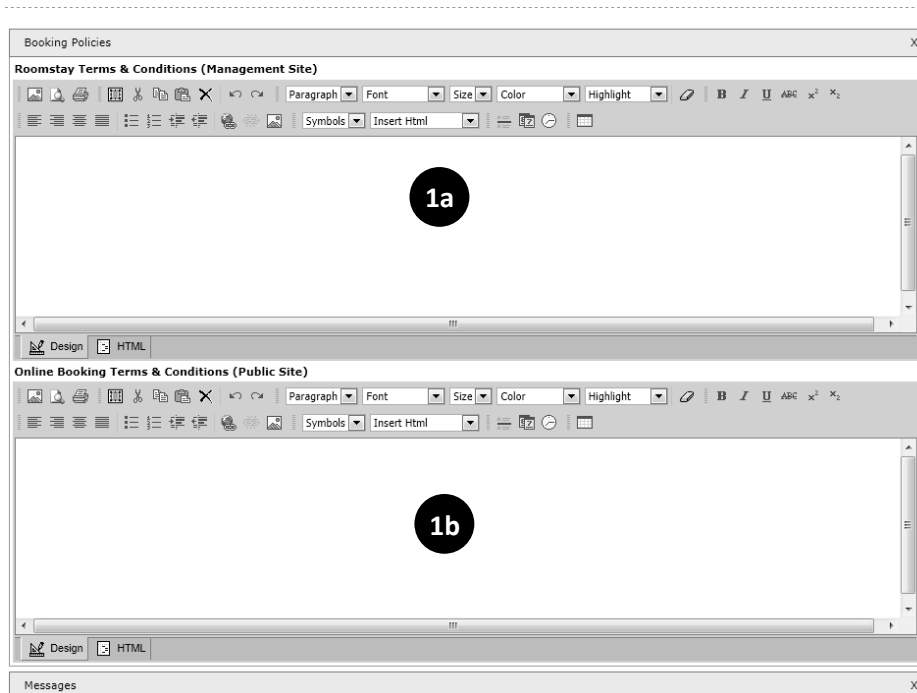
Page Location

Hotel Alcaide - Operations

Jribeiro | [Website](#) | [Sign out](#) |



Page Description



F1

[Update](#)

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.

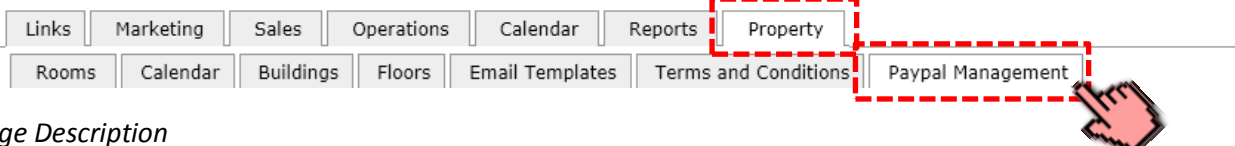
2.16 SET PAYPAL INTEGRATION

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

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |



Page Description

1a	1. Verify if your currency is available						
1b	2. Get your Paypal API Signature						
1c	PayPal API Username	1d	PayPal API Password	1e	PayPal API Signature	1f	PayPal API Stage
1g	Reservation Charge Percent	1h	Reservation Charge Fix Fee	1i	Reservation Charge by N° Nights		
F1	0.00	0.00	0				
Update							

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.

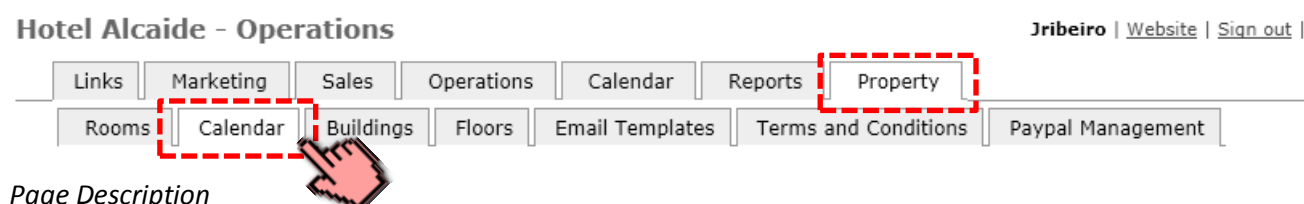
2.16.2 FUNCTIONS

- 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

Balanced account		Account with debit balance		Account with credit balance	
1a	#FF99FF	1b	#000000	1c	#FFFF99
Reserved		Reserved warning			
1d	#000000	1e	#99FF66		
Check in		Check in warning			
1f	#000000	1g	#000000		
Check out					
1h	#000000				
Update					
F1					

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 than 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.

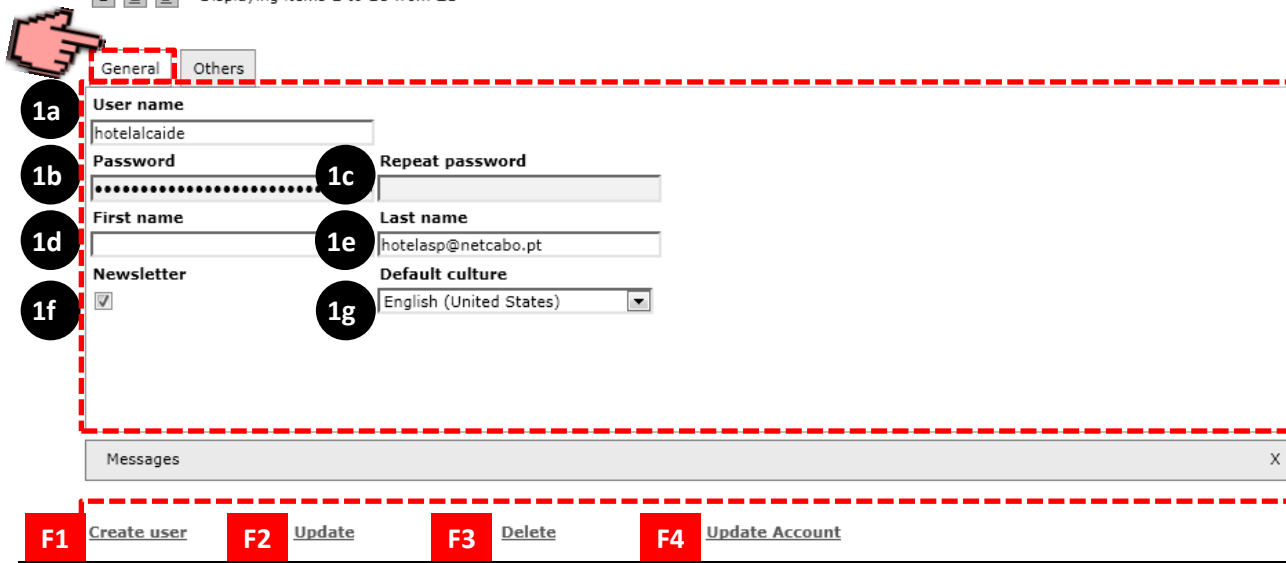
Page Location



Page Description

ID	User name	First name	Last name	user Status
 hotelalcaide			hotelasp@netcabo.pt	Active
 jribeiro			ribeiro	Active
 G1153				Active
 G1154				Active
 G1155		Max de Oliveira		Active
 G1207		miguel ribeiro		Active
 G1215		Corinne & Richard KRIZ		Active
 G1253		Magdalena Figiel		Active
 G1327		Magdalena Figiel		Active
 G1420		Daniel Zucca Aparicio		Active

1 2 3 Displaying items 1 to 10 from 28



General Others

1a User name
hotelalcaide

1b Password
.....

1c Repeat password
.....

1d First name
.....

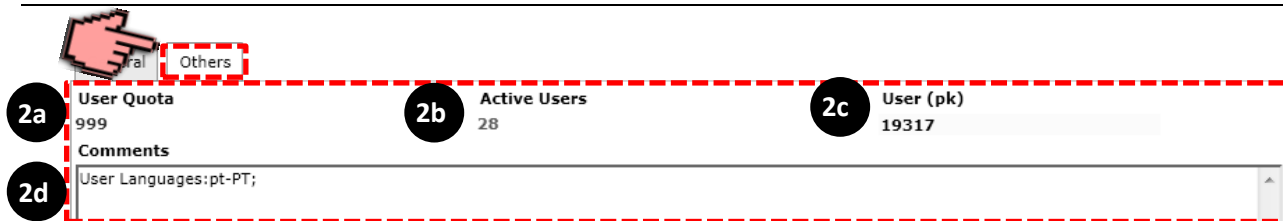
1e Last name
hotelasp@netcabo.pt

1f Newsletter
☒

1g Default culture
English (United States)

Messages X

F1 Create user F2 Update F3 Delete F4 Update Account



The screenshot shows a user management interface. A red dashed box highlights a section with four fields:

- 2a User Quota**: 999
- 2b Active Users**: 28
- 2c User (pk)**: 19317
- 2d Comments**: User Languages:pt-PT;

A hand icon points to the 'Others' tab.

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.

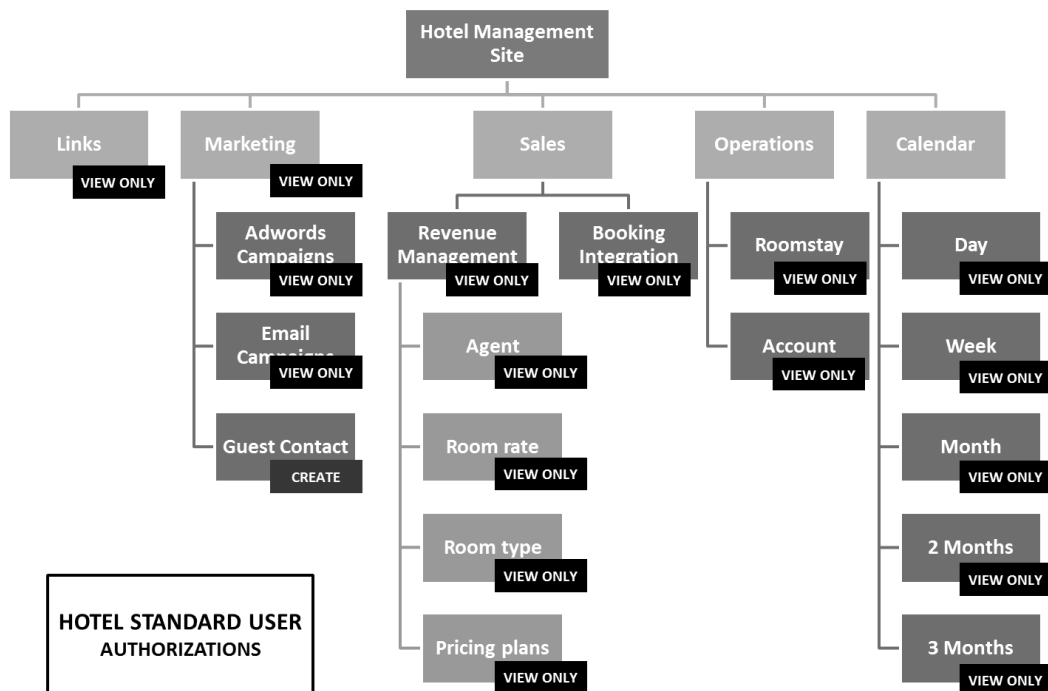


Figure 32 - HotelASP Authorizations: Standard User Accesses

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.

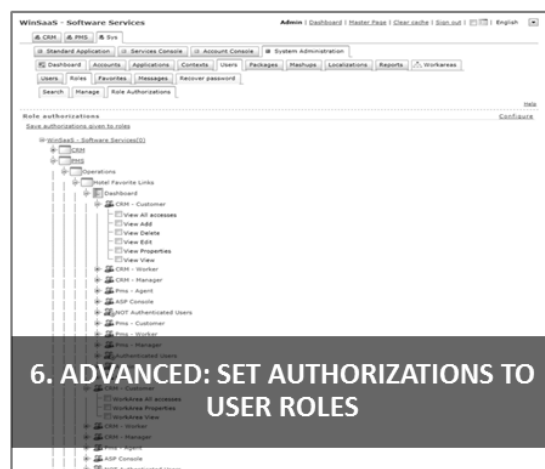
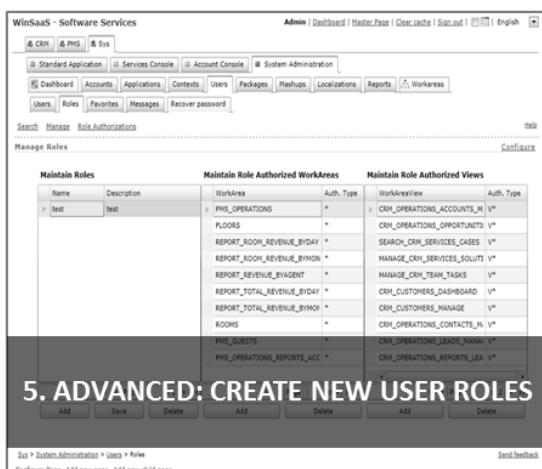
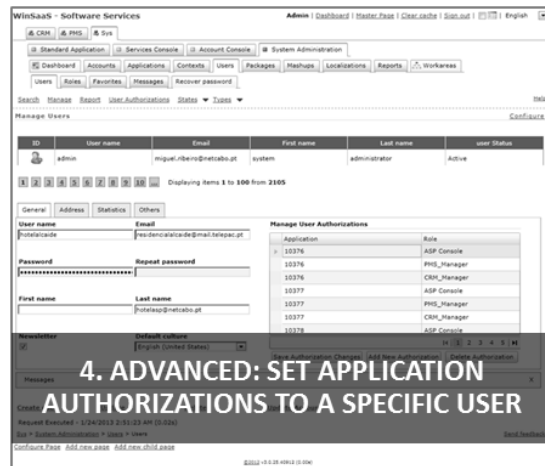
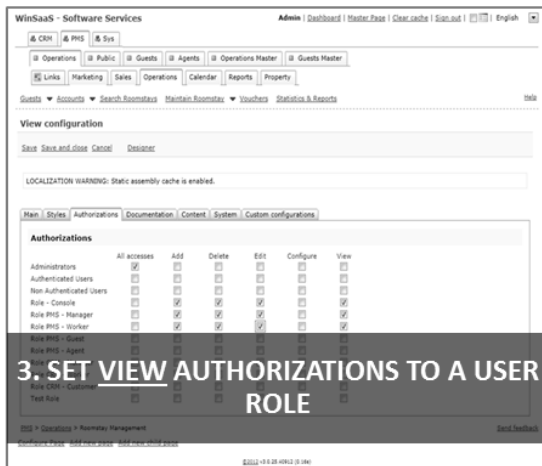
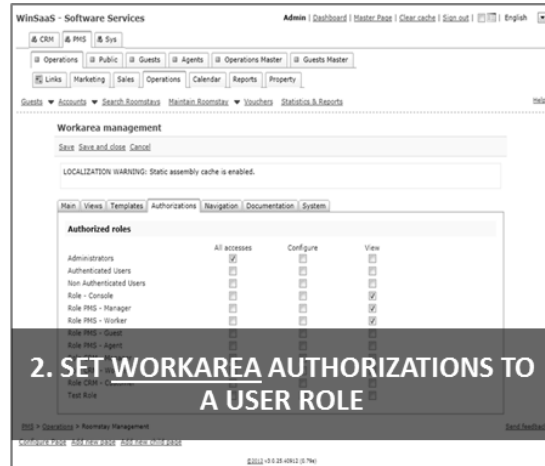


Figure 33 – Users, Roles and Authorizations: Advanced Settings

STEP 1

HOW TO GIVE UPDATE AUTHORIZATIONS TO A USER ROLE

WinSaaS - Software Services

CRM PMS Sys

Operations Guests Agents Operations Calendar

Guests Accounts Search Roomstays Maintain Roomstay

Search and update roomstays

Filter

No Data

Roomstay Account Documents Others Images

Name Last name Nationality No /

Passport \ ID Contact Email Payer

Agent n° Room Rate Date in Date out Room Total Room No of Nights

Roomstay Guest n° Account n° Status

Cancel No Show Delete Check Out

Folio Guest Voucher Doc. In Docs Contact

STEP 1
→ THE HOTEL MUST FIRST SELECT THE PAGE HE WANTS TO SET THE AUTHORIZATIONS IN THE SYSTEM ADMINISTRATION APPLICATION AT HTTP://LOCALHOST:8325/SAAS.ASPX?AID=0
→ IN THIS CASE IS THE HOTEL ROOMSTAY PAGE AT HTTP://LOCALHOST:8325/_0_EN-US_680___/SAAS.ASPX

STEP 2
EDIT WORKAREA AUTHORIZATIONS BY CLICKING IN THE "CONFIGURE PAGE" BUTTON

STEP 3
EDIT VIEW AUTHORIZATIONS BY CLICKING IN THE "CONFIGURE" BUTTON

PMS > Operations > Roomstay Management

Configure Page Add new page Add new child page

Send feedback

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STEP 2

SET WORKAREA AUTHORIZATIONS TO A USER ROLE

WinSaaS - Software Services

Admin | Dashboard | Master Page Clear cache Sign out | English

CRM PMS Sys

Operations Public Guests Agents Operations Master Guests Master

Links Marketing Sales

Guests Accounts Search Roomstays Maintain Roomstay

Statistics & Reports

Workarea manager

Save Save and close Cancel

LOCALIZATION WARNING: Static assembly cache is enabled

Main Views **Authz** Navigation Documentation System

Authorized roles

	All accesses	Configure	View
Administrators	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non Authenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Role - Console	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Role PMS - Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Role PMS - Worker	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Role PMS - Guest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Role PMS - Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Role CRM - Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Role CRM - Worker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Role CRM - Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PMS > Operations > Roomstay Management

Configure Page Add new page Add new child page

Send feedback

©2012 v3.0.25.40912 (0.79s)

STEP 1
SELECT THE WORKAREA AUTHORIZATIONS TAB

STEP 2
SET "VIEW" AUTHORIZATION TO THE "ROLE PMS - WORKER"

STEP 3
SAVE THE WORKAREA AUTHORIZATIONS

STEP 4
CLEAR CACHE AND LOGOFF FOR THE NEW SETTINGS TO BE ACTIVE

STEP 3

SET VIEW AUTHORIZATIONS TO A USER ROLE

STEP 1
SELECT THE VIEW AUTHORIZATIONS TAB

STEP 2
SET "ADD", "DELETE", "EDIT", "VIEW" AUTHORIZATIONS TO THE "ROLE PMS - WORKER"

STEP 3
SAVE THE VIEW AUTHORIZATIONS

STEP 4
CLEAR CACHE AND LOGOFF FOR THE NEW SETTINGS TO BE ACTIVE

WinSaaS - Software Services

Admin | Dashboard | Master Page | Clear cache | Sign out | English

CRM PMS Sys

Operations Public Guests Agents Operations Master Guests Master

Links Markets

Guests Accounts

Statistics & Reports

View configuration

Save Save and close Cancel Designer

LOCALIZATION WARNING: Static assets

Styles Authorizations Documentation Content System Custom configurations

Authorizations

	All accesses	Add	Delete	Edit	Configure	View
Administrators	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non Authenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Role - Console	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Role PMS - Manager	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Role PMS - Worker	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Role PMS - Guest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Role PMS - Agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Role CRM - Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Role CRM - Worker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Role CRM - Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PMS > Operations > Roomstay Management

Configure Page Add new page Add new child page

Send feedback

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STEP 4

ADVANCED: SET APPLICATION AUTHORIZATIONS TO A SPECIFIC USER

STEP 1
→ THE HOTEL MUST SELECT THE USER MANAGEMENT IN THE SYSTEM ADMINISTRATION APPLICATION AT [HTTP://localhost:8325/_0_EN-US_22999_/SAAS.ASPX](http://localhost:8325/_0_EN-US_22999_/SAAS.ASPX)

STEP 2
SELECT USER

STEP 3
ADD APPLICATION AUTHORIZATION TO USER

STEP 4
SAVE APPLICATION AUTHORIZATIONS

STEP 5
UPDATE USER

STEP 6
CLEAR CACHE AND LOGOFF FOR THE NEW SETTINGS TO BE ACTIVE

WinSaaS - Software Services

Admin | Dashboard | Master Page | Clear cache | Sign out | English

CRM PMS Sys

Standard Application Services Console Account Console System Administration

Dashboard Accounts Applications Contexts Users Packages Mashups Localizations Reports Workflows

Users Roles

Search Manage

Manage Users

ID	Username	Full Name	Role	Status
1	admin	miguel.ribeiro@netcabo.pt	system	Active

Displaying items 1 to 100 from 2105

Personal Address Statistics Others

Name Email

residencialcaide@mail.telepac.pt

Password Repeat password

First name Last name

hotelasp@netcabo.pt

Default culture

English (United States)

Create user Update Delete

Request Executed - 1/24/2013 2:51:23 AM (0.02s)

Sys > System Administration > Users > Users

Configure Page Add new page Add new child page

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Add Authorization

Application Role

OK Cancel

Manage User Authorizations

Application	Role
10376	ASP Console
10376	PMS_Manag
10376	CRM_Manag
10377	ASP Console
10377	PMS_Manag
10377	CRM_Manag
10378	ASP Console

Save Authorization Changes Add New Authorization Delete Authorization

STEP 5

ADVANCED: CREATE NEW USER ROLES

STEP 1
→ THE HOTEL MUST SELECT THE ROLE MANAGEMENT IN THE SYSTEM ADMINISTRATION APPLICATION AT [HTTP://LOCALHOST:8325/_0_EN-US_22762___/SAAS.ASPX](http://localhost:8325/_0_EN-US_22762___/SAAS.ASPX)

STEP 2
ADD ROLE

STEP 3
ADD WORKAREA AUTHORIZATIONS TO ROLE

STEP 4
ADD VIEW AUTHORIZATIONS TO ROLE

STEP 5
SAVE NEW ROLE

STEP 6
CLEAR CACHE AND LOGOFF FOR THE NEW SETTINGS TO BE ACTIVE

STEP 6

ADVANCED: SET AUTHORIZATIONS TO USER ROLES

STEP 1
→ THE HOTEL MUST NAVIGATE TO PAGE AT [HTTP://LOCALHOST:8325/_0_EN-US_14251___/SAAS.ASPX](http://localhost:8325/_0_EN-US_14251___/SAAS.ASPX)

STEP 2
SET VIEW AUTHORIZATIONS

STEP 3
SET WORKAREA AUTHORIZATIONS

STEP 4
SAVE AUTHORIZATIONS

STEP 5
CLEAR CACHE AND LOGOFF FOR THE NEW SETTINGS TO BE ACTIVE

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.

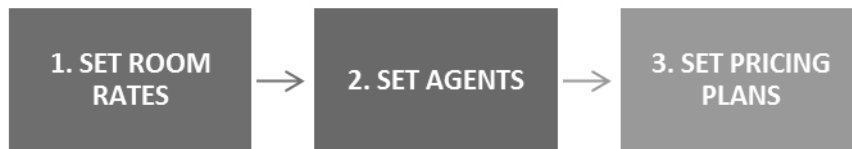


Figure 34 – Room Pricing: Setup Basic Steps

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.

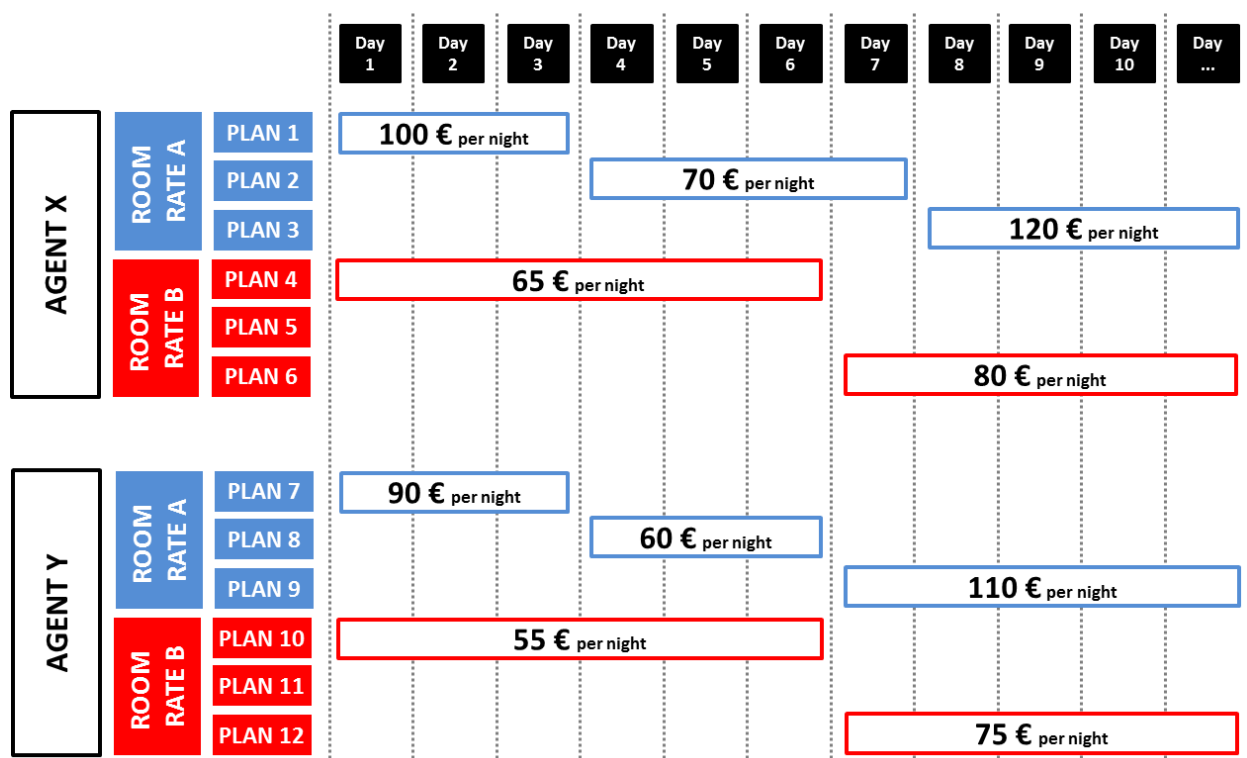


Figure 35 - Pricing Plans

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.

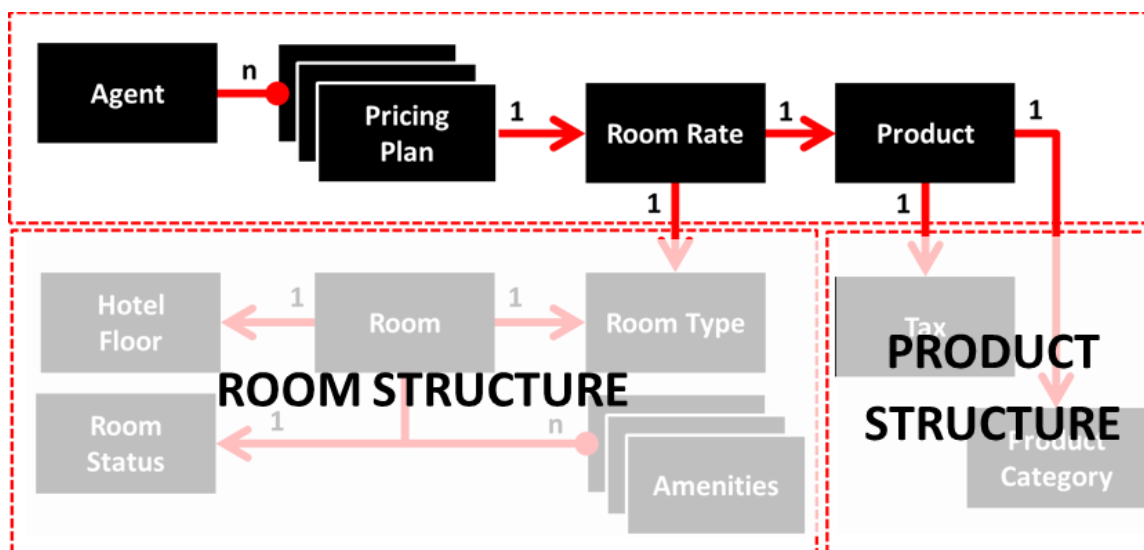


Figure 36 – Room Pricing: Data Model

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.

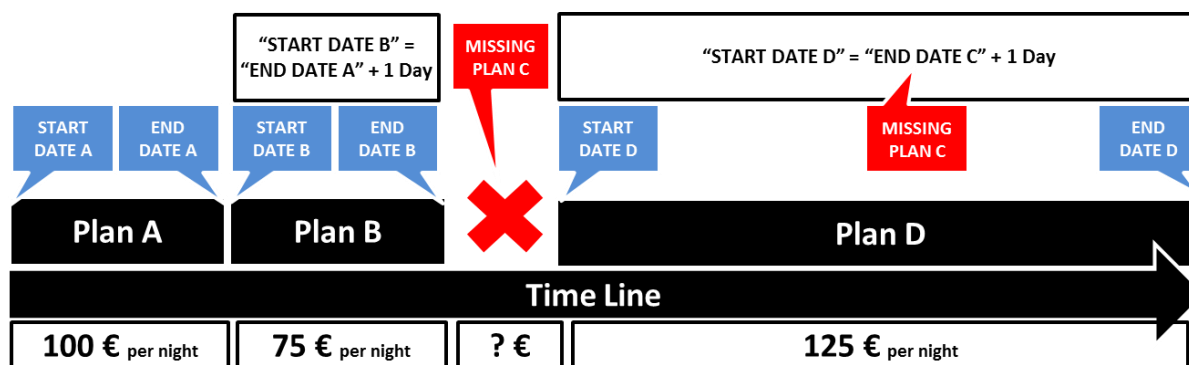


Figure 37 – Pricing Plan: Example of a problem in the agent plans of a specific room rate

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

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |



Page Description

List and edit room rates

[Configure](#)

[Filter](#)

ID	Code	Description	Active
654	NOT_ACTIVATED1	Rate 2	<input type="checkbox"/>
653	STANDARD	Double Bed	<input checked="" type="checkbox"/>
655	SUITE	Suite	<input type="checkbox"/>

1 Displaying items 1 to 3 from 3

1a

Room type

1b

Product & Tax

1c

Code

1d

Short Description

1e

Active

1f

Voucher Description

1g

Booking Description

1h

Enable Credit Card Data Collection

1i

Enable Paypal Payment

Messages

F1 Select F2 Insert F3 Update F4 Delete F5 Edit Product

3.1.1 FIELDS

1) Main

Required

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

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

- 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

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |

Links | Marketing | **Sales** | Operations | Calendar | Reports | Property
Revenue Management | **Agents** | Room Rates | Pricing | Channels | Discounts | Booking Integration

Page Description

Manage Agents

Filter

Edit	Code	Description	Comments	Default Offset %	Default Offset Amount	Is Direct Book	Active
2772	WEB_AGENT	Direct Booking	Agent used in public direct b			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3596	TOPTOURS	Top Tours	Agent used in public direct b	90.00		<input type="checkbox"/>	<input checked="" type="checkbox"/>
3603	SUB_TOURS	SUN TOURS				<input type="checkbox"/>	<input checked="" type="checkbox"/>
3604	BOOKING.COM	Booking.com				<input type="checkbox"/>	<input checked="" type="checkbox"/>

1 Displaying items 1 to 4 from 4

1a Agent 1b Pricing Plans 1c Others

1a Code TOPTOURS 1b Description Top Tours 1c Default Agent for Pricing Plan Direct Booking

1d Default Offset % 1e Default Offset Amount 1f Active

F1 New Agent F2 Update Agent F3 Delete Agent

AGENT USED IN THE HOTEL WEBSITE BOOKING

2a Pricing Plans Others

MANAGE ALL THE PRICING PLANS OF THE SELECTED AGENT

Edit	Agent nº	Room	Description	Start date	End date	OR. Offset %	OR. Offset Amt	Priority	Active
7175	Direct Booking	Double Bed	2011 - FECHADO	1/1/2011	31/12/2011	0.00	0.00	0	<input checked="" type="checkbox"/>
6100	Direct Booking	Double Bed	2011 - Epoca Baixa			0.00	0.00	0	<input checked="" type="checkbox"/>
6101	Direct Booking	Double Bed	2011 - Epoca Média	5/16/2011	6/30/2011	45.00	0.00	0	<input checked="" type="checkbox"/>
6102	Direct Booking	Double Bed	2011 - Epoca Alta			0.00	0.00	0	<input checked="" type="checkbox"/>
6800	Direct Booking	Double Bed	2011 - Epoca Baixa	10/1/2011	10/31/2011	40.00	0.00	0	<input checked="" type="checkbox"/>

1 2 3 4 5 Displaying items 1 to 5 from 22

2b Main Amounts by Day of the Week Yields by Occupancy Yields by Cut Offs Others

PRICING PLAN DETAIL

Agent nº Room Rate Start date End date Override ID OR. Offset % OR. Offset Amt Priority

Direct Booking Double Bed 1/1/2011 31/12/2011 0.00 0.00 0

Description Double Bed Extra Child. A Extra Child. B Stop Plan

2011 - FECHADO 0.00 0.00 0.00 0.00 0.00

Custom Date 1 Cut-off Days

Custom Date 2 Min. Days

Custom Date 3 Max. Days

Custom Date 4

Custom Date 5

Custom Date 6

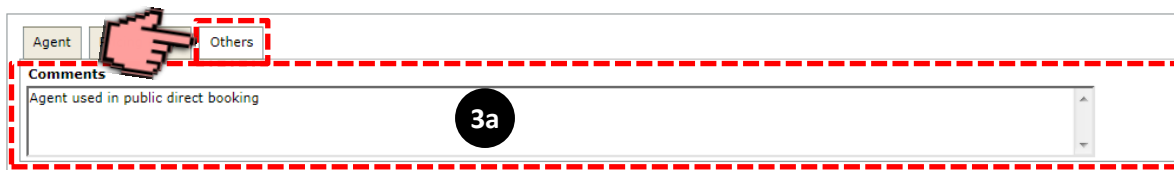
Custom Date 7

2c Refresh New Update Delete

PRICING PLAN OPERATIONS

AGENT PRICING PLANS

READ CHAPTER SET ROOM PLANS FOR MORE INFORMATION



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.

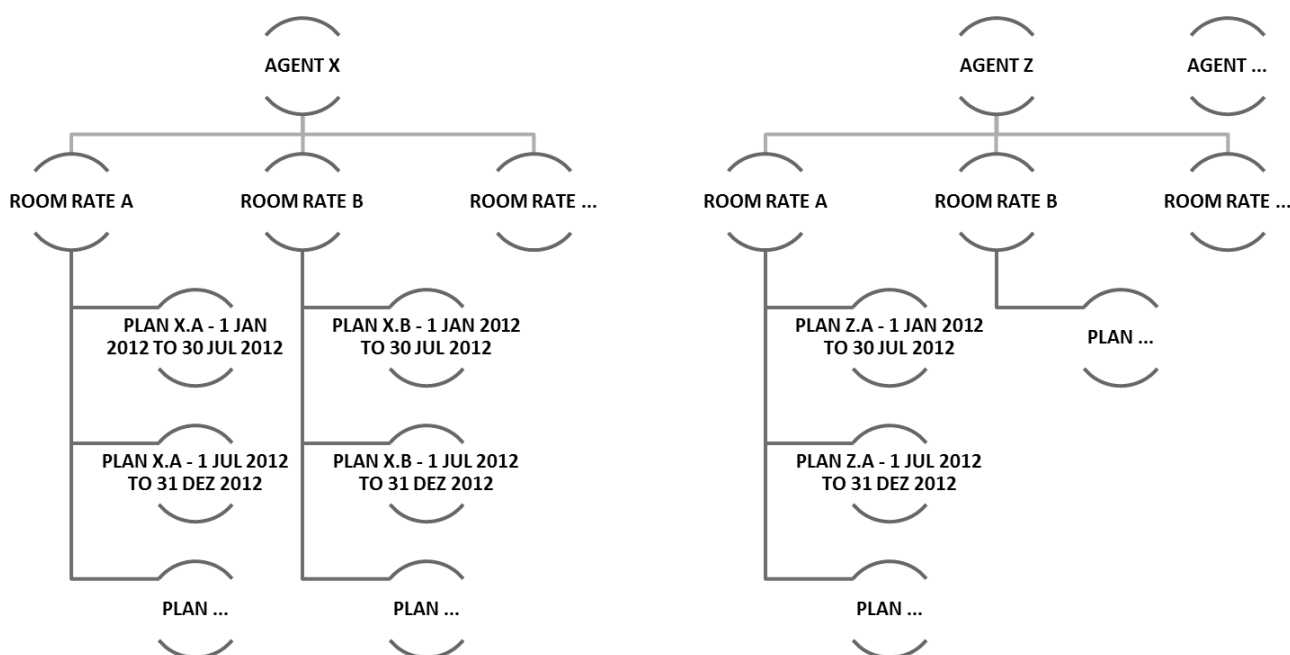


Figure 38 - Pricing Plan: Structure Example

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.

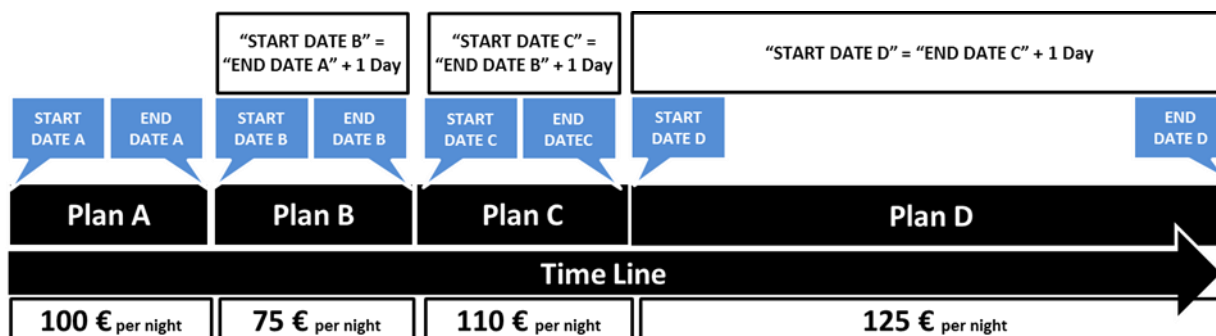
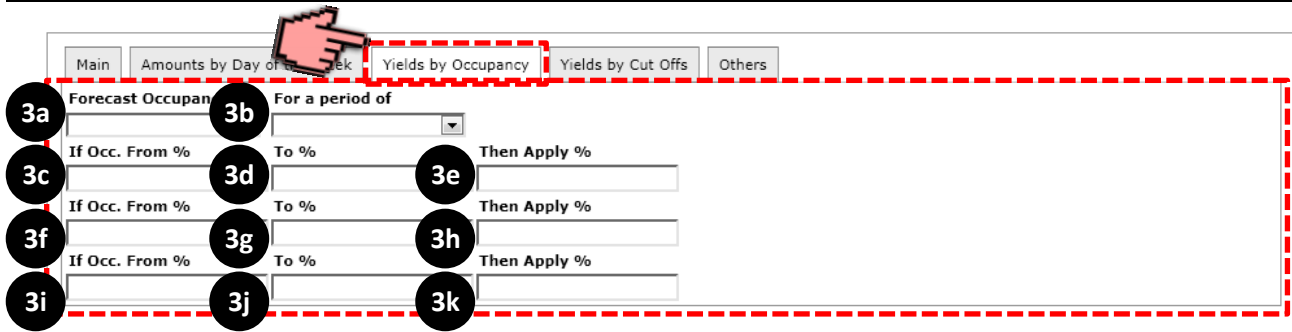


Figure 39 – Pricing Plan: Example of an Agent Plan



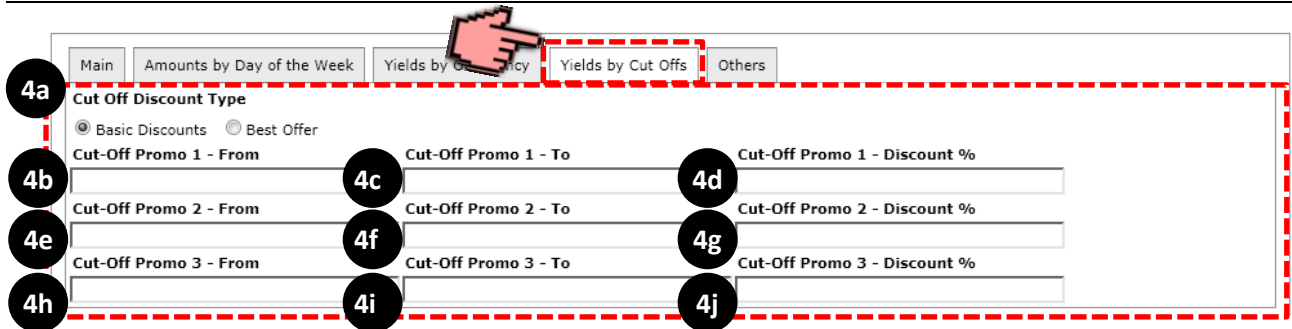
Main | Amounts by Day of the Week | **Yields by Occupancy** | Yields by Cut Offs | Others

3a Forecast Occupancy 3b For a period of

3c If Occ. From % 3d To % 3e Then Apply %

3f If Occ. From % 3g To % 3h Then Apply %

3i If Occ. From % 3j To % 3k Then Apply %



Main | Amounts by Day of the Week | Yields by Occupancy | **Yields by Cut Offs** | Others

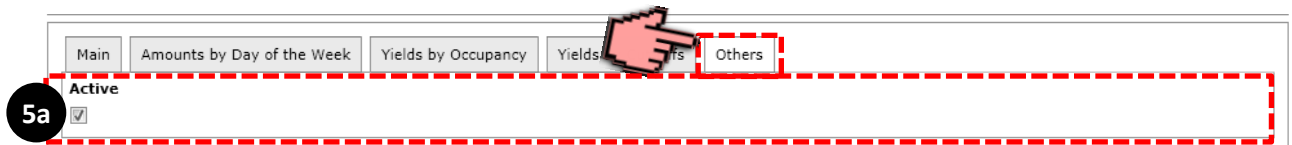
4a Cut Off Discount Type

☒ Basic Discounts ☐ Best Offer

4b Cut-Off Promo 1 - From 4c Cut-Off Promo 1 - To 4d Cut-Off Promo 1 - Discount %

4e Cut-Off Promo 2 - From 4f Cut-Off Promo 2 - To 4g Cut-Off Promo 2 - Discount %

4h Cut-Off Promo 3 - From 4i Cut-Off Promo 3 - To 4j Cut-Off Promo 3 - Discount %



Main | Amounts by Day of the Week | Yields by Occupancy | Yields by Cut Offs | **Others**

5a Active ☒

3.3.1 FIELDS

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

Required a. **Agent n°** – 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.
- Read SET HOTEL MAIN PROPERTIES chapter for more info about children groups.
 - 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.
 - 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.
- Read SET HOTEL MAIN PROPERTIES chapter for more info about children groups.
 - 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.
- The stop plan check box and active check box have the same impact and consequences but have different conceptual meanings.
 - The stop plan should be a kind of a temporary “pause” the plan.
 - A stopped plan is shown with the color red in the REVENUE MANAGEMENT page.
- p. **Custom dates** – the plan custom dates.
- Select this option to apply prices to specific dates.
 - These prices have higher priority than the prices set in the range.
 - The system allows setting seven days of custom pricings.
- q. **Custom dates amounts** – the plan custom amounts.
- These are the amounts associate with each of the 7 custom dates.
 - 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.
- The plan is applied only if the booking check-in date is at least the “cut off days” later than the booking date
 - CHECK-IN DATE \geq ACTUAL DATE + CUTOFF DAYS.
 - 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 occupancy 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. A creation of a booking between days 1 and days 4
 - 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 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
 - 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.

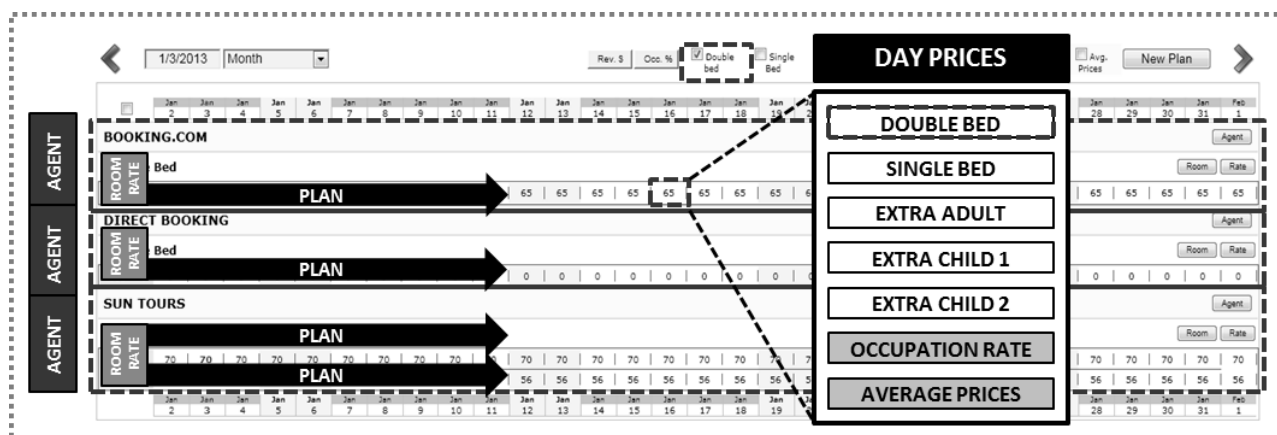


Figure 40 - Revenue Management Page Layout

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

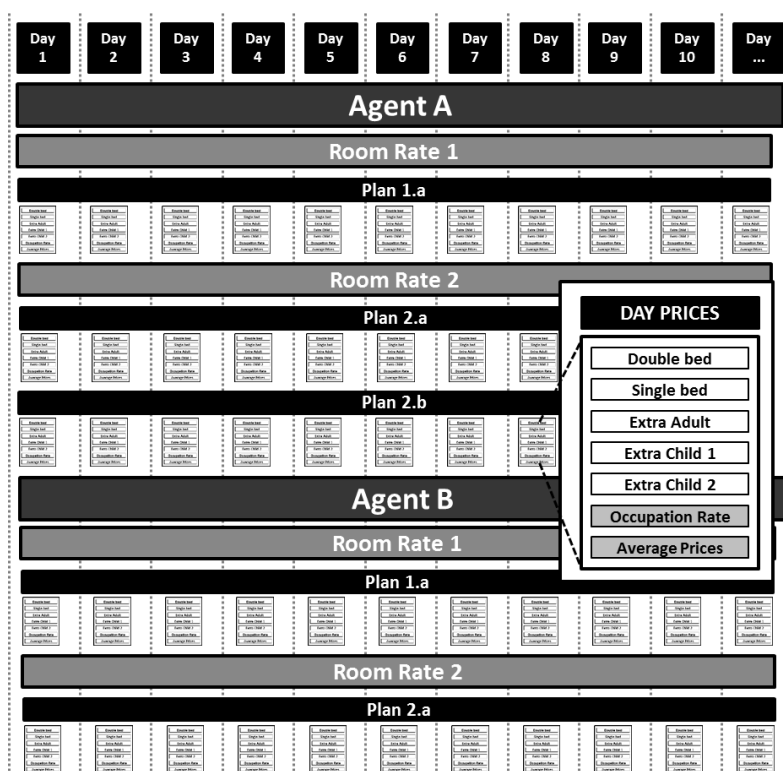
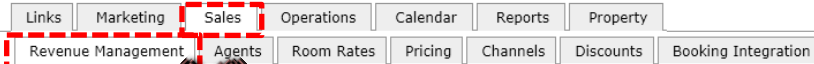


Figure 41 - Revenue Management Page Example

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

Hotel Alcaide - Operations



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.

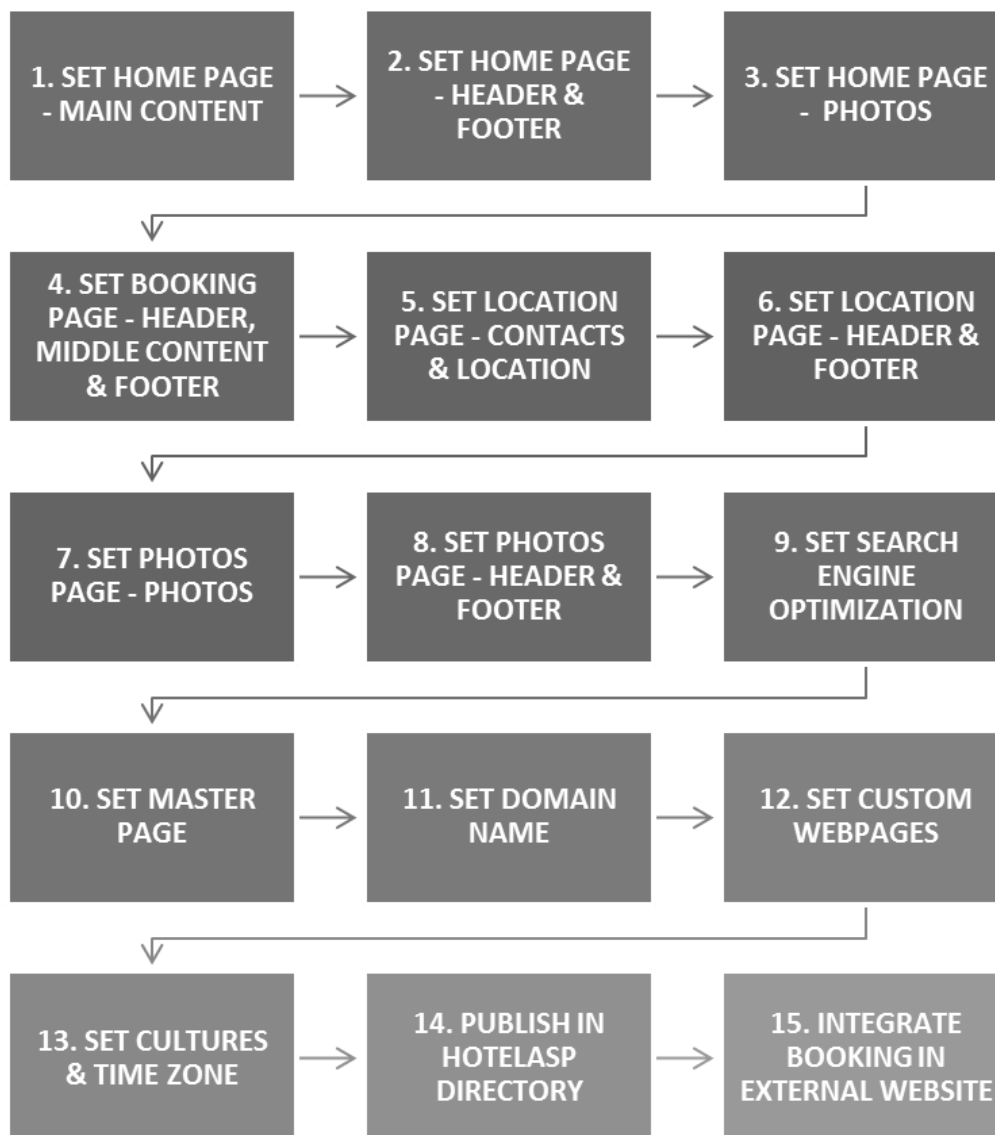


Figure 42 – Hotel Website: Configuration Steps

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.

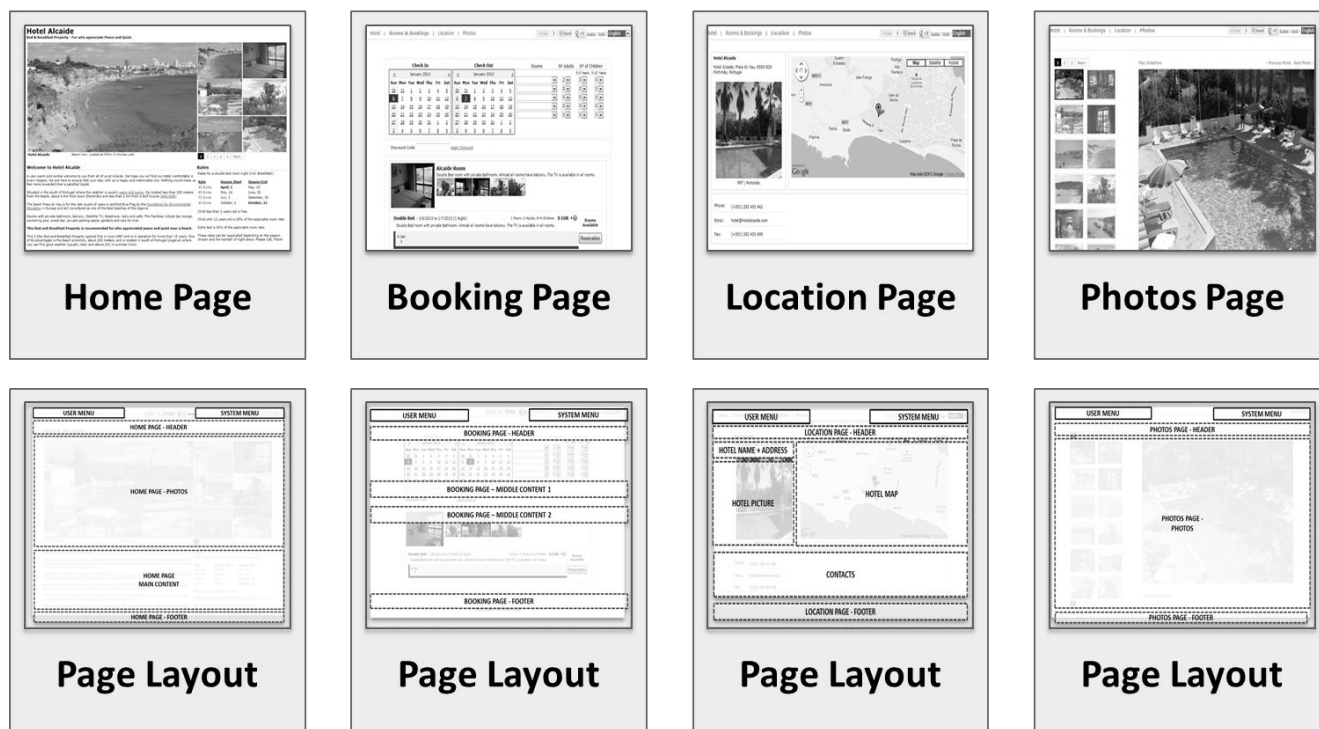


Figure 45 - Hotel Website: Page Layouts

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.

4.1.1.1 HOME PAGE LAYOUT

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

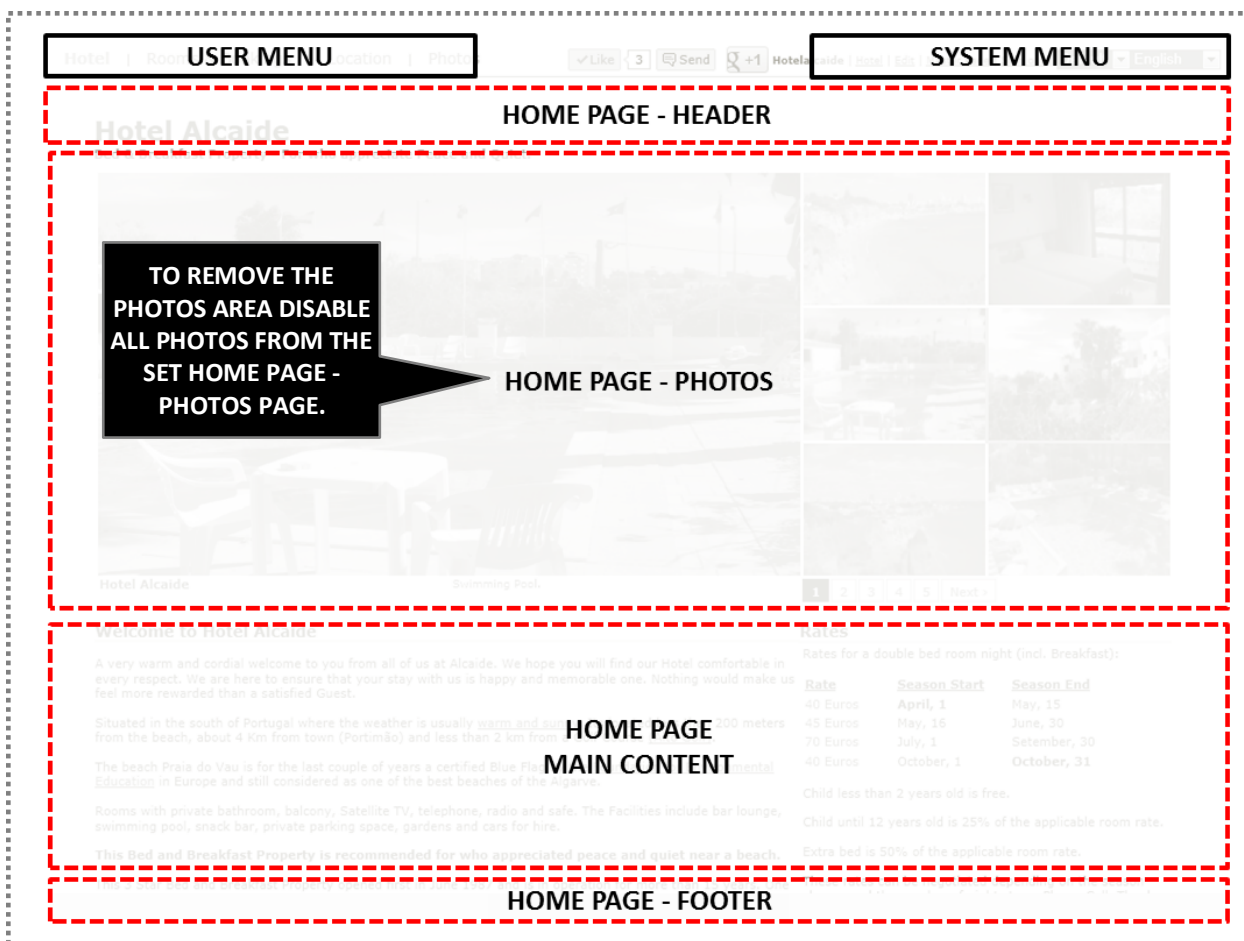


Figure 46 – Hotel Website: Home Page Layout

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:

- HOME PAGE - HEADER
- HOME PAGE - PHOTOS
- HOME PAGE – MAIN CONTENT
- 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.

The screenshot illustrates the layout of the Hotel Website Booking Page, divided into several key sections:

- USER MENU**: Located at the top left, containing links for Home, Rooms, Locations, and Prices.
- SYSTEM MENU**: Located at the top right, containing links for Feedback, Help, and Register.
- BOOKING PAGE - HEADER**: The top section of the booking form, including:
 - Check In and Check Out date pickers (both set to January 2013).
 - Room selection dropdowns (e.g., 2 Adults, 0 Children).
 - Age selection dropdowns (e.g., 0-2 Years, 3-12 Years).
- BOOKING PAGE – MIDDLE CONTENT 1**: The section immediately following the header, containing a Discount Code field and an Apply Discount button.
- BOOKING PAGE – MIDDLE CONTENT 2**: The section following the discount code, featuring a large image of a hotel room and a detailed description of the room type and availability.
- BOOKING PAGE - FOOTER**: The bottom section of the booking page, containing a Reservation button and a link to the Hotel's Home Page.

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:

- BOOKING PAGE - HEADER
- BOOKING PAGE – MAIN CONTENT 1
- BOOKING PAGE – MAIN CONTENT 2
- 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.

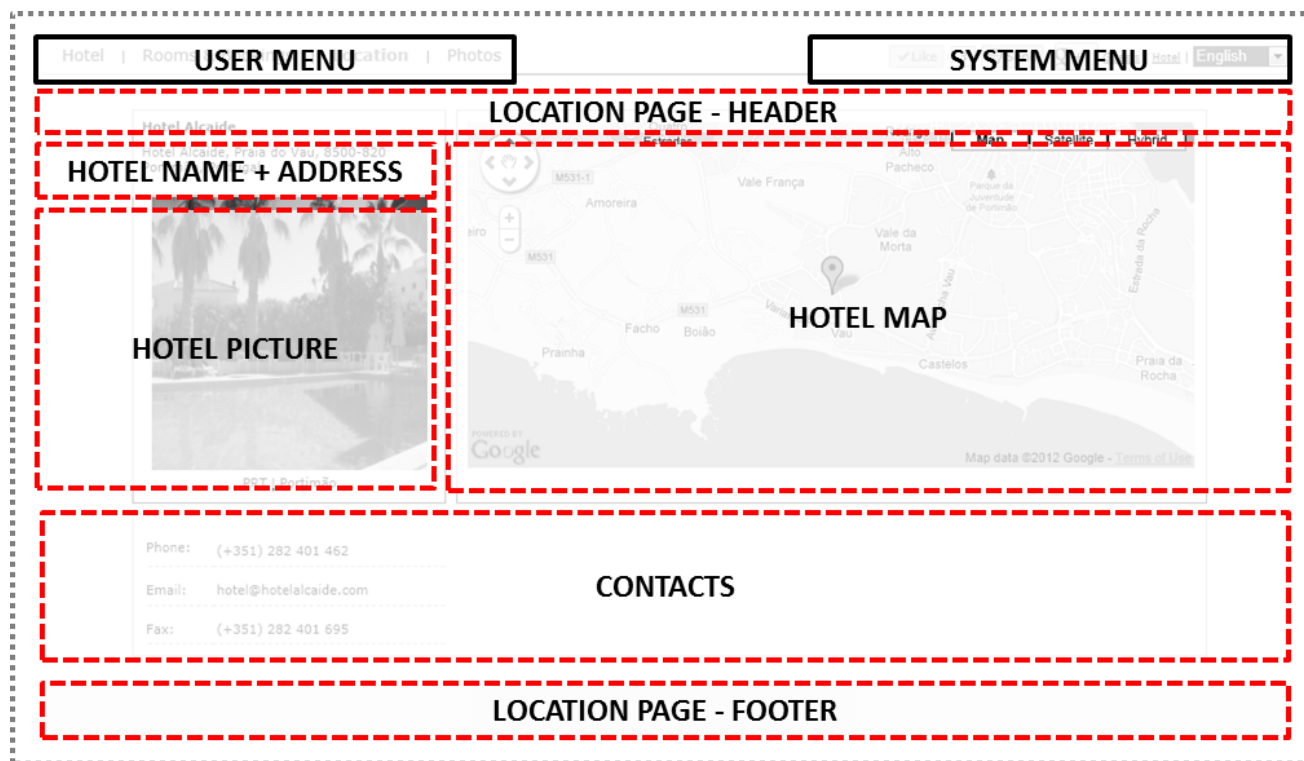


Figure 48 - Hotel Website: Location Page Layout

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.

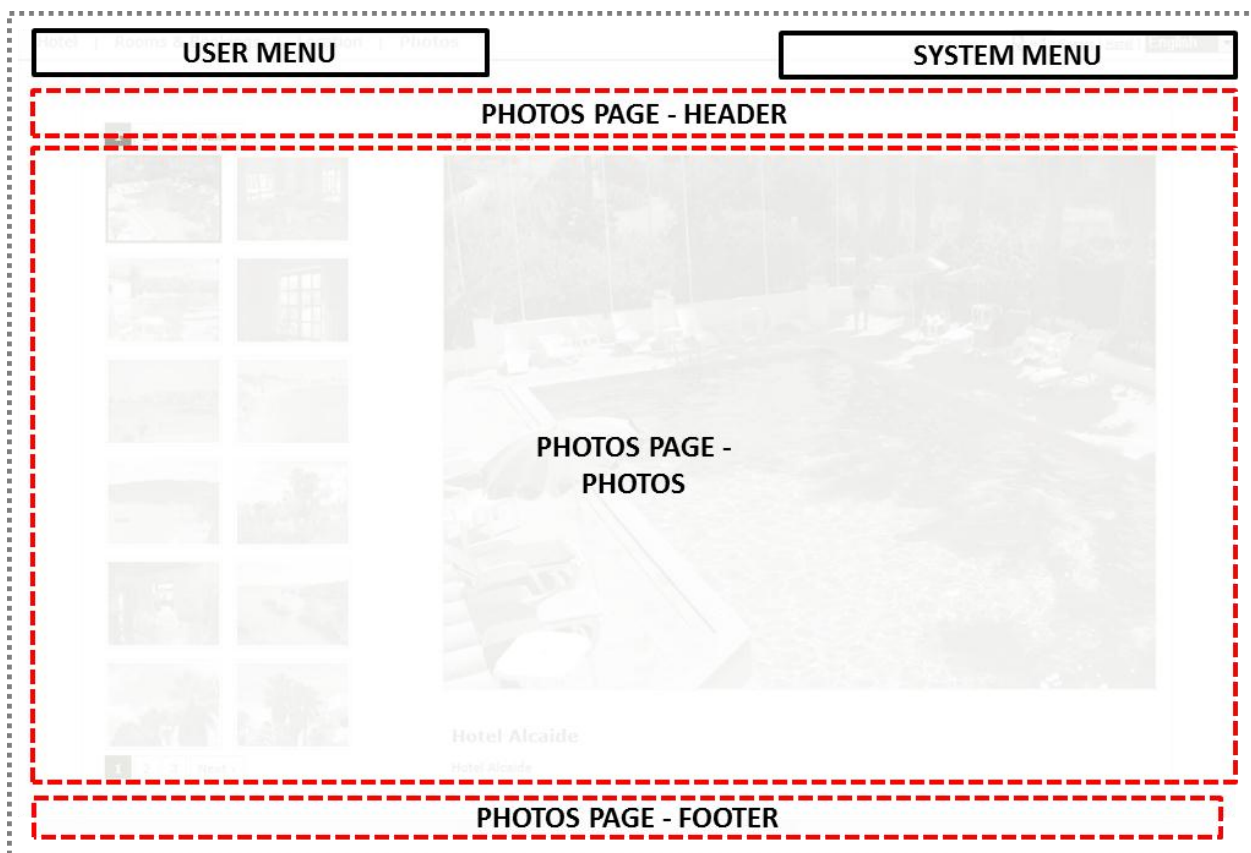


Figure 49 - Hotel Website: Photos Page Layout

The following areas can be edited by the hotel:

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

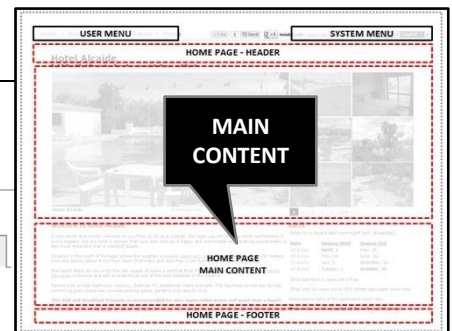
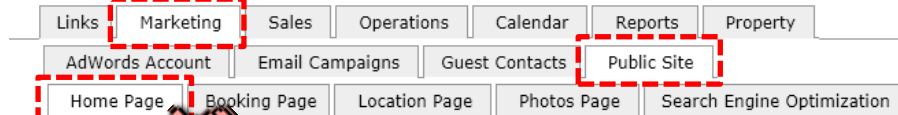
The hotel should read the SET PHOTOS PAGE and SET PHOTOS PAGE - HEADER & FOOTER for more information.

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

Hotel Alcaide - Operations



Page Description

Maintain Hotel home page descriptions

xls csv

* Culture Property Short Description Hotel Alcaide

1 Displaying rows 1 to 1

1a **1b** **1c**

Id Language Property Short Description

1046 English Hotel Alcaide

Overview

1d

Property Long Description

MANAGE PICTURES INSERT LINKS

Very warm and cordial welcome to you from all of us at Alcaide. We hope you will find our Hotel comfortable in every respect. We are here to ensure that your stay with us is happy and memorable one. Nothing would make us feel more rewarded than a satisfied Guest.

Situated in the south of Portugal where the weather is usually warm and sunny. Its located less than 200 meters from the beach, about 4 Km from town (Portimão) and less than 2 km from a Golf Course (Alto Golf).

The beach Praia do Vau is for the last couple of years a certified Blue Flag by the Foundation for Environmental Education in Europe and still considered as one of the best beaches of the Algarve.

Rooms with private bathroom, balcony, Satellite TV, telephone, radio and safe. The Facilities include bar lounge, swimming pool, snack bar, private parking space, gardens and cars for hire.

Recommended for who appreciated peace and quiet near

opened first in June 1987 and is in operation for more than 15 years. One of its advantages is the beach proximity, about 200 meters, and is located in south of Portugal (Algarve). Here you can find good weather (usually clear and above 22°C in summer).

These rates can be negotiated depending on season chosen and the number of nights.

Design HTML

Messages

F1 Update **F2** Refresh **F3** Insert **F4** Delete

4.2.1 FIELDS

1) Main

Read Onlya. ***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.

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

- i. This content is associated with the “Language” and its public content.
-

4.2.2 FUNCTIONS

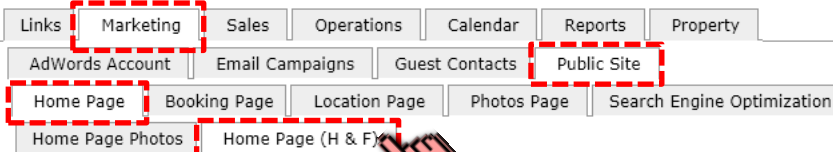
- 1) **Update** – saves the content in the database.
- 2) **Refresh** – refresh the content from the database.
- 3) **Insert** – creates a new content in the database.
- 4) **Delete** – deletes the content from the database.

4.3 SET HOME PAGE - HEADER & FOOTER

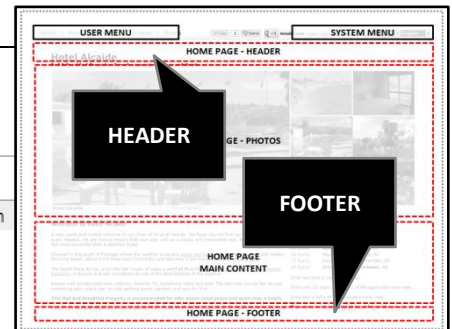
This page lets the hotel to configure the header and footer of the hotel website home page.

Page Location

Hotel Alcaide



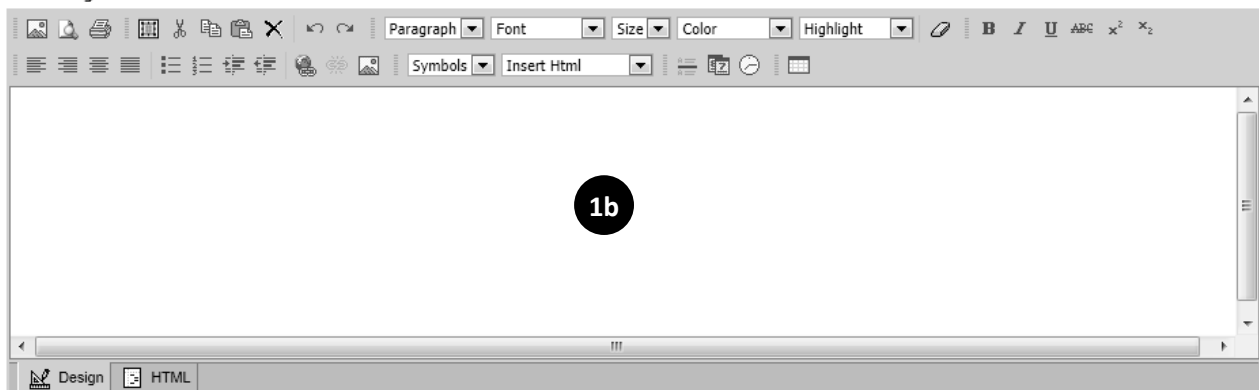
Page Description



Home Page Header



Home Page Footer



F1 Update

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

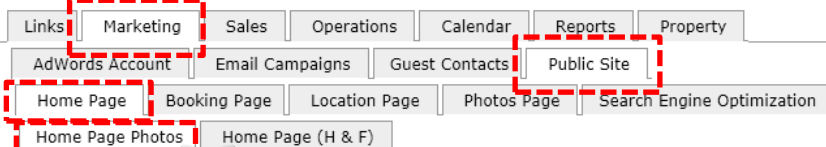
This page permits the hotel to configure the photos displayed in the hotel website homepage. The hotel can opt not to show this area by removing all photos or by unselecting the “Is Public” field from all the photos.

The steps to save a picture are:

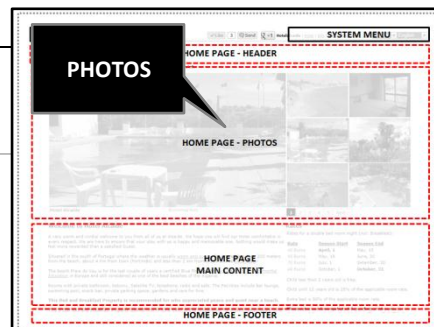
1. Select and upload the picture by pressing the button “Browse”;
2. Fill the picture header and body descriptions;
3. Save in the database by clicking the insert or update buttons.

Page Location

Hotel Alcaide



Page Description



Filter						
*	Name	Header description	Is Public	Media Order	Active	
1696	BEACH 1	Hotel Alcaide	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	
170	ROOM 1	Hotel Alcaide	<input checked="" type="checkbox"/>	15	<input checked="" type="checkbox"/>	
1692	SP 2	Hotel Alcaide	<input checked="" type="checkbox"/>	20	<input checked="" type="checkbox"/>	
	GARDEN 1	Hotel Alcaide	<input checked="" type="checkbox"/>	25	<input checked="" type="checkbox"/>	
	BEACH 2	Hotel Alcaide	<input checked="" type="checkbox"/>	30	<input checked="" type="checkbox"/>	

1 2 3 4 5 6 Displaying items 1 to 5 from 30

SELECT THE ROW TO LOAD THE PHOTOS

1a

Name

BEACH 1

1b

Media Order

10

1c

Header description

Hotel Alcaide

1d

Description

Beach View. Located at 300m. 5 minutes walk.



1e

Browse...

SELECT A PICTURE TO LOAD

Others		X
Is Public	Active	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Messages		X

F1 [Update](#)
F2 [Insert](#)
F3 [Delete](#)

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** c. **Header description** – the header description of the picture.
- Public**
- Required** d. **Description** – the description of the picture.
- Public**
- Required** e. **Picture** – the picture to be shown in the home page.
- Public**
- f. **Is public** – publish the photo in the home page.
- g. **Active** – shows or hides the photo.

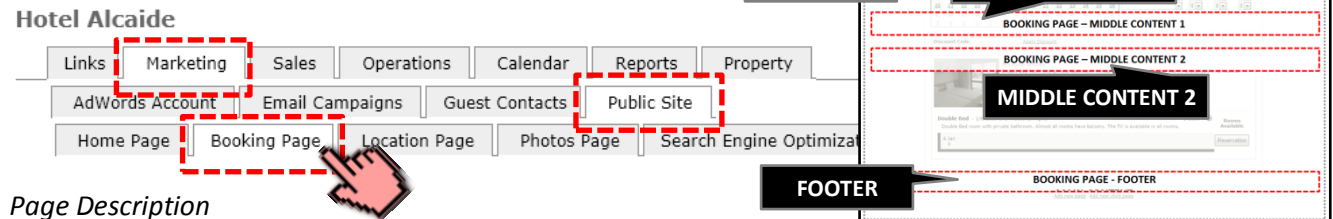
4.4.2 FUNCTIONS

- 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

Booking Header

1a

Booking Middle Content 1

1b

Booking Middle Content 2

1c

Booking Footer

1d

F1

[Update](#)

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.

The figure shows a booking page layout with the following components:

- DATE SELECTOR:** Two calendar pickers for 'Check In' and 'Check Out' dates, both set to April 2013.
- ROOMS:** A section with dropdown menus for selecting the number of rooms, adults, and children.
- DISCOUNT:** A text input field for a discount code.
- RESERVATION:** A section containing a 'Reservation' button.
- ROOM TYPE:** A section showing a room image and description, with a label 'ROOM TYPE' pointing to it.
- ROOM RATE:** A section displaying the room rate for a specific stay (e.g., 'Double Bed - 4/1/2013 to 4/11/2013 (10 Nights)').
- ROOMS:** A table showing the availability and rates for different room types over a period of 10 days.

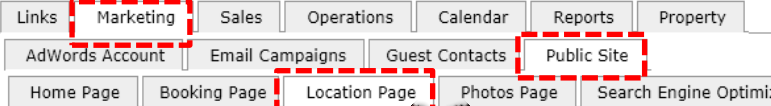
Figure 50 - Booking Page Layout

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

Hotel Alcaide



Page Description

F1 Update

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

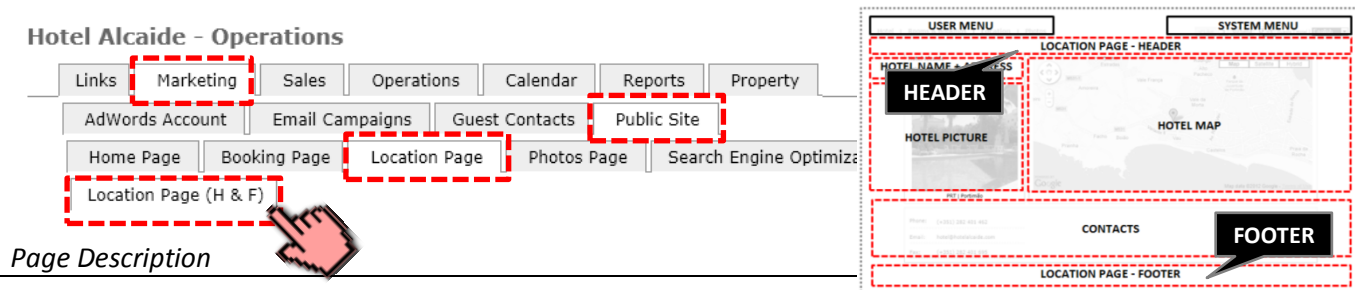
4.6.2 FUNCTIONS

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

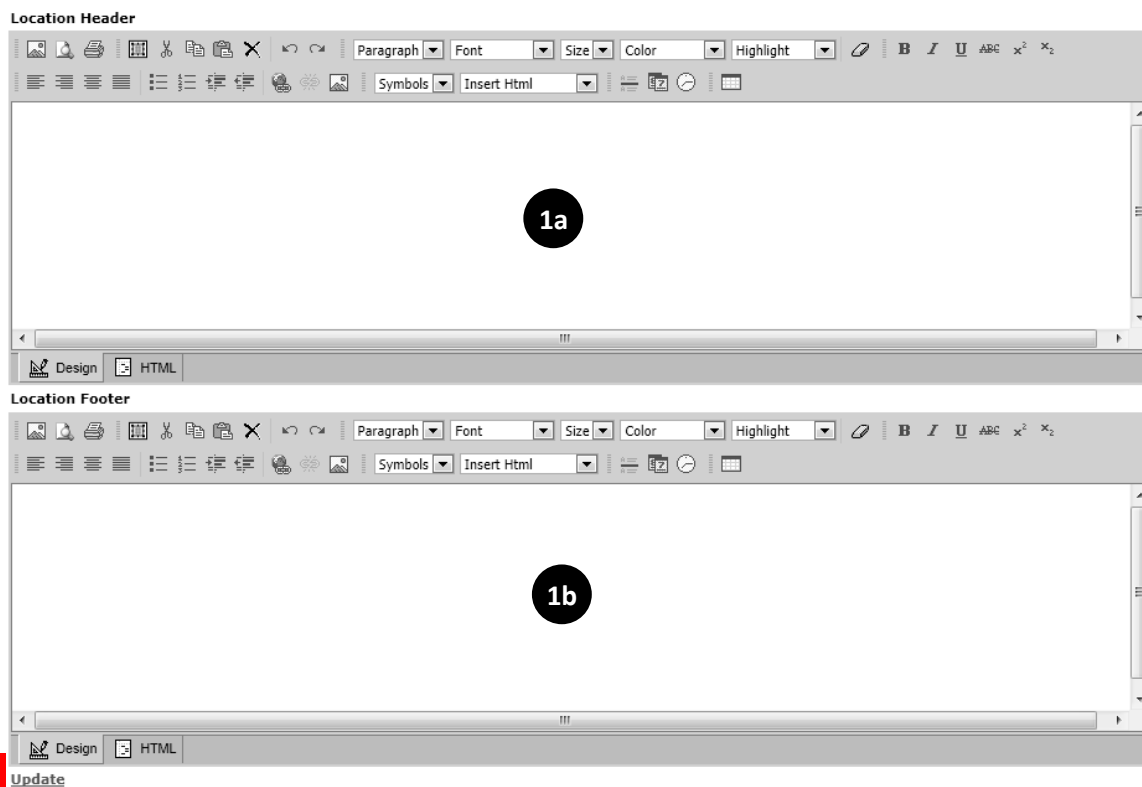
4.7 SET LOCATION PAGE – HEADER & FOOTER

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

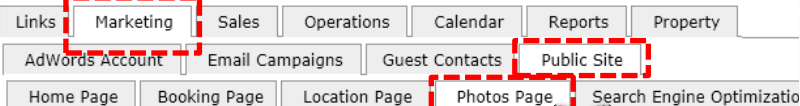
- 1) **Update** – save the content in the database.

4.8 SET PHOTOS PAGE

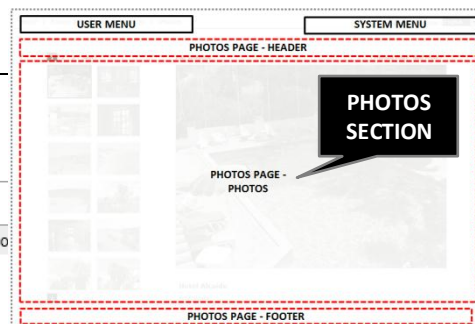
This page allows the hotel to set the pictures of the hotel website photo page. The header and footer of the photos page are configured in the SET PHOTOS PAGE - HEADER & FOOTER page.

Page Location

Hotel Alcaide - Operations



Page Description



Filter

*	Name	Header description	Is Public	Media Order	Active
412	Hotel Alcaide	Hotel Alcaide	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>
85	Hotel Alcaide	Hotel Alcaide	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>
418	Hotel Alcaide	Hotel Alcaide	<input checked="" type="checkbox"/>	15	<input checked="" type="checkbox"/>
425	Hotel Alcaide	Hotel Alcaide	<input checked="" type="checkbox"/>	25	<input checked="" type="checkbox"/>
398	Hotel Alcaide	Hotel Alcaide	<input checked="" type="checkbox"/>	30	<input checked="" type="checkbox"/>

1 2 3 4 5 6 7 Displaying items 1 to 5 from 35

Media

1a Name: Hotel Alcaide

1b Media Order: 5

1c Header description: Hotel Alcaide

1d Description: Hotel Alcaide

1e **SELECT A PICTURE TO LOAD**

Browse...

Others

2a Is Public: ☒

2b Active: ☒

2c Keywords: hotel alcaide;hotel;reservation;booking;alcaide;residencial

2d Comments:

Messages

F1 Update **F2** Insert **F3** Delete

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** c. **Header description** – the header description of the picture.
Public
- Required** d. **Description** – the description of the picture.
Public
- Required** e. **Picture** – the picture to be shown in the photo page.
Public

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

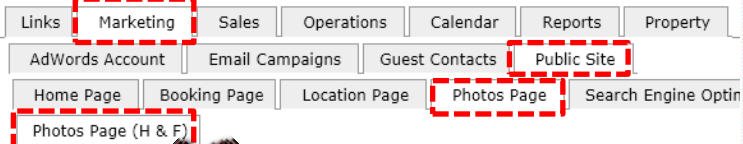
- 1) **Insert** – creates a new photo.
- 2) **Delete** – deletes the photo from the database.
- 3) **Update** – saves the information in the database.

4.9 SET PHOTOS PAGE - HEADER & FOOTER

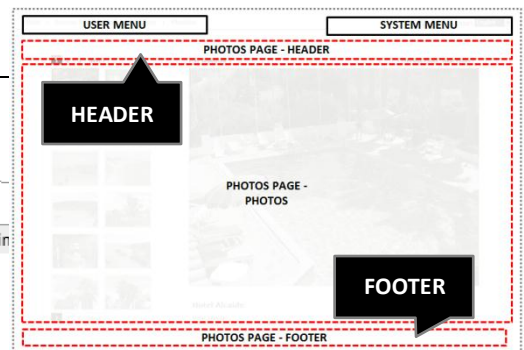
This page allows the hotel to set the header and footer of the hotel website photos page. The photos are configured in the SET PHOTOS PAGE.

Page Location

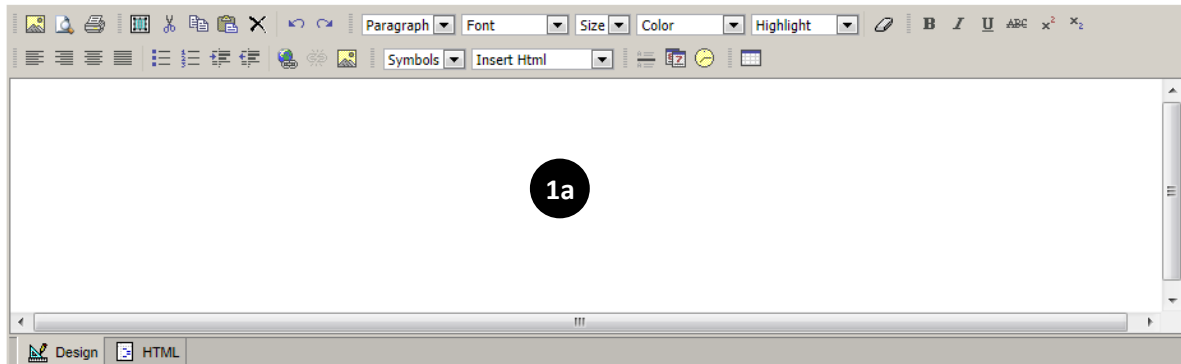
Hotel Alcaide - Operations



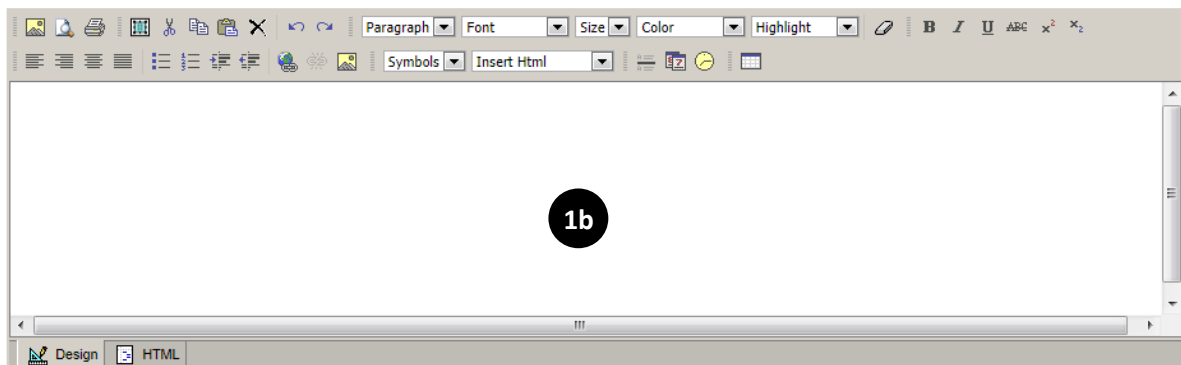
Page Description



Pictures Header



Pictures Footer



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.

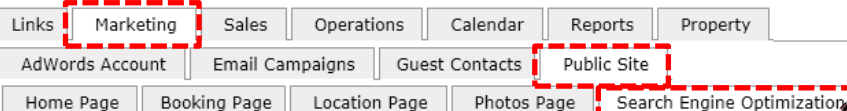
4.10 SET SEARCH ENGINE OPTIMIZATION

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

Hotel Alcaide - Operations

Jribeiro | [Website](#) | [Sign out](#) |



Page Description

Home Page		Booking Page		Location Page		Photo Page	
1a	Page Title Hotel Alcaide	1b	Page Title Hotel Alcaide - Bookings	1c	Page Title Hotel Alcaide - Location & Cont	1d	Page Title Hotel Alcaide - Photos
1e	Meta Description Hotel Alcaide - Ideal for Quiet, Sun, Beach and Golf Holidays. Bed & Breakfast Hotel for who appreciated peace and quiet nea	1f	Meta Description Hotel Alcaide Booking - Located in Algarve near the beach and golf course. Located in Portimão, Algarve, Portugal. Ideal for Quiet	1g	Meta Description Hotel Alcaide Location, Contacts and Address - Located in Algarve near the beach and golf course. Located in Portimão, Algarve,	1h	Meta Description Hotel Alcaide Photos - Located in Algarve near the beach and golf course. Located in Portimão, Algarve, Portugal. Ideal for Quiet,
1i	Meta Keywords hotel alcaide, hotels algarve, hotels portimao, accommodation algarve, bed breakfast algarve, hotels praia vau, bed breakfast	1j	Meta Keywords hotel alcaide reservation, hotel alcaide booking, hotel alcaide, hotels algarve, hotels portimao, accommodation algarve, bed	1k	Meta Keywords hotel alcaide location, hotel alcaide contacts, hotels algarve, hotel alcaide location, hotels portimao, accommodation	1l	Meta Keywords hotel alcaide photos, hotel alcaide, hotels algarve, hotels portimao, accommodation algarve, bed breakfast algarve,
F1 <input type="button" value="Update"/>							

4.10.1 FIELDS

Public

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

- Home Page - Page Title** – The page title of the home page. Max. 40 characters.
- Booking Page - Page Title** – The page title of the booking page. Max. 40 characters.
- Location Page - Page Title** – The page title of the location page. Max. 40 characters.
- Photos Page - Page Title** – The page title of the photos page. Max. 40 characters.
- Home Page – Meta Description** – A human readable description of the page content.
- Booking Page – Meta Description** – A human readable description of the page content.
- Location Page – Meta Description** – A human readable description of the page content.
- Photos Page – Meta Description** – A human readable description of the page content.
- Home Page – Meta Keywords** – A set of keywords related with the content of the page.
- Booking Page – Meta Keywords** – A set of keywords related with the content of the page.
- Location Page – Meta Keywords** – A set of keywords related with the content of the page.
- Photos Page – Meta Keywords** – A set of keywords related with the content of the page.

4.10.2 FUNCTIONS

- 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.

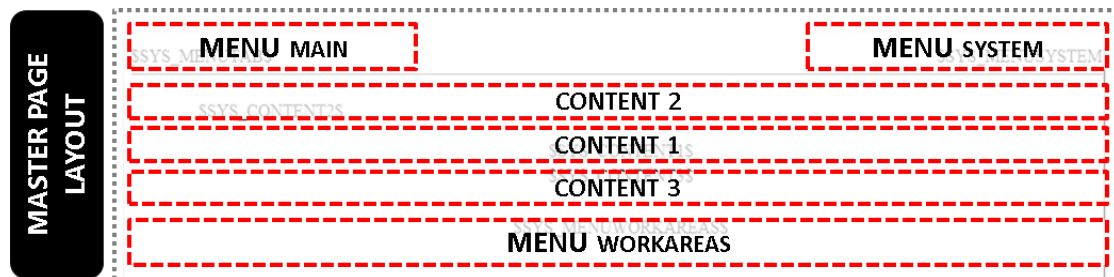


Figure 51 – Hotel Website: Master Page Layout

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.

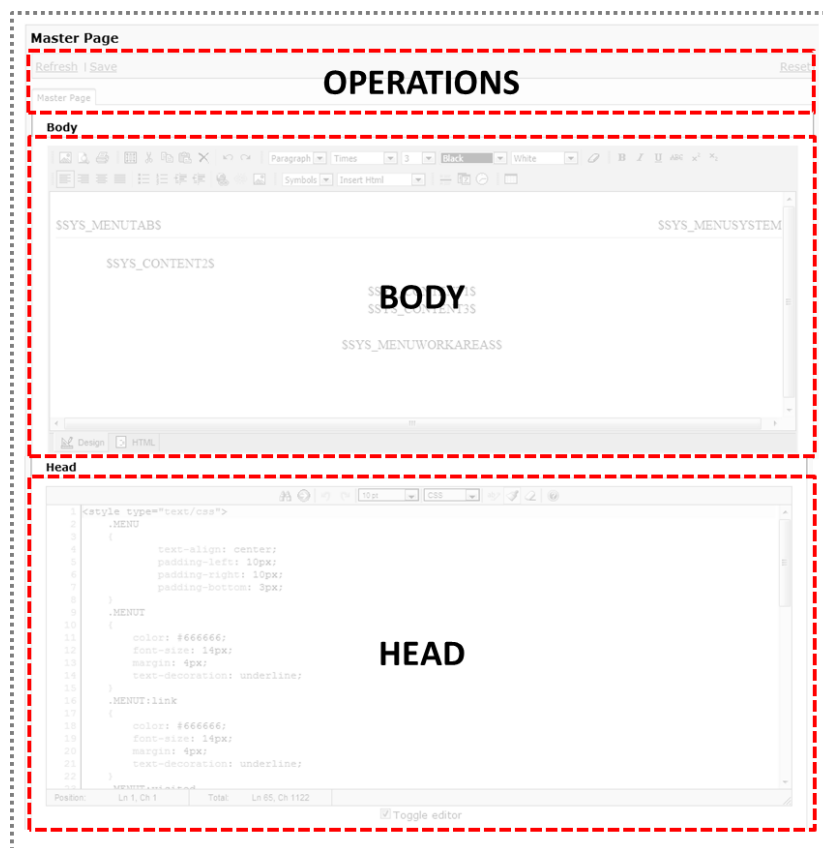


Figure 52 - Master Page Edit Area

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.

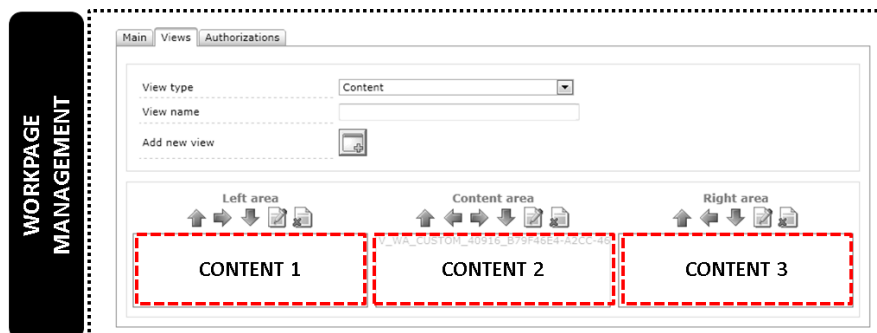


Figure 53 - Master Page: Workarea Management of the Content Areas

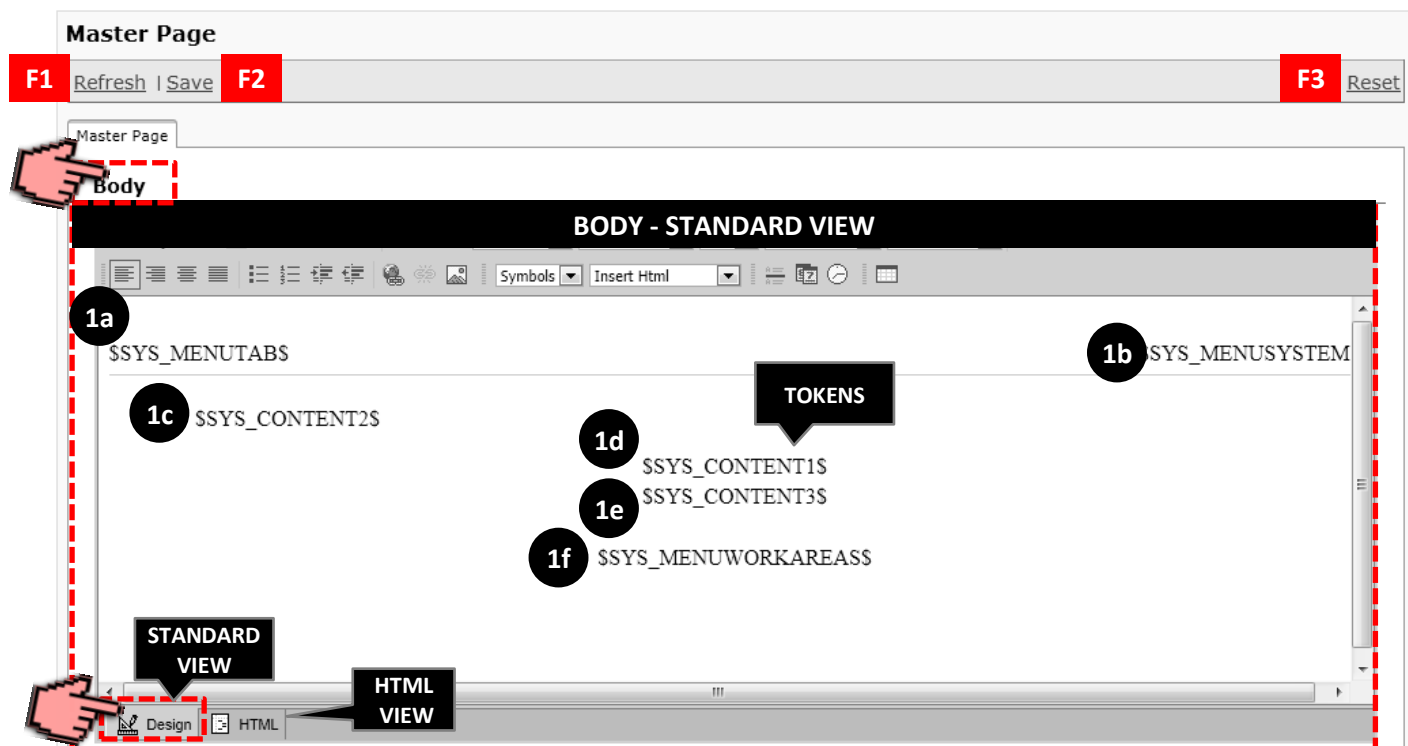
The system uses the master page to identify the location of the content areas and fill them with the appropriate data.

Page Location (HOTEL WEBSITE)

Hotel | Rooms & Bookings | Location | Photos

Hotelcaide | Hotel | Edit | **Master Page** | Sign out | Default | English

Page Description



Head

HEADER – PRINT VIEW

```

1 <style type="text/css">
2 .MENU
3 {
4     text-align: center;
5     padding-left: 10px;
6     padding-right: 10px;
7     padding-bottom: 3px;
8 }
9 .MENUT
10 {
11     color: #666666;
12     font-size: 14px;
13     margin: 4px;
14     text-decoration: underline;
15 }
16 .MENUT:link
17 {
18     color: #666666;
19     font-size: 14px;
20     margin: 4px;
21     text-decoration: underline;
22 }
23 .MENUT:visited

```

2a

CHANGE TO CSS TEXT VIEW

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

☒ Toggle editor

Master Page

Body

BODY – HTML VIEW

```

<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;
    font-size: 14px;

```

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 n°2 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 n°1 token.
 - i. It's a required master page token. It cannot be removed.
- e. **TOKEN \$SYS_CONTENT3\$** – the website content area n°3 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

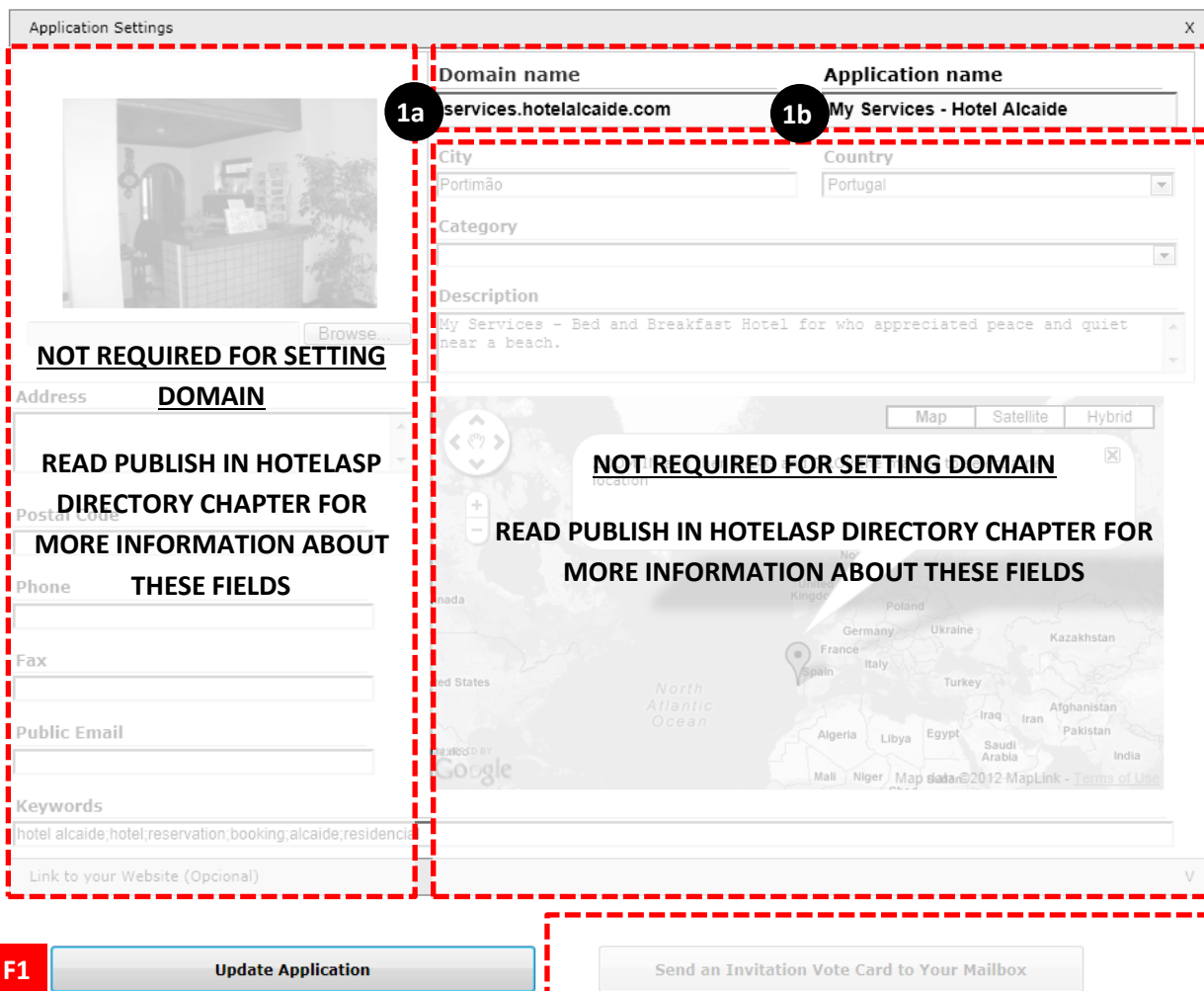
This page allows the hotel to set the domain name of the hotel website. The system by default allows the hotel to set domain names based on the “hotelasp.com” domain. For example: If your hotel is called “Alcaide” it can have a domain name of “alcaide.hotelasp.com”.

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



The screenshot shows the 'Application Settings' page. The 'Domain name' field is highlighted with a red dashed box and a hand icon pointing to it, labeled '1a'. The 'Application name' field is labeled '1b'. The 'Domain name' field contains 'services.hotelalcaide.com'. The 'Application name' field contains 'My Services - Hotel Alcaide'. Below the 'Domain name' field, there is a section labeled 'NOT REQUIRED FOR SETTING DOMAIN' with a red dashed box and a hand icon pointing to it. This section includes fields for 'City' (Portimão), 'Country' (Portugal), 'Category', 'Description' (My Services - Bed and Breakfast Hotel for who appreciated peace and quiet near a beach.), 'Address', 'Phone', 'Fax', 'Public Email', 'Keywords' (hotel alcaide, hotel, reservation, booking, alcaide, residence), and 'Link to your Website (Optional)'. A map is also visible, showing the location of the hotel. The 'Address' field is labeled 'DOMAIN'. The 'Phone' field is labeled 'READ PUBLISH IN HOTELASP DIRECTORY CHAPTER FOR MORE INFORMATION ABOUT THESE FIELDS'. The 'Fax' field is labeled 'READ PUBLISH IN HOTELASP DIRECTORY CHAPTER FOR MORE INFORMATION ABOUT THESE FIELDS'. The 'Public Email' field is labeled 'READ PUBLISH IN HOTELASP DIRECTORY CHAPTER FOR MORE INFORMATION ABOUT THESE FIELDS'. The 'Keywords' field is labeled 'READ PUBLISH IN HOTELASP DIRECTORY CHAPTER FOR MORE INFORMATION ABOUT THESE FIELDS'. The 'Link to your Website (Optional)' field is labeled 'READ PUBLISH IN HOTELASP DIRECTORY CHAPTER FOR MORE INFORMATION ABOUT THESE FIELDS'. At the bottom, there is a button labeled 'Update Application' and a button labeled 'Send an Invitation Vote Card to Your Mailbox'.

4.12.1 FIELDS

1) Application Settings

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

Public

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

Public

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.

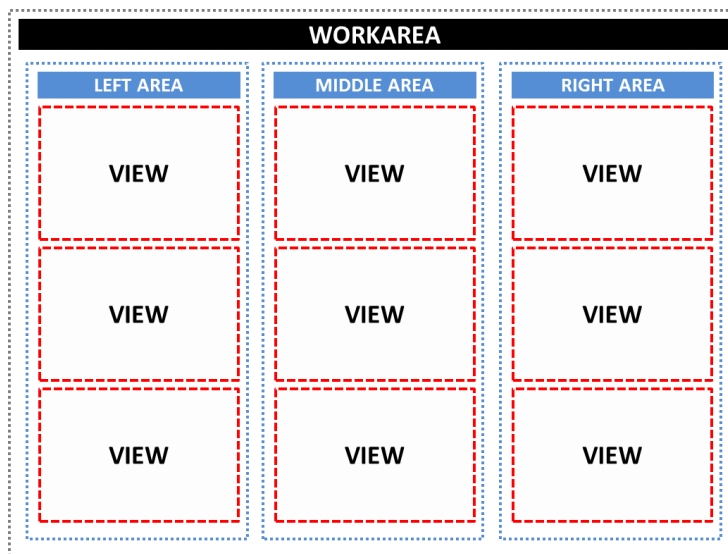


Figure 54 - Workarea Layout

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.

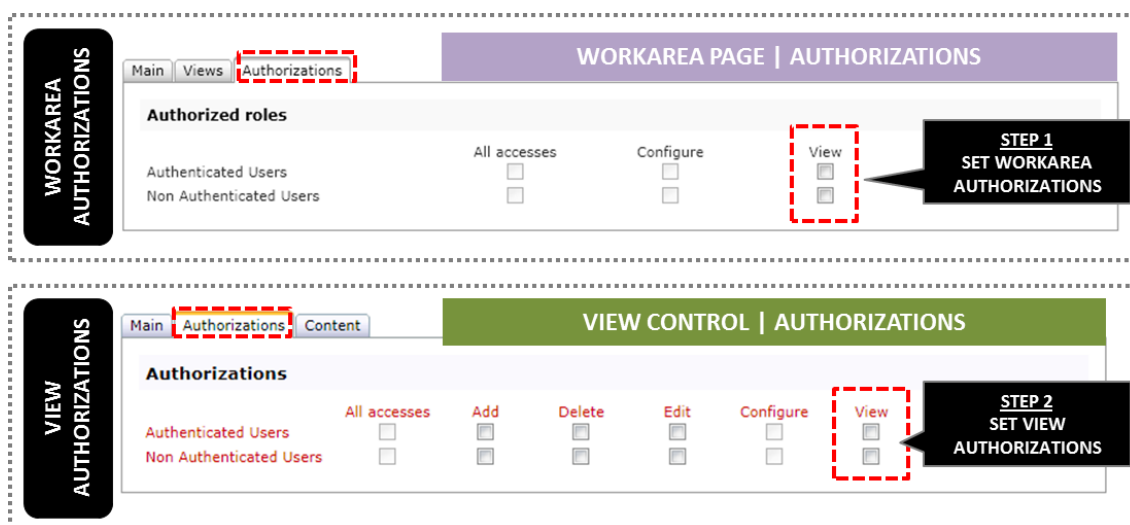


Figure 55 - Workarea Authorizations

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.

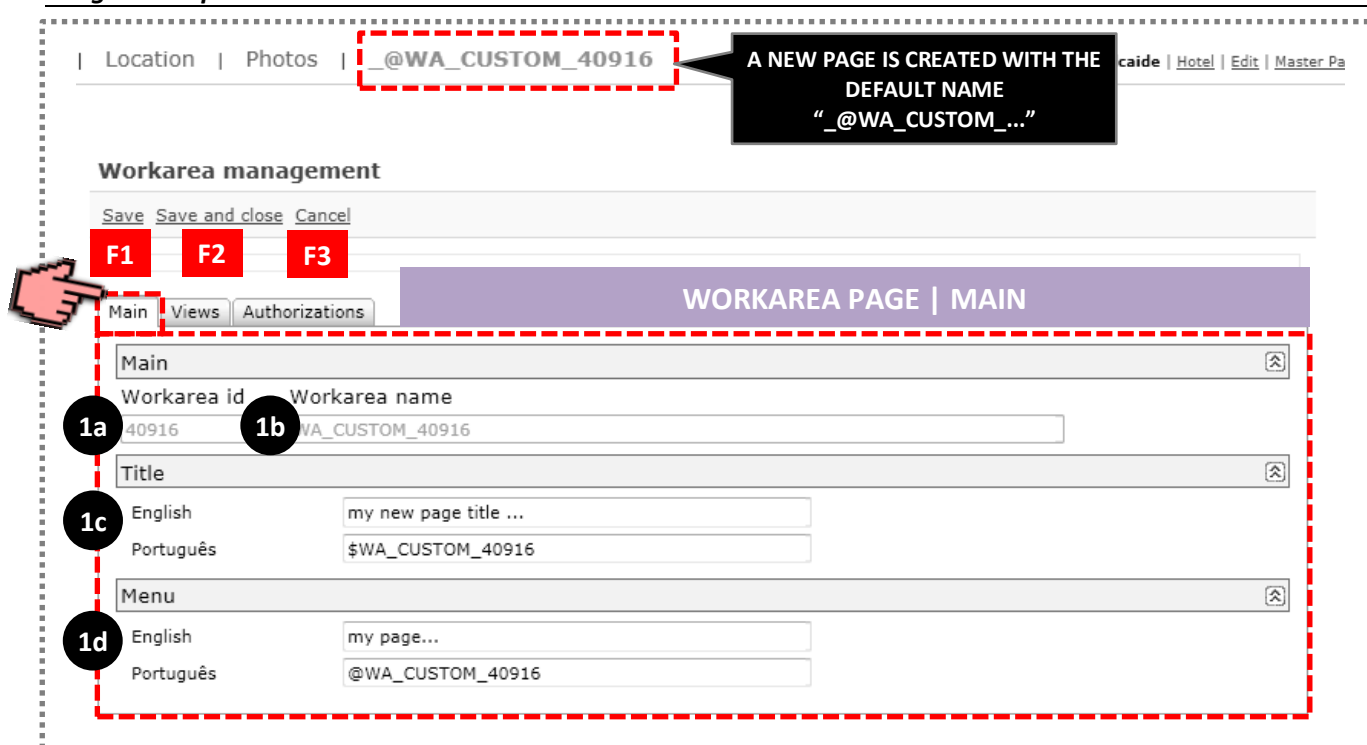
A public page must have the **Authenticated Users** and the **Non Authenticated Users** authorizations checked in both the *Workarea* and the *View* to be displayed to all users.

Page Location



4.13.1 WORKAREA MANAGEMENT

Page Description



WORKAREA PAGE | VIEW MANAGEMENT

Views Authorizations

2a View type: Content

2b View name: [empty]

Add new view: F4

Left area: [empty]

Content area: [empty]

Right area: [empty]

VIEW NAME: 2d

DELETE VIEW: F10

EDIT VIEW BUTTON: F9

MOVE UP: F5

MOVE LEFT: F6

MOVE RIGHT: F7

MOVE DOWN: F8

2c SELECT THE VIEW AND CLICK "EDIT VIEW" BUTTON

2e

WORKAREA

LEFT AREA	MIDDLE AREA	RIGHT AREA
VIEW	VIEW	VIEW
VIEW	VIEW	VIEW
VIEW	VIEW	VIEW

WORKAREA PAGE | AUTHORIZATIONS

Main Authorizations

Authorized roles

Authenticated Users: 3a

Non Authenticated Users: 3b

All accesses: 3c

Configure: 3b

View: 3c

4.13.2 VIEW MANAGEMENT

VIEW CONFIGURATION

Save Save and close Cancel

F11 F12 F13

Main Authorizations Content

VIEW CONTROL | MAIN

TO NAVIGATE TO THIS PAGE:

1. SELECT THE VIEW IN THE TAB "VIEW" OF THE WORKAREA PAGE
2. SELECT THE VIEW FROM THE LEFT, CONTENT AND RIGHT AREA LISTS
3. CLICK THE "EDIT VIEW" BUTTON

4a General

Workareaview id: 40579

Section id: Middle

4b

4c Workarea nº: 40916

4d View order: 999

4e Application: 10379

4f View id: 202

Localizations

View name: V_WA_CUSTOM_40916_B79F46E4_A2CC_46E9_A0A2_86757950EA90

4g

4h English: _\$_V_WA_CUSTOM_40916_B79F46E4_A2CC_46E9_A0A2_86757950EA90

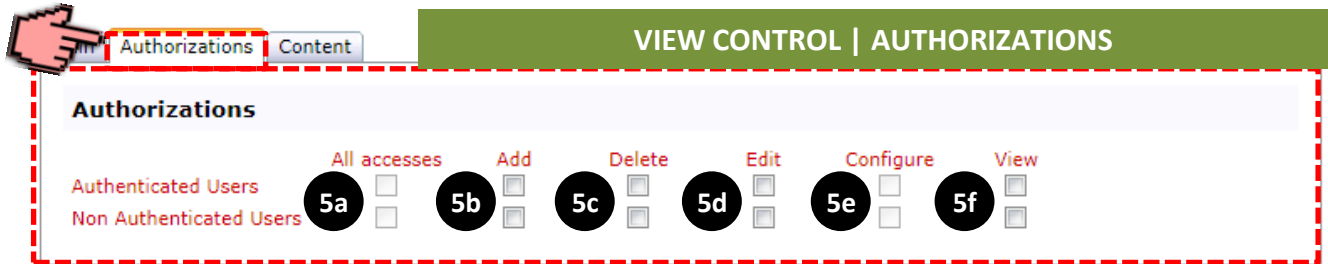
Português: _\$_V_WA_CUSTOM_40916_B79F46E4_A2CC_46E9_A0A2_86757950EA90

Configuration Documents

4i Config. path: [empty]

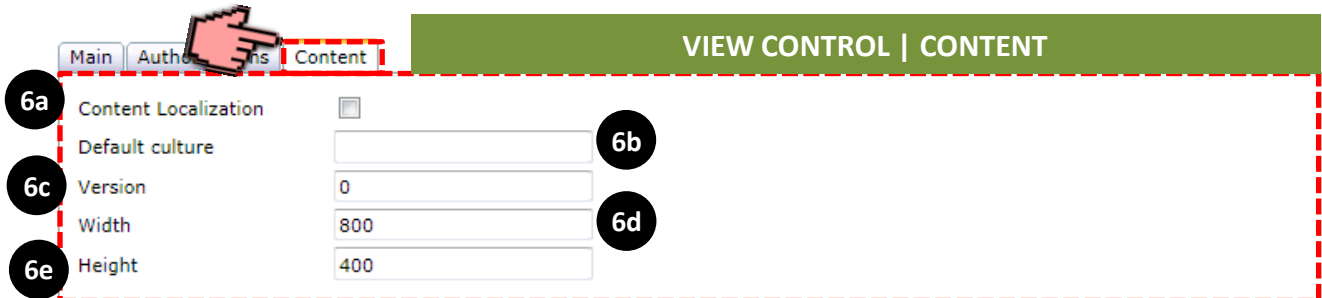
4j View path: [empty]

XML CONFIGURATION FILE
READ CONFIGURE XML FILES CHAPTER FOR MORE INFORMATION



Authorizations

	All accesses	Add	Delete	Edit	Configure	View
Authenticated Users	5a <input type="checkbox"/>	5b <input type="checkbox"/>	5c <input type="checkbox"/>	5d <input type="checkbox"/>	5e <input type="checkbox"/>	5f <input type="checkbox"/>
Non Authenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Content

6a	Content Localization	<input type="checkbox"/>	6b
6c	Default culture	<input type="text"/>	
	Version	<input type="text"/>	6d
	Width	<input type="text"/>	
6e	Height	<input type="text"/>	

4.13.3 FIELDS

1) WORKAREA | Main

- | | |
|------------------|--|
| Required | a. Workarea id – the webpage internal ID. |
| Read Only | |
| Required | b. Workarea name – the webpage unique name. |
| Read Only | |
| Required | c. Tile – the title of the page for each active language. |
| Read Only | i. To add or remove languages read the SET CULTURES & TIME ZONE chapter. |
| Required | d. Menu – the menu name of the page for each active language. |
| Read Only | 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

- View type** – the view type to add to the webpage.
 - The default view is the “Content” view that is equivalent to an HTML container.
- View name** – the name of view.
- Left Content Zone** – the views that are located in the left area of the webpage.
 - This zone is represented by the master page token **\$\$SYS_CONTENT1\$**.
 - Read the SET MASTER PAGE for additional information.
- Middle Content Zone** – the views that are located in the middle area of the webpage.
 - 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.
- 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.
- j. **View path** – the web control path.

Read Only**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

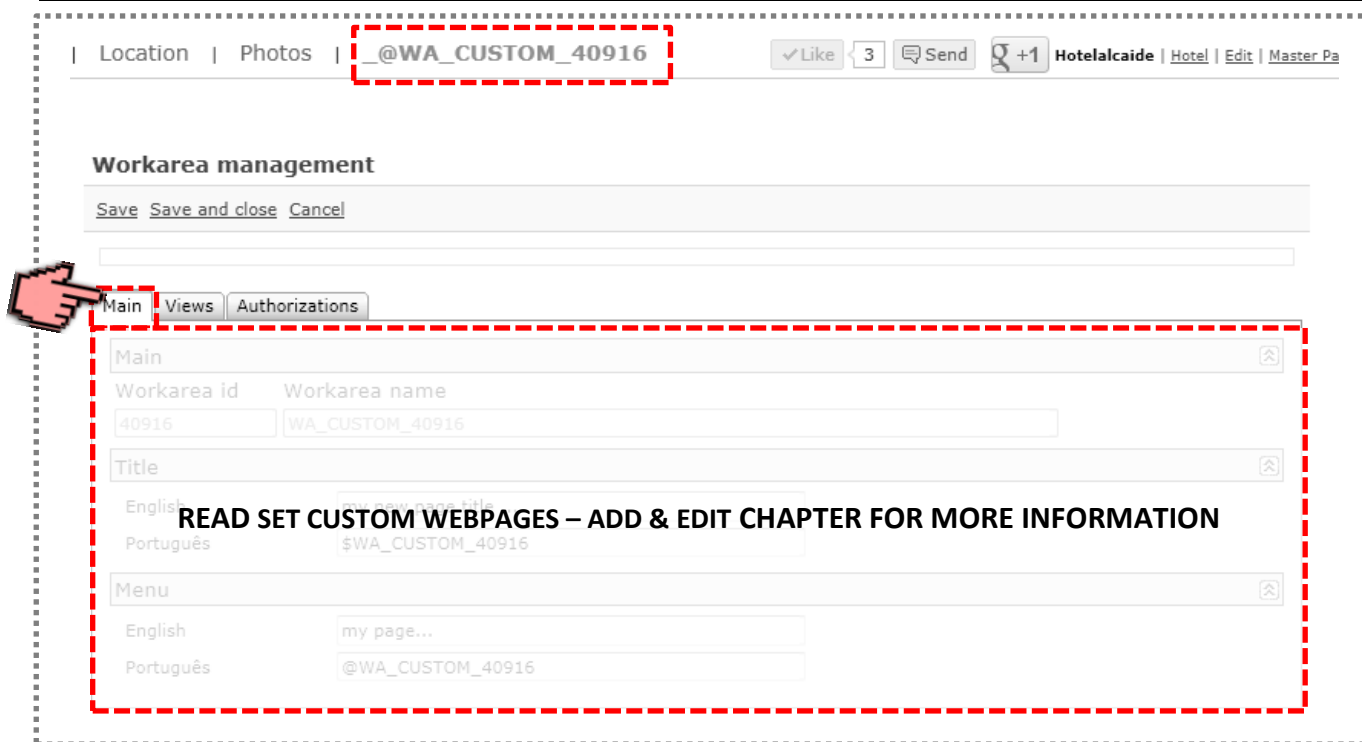
The configuration features are explained in the SET CUSTOM WEBPAGES – ADD & EDIT chapter.

Page Location



The screenshot shows the HOTELASP interface for configuring a custom webpage. The breadcrumb trail at the top includes "Location", "Photos", and "@WA_CUSTOM_40916". The page title is "\$_V_WA_CUSTOM_40916_B79F46E4-A2CC-46E9-A0A2-86757950EA90". The content area is empty, with a message: "This text container is empty. Edit the view to fill the container with content. To insert multi-language content use the language drop-down box to change the current language and then edit the content. The content will be associated to the active and current language." The footer contains several navigation links: "Configure Page", "Add new page", "Add new child page", "Delete page", "Move page to left", "Move page up", "Move page down", and "Move page to right". Two callout boxes provide instructions: "STEP 1: SELECT THE CUSTOM PAGE" pointing to the page title, and "STEP 2: CLICK 'CONFIGURE PAGE' TO EDIT" pointing to the "Configure Page" link in the footer.

Page Description



Location | Photos | **@WA_CUSTOM_40916** [✓ Like](#) [3](#) [Send](#) [+1](#) [Hotelalcaide](#) | [Hotel](#) | [Edit](#) | [Master Pa](#)

Workarea management

[Save](#) [Save and close](#) [Cancel](#)

Main | [Views](#) | [Authorizations](#)

Main [⌵](#)

Workarea id Workarea name

40916 WA_CUSTOM_40916

Title [⌵](#)

English [⌵](#)

Português \$WA_CUSTOM_40916

Menu [⌵](#)

English my page...

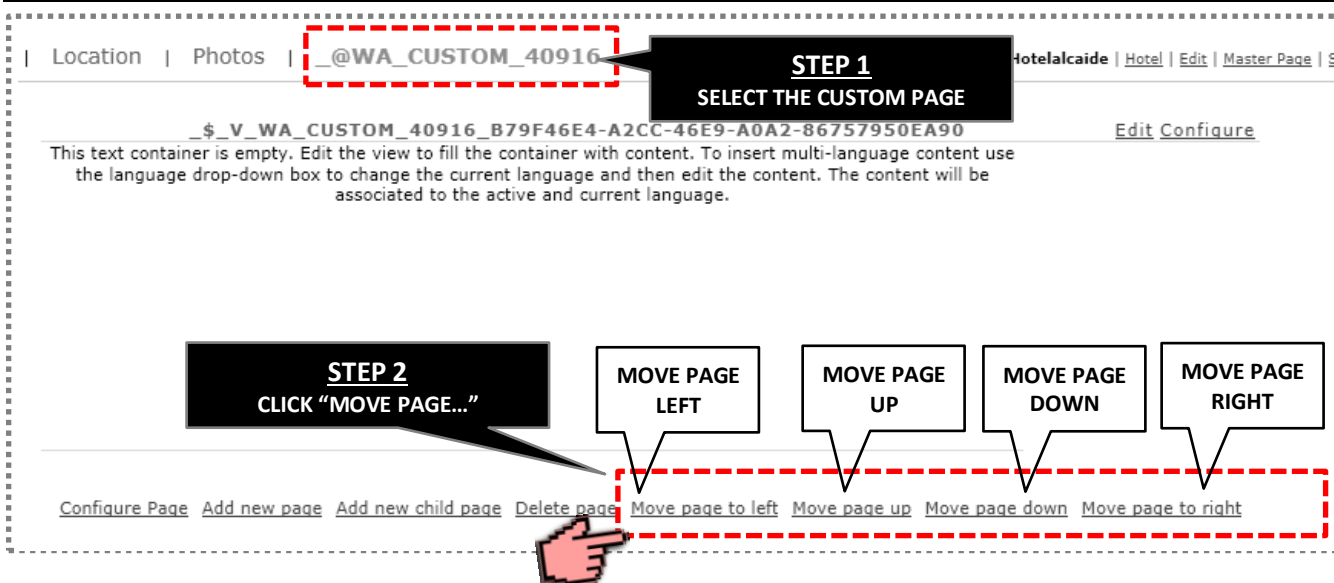
Português @WA_CUSTOM_40916

READ SET CUSTOM WEBPAGES – ADD & EDIT CHAPTER FOR MORE INFORMATION

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



Location | Photos | **@WA_CUSTOM_40916** [Hotelalcaide](#) | [Hotel](#) | [Edit](#) | [Master Page](#) | [S](#)

STEP 1
SELECT THE CUSTOM PAGE

\$_V_WA_CUSTOM_40916_B79F46E4-A2CC-46E9-A0A2-86757950EA90 [Edit](#) [Configure](#)

This text container is empty. Edit the view to fill the container with content. To insert multi-language content use the language drop-down box to change the current language and then edit the content. The content will be associated to the active and current language.

STEP 2
CLICK “MOVE PAGE...”

MOVE PAGE LEFT **MOVE PAGE UP** **MOVE PAGE DOWN** **MOVE PAGE RIGHT**

[Configure Page](#) [Add new page](#) [Add new child page](#) [Delete page](#) [Move page to left](#) [Move page up](#) [Move page down](#) [Move page to right](#)

4.14.3 DELETE CUSTOM WEBPAGE

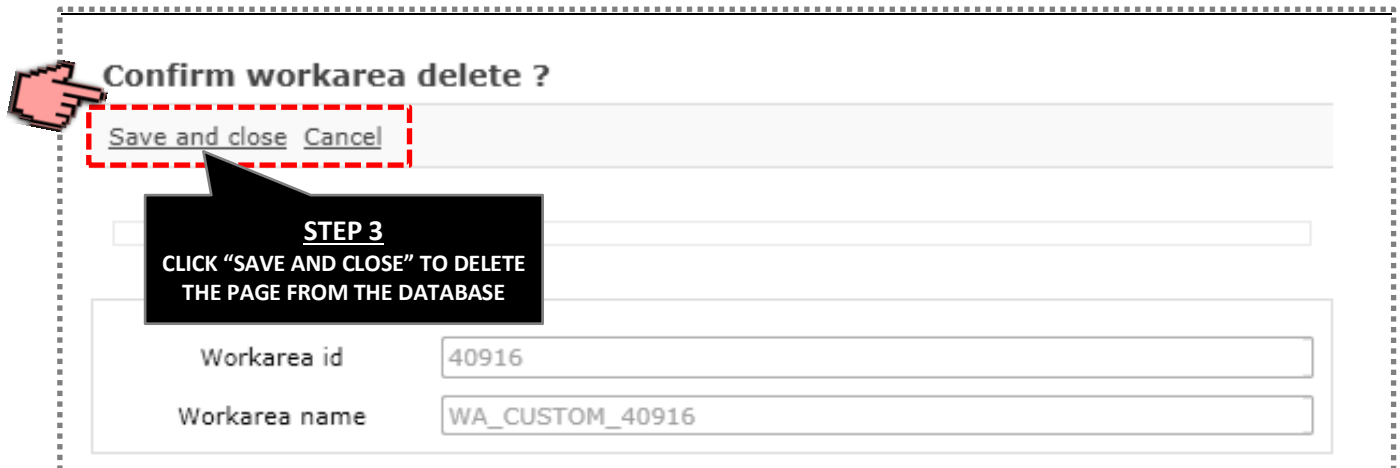
The system allows the hotel to delete custom webpages. Only the custom pages have the “Delete Page” link available.



STEP 1
SELECT THE CUSTOM PAGE

The screenshot shows the top navigation bar with links: Location, Photos, and a dropdown menu containing **@WA_CUSTOM_40916**. Below this, the page title is **\$_V_WA_CUSTOM_40916_B79F46E4-A2CC-46E9-A0A2-86757950EA90** with an [Edit Configure](#) link. A text box contains the instruction: "This text container is empty. Edit the view to fill the container with content. To insert multi-language content use the language drop-down box to change the current language and then edit the content. The content will be associated to the active and current language." At the bottom, a toolbar includes links: [Configure Page](#), [Add new page](#), [Add new child](#), **Delete page** (highlighted with a red dashed box and a hand icon), [Move page to left](#), [Move page up](#), [Move page down](#), and [Move page to right](#).

STEP 2
CLICK “DELETE PAGE”



Confirm workarea delete ?

The dialog box has two buttons: [Save and close](#) (highlighted with a red dashed box and a hand icon) and [Cancel](#). Below the buttons, a text box contains the instruction: "CLICK “SAVE AND CLOSE” TO DELETE THE PAGE FROM THE DATABASE". At the bottom, there are two input fields: "Workarea id" with the value **40916** and "Workarea name" with the value **WA_CUSTOM_40916**.

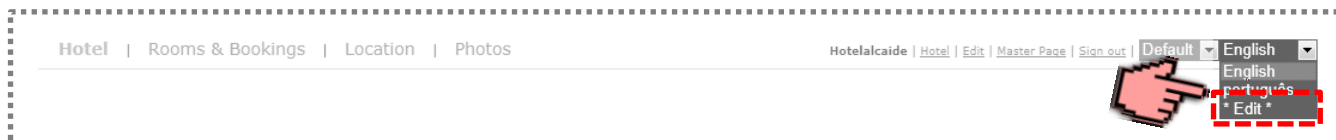
STEP 3
CLICK “SAVE AND CLOSE” TO DELETE THE PAGE FROM THE DATABASE

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



Hotel Alcaide - Operations

Links | Marketing | Sales | Operations | Calendar | Reports | Property

Hotelalcaide | **Account** | Website | Sign out |

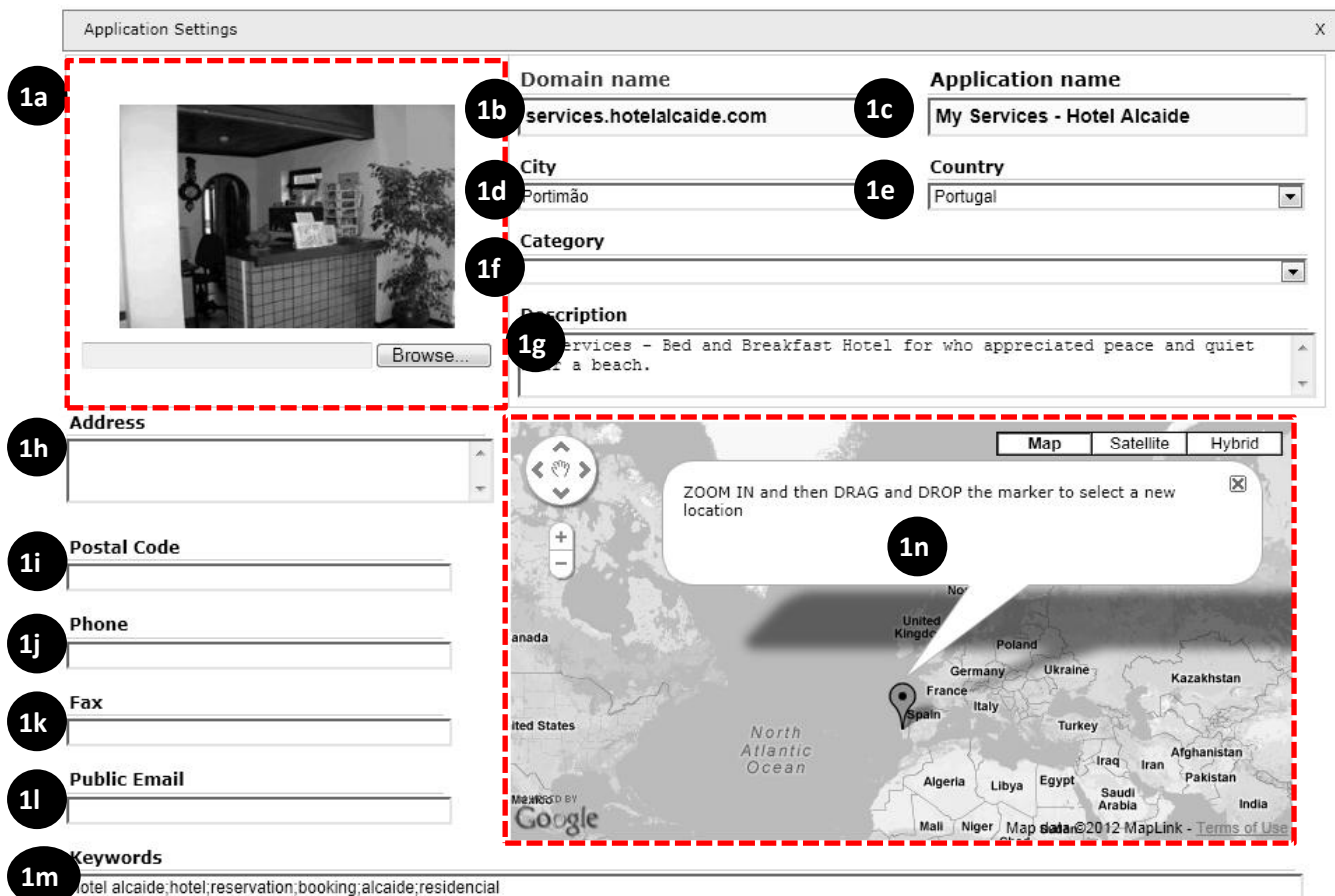
My Services - Hotel Alcaide

Services | Account | Links | Users

STEP 1 | Sign out | English |

STEP 2

Page Description



Application Settings

1a **1b** **1c** **1d** **1e** **1f** **1g** **1h** **1i** **1j** **1k** **1l** **1m** **1n**

Domain name

services.hotelalcaide.com

Application name

My Services - Hotel Alcaide

City

Portimão

Country

Portugal

Category

Description

Services - Bed and Breakfast Hotel for who appreciated peace and quiet
and a beach.

Address

Postal Code

Phone

Fax

Public Email

Keywords

hotel alcaide;hotel;reservation;booking;alcaide;residencial

Map **Satellite** **Hybrid**

ZOOM IN and then DRAG and DROP the marker to select a new location

Map data ©2012 MapLink - Terms of Use

Link to your Website (Optional)

X

2a ☒ No Direct Link to your Website (Default) - FREE

☐ Regular Link - 24 EUR per Year (Payment by PayPal)

☐ Regular Link with reciprocal link (MUST be on the home page of your site, no other page) - FREE

2b Link

2c Reciprocal Link

2d To validate the reciprocal link please include the following HTML code in the page at the URL specified above, before submitting this form:

OPTIONAL

The link is free if you link to us with a reciprocal link. We review all links. We maintain the link the same time that you maintain your reciprocal link. The paid link is maintained during one year and can be renewed. The payments are done by PayPal (via email).

Link to your website. This link will be shown in all WinSaaS Directories sites associated with the selected category, location or keywords. Must start with http://

The URL of your website where you will insert the Html link code. Must start with http://

HTML code to insert in your website (Reciprocal Link). MUST INSERT BEFORE SUBMITTING THIS FORM. You must copy and insert the HTML code defined below into your website (the field Reciprocal Link defines the URL of your website).

F1

Update Application

F2

Send an Invitation Vote Card to Your Mailbox

4.16.1 FIELDS

1) Application Settings

- | | | |
|----------|--|---|
| Required | | a. Picture – the picture to be published in the HotelASP Directory. |
| Public | | |
| Required | | b. Domain name – the domain name associated with the hotel public site. |
| Public | | |
| Required | | c. Application name – the hotel name. |
| Public | | |
| 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

Hotel Alcaide - Operations

Jribeiro | [Website](#) | [Sign out](#) |

Links Marketing Sales Operations Calendar Reports Property
Revenue Management Agents Room Rates Pricing Channels Discounts Booking Integration

Page Description

Direct Booking Integration

Integrate your Direct Booking in external websites

BASIC SETTINGS FOR THE CONTAINER OF THE HOTELASP BOOKING CONTROL

1a Width 940 **1b** height 1200 **1c** Background Color #FFFFFF **1d** Enable Scrollbars ☒

1e COPY AND PASTE THE CODE BELOW INTO ANY WEBPAGE OR WEBSITE.

```
<iframe width="940px" height="1200px" allowtransparency="true" frameborder="0" sandbox="allow-same-origin allow-forms allow-scripts" scrolling="auto" src="https://secure.hotelasp.com/packages/sys/$sys_version$/ui/web/workareas/View.aspx?aid=10378&ModuleName=PMS_PUB&WorkAreaName=HOTEL_BOOKINGS&ViewName=HOTEL_BOOKINGS&background-color=%23FFFFFF" seamless="seamless" ></iframe>
```

THE HTML CODE TO BE COPIED AND INTEGRATED IN THE EXTERNAL WEBSITE

PREVIEW

A PREVIEW OF WHAT SHOULD APPEAR IN THE EXTERNAL WEBSITE USING THE SETTINGS ABOVE

1f

Check In								Check Out								Rooms	Nº Adults	Nº of Children	
January 2013								January 2013										0-2 Years	3-12 Years
<	Sun	Mon	Tue	Wed	Thu	Fri	Sat	<	Sun	Mon	Tue	Wed	Thu	Fri	Sat				
	30	31	1	2	3	4	5		30	31	1	2	3	4	5		2	0	0
	6	7	8	9	10	11	12		6	7	8	9	10	11	12		0	0	0
	13	14	15	16	17	18	19		13	14	15	16	17	18	19		0	0	0
	20	21	22	23	24	25	26		20	21	22	23	24	25	26		0	0	0
	27	28	29	30	31	1	2		27	28	29	30	31	1	2		0	0	0
	3	4	5	6	7	8	9		3	4	5	6	7	8	9		0	0	0

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.

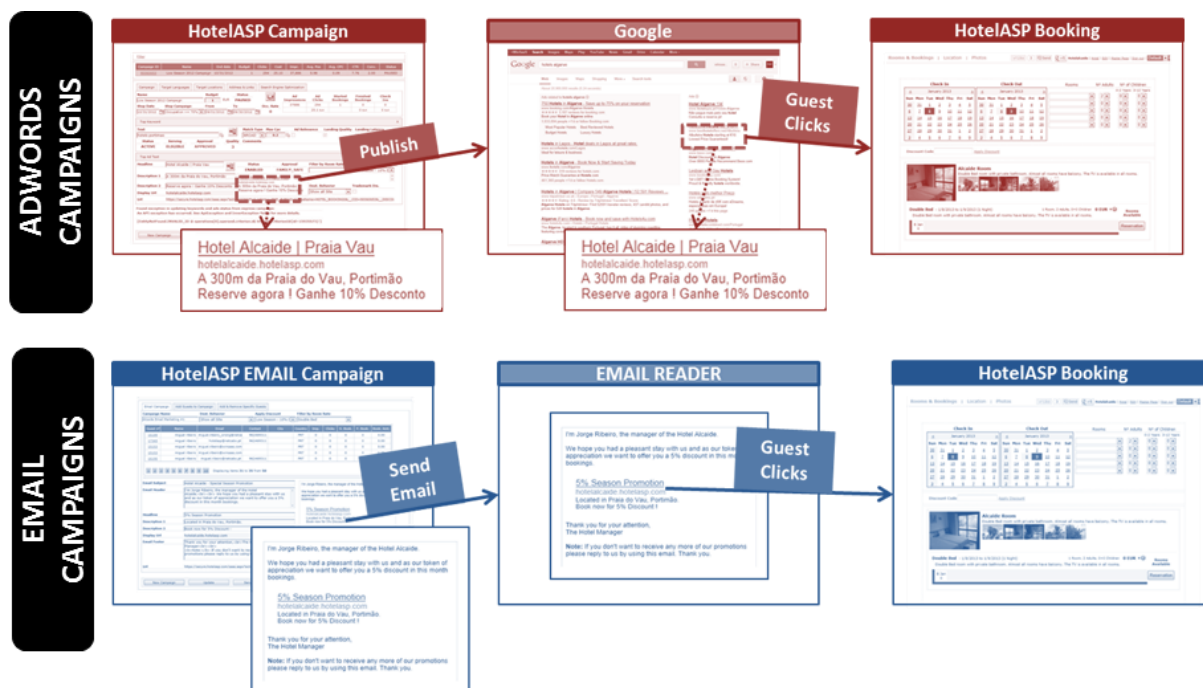


Figure 56 – Marketing Campaign Types

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.

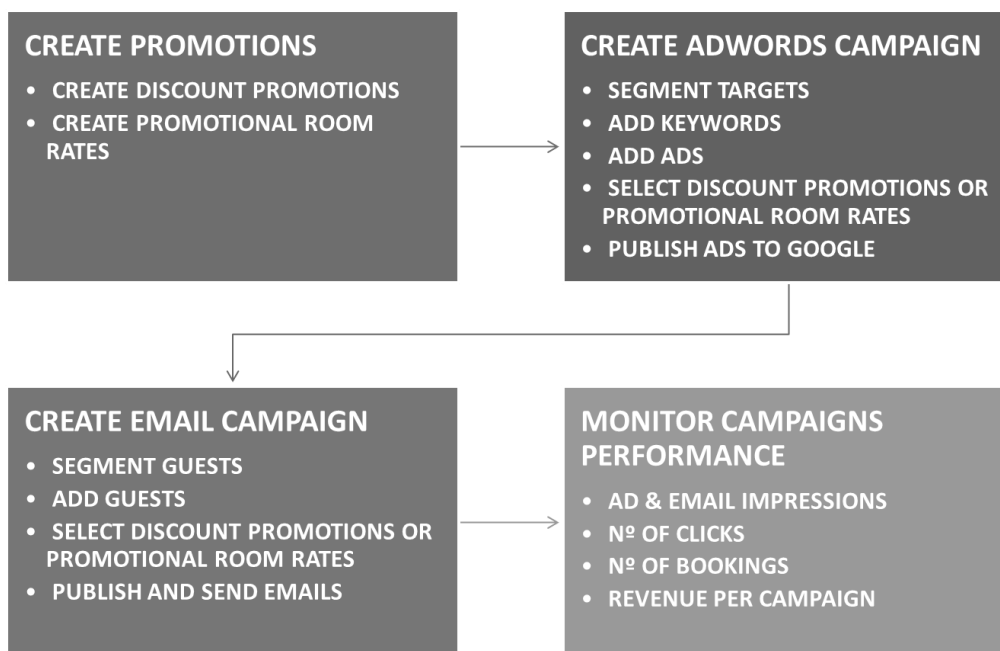


Figure 57 – Marketing Campaigns: Basic Steps

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

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |

Links | Marketing | **Sales** | Operations | Calendar | Reports | Property
 Revenue Management | Agents | Room Rates | Pricing | Channels | **Discounts** | Booking Integration

Page Description

Discounts and Promotions

Filter

Edit	Discount Code	Discount Percentage	Start Date	Expiration Date	Description	Active
34	HALC10	10.00	8/1/2012	10/30/2012	Low Season - 10% Discount	<input checked="" type="checkbox"/>

1 Displaying items 1 to 1 from 1

Main

1a Agent nº

1b Room Rate

1c Discount Code

1d Discount Percentage

1e Start Date

1f Expiration Date

2a Description

2b Active

Messages

F1 Select F2 Insert F3 Update F4 Delete

5.1.1 FIELDS

1) Main

- Agent nº** – the agent associated with the discount code.
 - It's optional.
 - If selected then the discount code can only be applied if the booking is created for that specific agent.
- Room rate** – the room rate to be associated with the discount code.
 - It's optional.
 - 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

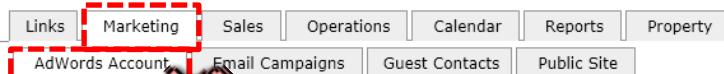
The hotel to start using the AdWords campaigns needs to activate the AdWords account and proceed with an initial payment.

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.

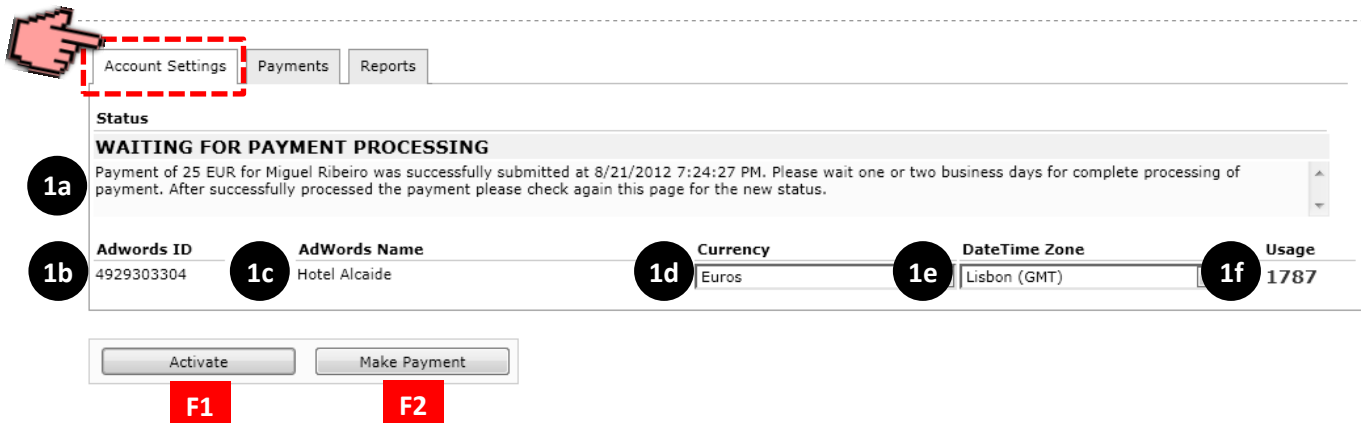
Page Location

Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |



Page Description



Status

WAITING FOR PAYMENT PROCESSING

Payment of 25 EUR for Miguel Ribeiro was successfully submitted at 8/21/2012 7:24:27 PM. Please wait one or two business days for complete processing of payment. After successfully processed the payment please check again this page for the new status.

Adwords ID	AdWords Name	Currency	DateTime Zone	Usage
4929303304	Hotel Alcaide	Euros	Lisbon (GMT)	1787

1a Payment of 25 EUR for Miguel Ribeiro was successfully submitted at 8/21/2012 7:24:27 PM. Please wait one or two business days for complete processing of payment. After successfully processed the payment please check again this page for the new status.

1b Adwords ID: 4929303304

1c AdWords Name: Hotel Alcaide

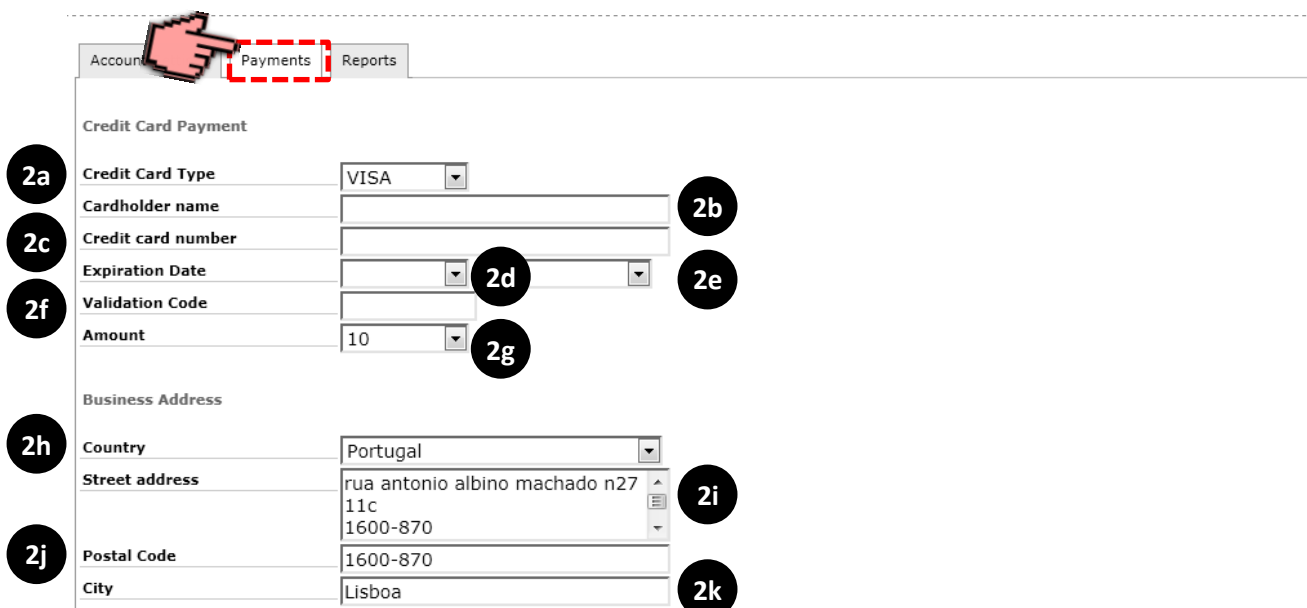
1d Currency: Euros

1e DateTime Zone: Lisbon (GMT)

1f Usage: 1787

F1 **Activate**

F2 **Make Payment**



2a Credit Card Type: VISA

2b Cardholder name:

2c Credit card number:

2d Expiration Date:

2e Validation Code:

2f Amount: 10

2g

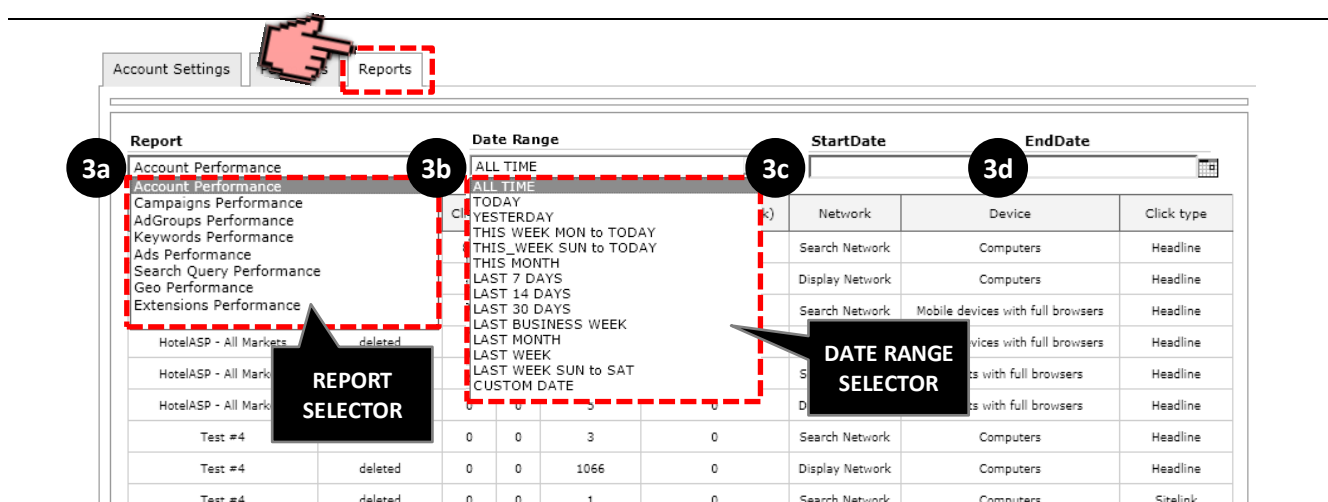
2h Business Address

2i Country: Portugal

2j Street address: rua antonio albino machado n27
11c
1600-870

2k Postal Code: 1600-870

City: Lisboa



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.

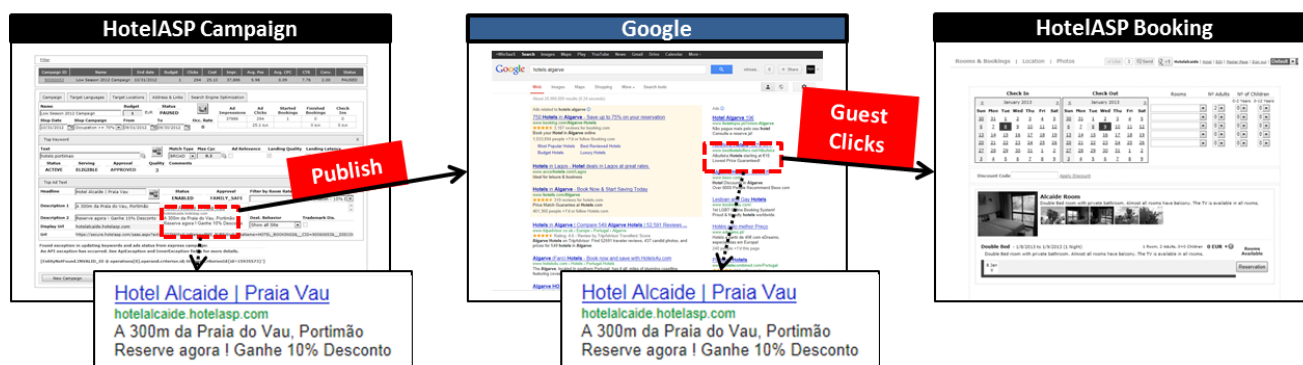


Figure 59 – AdWords Campaigns: Generate Traffic to your Website

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.

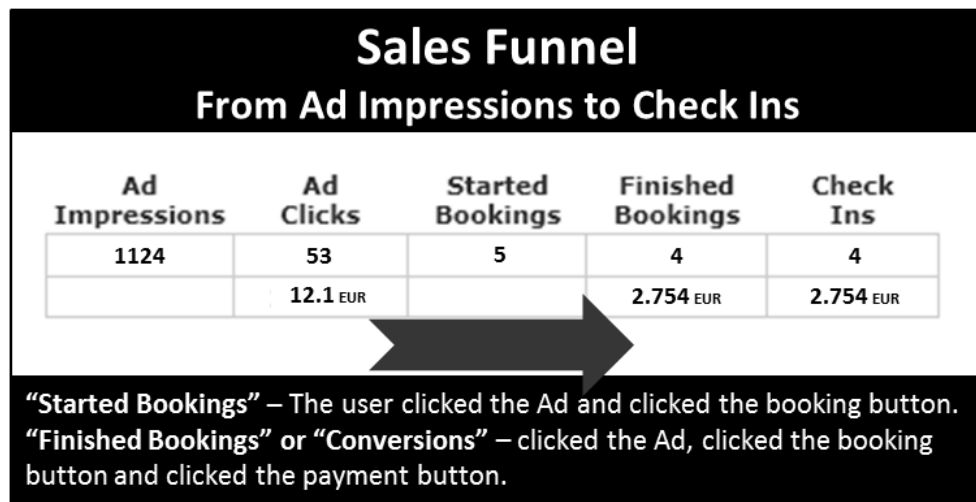


Figure 61 – AdWords Campaigns: Sales Funnel

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

Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |

Links **Marketing** Sales Operations Calendar Reports Property

Page Description

SELECT THE ROW TO LOAD THE CAMPAIGN

Campaign ID	Name	End date	Budget	Clicks	Cost	Impr.	Avg. Pos	Avg. CPC	CTR	Conv.	Status
90060653	Low Season 2012 Campaign	10/31/2012	1	294	25.10	37,886	5.98	0.09	7.76	2.00	PAUSED

REPORTS VIEW REPORTS

SALES FUNNEL

MANAGE KEYWORDS ADD MORE KEYWORDS

MANAGE ADS ADD MORE ADS

MANAGE CAMPAIGN

SEGMENT CAMPAIGN BY LANGUAGES

F1 **F2** **F3** **F4** **F5** **F6**

New Campaign Update Publish Keyword & Ad Enable Pause Delete

SEGMENT CAMPAIGN BY LANGUAGES

Target Languages

4a

Target Languages

☐ Arabic ☐ Bulgarian ☐ Catalan

☐ Chinese (simplified) ☐ Chinese (traditional) ☐ Croatian

☐ Czech ☐ Danish ☐ Dutch

☐ English ☐ Estonian ☐ Filipino

☐ Finnish ☐ French ☐ German

☐ Greek ☐ Hebrew ☐ Hindi

☐ Hungarian ☐ Icelandic ☐ Indonesian

☐ Italian ☐ Japanese ☐ Korean

☐ Latvian ☐ Lithuanian ☐ Norwegian

☐ Polish ☐ Portuguese ☐ Romanian

☐ Russian ☐ Serbian ☐ Slovak

☐ Slovenian ☐ Spanish ☐ Swedish

☐ Thai ☐ Turkish ☐ Ukrainian

☐ Urdu ☐ Vietnamese

Target Locations

5a

SEGMENT CAMPAIGN BY COUNTRIES

<input type="checkbox"/> Afghanistan	<input type="checkbox"/> Albania	<input type="checkbox"/> Algeria
<input type="checkbox"/> Andorra	<input type="checkbox"/> Angola	<input type="checkbox"/> Anguilla
<input type="checkbox"/> Antigua and Barbuda	<input type="checkbox"/> Argentina	<input type="checkbox"/> Armenia
<input type="checkbox"/> Australia	<input checked="" type="checkbox"/> Austria	<input type="checkbox"/> Azerbaijan
<input type="checkbox"/> Bahrain	<input type="checkbox"/> Bangladesh	<input type="checkbox"/> Barbados
<input type="checkbox"/> Belgium	<input type="checkbox"/> Belize	<input type="checkbox"/> Benin
<input type="checkbox"/> Bhutan	<input type="checkbox"/> Bolivia	<input type="checkbox"/> Bosnia and Herzegovina
<input type="checkbox"/> Bouvet Island	<input type="checkbox"/> Brazil	<input type="checkbox"/> British Indian Ocean Territory
<input type="checkbox"/> Bulgaria	<input type="checkbox"/> Burkina Faso	<input type="checkbox"/> Burundi
<input type="checkbox"/> Cameroon	<input type="checkbox"/> Canada	<input type="checkbox"/> Cape Verde
<input type="checkbox"/> Central African Republic	<input type="checkbox"/> Chad	<input type="checkbox"/> Chile
<input type="checkbox"/> Christmas Island	<input type="checkbox"/> Cocos (Keeling) Islands	<input type="checkbox"/> Colombia
<input type="checkbox"/> Congo	<input type="checkbox"/> Congo, Democratic Republic	<input type="checkbox"/> Cook Islands

6a **6b** **6c** **6d** **6e** **6f**

THE SYSTEM AUTOMATICALLY GENERATES THE LINKS TO THE DEFAULT PAGES.

Street Address	City Name	Province Co	Postal Code	Country
Praia do Vau	Portimão		8500-820	Desc not found...
SiteLink 1	Url			
Hotel Alcaide	http://www.hotelalcaide.com/			
SiteLink 2	Url			
Rooms & Bookings	https://secure.hotelasp.com/_10379_en-US__PMS-PUB_HOTEL-BOOKINGS_/saas.aspx			
SiteLink 3	Url			
Location	http://www.hotelalcaide.com/_10379_en-US__PMS-PUB_HOTEL-LOCATION_/saas.aspx			
SiteLink 4	Url			
Photos	http://www.hotelalcaide.com/_10379_en-US__PMS-PUB_HOTEL-PHOTOS_/saas.aspx			

7a

READ SET SEARCH ENGINE OPTIMIZATION CHAPTER FOR MORE INFORMATION

Home Page	Booking Page	Location Page	Photo Page
Page Title	Page Title	Page Title	Page Title
Hotel Alcaide	Hotel Alcaide - Bookings	Hotel Alcaide - Location & Contacts	Hotel Alcaide - Photos
Meta Description	Meta Description	Meta Description	Meta Description
Hotel Alcaide - Ideal for Quiet, Sun, Beach and Golf Holidays. Bed & Breakfast Hotel for who appreciate the Algarve.	Hotel Alcaide Booking - Located in Algarve near the beach and golf course. Located in Portimão, Algarve.	Hotel Alcaide Location, Contacts and Address - Located in Algarve near the beach and golf course.	Hotel Alcaide Photos - Located in Algarve near the beach and golf course. Located in Portimão, Algarve.
Meta Keywords	Meta Keywords	Meta Keywords	Meta Keywords
hotel alcaide, hotels algarve, algarve, bed breakfast algarve, hotels praia vau, bed breakfast	hotel alcaide reservation, hotel alcaide booking, hotel alcaide, hotels algarve, hotels portimao, accommodation algarve, bed	hotel alcaide location, hotel alcaide contacts, hotels algarve, hotel alcaide location, hotels portimao, accommodation	hotel alcaide photos, hotel alcaide, hotels algarve, hotels portimao, accommodation algarve, bed breakfast algarve,

Update

MANAGE KEYWORDS: ADD MORE KEYWORDS

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
94533838	praia do vau	22	3.34	1,317	3.18	0.15	0.33
123868031	bed and breakfast algarve	0	0.00	30	5.80	0.00	2.25
274187498	bed breakfast algarve	0	0.00	63	7.54	0.00	1.50
319133249	hotels in portimao	0	0.00	117	7.11	0.00	1.00

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

Keyword ID

Text

AdGroup ID

Match Type

Status

MaxCpc

Serving Status

DestinationUrl

Approval Status

8a
8b
8c
8d
8e

8f
8g
8h
8i

Add Keyword
Update Keyword
Enable
Pause
Delete Keyword

F7
F8
F9
F10
F11

CLICK THE BUTTON "MANAGE KEYWORDS" TO OPEN THE KEYWORDS MANAGEMENT POPUP

MANAGE ADS: ADD MORE ADS

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
9b
9c
9d
9e

Ad ID

Headline

Description 1

Description 2

Display Ur

Url

AdGroup ID

Status

Approval Status

Comments

Trademark Dis.

9f
9a
9i

Add Ad
Update Ad
Enable
Pause
Delete Ad

F12
F13
F14
F15
F16

CLICK THE BUTTON "MANAGE ADS" TO OPEN THE ADS MANAGEMENT POPUP

VIEW REPORTS

Report
10a Campaigns Performance

Date Range
10b ALL TIME

StartDate
10c

EndDate
10d

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

F17
Get Report

CLICK THE BUTTON "REPORTS" TO
OPEN THE VIEW REPORTS POPUP

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



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 | f. Headline – the headline of the ad. |
| Public | |
| Required | g. Description 1 – the first description below the ad headline. |
| Public | |
| Required | h. Description 2 – the last description of the ad. |
| Public | |
| Required | i. Display url – the Url to show in the ad. |
| Public | |

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.

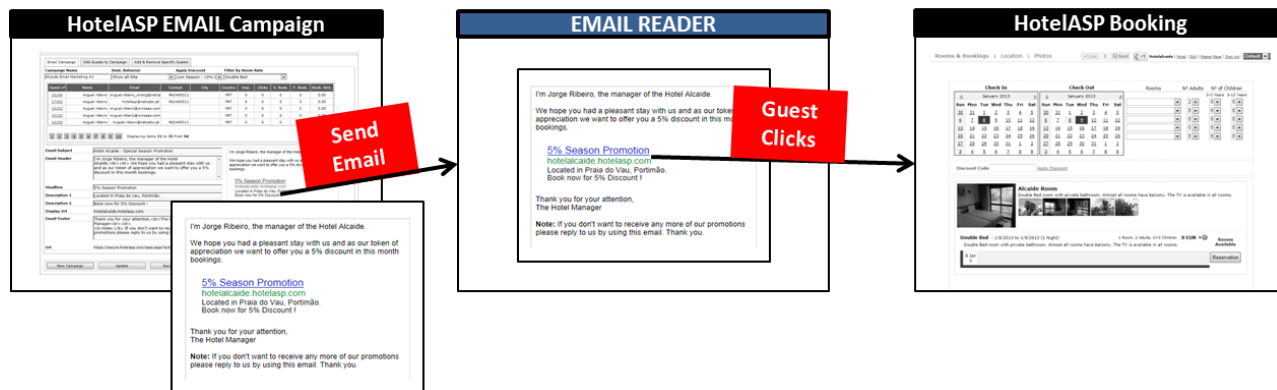


Figure 63 - Email Campaigns

The basic steps to create an email campaign are described in illustration below.

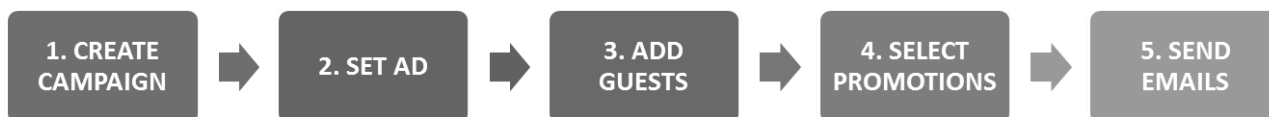


Figure 64 - Email Campaigns: Basic Configuration Steps

The email structure must follow a set of rules as described in the picture below.

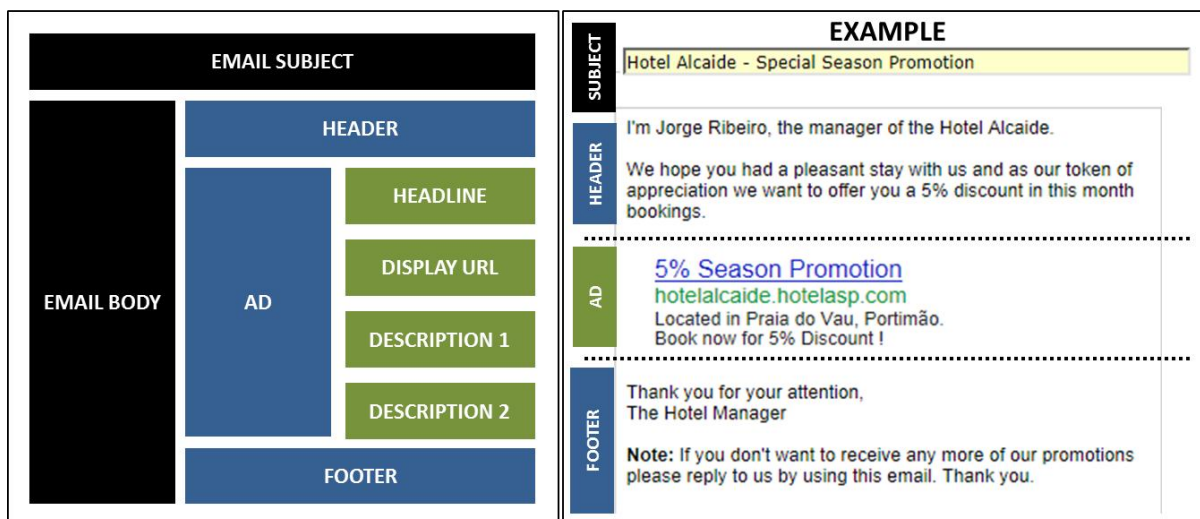


Figure 65 - Email Campaign Layout

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

Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |

Links **Marketing** Sales Operations Calendar Reports Property
AdWords Account **Email Campaigns** Guest Contacts Public Site

Page Description

Campaign ID	Name	Sent Emails	Clicks	Start Book.	Finish Book.	Book. Amt.	Failed Emails
18057	Alcaide Email Marketing #1	42	4	1	0	0	0
18058	Alcaide Campaign #2	2	1	0	0	0	0

1a Email Campaign **Add Guests to Campaign** **Add & Remove Specific Guests**

1b Campaign Name: Alcaide Email Marketing #1 **1c** Dest. Behavior: Show all Site **1d** Apply Discount: Low Season - 10% **1e** Filter by Room Rate: Double Bed

Guest nº	Name	Email	Contact	City	Country	Imp.	Clicks	S. Book.	F. Book.	Book. Amt.
16189							0	0	0	0.00
17365							0	0	0	0.00
15153							0	0	0	0.00
15153							0	0	0	0.00
16190							0	0	0	0.00

1f Email Subject: Hotel Alcaide - Special Season Promotion

1g Email Header: I'm Jorge Ribeiro, the manager of the Hotel Alcaide.

 We hope you had a pleasant stay with us and as our token of appreciation we want to offer you a 5% discount in this month bookings.

1h Headline: 5% Season Promotion

1i Description 1: Located in Praia do Vau, Portimão.

1j Description 2: Book now for 5% Discount !

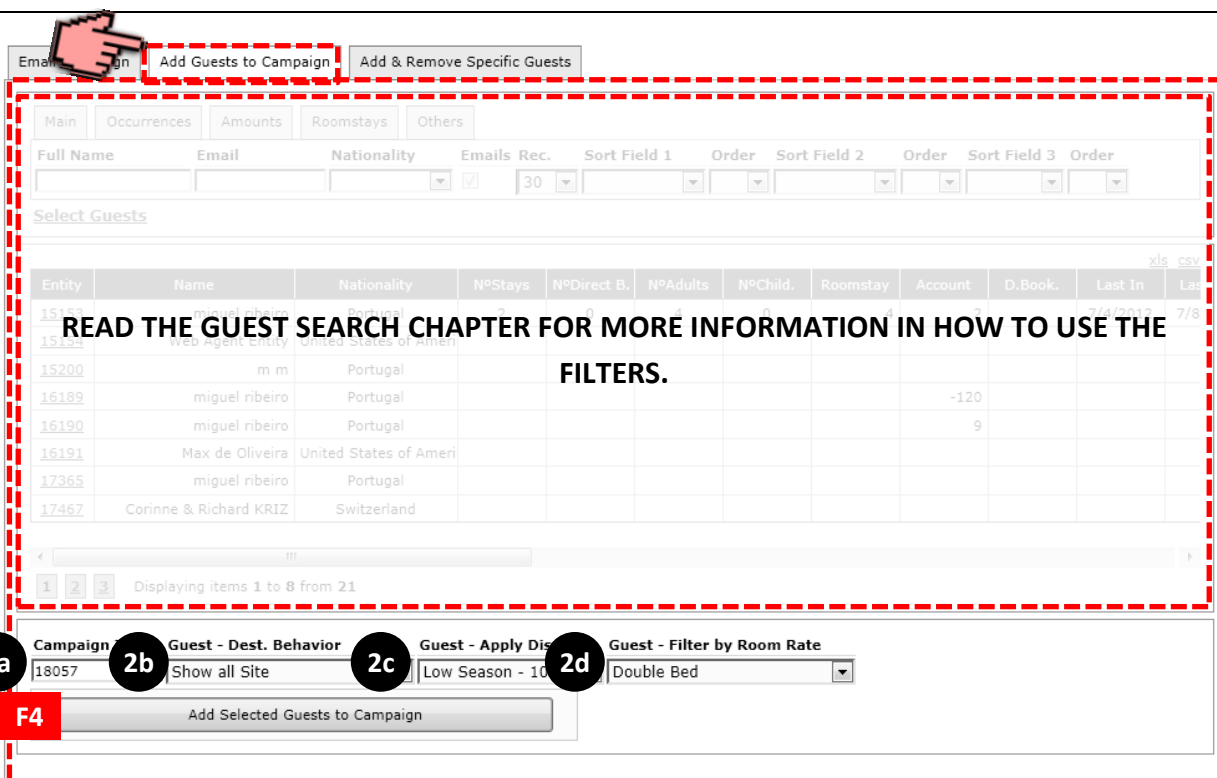
1k Display Url: hotelalcaide.hotelasp.com

1m Email Footer: Thank you for your attention,
 The Hotel Manager

1n Note: If you don't want to receive any more of our promotions please reply to us by using this email. Thank you.

1o Url: https://secure.hotelasp.com/saas.aspx?aid=10379&ModuleName=PMS_PUB&WorkAreaName=HOTEL_BOOKINGS&_CID=18057&_DISC=

F1 New Campaign **F2** Update **F3** Send Emails **F4** Delete



Hand icon pointing to **Add Guests to Campaign**

2a Campaign: 18057

2b Guest - Dest. Behavior: Show all Site

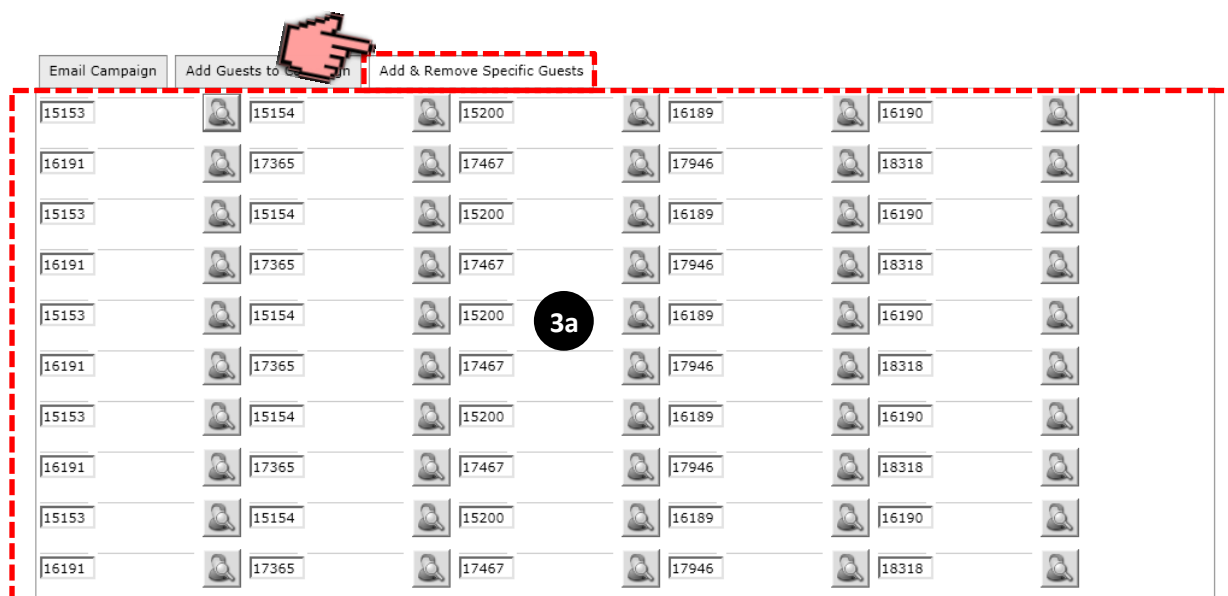
2c Guest - Apply Dis: Low Season - 10

2d Guest - Filter by Room Rate: Double Bed

F4 Add Selected Guests to Campaign

Entity	Name	Nationality	NºStays	NºDirect B.	NºAdults	NºChild.	Roomstay	Account	D.Book.	Last In	Last
15153	miguel ribeiro	Portugal								7/1/2012	7/8
15153	miguel ribeiro	Portugal									
15200	m m	Portugal									
16189	miguel ribeiro	Portugal						-120			
16190	miguel ribeiro	Portugal						9			
16191	Max de Oliveira	United States of Ameri									
17365	miguel ribeiro	Portugal									
17467	Corinne & Richard KRIZ	Switzerland									

Displaying items 1 to 8 from 21



Hand icon pointing to **Add Guests to Campaign**

3a

15153	15154	15200	16189	16190
16191	17365	17467	17946	18318
15153	15154	15200	16189	16190
16191	17365	17467	17946	18318
15153	15154	15200	16189	16190
16191	17365	17467	17946	18318
15153	15154	15200	16189	16190
16191	17365	17467	17946	18318
15153	15154	15200	16189	16190
16191	17365	17467	17946	18318

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 e. **Email Subject** – The subject of the email.

Public

Required f. **Email header** – the header of email body.

Public

Required g. **Headline** – the headline of the ad to be included in the email body.

Public

Required h. **Description 1** – the description 1 of the ad to be included in the email body.

Public

Required i. **Description 2** – the description 2 of the ad to be included in the email body.

Public

Required j. **Display Url** – the url of the ad to be included in the email body.

Public

Required k. **Email Footer** – the footer of the email body.

Public

Read Only l. **Url** – the internal Url of the ad to be included in the email body.

Public

Read Only m. **PREVIEW** – the preview of the email.

Public

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

Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |

Links **Marketing** Sales Operations Calendar Reports Property
AdWords Account Email Campaigns **Guest Contacts** Public Site

Page Description

Filter

GUEST LIST

Entity	Name	Email	Contact	Nationality	Status
15153	miguel ribeiro	miguel.ribeiro@winsaas.com		Portugal	Active
15154		mrribeiro@winsaas.com		United States of America	Active
15200		sales@winsaas.com	m	Portugal	Active
16189	miguel ribeiro	miguel.ribeiro_wrong@netcabo.pt	962969399	Portugal	Active

1 2 3 4 5 6
Displaying items 1 to 4 from 21

ID	Date	Subject	Description
16140	9/1/2012	ber Season Promotion	Email Campaign - Alcaide Email Marketing #1 - Sent Email: Hotel Alcaide - S
16134	9/1/2012	Hotel Alcaide - September Season Promotion	Email Campaign - Alcaide Email Marketing #1 - Sent Email: Hotel Alcaide - S
16128	9/1/2012	Hotel Alcaide - September Season Promotion	Email Campaign - Alcaide Email Marketing #1 - Sent Email: Hotel Alcaide - S
14763	7/22/2012	Created roomStay nº14068	Standard Booking - New Roomstay

1 2 3 4
Displaying items 9 to 12 from 14

Date	To	Subject	Description
09/01/2012	miguel.ribeiro@winsaas.com	Hotel Alcaide - September Season Promotion	Email Campaign - Alcaide Email Marketing #1 - Sent Email: H

miguel ribeiro,

Hello,

I'm the Hotel Manager jorge ribeiro and I'm contacting you to give you the news that we are having a 5% discount in this september.

Book Now ! September 2012
hotelalcaide.hotelasp.com
 Book Now for a 5% discount
 Located in Praia do Vau, Portimão.

Thank you for your attention,
 Jorge Ribeiro

Send us an email to hotel@hotelalcaide.com if you don't want to receive any more promotions

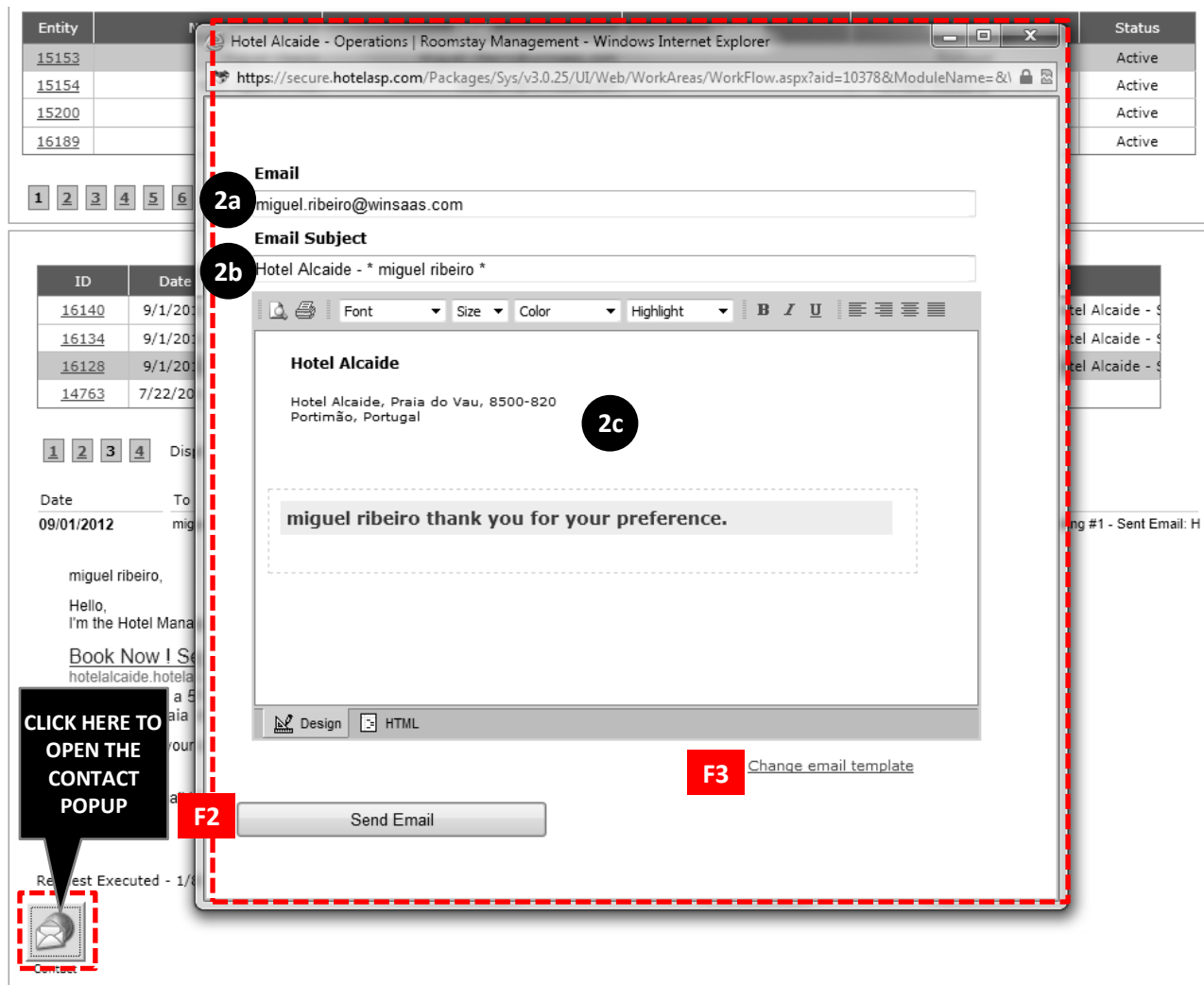
SEND AN EMAIL

F1

Contact

DETAILS OF THE EVENT

1a



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.

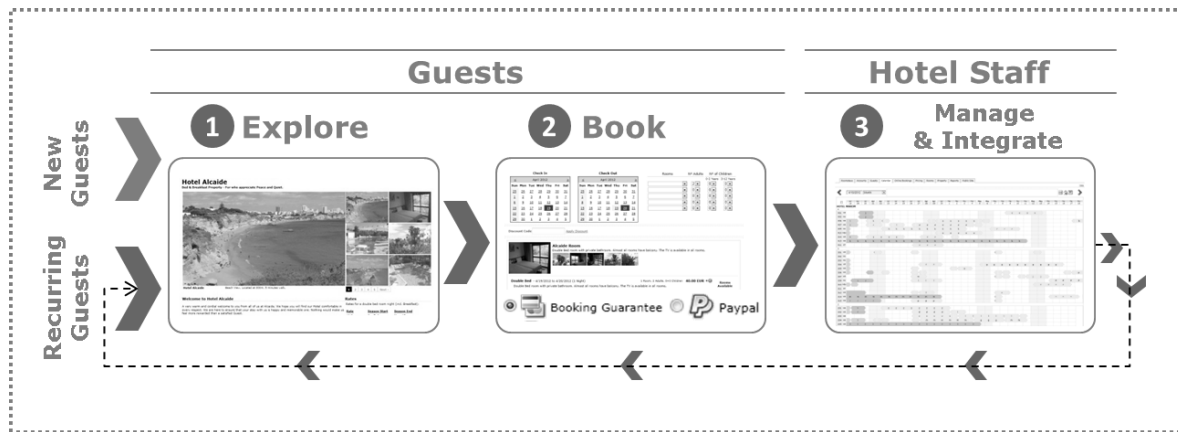


Figure 66 – Hotel Website: From Look to Book

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.

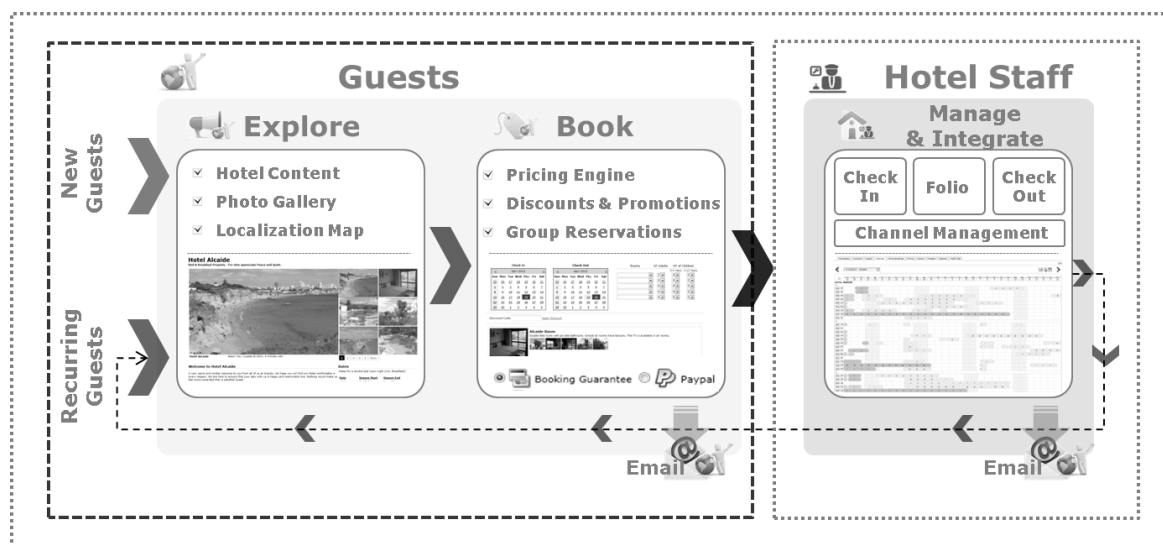


Figure 67 – Hotel Website: Direct Booking Workflow

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.

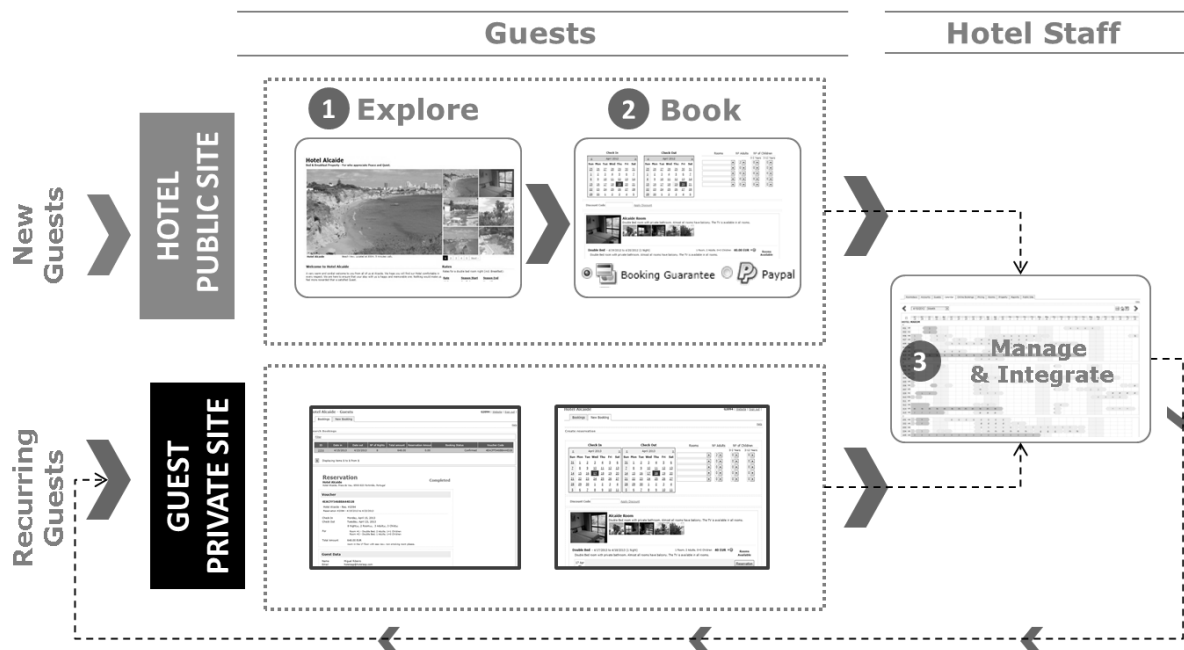


Figure 68 - Guest Private Site

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

Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |

Links Marketing Sales Operations Calendar Reports Property

Page Description

ID	Name	Check In	Check Out	Nights	NºRooms	\$ Room	Paid	Booking Status	Creation date
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	0.00	Cancelled	7/13/2012 11:45:59 AM
1420	Daniel Zucca Aparicio	7/3/2012	7/6/2012	3	1	210.00	0.00	Confirmed	6/18/2012 2:28:11 PM
1327	Figiel	7/30/2012	8/1/2012	2	1	140.00	0.00	Confirmed	5/27/2012 8:09:14 AM
1253	Figiel	5/21/2012	5/22/2012	1	1	45.00	0.00	Confirmed	4/29/2012 10:54:39 AM

1 2 Displaying items 1 to 5 from 8

1a Room

1b Name

1c Total amount

1d Paid

1e Discount amount

1f Discount Code

1g Voucher Code

1h Comments

1i Credit Card Access Password

1j Booking Guarantee

ROOMSTAYS LINKED TO THE RESERVATION

we would like to reserve an exterior non smoking room with double bed, thanks.

Invalid Access Password. Please fill the password to access the secured data.

Reservation

Hotel Alcaide

Hotel Alcaide, Praia do Vau, 8500-820 Portimão, Portugal

Completed

Voucher

3485A34A7B2F4FADB

Hotel Alcaide - Res. #1420

Reservation #1420 - 7/3/2012 to 7/6/2012

Check In Tuesday, July 03, 2012

Check Out Friday, July 06, 2012

3 Night(s), 1 Room(s), 2 Adult(s), 0 Child(s)

For Room #1 - Double Bed, 2 Adults, 0+0 Children

Total Amount 210.00 EUR

we would like to reserve an exterior non smoking room with double bed, thanks.

1k

Guest Data

Name Daniel Zucca Aparicio

Email cca@gmail.com

Guest Site

UserName G1420

Password 1

Bookings

New Booking

View Booking

v1.1.#1420

BOOKING VOUCHER THE GUEST AND THE HOTEL RECEIVES BY EMAIL THIS VOUCHER.

GUEST PRIVATE SITE CREDENTIALS THE PRIVATE SITE ALLOWS THE GUEST TO VIEW HIS BOOKINGS, CREATE NEW BOOKINGS AND BENEFIT FROM HOTEL SPECIFIC PROMOTIONS

F1 Cancel Reservation

5.6.1 FIELDS

1) Main

Read Only

a. **Roomstay** – the roomstays associated with the booking.

- The hotel can navigate to the associated roomstays by clicking in the links.
- 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.
- 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.

Check In 5. April 2013 **Check Out** 15. April 2013

Rooms: 2 Double Bed, 1 Adult, 1 Child

Total Price: 720 EUR + €0

Reservation

Alcade Room
Double Bed room with private bathroom. Almost all rooms have balcony. The TV is available in all rooms.

Double Bed - 4/15/2013 to 4/23/2013 (8 Nights)
2 Rooms, 3 Adults, 1 Child **720 EUR + €0**

Room #1: 15 Apr 13, 16 Apr 13, 17 Apr 13, 18 Apr 13, 19 Apr 13, 20 Apr 13, 21 Apr 13, 22 Apr 13
Room #2: 15 Apr 13, 16 Apr 13, 17 Apr 13, 18 Apr 13, 19 Apr 13, 20 Apr 13, 21 Apr 13, 22 Apr 13

STEP 1 - THE GUEST SELECTS THE DATES, TWO ROOMS AND ALSO FILLS THE RATE, Nº OF ADULTS AND CHILDREN.

Check In 5. April 2013 **Check Out** 15. April 2013

Rooms: 2 Double Bed, 1 Adult, 1 Child

Total Price: 648 EUR + €0

Reservation

Alcade Room
Double Bed room with private bathroom. Almost all rooms have balcony. The TV is available in all rooms.

Double Bed - 4/15/2013 to 4/23/2013 (8 Nights)
2 Rooms, 3 Adults, 1 Child **648 EUR + €0**

STEP 2 - THE GUEST FILLS THE DISCOUNT CODE AND CLICKS "APPLY DISCOUNT". HE CONFIRMS THE AMOUNTS AND CLICKS THE "RESERVATION" BUTTON.

Booking
Hotel Alcade
Hotel Alcade, Rua do Vau, 8500-020 Portimão, Portugal

Check In Monday, April 15, 2013
Check Out Tuesday, April 23, 2013
8 Nights, 2 Rooms, 3 Adults, 1 Child

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 do Vau, 8500-020 Portimão, Portugal
City: Lisboa
Post Code: 1600

STEP 3 - THE GUEST FILLS THE REQUESTED BOOKING DATA, INCLUDING THE CREDIT CARD DATA. ACCEPTS THE TERMS AND CLICKS THE "MAKE RESERVATION" BUTTON.

Reservation
Hotel Alcade
Hotel Alcade, Rua do Vau, 8500-020 Portimão, Portugal

Voucher
4EACFF5468BA4D2B
Hotel Alcade - Res. #2094
Reservation #2094 - 4/15/2013 to 4/23/2013
Check In: Monday, April 15, 2013
Check Out: Tuesday, April 23, 2013
8 Nights, 2 Rooms, 3 Adults, 1 Child
For: Room #1 - Double Bed, 2 Adults, 1 Child
Room #2 - Double Bed, 1 Adult, 1 Child
Total Amount: 648.00 EUR
room in the 2nd floor with sea view, non smoking room please.

Guest Data
Name: Miguel Ribeiro
Email: hotelasp@hotelasp.com

Guest Site
Username: 02094
Password: 02094
Bookings: 02094
Non Bookings: 02094
Voucher: 02094

STEP 4 - THE GUEST RECEIVES BY EMAIL A VOUCHER CONFIRMING THE RESERVATION.

Hotel Alcade - Guests

Sign In
Email:
Password:
☐ Remember me on this computer
Sign In
[Forgot my password](#)

STEP 5 - THE GUEST GOES TO HIS PRIVATE WEB SITE AND USE THE USERNAME AND PASSWORD PROVIDED IN THE VOUCHER.

Hotel Alcade - Guests

Search Bookings
Title:
ID:
Date: Date: N° of Nights: Total amount: Booking Status: Voucher Code:
Displaying items 1 to 1 from 1

STEP 6 - CONFIRMS THE STATUS OF BOOKING

Reservation
Hotel Alcade
Hotel Alcade, Rua do Vau, 8500-020 Portimão, Portugal

Voucher
4EACFF5468BA4D2B
Hotel Alcade - Res. #2094
Reservation #2094 - 4/15/2013 to 4/23/2013
Check In: Monday, April 15, 2013
Check Out: Tuesday, April 23, 2013
8 Nights, 2 Rooms, 3 Adults, 1 Child
For: Room #1 - Double Bed, 2 Adults, 1 Child
Room #2 - Double Bed, 1 Adult, 1 Child
Total Amount: 648.00 EUR
room in the 2nd floor with sea view, non smoking room please.

Guest Data
Name: Miguel Ribeiro
Email: hotelasp@hotelasp.com

STEP 7 - CHECKS THE VOUCHER

Hotel Alcade

Check In 5. April 2013 **Check Out** 15. April 2013

Rooms: 2 Double Bed, 1 Adult, 1 Child

Total Price: 648 EUR + €0

Reservation

Alcade Room
Double Bed room with private bathroom. Almost all rooms have balcony. The TV is available in all rooms.

Double Bed - 4/15/2013 to 4/23/2013 (8 Nights)
2 Rooms, 3 Adults, 1 Child **648 EUR + €0**

STEP 8 - STARTS A NEW BOOKING INSIDE HIS PRIVATE WEB SITE

Hotel Alcade - Operations

Search Bookings
Title:
ID:
Date: Date: N° of Nights: Total amount: Booking Status: Voucher Code:
Displaying items 1 to 1 from 1

Reservation
Hotel Alcade
Hotel Alcade, Rua do Vau, 8500-020 Portimão, Portugal

Voucher
4EACFF5468BA4D2B
Hotel Alcade - Res. #2094
Reservation #2094 - 4/15/2013 to 4/23/2013

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

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

Rooms

Double Bed

▼

Double Bed

▼

2 ROOMS

Nº Adults

2

▼

1

▼

0

▼

0

▼

0

▼

0

▼

Nº of Children

1

▼

1

▼

0

▼

0

▼

0

▼

0

▼

0-2 Years

1

▼

1

▼

0

▼

0

▼

0

▼

0

▼

3-12 Years

1

▼

1

▼

0

▼

0

▼

0

▼

0

▼

CHECK IN DATE

Apply

CHECK OUT DATE

Total Price: 720 EUR

Reservation

Alcaide Room

Double Bed room with private bathroom. Almost all rooms have balcony. The TV is available in all rooms.

Room #1

15 Apr

50

Room #1

16 Apr

50

Room #1

17 Apr

50

Room #1

18 Apr

50

Room #1

19 Apr

50

Room #1

20 Apr

50

Room #1

21 Apr

50

Room #1

22 Apr

50

Room #2

15 Apr

40

Room #2

16 Apr

40

Room #2

17 Apr

40

Room #2

18 Apr

40

Room #2

19 Apr

40

Room #2

20 Apr

40

Room #2

21 Apr

40

Room #2

22 Apr

40

Double Bed - 4/15/2013 to 4/23/2013 (8 Nights)

2 Rooms, 3 Adults, 2+1 Children

720 EUR

Double Bed room with private bathroom. Almost all rooms have balcony. The TV is available in all rooms.

STEP 2

GUEST APPLY A DISCOUNT CODE

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

Rooms

Double Bed

▼

Double Bed

▼

2 ROOMS

Nº Adults

2

▼

1

▼

0

▼

0

▼

0

▼

Nº of Children

1

▼

1

▼

0

▼

0

▼

0

▼

0

▼

Discount Code

HALC10

Apply Discount

Total Price: 720.00 EUR 648 EUR

Reservation

Alcaide Room

Double Bed room with private bathroom. Almost all rooms have balcony. The TV is available in all rooms.

Room #1

15 Apr

50.00

45

Room #1

16 Apr

50.00

45

Room #1

17 Apr

50.00

45

Room #1

18 Apr

50.00

45

Room #1

19 Apr

50.00

45

Room #1

20 Apr

50.00

45

Room #1

21 Apr

50.00

45

Room #1

22 Apr

50.00

45

Room #2

15 Apr

40.00

36

Room #2

16 Apr

40.00

36

Room #2

17 Apr

40.00

36

Room #2

18 Apr

40.00

36

Room #2

19 Apr

40.00

36

Room #2

20 Apr

40.00

36

Room #2

21 Apr

40.00

36

Room #2

22 Apr

40.00

36

Double Bed - 4/15/2013 to 4/23/2013 (8 Nights)

2 Rooms, 3 Adults, 2+1 Children

720.00 EUR 648 EUR

Double Bed room with private bathroom. Almost all rooms have balcony. The TV is available in all rooms.

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
	8 Nights, 2 Rooms, 3 Adults, 3 Children
For	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 1º 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]

Hotel Alcaide - Guests

GUEST PRIVATE SITE

Sign In

Email

Password

☐ Remember me on this computer

[I forgot my password](#)

Website |

HOTEL PUBLIC SITE

GUEST USES THIS CREDENTIALS TO ACCESS THE GUEST SITE

Guest Site

UserName	G2094
Password	2094

[Bookings](#)
[New Booking](#)
[View Booking](#)

STEP 6

GUEST CONFIRMS THE BOOKING STATUS [GUEST SITE]

Hotel Alcaide - Guests

VIEW BOOKING PAGE

G2094 | [Website](#) | [Sign out](#) | [Help](#)

[Bookings](#) | [New Booking](#)

Search Bookings

ID	Date in	Date out	Nº of Nights	Total amount	Reservation Amount	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

English

©2012 v3.0.25.40912 (0.07s)

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 Amount	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](#) |

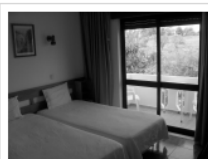
[Bookings](#) [New Booking](#)

Create reservation

Check In							Check Out						
April 2013							April 2013						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6	31	1	2	3	4	5	6
7	8	9	10	11	12	13	7	8	9	10	11	12	13
14	15	16	17	18	19	20	14	15	16	17	18	19	20
21	22	23	24	25	26	27	21	22	23	24	25	26	27
28	29	30	1	2	3	4	28	29	30	1	2	3	4
5	6	7	8	9	10	11	5	6	7	8	9	10	11

GUEST IS AUTHENTICATED. THE GUEST DATA IS AUTOMATICALLY FILLED BY THE SYSTEM. SAVING TIME FOR THE GUEST AND THE HOTEL AVOIDS DUPLICATION OF DATA.

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** + €

Rooms Available

Double Bed room with private bathroom. Almost all rooms have balcony. The TV is available in all rooms.

17 Apr
40

[Reservation](#)

STEP 9
HOTEL VALIDATES THE CREDIT CARD DATA [HOTEL PRIVATE SITE]
Hotel Alcaide - Operations
HOTEL SALES

 Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |

[Links](#) | [Marketing](#) | [Sales](#) | [Operations](#) | [Calendar](#) | [Reports](#) | [Property](#)
[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	Miguel Ribeiro	648.00	0.00	72.00	HALC10	4EACFF546BBA44D28
16624						

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

**PROMOTION
DATA**
**STEP 1
HOTEL FILLS ACCESS
PASSWORD DEFINED IN
THE MAIN PROPERTIES
PAGE OF THE HOTEL**
**STEP 3
HOTEL VIEWS CREDIT
CARD DATA**

Completed

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.

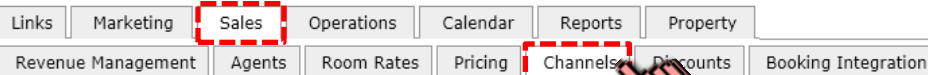
The hotel must set the credentials in the SET HOTEL MAIN PROPERTIES page for this page to be able to connect with the channel manager and get the orders.

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 as **"Confirmed"** and the orders that are still without a roomstay associated are classified as **"Waiting"** or **"Non confirmed"**.

Page Location

Hotel Alcaide - Operations

Hotelalcaide | Account | Website | Sign out |



Page Description

Filter

S	R.	Channel	Order	Order nº	Check In	Check Out	Name	Nights	Persons	Amount
	17102	Booking.com	Double or Twin Room - Non-re	791685950	2/20/2013	2/22/2013		2	2	166.00
	17102	Booking.com	Double or Twin Room - Non-re	334556064	1/28/2013	2/3/2013		6	1	435.00
	17105	Booking.com	Double or Twin Room - Non-re	298049835	1/26/2013	1/27/2013		1	1	68.00
	17112	Booking.com	Double or Twin Room - Non-re	184063195	1/28/2013	2/14/2013		5	1	726.00
	17112	Booking.com	Double or Twin Room with Kit	428152915	2/13/2013	2/14/2013		1	0	122.00

Displaying items 1 to 5 from 100

ORDER NOT CONFIRMED BY HOTEL

ORDER CONFIRMED BY HOTEL

BOOKING ORDERS FROM EXTERNAL CHANNELS
(BOOKING.COM, VENERE.COM, ETC)

BOOKING CHANNELS

ORDER CONFIRMED AND ASSOCIATED TO ROOMSTAY

Channel Order | Roomstays | Voucher

Channel	Order	Order nº	City	Country	ORDER STATUS
Booking.com	Double or Twin Room - Non-refundable - Single Use	334556064			OK
Name	Last name	Nº Adults	Nº Child	Nº Child	Add
	ANDRE	1	1	0	
Contact	Roomstay	Guest n°	Roomstay	Status	
	COM			OK	
Agent nº	Room Rate	Date in	Date of	Room	Total R
BOOKING.COM		01/28/2013	02/03/2013		435.00
					Nº of Nights
					2139

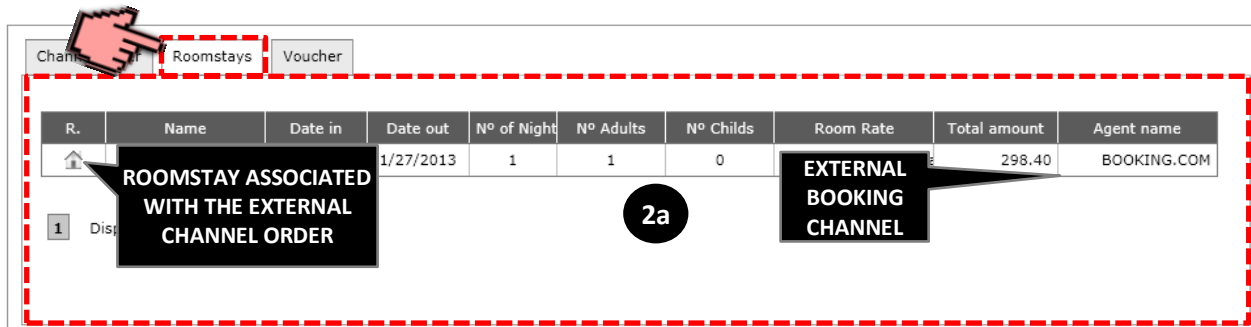
EXTERNAL BOOKING CHANNEL

ORDER DESCRIPTION

ORDER STATUS

1a Channel **1b** Order **1c** Order nº **1d** City **1e** Country **1f** Name **1g** Last name **1h** Nº Adults **1i** Nº Child **1j** Nº Child **1k** Add **1l** Contact **1m** Roomstay **1n** Guest n° **1o** Roomstay **1p** Status **1q** **1r** **1s** **1t** Agent nº **1u** Room Rate **1v** Date in **1w** Date of **1x** Room **1y** Total R **1z** Nº of Nights **1aa** Reservation nº

F1 Import orders **F2** Create reservation **F3** Delete order



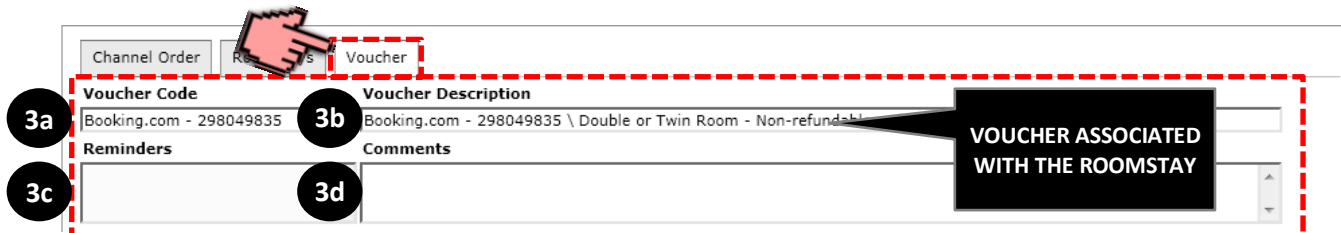
Channel Order Roomstays Voucher

R.	Name	Date in	Date out	Nº of Night	Nº Adults	Nº Childs	Room Rate	Total amount	Agent name
1	Dis...		1/27/2013	1	1	0		298,40	BOOKING.COM

ROOMSTAY ASSOCIATED WITH THE EXTERNAL CHANNEL ORDER

EXTERNAL BOOKING CHANNEL

2a



Channel Order Roomstays Voucher

3a Voucher Code: Booking.com - 298049835

3b Voucher Description: Booking.com - 298049835 \ Double or Twin Room - Non-refundable

3c Reminders

3d Comments

VOUCHER ASSOCIATED WITH THE ROOMSTAY

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.
- t. **Agent nº** - the agent associated with the roomstay.
 - i. The hotel should review this data before creating the reservation.
- u. **Room rate** – the room rate associated with the roomstay.
 - i. The hotel should review this data before creating the reservation.
- 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.
- 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.

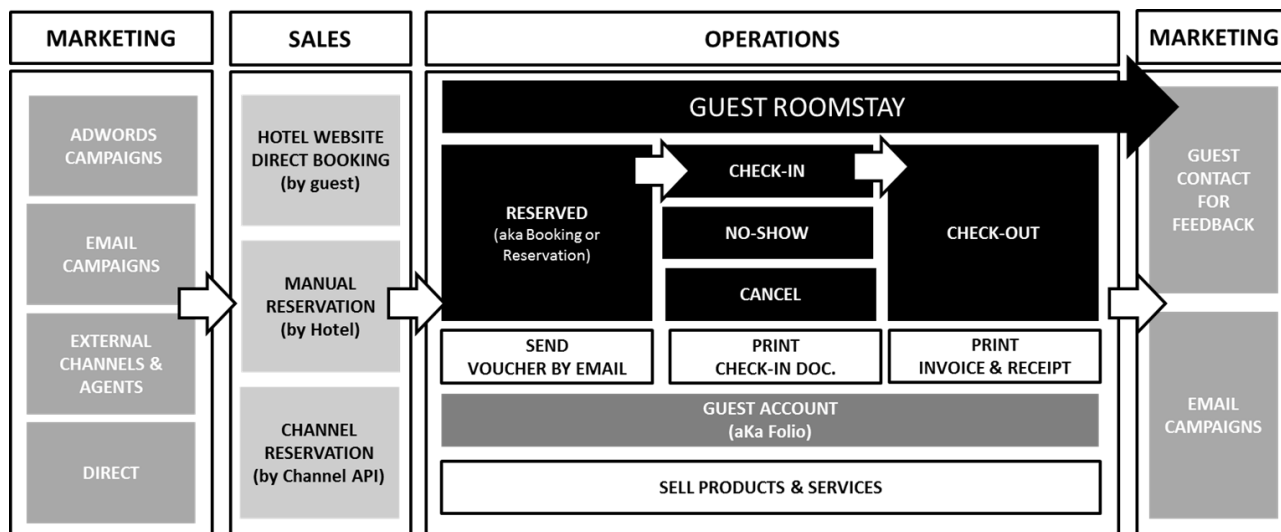


Figure 70 - HotelASP Operations

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.

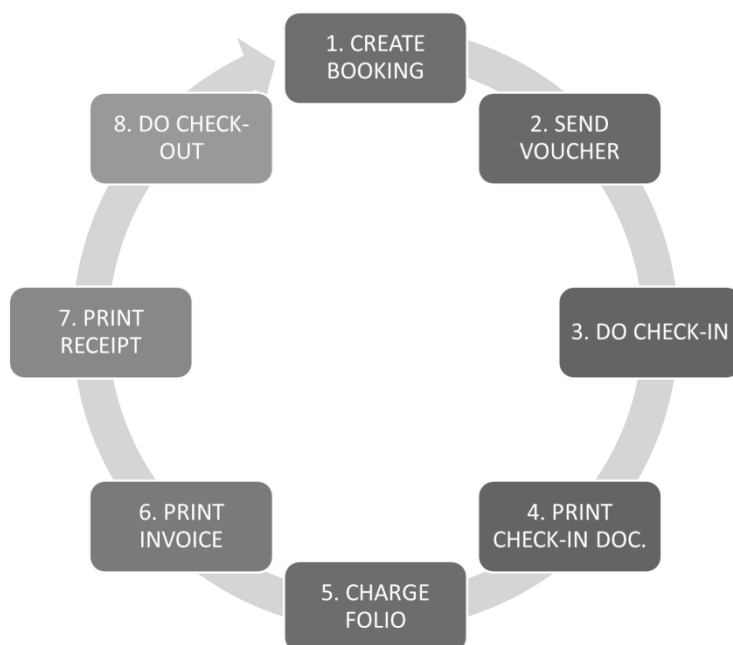


Figure 71 - Roomstay Life Cycle

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.

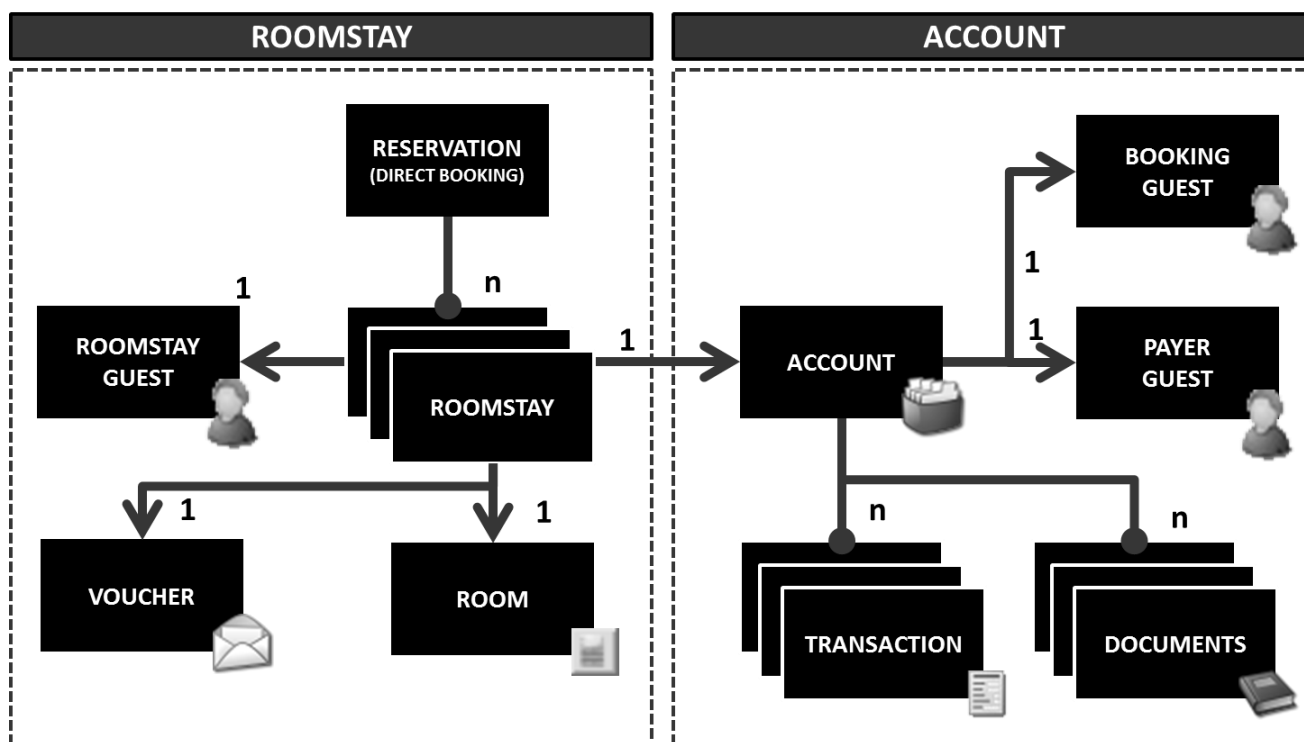


Figure 73 - Operations Data Model

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.

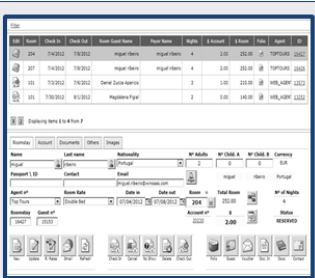
The hotel has also specific documents for each stage of the guest life cycle. The figure below shows the main reports available:

GUEST REPORTS	HOTEL REPORTS
<ul style="list-style-type: none">• RESERVED - <i>GUEST BOOKS</i><ul style="list-style-type: none">• VOUCHER DOCUMENT• CHECK-IN - <i>GUEST ARRIVES AND STAYS IN HOTEL</i><ul style="list-style-type: none">• CHECK-IN DOCUMENT• DRAFT INVOICE DOC. & DRAFT RECEIPT DOC.• CHECK-OUT - <i>GUEST LEAVES THE HOTEL</i><ul style="list-style-type: none">• FINAL INVOICE DOC.• FINAL RECEIPT DOC.• FINAL CREDIT NOTE DOC. & REFUND NOTE DOC.	<ul style="list-style-type: none">• <i>ACCOUNTING REPORTS</i>• <i>ROOMSTAY REPORTS</i>• <i>FOLIO REPORTS</i>• <i>GUEST REPORTS</i>

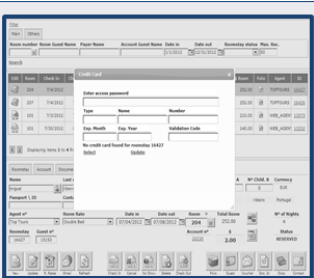
Figure 74 – HotelASP Operations: Main Reports

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.

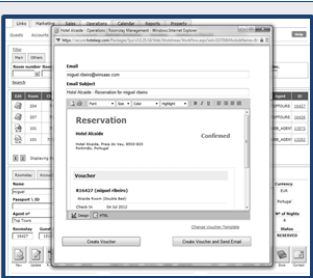
The roomstay life cycle starts with the booking creation and it ends with the check-out as shown below.



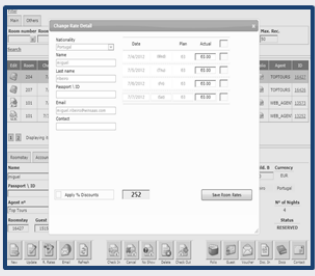
1. FILL THE GUEST DATA



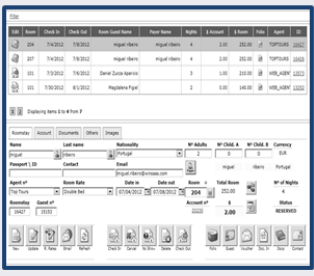
2. FILL THE BOOKING DATA




3. CLICK "NEW". IN VOUCHER POPUP CLICK "CREATE VOUCHER"



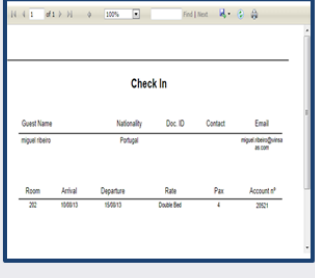
4. CLICK "CHANGE RATE DETAIL". CHANGE THE DAY RATES AND CLICK "UPDATE"



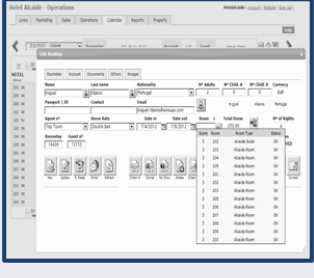
5. CHANGE CONTACT. CLICK "UPDATE"



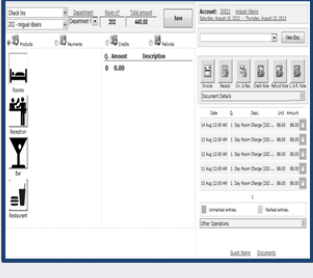
6. CLICK "CHECK IN"



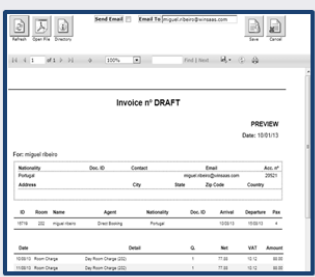
7. CLICK "DOC. IN". PRINT THE CHECK IN DOCUMENT



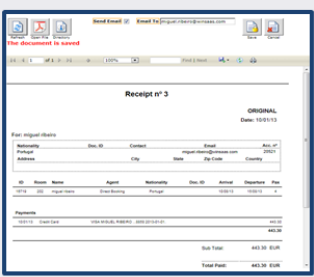
8. CHANGE ROOM AND CLICK "UPDATE"




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.

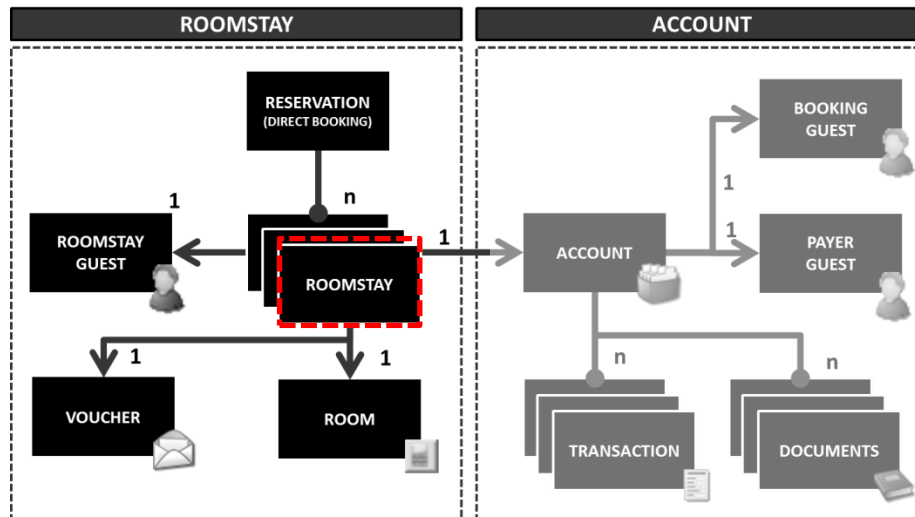


Figure 76 - Roomstay Model

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

Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |

[Links](#) | [Marketing](#) | [Sales](#) | [Operations](#) | [Calendar](#) | [Reports](#) | [Property](#)

Page Description

Filter

Edit	Room	Check In	Check Out	Room Guest Name	Payer Name	Nights	\$ Account	\$ Room	Folio	Agent	ID
	204	7/4/2012	7/8/2012	miguel ribeiro	miguel ribeiro	4	2.00	252.00		TOPTOURS	16427
	204	7/4/2012	7/8/2012	miguel ribeiro	miguel ribeiro	4	2.00	252.00		TOPTOURS	16426
	101	7/6/2012	7/6/2012	Daniel Zucca Aparicio		3	1.00	210.00		WEB_AGENT	13573
	101	7/30/2012	8/1/2012	Magdalena Figiel		2	0.00	140.00		WEB_AGENT	13252

1 2

Displaying items 1 to 4 from 7

Roomstay

Account

Documents

Others

Images

ROOMSTAY

1a

1b

1c

1d

1e

1f

1g

1h

1i

1j

1k

1l

1m

1n

1o

1p

1q

1r

1s

1t

1u

1v

1w

New

Update

R. Rates

Email

Refresh

Check In

Cancel

No Show

Delete

Check Out

Folio

Guest

Voucher

Doc. In

Docs

Contact

F1

F2

F3

F4

F5

F6

F7

F8

F9

F10

F11

F12

F13

F14

F15

F16

Roomstay

Account

Documents

Others

Images

ACCOUNT

2a

2b

2c

2d

2e

2f

2g

2a

2b

2c

2d

2e

2f

2g

Edit

Trx. date

Description

Amount

Tax Amount

Tax Rate

P&S

Department

IV

RC

CN

RF

1078479

1/1/2013

Water

1.00

0.19

IVA 23%

Water

Department 1

1078478

1/1/2013

Beer

1.00

0.19

IVA 23%

Beer

Department 1

1

Displaying items 1 to 2 from 2

F24

Reopen account

F25

Close account

Roomstay
Documents
Others
Images

DOCUMENTS

Doc.	Payer Name	Doc. type	Doc. id.	Status	Amount	D	C	T	Q	I	F26
	miguel ribeiro	Invoice	7	DUPLICATE	2.00	2.00	0.00	0.38	2	2	

1
Displaying items 1 to 1 from 1
3a

Roomstay
Account
Documents
Others
Images

OTHERS

4a
Voucher Code
4b
Voucher Description

4c
Reminders
4d
Comments

Roomstay
Account
Documents
Images

IMAGES

Doc. Image 1

Browse...

Doc. Image 2
5a

Browse...
F27

Doc. Image 3

Browse...

6.1.1 FIELDS

1) Roomstay

- Required** a. **Name** – the guest first name.
- The guest associated with the roomstay.
 - 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.
- 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.
- The children are divided in two generic groups, namely group A and group B.
 - 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.
- Read the SET HOTEL MAIN PROPERTIES chapter for the children type definition.

Read Onlyg. **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.

Requiredk. **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.

Requiredl. **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 Onlyq. **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 n°** – 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 n°** – 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

Room number: Search

Entity: Name: Email: Passport \ ID: Nationality: Entity:

**STEP 1
SELECT THE GUEST**

Entity	Name	Email	Passport \ ID	Nationality
15153	miguel ribeiro	miguel.ribeiro@winsaas.com		Portugal
15154	Web Agent Entity	miguel.ribeiro@winsaas.com		United States of America
15200		as.com		Portugal
16189	miguel	@netca		Portugal
16190	miguel ribeiro	miguel.ribeiro@netcabo.pt		Portugal

1 2 3 4 5 Displaying items 1 to 5 from 21

**STEP 2
VERIFY GUEST INFO**

Name: miguel Last name: ribeiro Nationality: Portugal Guest n°: 15153

**STEP 3
SELECT THE GUEST AND IN ROOMSTAY PAGE PRESS "UPDATE" TO SAVE IN THE DATABASE**

Select Account Payer Guest

New Update R. Rates Email Refresh Check In Cancel No Show Delete Check Out Folio Guest Voucher Doc. In Docs Contact

F18

CHANGE DAY RATES

Room number: Search

**STEP 1
VERIFY ROOMSTAY INFO**

Nationality: Portugal

Name: miguel Last name: ribeiro Passport \ ID: Email: miguel.ribeiro@winsaas.com Contact:

**STEP 2
APPLY DISCOUNTS TO ALL CELLS IF NEEDED**

☐ Apply % Discounts 252

Date	Plan	Actual
7/4/2012 (Wed)	63	63.00
7/5/2012 (Thu)	63	63.00
7/6/2012 (Fri)	63	63.00
7/7/2012 (Sat)	63	63.00

**STEP 3
REVIEW DAY RATES**

**STEP 4
VERIFY TOTAL**

**STEP 5
SAVE DAY RATES**

Save Room Rates

New Update R. Rates Email Refresh Check In Cancel No Show Delete Check Out Folio Guest Voucher Doc. In Docs Contact

F19
VIEW CREDIT CARD INFORMATION

Room number	Room	Guest Name	Payer Name	Account	Guest Name	Date in	Date out	Roomstay status	Max. Rec.
						1/1/2012	12/31/2012		50

Search

Edit	Room	Check In	Check Out
	204	7/4/2012	
	207	7/4/2012	
	101	7/3/2012	
	101	7/30/2012	

1 2 Displaying items 1 to 4 from 4

Credit Card [X]

Enter access password

Type

Name

Number

Exp. Month

Exp. Year

Validation Code

No credit card found for roomstay 16427

Select Update

STEP 2
PRESS SELECT TO READ THE CC DATA USING THE ACCESS PASSWORD

STEP 3
UPDATE THE CC DATA IF NEEDED

A	Nº Child.	B	Currency
	0		EUR
	ribeiro		Portugal

Nº of Nights: 4

Status: RESERVED

Roomstay	Guest n°	Rate	Date in	Date out	Room	Amount	Account n°	Amount
16427	15153	Double Bed	07/04/2012	07/08/2012	204	252.00	20230	2.00

New Update R. Rates Email Refresh

Check In Cancel No Show Delete Check Out

Folio Guest Voucher Doc. In Docs Contact

F21
CHANGE THE ACCOUNT OF THE ROOMSTAY

Search Accounts [X]

Main Others

Room	Guest Name	Payer Name	Room number	Date in	Date out

Search

Edit	Room	Guest Name	Payer Name	Date in	Date out	Amount	Tax Amount	Status	
	20230	207	miguel ribeiro	miguel ribeiro	7/4/2012	7/8/2012	2.00	0.38	OPEN
	20230	204	miguel ribeiro	miguel ribeiro	7/4/2012	7/8/2012	2.00	0.38	OPEN
	17623	101	Daniel Zucca Aparicio		7/3/2012	7/6/2012	1.00	24.34	
	18769						0.00	0.00	
	18739						0.00	0.00	

1 2 3 4 Displaying items 1 to 5 from 19

STEP 1
SELECT THE ACCOUNT

STEP 2
VERIFY ACCOUNT INFO

Account n°	Amount	Tax Amount	Status
20230	2.00	0.38	OPEN

STEP 3
CONFIRM THE ACCOUNT AND IN ROOMSTAY PAGE PRESS "UPDATE" TO SAVE IN THE DATABASE

Payer ID: 15153

CN RF

Select Account

Close account

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Last Revision
2013-01-26

F22
CHANGE GUEST ASSOCIATED WITH THE ACCOUNT

Room number

Search

Edit Room

Roomstay

Account n°

20230

Edit

1078479

1078478

1 Displaying items 1 to 2 from 2

Reopen account

Search Entities

Name	Email	Passport \ ID	Nationality	Entity
15153	miguel ribeiro	miguel.ribeiro@winsaas.com		Portugal
15154	Web Agent Entity	mrribeiro@winsaas.com		United States of America
15200	m m	sales@winsaas.com		Portugal
16189	miguel ribeiro	miguel.ribeiro_wrong@netca		
16190	miguel ribeiro	miguel.ribeiro@netcabo.pt		

1 2 3 4 5 Displaying items 1 to 5 from 21

Name	Last name	Nationality	Guest n°
Web Agent	Entity	United States of America	15154

1 2 3 4 5 Displaying items 1 to 2 from 2

Select Account Guest Owner

STEP 1
SELECT THE GUEST

STEP 2
VERIFY GUEST INFO

STEP 3
CONFIRM THE GUEST AND IN
ROOMSTAY PAGE PRESS "UPDATE"
TO SAVE IN THE DATABASE

Close account

Request Executed - 1/8/2013 9:33:49 AM (0.03s)

F6
CHECK IN – STEP 1

Room number

Room Guest Name

Payer Name

Account Guest Name

Date in

1/1/2012

Date out

12/31/2012

Roomstay status

Max. Rec.

50

Search

Edit Room

204

7/4/2012

7/8/2012

207

7/4/2012

7/8/2012

101

7/4/2012

7/8/2012

101

7/4/2012

7/8/2012

1 2 Displaying items 1 to 4 from 7

Roomstay

Account

Name

miguel

Passport \ ID

Contact

Agent n°

Top Tours

Room Rate

Double Bed

Date in

07/04/2012

Date out

07/08/2012

Room

204

Roomstay

Guest n°

16427

15153

Check In

Confirm

Options

Reserved: 7/4/2012 - 7/8/2012

Confirm Guest Check In

Confirm

Confirm

STEP 1
VERIFY STATUS

STEP 2
CONFIRM CHECK-IN

Amount	\$ Room	Folio	Agent	ID
2.00	252.00	TOPTOURS	16427	
2.00	252.00	TOPTOURS	16426	
1.00	210.00	WEB_AGENT	13573	
0.00	140.00	WEB_AGENT	13252	

N° Child. A	N° Child. B	Currency
0	0	EUR
miguel	ribeiro	Portugal

Total Room	N° of Nights	Status
252.00	4	RESERVED
2.00		

New

Update

R. Rates

Email

Refresh

Check In

Cancel

No Show

Delete

Check Out

Folio

Guest

Voucher

Doc. In

Docs

Contact

F6
CHECK IN – STEP 2

Room number	Room	Guest Name	Payer Name	Account Guest Name	Date in	Date out	Roomstay status	Max. Rec.
					1/1/2012	12/31/2012		50

STEP 1
VERIFY STATUS

STEP 2
NAVIGATE TO FOLIO OR CHECK IN REPORT

STEP 3
CLOSE POPUP

Edit	Room	Check In	Check Out	Room	Rate	Roomstay status	Max. Rec.
	204	7/4/2012	7/8/2012	204	252.00	TOPTOURS	16427
	207	7/4/2012	7/8/2012	207	252.00	TOPTOURS	16426
	101	7/4/2012	7/8/2012	101	210.00	WEB_AGENT	13573
	101	7/4/2012	7/8/2012	101	140.00	WEB_AGENT	13252

Guest Information:

Name: miguel ribeiro
 Check In: 7/4/2012 - 7/8/2012
 Update Guest Folio
 View Check In Report

Room Information:

Room: 204
 Rate: Double Bed
 Date in: 07/04/2012
 Date out: 07/08/2012
 Roomstay: 16427
 Guest n°: 15153
 Account n°: 20230

Summary:

Total Room: 252.00
 \$ 2.00
 N° of Nights: 4
 Status: RESERVED

New Update R. Rates Email Refresh

Check In Cancel No Show Delete Check Out

Folio Guest Voucher Doc. In Docs Contact

10
CHECK OUT – STEP 1

Room number	Room	Guest Name	Payer Name	Account Guest Name	Date in	Date out	Roomstay status	Max. Rec.
					1/1/2012	12/31/2012		50

STEP 1
VERIFY STATUS

STEP 2
CONFIRM CHECK-OUT

Confirm CheckOut

Edit	Room	Check In	Check Out	Room	Rate	Roomstay status	Max. Rec.
	204	7/4/2012	7/8/2012	204	252.00	TOPTOURS	16427
	207	7/4/2012	7/8/2012	207	252.00	TOPTOURS	16426
	101	7/4/2012	7/8/2012	101	210.00	WEB_AGENT	13573
	101	7/4/2012	7/8/2012	101	140.00	WEB_AGENT	13252

Guest Information:

Name: miguel ribeiro
 Check In: 7/4/2012 - 7/8/2012
 Confirm CheckOut

Room Information:

Room: 204
 Rate: Double Bed
 Date in: 07/04/2012
 Date out: 07/08/2012
 Roomstay: 16427
 Guest n°: 15153
 Account n°: 20230

Summary:

Total Room: 252.00
 \$ 2.00
 N° of Nights: 4
 Status: CHECK_IN

New Update R. Rates Email Refresh

Check In Cancel No Show Delete Check Out

Folio Guest Voucher Doc. In Docs Contact

F10
CHECK OUT – STEP 2

Room number	Room	Guest Name	Payer Name	Account Guest Name	Date in	Date out	Roomstay status	Max. Rec.
					1/1/2012	12/31/2012		50

Search

Edit	Room	Check In	Check Out
	204	7/4/2012	7/8/2012
	207	7/4/2012	7/8/2012
	101		
	101		

CheckOut

Confirm Options

**STEP 1
VERIFY STATUS**

miguel ribeiro
Check Out: 7/4/2012 - 7/8/2012

Room	Rate	Tax	Total	Agent	ID
2.00	252.00			TOPTOURS	16427
2.00	252.00			TOPTOURS	16426
1.00	210.00			WEB_AGENT	13573
0.00	140.00			WEB_AGENT	13252

Nº Child. A	Nº Child. B	Currency
0	0	EUR
miguel	ribeiro	Portugal

Name	Last name
miguel	ribeiro

Passport \ ID	Contact

Agent nº	Room Rate	Date in	Date out	Room
Top Tours	Double Bed	07/04/2012	07/08/2012	204

Total Room	Nº of Nights
252.00	4

Roomstay	Guest nº
16427	15153

Account nº	Status
20230	CHECK_IN

New Update R. Rates Email Refresh

Check In Cancel No Show Delete Check Out

Folio Guest Voucher Doc. In Docs Contact

F22
SEND CONFIRMATION TO THE GUEST

**STEP 1
VERIFY EMAIL**

**STEP 2
VERIFY EMAIL
SUBJECT**

**STEP 3
VERIFY VOUCHER**

**STEP 4
CREATE VOUCHER
BUT DON'T SEND
EMAIL**

Hotel Alcaide - Operations | Roomstay Management - Windows Internet Explorer

https://secure.hotelasp.com/Packages/Sys/v3.0.25/UI/Web/WorkAreas/Workflow.aspx?aid=10378&ModuleName=80

Guests Accounts

Email: miguel.ribeiro@winsaas.com

Email Subject: Hotel Alcaide - Reservation for miguel ribeiro

Reservation

Hotel Alcaide

Hotel Alcaide, Praia do Vau, 8500-820
Portimão, Portugal

Confirmed

Voucher

R16427 (miguel ribeiro)

Alcaide Room (Double Bed)

Check In: 04 Jul 2012

Design HTML

Change Voucher Template

Create Voucher

Create Voucher and Send Email

**STEP 5
CHANGE VOUCHER
TEMPLATE**

**STEP 4
CREATE VOUCHER
AND SEND EMAIL**

**STEP 6
CLOSE POPUP**

Agent	ID
TOPTOURS	16427
TOPTOURS	16426
WEB_AGENT	13573
WEB_AGENT	13252

F27

ASSOCIATE PICTURE FROM WEBCAM TO ROOMSTAY

**STEP 1
ENABLE CAMERA**

**STEP 2
TAKE PICTURE**

**STEP 3
UPLOAD PICTURE**

**STEP 4
ASSOCIATE UPLOADED PICTURE TO ROOMSTAY AND IN THE ROOMSTAY PAGE PRESS "UPDATE" TO SAVE THE PICTURE IN THE DATABASE**

BRIEF INSTRUCTIONS
Steps: 1.Enable Camera 2.Take Picture 3.Upload Picture 4.Associate Picture 5.Update

Room	Folio	Agent	ID
252.00	TOPTOURS	16427	
252.00	TOPTOURS	16426	
210.00	WEB_AGENT	13573	
140.00	WEB_AGENT	13252	

F28

SELECT ROOMS & ALLOCATION SCORE

THE ROOMSTAY VIEW CAN ALSO BE ACCESSED FROM THE CALENDAR VIEW

THE ROOM LIST IS FILTERED BY THE CONTENT OF THE ROOM FIELD

**STEP 1
CLICK ROOM BUTTON SELECTION**

ROOM LIST

ROOM ALLOCATION SCORE
THE SYSTEM RECOMMENDATIONS FOR THE ROOMS THAT OPTIMIZE THE ROOM ALLOCATION.
HIGHEST SCORE → BETTER ALLOCATION

**STEP 2
SELECT ROOM BY CLICKING THE ROW**

Score	Room	Room Type	Status
3	102	Alcaide Suite	OK
3	103	Alcaide Room	OK
3	104	Alcaide Room	OK
3	105	Alcaide Room	OK
3	201	Alcaide Room	OK
3	202	Alcaide Room	OK
3	203	Alcaide Room	OK
3	205	Alcaide Room	OK
3	206	Alcaide Room	OK
3	207	Alcaide Room	OK
3	208	Alcaide Room	OK
3	209	Alcaide Room	OK
3	210	Alcaide Room	OK

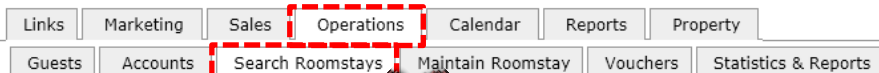
6.2 EXPRESS CHECK-IN & CHECK-OUT

This page allows the hotel to quickly process the guest check in and check outs.

Page Location

Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |



Page Description

Main Others

Room number Room Guest Name Payer Name Account Guest Name Date in Date out Roomstay status Max. Rec.

Search

SELECTED ROW

Rooms	Room	Date in	Date out	Room Guest Name	Payer Name	Nights	Persons	Childs	\$ Account	\$ Room	Folio	gent
	204	7/4/2012	7/8/2012	miguel ribeiro	miguel ribeiro	4	2	0	2.00	252.00		PTOU
	207	7/4/2012	7/8/2012	miguel ribeiro	miguel ribeiro	4	2	0	2.00	252.00		PTOU
	101	7/3/2012	7/6/2012	Daniel Zucca Aparicio		3	2	0	1.00			G
	101	7/30/2012	8/1/2012	Magdalena Figiel		2	2	0	0.00	140.00		WEB_AG
	101	5/21/2012	5/22/2012	Magdalena Figiel		1	2	0	0.00	45.00		WEB_AG
	101	6/16/2012	6/23/2012	Corinne & Richard KRIZ		7	2	0	315.00	315.00		WEB_AG
	101	5/1/2012	5/2/2012	miguel ribeiro		1	2	0	40.00	40.00		WEB_AG
									360.00	1,254.00		

EXPORT DATA TO EXCEL OR CSV

BASIC DATA AND LINKS LOADED AND CONFIGURED FOR THE SELECTED ROW

1 Displaying items 1 to 7 from 7

1a Roomstay 1b Entity 15c account nº 202d beiro miguel

F1 Operation Details F2 Check in F3 Check out F4 Folio F5 Guest F6 CheckIn Doc. F7 Account Doc.

6.2.1 FIELDS

1) Main

- Roomstay** – the roomstay id.
- Entity** – the guest id associated with the roomstay.
- Account** – the account id associated with the roomstay.
- Guest name** – the guest name.

6.2.2 FUNCTIONS

- Operation Details** – view the ROOMSTAY MANAGEMENT page associated with the selected row.
- 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.

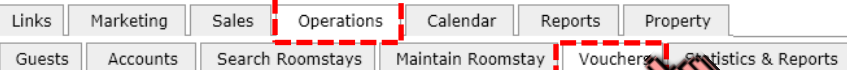
6.3 VOUCHERS

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

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |



Page Description

Search and Update Vouchers

Main Others

Code	Name	Agent nº	Voucher Status	Voucher Type
<input type="text"/>	<input type="text"/>	<input type="text"/>	Active	<input type="text"/>

Search

[xls](#) [csv](#)

Edit	Agent nº	Code	Name	Status	Type	Date
2421	Direct Booking	R14050 (miguel ribeiro)	miguel ribeiro	Active	Standard	7/21/2012
2419	Direct Booking	R14049 (miguel)	miguel	Active	Stand	7/21/2012
2410	Direct Booking	R12114 (miguel ribeiro)	miguel ribeiro	Active		7/21/2012
2406	Direct Booking	R14040 (miguel ribeiro)	miguel ribeiro	Active		7/21/2012
1863	Direct Booking	3485A34A7B2F4FADB	Daniel Zucca Aparicio	Active	Online Reservations	7/3/2012
1555	Direct Booking	E79EF3F79E93498E9	Magdalena Figiel	Active	Online Reservations	7/30/2012
1322	Direct Booking	A64FD10C6CF44830B	Magdalena Figiel	Active	Online Reservations	5/21/2012
949	Direct Booking	6375E056F37C48BEA	Corinne & Richard KRIZ	Active	Online Reservations	6/16/2012
880	Direct Booking	8B37854FD1264D0D8	miguel ribeiro	Active	Online Reservations	5/1/2012
297	Direct Booking	6DEA97C2D29B42BD9	Max de Oliveira	Active	Online Reservations	9/4/2011

1 Displaying items 1 to 10 from 10

1a

1b

1c

Code	Name	Description
R14050 (miguel ribeiro)	miguel ribeiro	Hotel Alcaide - Reservation for miguel ribeiro

1d

1e

1f

1g

1h

Agent nº	Voucher Status	Voucher Type	Reception Date
Direct Booking	Active	Standard	7/21/2012

1i

Comments

miguel.ribeiro@netcabo.pt

F1

F2

Update Delete

6.3.1 FIELDS

1) Main

Requireda. **Code** – the voucher unique code.**Public****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.

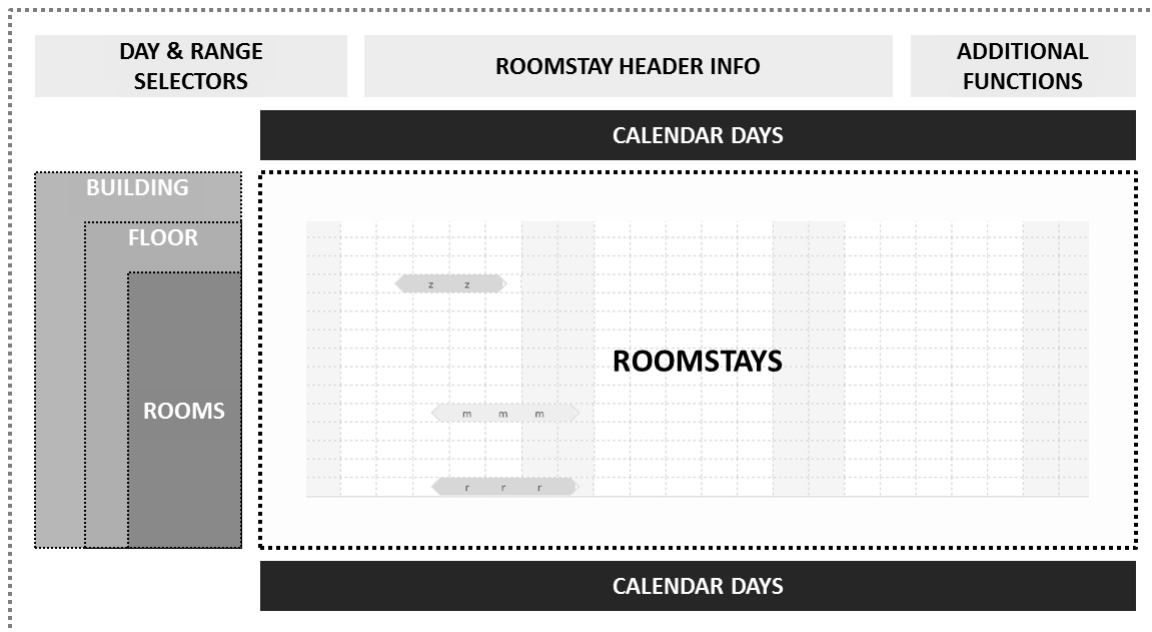


Figure 79 – Calendar Layout

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

Hotel Alcaide - Operations

Hotelalcaide | Account | Website | Sign out |

Links | Marketing | Sales | Operations | **Calendar** | Reports | Property

Page Description

The screenshot shows the Hotel Alcaide - Operations interface. The top navigation bar includes links for Links, Marketing, Sales, Operations, **Calendar**, Reports, and Property. The main content area displays a calendar view for the month of July 2012. The calendar is organized by building, floor, and room. Annotations include:

- F1**: Fix Header
- 1a**: Date selector (30/2012)
- 1b**: Week selector
- 1c**: Roomstay selector (207 (4 Jul - 8 Jul))
- 1d**: Account selector
- 1e**: Guest selector (miquel ribeiro)
- 1f**: Building selector
- 1g**: Floor selector
- 1h**: Building header
- 1i**: Floor header
- 1j**: Rooms header
- 1k**: Room type header
- 1l**: Room header
- F6**: Click in the roomstay to load the header info
- F7**: Double click in the roomstay to popup the details
- F8**: Double click in the room to popup the room details
- F9**: Hover over the roomstay to show the quick info box
- 1m**: Step 1 - Define start date
- 1n**: Step 2 - Define end date
- F3**: Step 3 - Create booking

F10 **F11** **7/2/2012** **Month** **SELECT MONTH VIEW**

SELECT CALENDAR START DATE

HOTEL Group

CLICK THE LINK TO HIDE OR SHOW THE BUILDING

CLICK THE LINK TO HIDE OR SHOW THE FLOOR

F12

F13

THE COLORS CAN BE CONFIGURED

DRAG & DROP TO MOVE THE ROOMSTAY **F14**

SHOW THE 1ºWORD OF THE GUEST NAME

Calendar grid showing dates from Jul 1 to Jul 22. Roomstays are visible for various dates, including 202 DB, 205 DB, 208 DB, 101 DB, 105 DB, 201 DB, 203 DB, and 204 DB. Guest names like 'm', 'm', 'm', 'r', 'r' are visible.

ROOMSTAY DETAIL POPUP

CLOSE POPUP

DOUBLE CLICK IN THE ROOMSTAY TO POPUP THE DETAIL

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**

op Tours Double Bed 7/4/2012 7/6/2012 207 252.00 4

Roomstay **Guest nº** **Account nº** **Status**

16426 15153 20230 2.00 RESERVED

New Update R. Rates Email Refresh

Check In Cancel No Show Delete Check Out

Folio Guest Voucher Doc. In Docs Contact

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

Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#)

Links | Marketing | Sales | Operations | **Calendar** | Reports | Property

Page Description

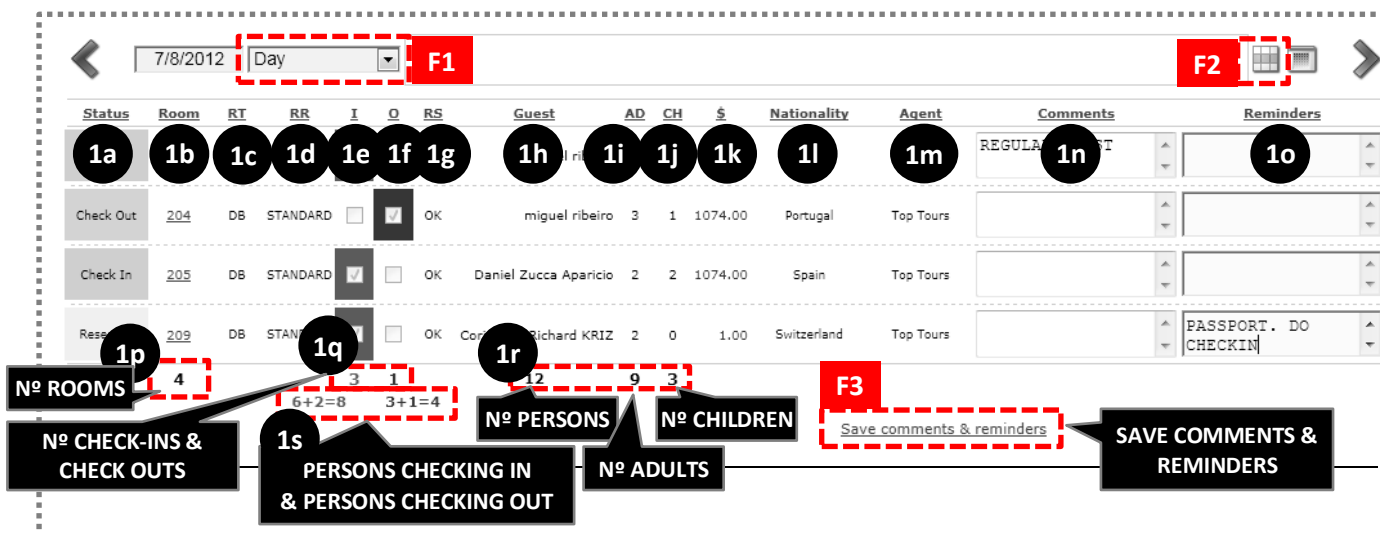


Table Data (7/8/2012):

Status	Room	RT	RR	I	O	RS	Guest	AD	CH	\$	Nationality	Agent	Comments	Reminders
Check Out	204	DB	STANDARD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	OK	miguel ribeiro	3	1	1074.00	Portugal	Top Tours		
Check In	205	DB	STANDARD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	OK	Daniel Zucca Aparicio	2	2	1074.00	Spain	Top Tours		
Reserved	209	DB	STANDARD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	OK	Corinne & Richard KRIZ	2	0	1.00	Switzerland	Top Tours		PASSPORT. DO CHECKIN

Summary: 4 rooms, 12 persons (6+2=8 adults, 3+1=4 children), 9 adults, 3 children.

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

Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |

Links Marketing Sales **Operations** Calendar Reports Property

Guests **Roomstays** Search Roomstays Maintain Roomstay Vouchers Statistics & Reports

Page Description

Maintain guests

Main Occurrences Amounts Roomstays Others

1a 1b 1c 1d 1e 1f 1g 1h 1i 1j 1k 1l

Full Name Email Nationality Photos Emails Rec. Sort Field 1 Order Sort Field 2 Order Sort Field 3 Order

F1 Search

Entity	Name	Nationality	NºStays	ct B.	NºAdults	NºChild.	Book.	Last I
15153	miguel ribeiro	Portugal	2			1	7/8/2012	7/20
15154	Web Agent Entity	United States of Ameri						
15200		Portugal						
16189		Portugal						
16190		Portugal						
16191		United States of Ameri						
17365	miguel ribeiro	Portugal						
17467	Donne & Richard KRIZ	Switzerland	1			0	7/8/2012	7/12

Displaying items 1 to 8 from 22

NAVIGATE THROUGH THE SELECTED RECORDS

NUMBER OF RECORDS TO RETURN FROM DATABASE

FIELDS AVAILABLE FOR SORTING

EXPORT DATA

Full Name
Doc. ID
Email
Nationality
Guest ID
Number Of Stays
Number Of Direct Bookings
Number Of Adults
Number Of Children
Roomstay Amount
Account Amount
Direct Booking Amounts
Last DateIn
Last DateOut
Last Room Rate
Last Room Number
First DateIn
First DateOut
First Room Rate
First Room Number
Name
Last Name
Fiscal Number
Contact
Discount Code

Maintain guests

Main Occurrences Amounts Roomstays Others

FILTER BY OCCURRENCES

NºStays N°Direct B. N°Adults N°Child.

2a 2b 2c 2d

Search

Maintain guests

Main Occurrences Amounts Roomstays Others

FILTER BY AMOUNTS

Roomstay Account D.Book.

3a 3b 3c

Search

Maintain guests

FILTER BY ROOMSTAY DATA

4a Last In 4b Last Out 4c Last Rate 4d Last Room 4e First In 4f First Out 4g First Rate 4h First Room
 Search

Maintain guests

FILTER BY OTHER GUEST DATA

5a Passport \ ID 5b Entity 5c Name 5d Last name 5e Fiscal Number 5f Contact 5g Discount Code
 Search

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.

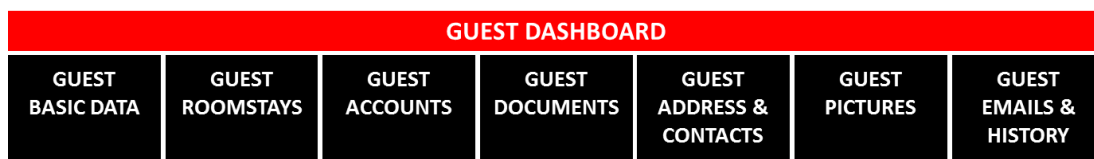
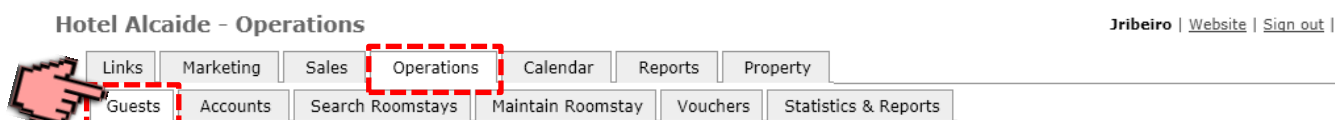


Figure 80 - Guest Dashboard

The hotel can search, update, delete and contact the guest.

Page Location



Page Description

maintain guests

Main Occurrences Amounts Roomstays Others

Full Name Email Nationality Photos Emails Rec. Sort Field 1 Order Sort Field 2 Order Sort Field 3 Order

Search

Entity	Name	Nationality	NºStays	NºDirect B.	NºAdults	NºChild.	Roomstay	Account	D.Book.	Last In	Last
17946	Magdalena Figiel	Poland									
18318	Magdalena Figiel	Poland									
18601	Daniel Zucca Aparicio	Spain	1	1	2	0	0		210	7/3/2012	7/6
18941	Mariano Quinter	Switzerland									
19693	hotelasp@netcabo.pt	Venezuela									
19694	hotelasp@netcabo.pt	Afghanistan									
19695	hotelasp@netcabo.pt	Afghanistan									
19696	hotelasp@hotelasp.com	Afghanistan									

Displaying items 9 to 16 from 21

GUEST BASIC DATA

1a Name: Daniel 1b Last name: Zucca Aparicio 1c Nationality: Spain 1d Email: daniel.zucca@gmail.com 1e

1f Telephone 1: +00 34 605 53 35 24 1g Doc. id.: 1h Issued date: 1i Issued by: 1k Guest nº: 18601

1j Comments: 1l Tax Number: 1m Discount Percentage: 1n Tax Deduction %: 1o Type: Online Customer 1p Status: Active

1i Upload picture using webcam

1l Insert guest 1m Update guest 1n Delete guest 1o Contact

F1 F2 F3 F4

GUEST ROOMSTAYS

Roomstays Accounts Documents Contacts Images Emails

2a

R.	Date in	Date out	Nº of Nigh	Nº Adults	Nº Childs	Room Rate	Total amount	Agent name	Comments	Edit
↑	7/3/2012	7/6/2012	3	2	0	Double Bed	0.00			++ 3581

NAVIGATE TO ROOMSTAY

2b

Guest associated roomstay

Associate quest to roomstay Remove association between quest and roomstay

F5 F6

GUEST ACCOUNTS

Guest Roomstays Accounts Documents Contacts Images Emails

3a

Folio	Debit	Credit	Amount	Tax Amount	Payer Name	Guest Account Name	Last change	Status	
	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 DOCUMENTS

Guest Roomstays Documents Contacts Images Emails

4a

Doc.	Payer Name	Doc. type	Doc. id.	Status	Amount	D	C	T	Q	I	
	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 CONTACTS

Guest Roomstays Accounts Documents Contacts Images Emails

5a Telephone 2

5b Fax

5c City

5d State

5e Zip code

5f Country

Address

C/ Andres Mellado, 13, 5º D

GUEST PICTURES

Guest Roomstays Accounts Documents Images Emails

Doc. Image 1

6a

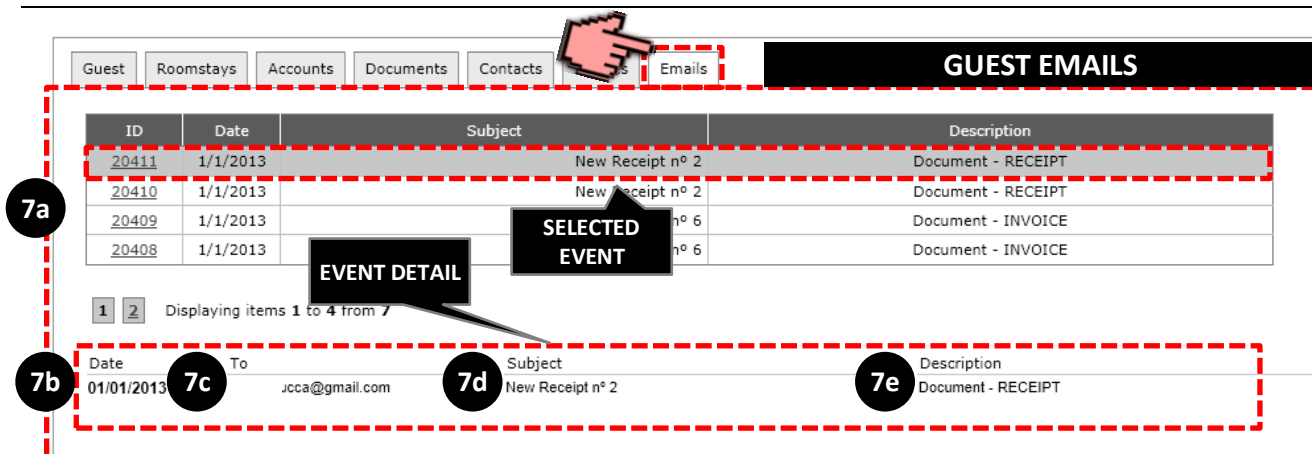
Doc. Image 2

6b

Doc. Image 3

6c

UPLOAD PICTURE USING WEBCAM



The screenshot shows the 'GUEST EMAILS' section of the HOTELasp interface. A red dashed box highlights the email list and details. A hand icon points to the 'Emails' tab. Callouts 7a, 7b, 7c, 7d, and 7e identify specific elements.

ID	Date	Subject	Description
20411	1/1/2013	New Receipt n° 2	Document - RECEIPT
20410	1/1/2013	New Receipt n° 2	Document - RECEIPT
20409	1/1/2013	n° 6	Document - INVOICE
20408	1/1/2013	n° 6	Document - INVOICE

Displaying items 1 to 4 from 7

Date	To	Subject	Description
01/01/2013	jcca@gmail.com	New Receipt n° 2	Document - RECEIPT

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 n°** - 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.



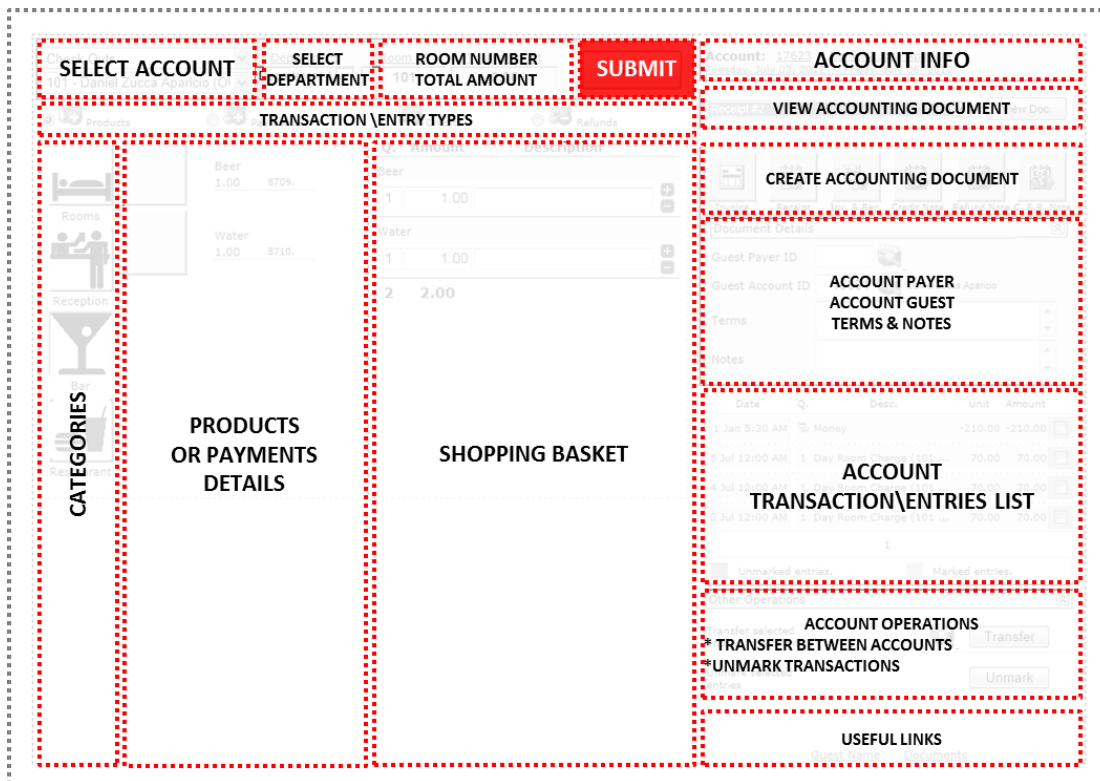
Figure 81 – Point of Sale Page Layout

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.



The screenshot shows the HOTELasp Point of Sale interface. The layout is divided into several sections outlined by red dashed boxes:

- Top Left:** SELECT ACCOUNT, SELECT DEPARTMENT, ROOM NUMBER, TOTAL AMOUNT, and a red SUBMIT button.
- Top Right:** ACCOUNT INFO, VIEW ACCOUNTING DOCUMENT, and CREATE ACCOUNTING DOCUMENT.
- Left Side:** A vertical menu with icons for Products, Rooms, Reception, and Restaurant, labeled CATEGORIES.
- Center:** Divided into PRODUCTS OR PAYMENTS DETAILS (showing items like Beer and Water) and SHOPPING BASKET (showing a list of items with quantities and prices).
- Right Side:** ACCOUNT PAYER, ACCOUNT GUEST, TERMS & NOTES, and a list of ACCOUNT TRANSACTION/ENTRIES.
- Bottom Right:** ACCOUNT OPERATIONS (including TRANSFER BETWEEN ACCOUNTS and UNMARK TRANSACTIONS) and USEFUL LINKS.

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

Hotel Alcaide - Operations

Jrubeiro | Website | Sign out |

Links Marketing Sales **Operations** Calendar Reports Property
Guests **Accounts** Roomstays Maintain Roomstay Vouchers Statistics & Reports

Page Description

The screenshot shows the 'Accounts' page in the Hotel Alcaide system. It features a sidebar with navigation icons for Rooms, Reception, Bar, and Restaurant. The main area displays a table of account entries with columns for Date, Q., Desc., Unit, and Amount. A shopping basket is visible on the left, and a transaction selection area is at the bottom. Numbered callouts (1a-8a) and function key labels (F1-F17) highlight specific UI elements and actions.

Callouts and Labels:

- 1a: Check Outs
- 1b: 101 - Daniel Zucca Aparicio
- 1c: Department
- 2a: Department
- 2b: Room
- 2c: Total amount
- 2d: 0.00
- 2e: F1 Save
- 2f: 6a
- 3a: Products
- 3b: Payments
- 3c: Credits
- 3d: Refunds
- 3e: 6b
- 3f: F2 View Doc.
- 4a: Rooms
- 4b: Beer
- 4c: 1.00
- 4d: 8709.
- 4e: 5a
- 4f: 5b
- 4g: 5c
- 4h: 5d
- 4i: 5e
- 4j: 6c
- 4k: 6d
- 4l: 6e
- 4m: 6f
- 4n: 7a
- 4o: 7b
- 4p: 7c
- 4q: 7d
- 4r: 7e
- 4s: 7f
- 4t: F3
- 4u: F4
- 4v: F5
- 4w: F6
- 4x: F7
- 4y: F8
- 4z: F9
- 4aa: F10
- 4ab: F11
- 4ac: F12
- 4ad: F13
- 4ae: F14
- 4af: F15
- 4ag: F16
- 4ah: F17

Text Boxes:

- CLICK THE PRODUCT TO ADD TO THE SHOPPING BASKET
- CLICK THE CATEGORY TO VIEW THE PRODUCTS
- REMOVE THE ITEM FROM BASKET BY DECREASING THE QUANTITY
- ACCESS CREDIT CARD INFO BY PRESSING THIS ICON
- TRANSACTION SELECTION

6.8.1 FIELDS

1) Selection Area

Required

a. **Roomstay types** – select the roomstay types.

- “Bookings” – select roomstays that are booked but are not checked in.
- “Check ins” – select roomstays that are in check-in state.
- “Check outs” – select roomstays that are in check-out state.

Required

b. **Roomstays** – the selected roomstay.

- This field depends on the selection of the “Roomstay types”.
- The system shows only the first 100 roomstays associated with open accounts.
 - 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 entries 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

Filter

Edit	Room	Check In	Check Out	Room Guest Name	Payer Name	Nights	\$ Account	\$ Room	Folio	Agent	ID
	202	8/10/2013	8/15/2013	miguel ribeiro	miguel ribeiro	5	0.00	440.00		WEB_AGENT	16719
	103	4/15/2013	4/23/2013	Miguel Ribeiro	miguel ribeiro	8	756.00	360.00		WEB_AGENT	16624
	104	4/15/2013	4/23/2013	Miguel Ribeiro	miguel ribeiro	8	756.00	288.00		WEB_AGENT	16625

1 Displaying items 1 to 3 from 3

Roomstay Account Documents Others Images

Name Last name Nationality N° Adults N° Child. A N° Child. B Currency

miguel nbeiro Portugal 2 1 be

Passport \ ID Contact Email

Agent n° Room Rate Date in Date out Room Total Room N° of Nights

Direct Booking Double Bed 08/10/2013 08/15/2013 202 440.00 5

Roomstay Guest n°

16719 15153

Account n° 20521 0.00

Status RESERVED

New Update R. Rates Email Refresh Check In Cancel No show Delete Check Out Folio Guest Voucher Doc. In Docs Contact

ROOM N°

ROOM AMOUNT

N° OF NIGHTS

ACCOUNT AMOUNT

CLICK FOLIO

STEP 2

VIEW ROOMSTAY ACCOUNT – NO CHECK-IN

SELECTED ROOMSTAY

Bookings Department Room n° Total amount

202 - miguel ribeiro (10-8) Department 1 202 0.00

Save

TOTAL AMOUNT IS ZERO

ACCOUNT IS LOADED

Account: 20521 miguel ribeiro
Saturday, August 10, 2013 - Thursday, August 15, 2013

View Doc.

Products Payments Credits Refunds

Q. Amount Descrip

0 0.00

DO CHECK-IN
IF NO ENTRIES FOUND THEN DO THE CHECK IN OR UPDATE "R. RATES" IN THE ROOMSTAY PAGE AND RETURN TO THIS PAGE

Invoice Receipt Inv. & Rec. Credit Note Refund Note C. & R. Note

Document Details

Unmarked entries. Marked entries.

Other Operations

Guest Name

NO ACCOUNT ENTRIES
BECAUSE THE "ROOM CHARGE IN RESERVATION" FIELD IN THE "HOTEL MAIN PROPERTIES" IS NOT ACTIVATED AND THE ROOMSTAY IS STILL IN RESERVED STATUS.
TO CREATE THE ENTRIES THE HOTEL NEED TO DO THE CHECK IN OR ACTIVATE THE "ROOM CHARGE IN RESERVATION" FOR THE NEW BOOKINGS.

STEP 3

VIEW ROOMSTAY ACCOUNT – WITH CHECK-IN

SELECTED ROOMSTAY

Check Ins: 202 - miguel ribeiro | Department: Department 1 | Room n°: 202 | Total amount: 440.00 | Save

TOTAL AMOUNT

ACCOUNT IS LOADED

Account: 20521 miguel ribeiro
Saturday, August 10, 2013 - Thursday, August 15, 2013

Products Payments Credits Refunds

Rooms Reception Bar Restaurant

ACCOUNT ENTRIES FOR THE ROOM STAY ARE NOW CREATED IN THE ACCOUNT

Date	Q.	Desc.	Unit	Amount
14 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
13 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
12 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
11 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
10 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00

Unmarked entries. Marked entries.

Other Operations

Guest Name Documents

STEP 4

ADD ITEMS TO THE SHOPPING BASKET

STEP 6
CLICK THE "SAVE" BUTTON

Check Ins: 202 - miguel ribeiro | Department: Department 1 | Room n°: 202 | Total amount: 440.00 | Save

Products Payments Credits Refunds

Rooms Reception Bar Restaurant

STEP 2
CLICK IN BEER ITEM AND IN WATER ITEM

STEP 3
CHANGE THE WATER DEFAULT PRICE

STEP 4
CHANGE ITEM DESCRIPTION

STEP 5
CHANGE THE QUANTITY AND UPDATE THE TOTAL

STEP 1
CLICK IN CATEGORY BAR

Beer 1.00 8709.
Water 1.00 8710.

Q.	Amount	Description
1	1.00	Simple beer
2	1.15	Water
3	3.30	

Account: 20521 miguel ribeiro
Saturday, August 10, 2013 - Thursday, August 15, 2013

Invoice Receipt Inv. & Rec. Credit Note Refund Note C. & R. Note

Date	Q.	Desc.	Unit	Amount
14 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
13 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
12 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
11 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
10 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00

Unmarked entries. Marked entries.

Other Operations

Guest Name Documents

STEP 5

SAVES ITEMS IN THE ACCOUNT

TOTAL AMOUNT

PREVIEW INVOICE
CLICK THE "INVOICE" BUTTON TO PREVIEW THE INVOICE

RESULTS OF PROCESSING THE ITEMS FROM THE BASKET. THE ITEMS ARE NOW SAVED IN THE DATABASE

NEW ENTRIES WERE ADDED TO THE ACCOUNT

RED COLOR: THE TRANSACTIONS ARE NOT MARKED BECAUSE THEY ARE NOT ASSOCIATED WITH ANY ACCOUNTING DOCUMENT

Check Ins: 202 - miguel ribeiro | Department: Department 1 | Room n°: 202 | Total amount: 443.30 | Save

Products | Payments | Credits | Refunds

Processing Results

Result: 8709 1 1 simple beer | Processed with success

Result: 8710 2 1.15 Water | Processed with success

Q. Amount Description

0 0.00

Document Details

Date	Q.	Desc.	Unit	Amount
10 Jan 11:44 AM	2	Water	1.15	2.30
10 Jan 11:44 AM	1	simple beer	1.00	1.00
14 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
13 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
12 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
11 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
10 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00

Unmarked entries. | Marked entries

Other Operations

STEP 6

PREVIEW THE INVOICE

SEND TO THE GUEST THE INVOICE BY EMAIL USING THE "SEND DOCUMENT" TEMPLATE

SAVE INVOICE
CLICK THE "SAVE" BUTTON TO CREATE THE FINAL INVOICE

Send Email ☐ | Email To: miguel.ribeiro@winsaas.com | Save | Cancel

PREVIEW THE INVOICE

Invoice n° **DRAFT**

PREVIEW
Date: 10/01/13

For: miguel ribeiro

Nationality	Doc. ID	Contact	Email	Acc. n°
Portugal			miguel.ribeiro@winsaas.com	20521
Address	City	State	Zip Code	Country

ID	Room	Name	Agent	Nationality	Doc. ID	Arrival	Departure	Pax
16719	202	miguel ribeiro	Direct Booking	Portugal		10/08/13	15/08/13	4

Date	Detail	Q.	Net	VAT	Amount	
10/08/13	Room Charge	Day Room Charge (202)	1	77.88	10.12	88.00
11/08/13	Room Charge	Day Room Charge (202)	1	77.88	10.12	88.00

STEP 7

FINALIZE THE INVOICE



100% Find | Next

Invoice nº 8

FINAL INVOICE **ORIGINAL**
Date: 10/01/13

For: miguel ribeiro

Nationality	Doc. ID	Contact	Email	Acc. nº
Portugal			miguel.ribeiro@winsaas.com	20521
Address	City	State	Zip Code	Country

ID	Room	Name	Agent	Nationality	Doc. ID	Arrival	Departure	Pax
16719	202	miguel ribeiro	Direct Booking	Portugal		10/08/13	15/08/13	4

Date	Detail	Q.	Net	VAT	Amount
10/08/13	Room Charge Day Room Charge (202)	1	77.88	10.12	88.00
11/08/13	Room Charge Day Room Charge (202)	1	77.88	10.12	88.00
12/08/13	Room Charge Day Room Charge (202)	1	77.88	10.12	88.00
13/08/13	Room Charge Day Room Charge (202)	1	77.88	10.12	88.00
14/08/13	Room Charge Day Room Charge (202)	1	77.88	10.12	88.00

STEP 8

GUESTS CONFIRMS THE INVOICE IN HIS EMAIL

Go Daddy WORKSPACE v 5.6 Logged in as: miguel.ribeiro@winsaas.com

Homepage Email Calendar Files Fax

Check Email Compose Address Book Settings Tools Help

Zoom: Compose Email

Search... Go Adv. Search

Folders Saved Search

Storage Usage 1% Upgrade 100 MB

New Folder

Inbox (10)

Bulk Mail

Drafts

Templates

Send Later

Sent Items

Trash

Reply Reply to All Forward Delete Purge Mark as Spam Move to Folder Move More Actions Apply

Inbox > Message Detail Entire thread Print Next

Subject: Hotel Alcaide - Invoice nº 8 - miguel ribeiro

From: residencialalcaide@mail.telepac.pt (Add as Preferred Sender)

Date: Thu, Jan 10, 2013 12:16 pm

To: miguel.ribeiro@winsaas.com

Cc: residencialalcaide@mail.telepac.pt

Invoice nº 8

Hotel Alcaide
Hotel Alcaide, Praia do Vau, 8500-820 Portimão,
Portugal

miguel ribeiro thank you for your preference.

Download

Attachments	Size	Action(s)	Send To
HOTEL ALCAIDE INVOICE 2013 1 10 8 D...	5 k	Download	

THE EMAIL TEMPLATE "SEND DOCUMENT" IS USED

DOCUMENT IN PDF FORMAT IS ATTACHED TO THE EMAIL

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STEP 9

VIEW ROOMSTAY ACCOUNT – BEFORE PAYMENT

SELECT THE DOCUMENT AND CLICK "VIEW DOC." TO SHOW THE DOCUMENT

A NEW DOCUMENT IS ASSOCIATED WITH THE ACCOUNT

GREEN COLOR: THE TRANSACTIONS ARE MARKED BECAUSE THEY ARE ASSOCIATED WITH AN ACCOUNTING DOCUMENT

Check Ins: 202 - miguel ribeiro | Department: Department 1 | Room n°: 202 | Total amount: 443.30 | Save

Products | Payments | Credits | Refunds

Rooms | Reception | Bar | Restaurant

Account: 20521 miguel ribeiro
Saturday, August 10, 2013 - Thursday, August 15, 2013

Invoice #9 | View Doc.

Document Details

Date	Q.	Desc.	Unit	Amount
10 Jan 11:44 AM	2	Water	1.15	2.30
10 Jan 11:44 AM	1	simple beer	1.00	1.00
14 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
13 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
12 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
11 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
10 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00

Unmarked entries. | Marked entries.

Other Operations

STEP 10

MAKE A PAYMENT

STEP 1 SELECT PAYMENTS

STEP 3 FILL THE TOTAL AMOUNT TO PAY

STEP 2 CLICK PAYMENT BY CREDIT CARD

STEP 4 FILL CREDIT CARD DATA

STEP 5 CLICK "SAVE" TO PROCESS THE PAYMENT FROM THE ITEMS BASKET

Check Ins: 202 - miguel ribeiro | Department: Department 1 | Room n°: 202 | Total amount: 443.30 | Save

Products | Payments | Credits | Refunds

Money | Check | Credit Card | Others

Q. Amount | Description

1 0.00

Card

Type: VISA | Name: MIGUEL RIBEIRO
Number: 44488885498858 | Expiration Date: 2013-01-01
CVV: 1234

Cheque & Wire Transfers

Bank Name | Number | Bank Code | Branch | Date | Notes

Invoice #9 | View Doc.

Document Details

Date	Q.	Desc.	Unit	Amount
10 Jan 11:44 AM	2	Water	1.15	2.30
10 Jan 11:44 AM	1	simple beer	1.00	1.00
14 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
13 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
12 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
11 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
10 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00

Unmarked entries. | Marked entries.

Other Operations

Guest Name | Documents

STEP 11

PREVIEW A RECEIPT

Check Ins: 202 - miguel ribeiro | Department: Department 1 | Room n°: 202 | Total amount: 0.00 | Save

Products | **Payments** | Credits | Refunds

Processing Results

Result: 10092 1 - 443.30 -01. VISA MIGUEL RIBEIRO ...8858 2013-01 Processed with success

THE PAYMENT IS PROCESSED AND SAVED IN THE GUEST ACCOUNT

NEW PAYMENT

Account: Saturday, August 10, 2013 | Invoice #9 | View Doc.

Document Details

Date	Q.	Desc.	Unit	Amount
10 Jan 2:06 PM		VISA MIGUEL RIBEIRO ...	-443.30	-443.30
10 Jan 11:44 AM	2	Water	1.15	2.30
10 Jan 11:44 AM	1	simple beer	1.00	1.00
14 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
13 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
12 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
11 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
10 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00

1

Unmarked entries. | Marked entries.

Other Operations

Guest Name | Documents

STEP 12

VIEW PAYMENT DETAILS

STEP 2
FILL THE CREDIT CARD ACCESS PASSWORD
DEFINED IN THE HOTEL MAIN PROPERTIES PAGE

Payment

Credit Card

Enter access password:

Type: VISA | Name: MIGUEL RIBEIRO | Number: 444488885498858 | Expiration Date: 2013-01-01 | CVV: 1234

Cheque

Bank Name | Name | Number | Account

Bank Code | Branch | Date

Messages

Select | Update

STEP 3
CLICK SELECT BUTTON TO VIEW THE PAYMENT DATA USING THE ACCESS PASSWORD

STEP 1
CLICK THE CREDIT CARD ICON TO POPUP THE PAYMENT DETAILS

Account: 20521 | miguel ribeiro | 10, 2013 - Thursday, August 15, 2013 | View Doc.

Document Details

Q.	Desc.	Unit	Amount
	VISA MIGUEL RIBEIRO ...	-443.30	-443.30
2	Water	1.15	2.30
1	simple beer	1.00	1.00
1	Day Room Charge (202 ...	88.00	88.00
1	Day Room Charge (202 ...	88.00	88.00
1	Day Room Charge (202 ...	88.00	88.00
1	Day Room Charge (202 ...	88.00	88.00
1	Day Room Charge (202 ...	88.00	88.00

1




Unmarked entries. | Marked entries.

Other Operations



Guest Name | Documents

STEP 13

RECEIPT PREVIEW

 Refresh
  Open File
  Directory

Send Email ☐ Email To: miguel.ribeiro@winsaas.com

 Save
  Cancel

1 of 1 100% Find | Next

Receipt nº DRAFT

PREVIEW

 Date: 10/01/13

For: miguel ribeiro

Nationality	Doc. ID	Contact	Email	Acc. nº
Portugal			miguel.ribeiro@winsaas.com	20521
Address	City	State	Zip Code	Country

ID	Room	Name	Agent	Nationality	Doc. ID	Arrival	Departure	Pax
18719	202	miguel ribeiro	Direct Booking	Portugal		10/08/13	15/08/13	4




Payments

10/01/13	Credit Card	VISA MIGUEL RIBEIRO ...8858 2013-01-01.	443.30
			443.30
Sub Total:			443.30 EUR



STEP 1
SAVES THE
RECEIPT

STEP 14

FINAL RECEIPT

 Refresh
  Open File
  Directory

Send Email ☒ Email To: miguel.ribeiro@winsaas.com

 Save
  Cancel

The document is saved

1 of 1 100% Find | Next

Receipt nº 3

ORIGINAL

 Date: 10/01/13

For: miguel ribeiro

Nationality	Doc. ID	Contact	Email	Acc. nº
Portugal			miguel.ribeiro@winsaas.com	20521
Address	City	State	Zip Code	Country

ID	Room	Name	Agent	Nationality	Doc. ID	Arrival	Departure	Pax
18719	202	miguel ribeiro	Direct Booking	Portugal		10/08/13	15/08/13	4

Payments

10/01/13	Credit Card	VISA MIGUEL RIBEIRO ...8858 2013-01-01.	443.30
			443.30
Sub Total:			443.30 EUR
Total Paid:			443.30 EUR

STEP 15

CHANGE THE PAYER

Check Ins

Department

Room n°

Total amount

Save

Search Entities

Name

Email

Passport \ ID

Nationality

Entity

Search

Add Guest

Entity	Name	Email	Passport \ ID	Nationality
15157	miguel ribeiro	miguel.ribeiro@winsaas.com		Portugal
151	m m	mribeiro@winsaas.com		United States of America
152	m m	sales@winsaas.com		Portugal
16192	miguel ribeiro	miguel.ribeiro_wrong@netca		Portugal
16190	miguel ribeiro	miguel.ribeiro@netcabo.pt		Portugal

1

2

3

4

5

Displaying items 1 to 5 from 22

Name	Last name	Nationality	Guest n°
miguel	ribeiro	Portugal	16190

Request Executed - 1/10/2013 2:44:02 PM (0.02s)

STEP 2
SELECT THE ROW

STEP 3
SELECT THE GUEST

Select Account Payer Guest

Account: 20521 miguel ribeiro

Saturday, August 10, 2013 - Thursday, August 15, 2013

Receipt #3

Invoice

Receipt

Inv. & Rec.

Credit Note

Refund Note

C. & R. Note

Document Details

Guest Payer ID

16190

Guest Account ID

15153

Terms

Notes

Date	Q.	Desc.	Unit	Amount
10 Jan 2:43 PM	1	Water	1.00	1.00
10 Jan 2:43 PM	1	Beer	1.00	1.00
10 Jan 2:06 PM		VISA MIGUEL RIBEIRO ...	-443.30	-443.30
10 Jan 11:44 AM	2	Water	1.15	2.30
10 Jan 11:44 AM	1	simple beer	1.00	1.00
14 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
13 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
12 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
11 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
10 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00

STEP 1
CLICK THE CHANGE GUEST ICON

STEP 16

UNMARK TRANSACTIONS

Check Ins

Department

Room n°

Total amount

Save

202 - miguel ribeiro

Department 1

202

2.00

Products

Payments

Credits

Refunds

Processing Results

Result: 8709 1 1 Beer

Processed with success

Result: 8710 1 1 Water

Processed with success

Rooms

Reception

Bar

Restaurant

Q.	Amount	Description
0	0.00	

STEP 1
SELECT TRANSACTIONS TO UNMARK

Account: 20521 miguel ribeiro

Saturday, August 10, 2013 - Thursday, August 15, 2013

Receipt #3

View Doc.

Invoice

Receipt

Inv. & Rec.

Credit Note

Refund Note

C. & R. Note

Document Details

Date	Q.	Desc.	Unit	Amount
10 Jan 2:43 PM	1	Water	1.00	1.00
10 Jan 2:43 PM	1	Beer	1.00	1.00
10 Jan 2:06 PM		VISA MIGUEL RIBEIRO ...	-443.30	-443.30
10 Jan 11:44 AM	2	Water	1.15	2.30
10 Jan 11:44 AM	1	simple beer	1.00	1.00
13 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
12 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
11 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00
10 Aug 12:00 AM	1	Day Room Charge (202 ...	88.00	88.00

1

Unmarked entries.

Marked entries.

Other Operations

Transfer selected entries to account

Transfer

Unmark selected entries

Unmark

STEP 2
CLICK THE UNMARK BUTTON

STEP 17

TRANSFER TRANSACTIONS TO ANOTHER ACCOUNT

STEP 1
SELECT TRANSACTIONS TO TRANSFER

STEP 2
CLICK SELECT ACCOUNT BUTTON

STEP 3
SELECT ROW

STEP 4
SELECT ACCOUNT

STEP 5
CLICK TRANSFER BUTTON

Account: 20521 miguel ribeiro
Saturday, August 10, 2013 - Thursday, August 15, 2013

Invoice #9 View Doc.

Transfer selected entries to account

Transfer

Unmark selected entries

Unmark

Edit	Room	Guest Name	Payer Name	Date in	Date out	Amount	Tax Amount	Status
17623	101	Daniel Zucca Aparicio	miguel ribeiro	7/3/2012	7/6/2012	1.00	24.34	OPEN
17623	205	Corinne & Richard F	miguel ribeiro	7/8/2012	7/12/2012	1.00	24.34	OPEN
18769						0.00	0.00	OPEN
18739						0.00	0.00	OPEN

1 2 3 4 5 Displaying items 6 to 10 from 24

Account n°	Amount	Tax Amount	Status
17623	1.00	24.34	OPEN

Request Executed - 1/10/2013 2:54:03 PM (0.00s)

STEP 18

CANCEL A DOCUMENT

STEP 1
SELECT DOCUMENT TO CANCEL

STEP 2
CLICK "VIEW DOC" BUTTON

STEP 3
CLICK THE CANCEL BUTTON

NOTE
THE DOCUMENT CANCELLATION WILL UN MARK ALL ENTRIES ASSOCIATED WITH THE DOCUMENT AND TAG THE DOCUMENT AS "CANCELED". THE ENTRIES WILL BE AVAILABLE TO BE USED IN OTHER DOCUMENTS.

Account: 20521 miguel ribeiro
Saturday, August 10, 2013 - Thursday, August 15, 2013

Invoice #9 View Doc.

Send Email Email To miguel.ribeiro@winsaas.com

Save Cancel

as successful canceled.

Invoice n° 9

CANCELED
Date: 10/01/13

ID	Room	Name
16719	202	miguel ribeiro

Date	Room Charge	Day Room Charge (202)	1	77.88	10.12	88.00
10/08/13	Room Charge	Day Room Charge (202)	1	77.88	10.12	88.00
11/08/13	Room Charge	Day Room Charge (202)	1	77.88	10.12	88.00
12/08/13	Room Charge	Day Room Charge (202)	1	77.88	10.12	88.00
13/08/13	Room Charge	Day Room Charge (202)	1	77.88	10.12	88.00
14/08/13	Room Charge	Day Room Charge (202)	1	77.88	10.12	88.00

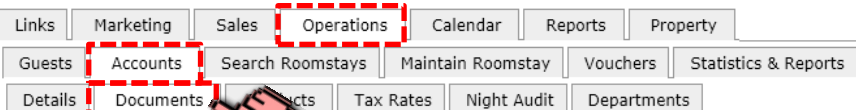
6.9 ACCOUNTING DOCUMENTS

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

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |



Page Description

Manage documents

Edit	Room	Guest Account Nam	Doc. type	Doc. id.	Status	Amount	D	C	T	Q	I	View Doc.	Account n°
12649	204	miguel ribeiro	Invoice	7	DUPLICATE	2.00	2.00	0.00	0.38	2	2		20230
12648	102	Daniel Zucca Aparic	Invoice	DRAFT	PREVIEW	1.00	1.00	0.00	0.19	1	1		17623
12644	102	Daniel Zucca Aparic	Receipt	2	DUPLICATE	-210.00	0.00	210.00	0.00	1	1		17623
12643	102	Daniel Zucca Aparic	Invoice	6	DUPLICATE	210.00	210.00	0.00	24.15	3			17623
8347	103	miguel ribeiro	Invoice	5	CANCELED	1.00	1.00	0.00	0.19		1		18074

1 2 Displaying items 1 to 5 from 10

VIEW PDF DOCUMENT

1a

Doc. type

Invoice

1b

Doc. id.

7

1c

Status

DUPLICATE

1d

Account n°

20230

1e

Guest Account ID

15153

1f

Payer ID

15153

1g

Issued by

jrubeiro

1h

Issued date

01/01/2013

1i

Document Terms

1j

Notes

1k

Document Selection

Messages

View and Print Documents

View Doc.

Doc. Directory

F1

F2

Invoices

Invoice

F3

Receipts

Invoice \ Receipt

Receipt

F4

F5

Others

Credit Note

Refund Note

Credit \ Refund Note

F6

F7

F8

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 n°** - 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.

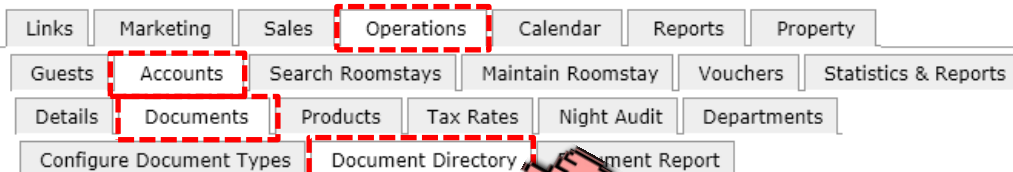
6.10 ACCOUNTING PDF REPOSITORY

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

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |



Page Description

1a	Date	1b	File
	1/1/2013		HOTEL ALCAIDE INVOICE 2013 1 1 7 D
	1/1/2013		HOTEL ALCAIDE RECEIPT 2013 1 1 2 D
	1/1/2013		HOTEL ALCAIDE INVOICE 2013 1 1 6 D
	7/21/2012		HOTEL ALCAIDE INVOICE 2012 7 21 5 D
	7/21/2012		HOTEL ALCAIDE INVOICE 2012 7 21 4 D
	7/21/2012		HOTEL ALCAIDE INVOICE 2012 7 21 3 D
	7/21/2012		HOTEL ALCAIDE INVOICE 2012 7 21 2 D
	7/21/2012		HOTEL ALCAIDE RECEIPT 2012 7 21 1 D
	7/21/2012		HOTEL ALCAIDE INVOICE 2012 7 21 1 D

FILE NAME RULE

HOTEL NAME + DOC. NAME + YEAR + MONTH + DAY + NEXT ID + ORIGINAL OR DUPLICATE

Invoice nº 7

DUPLICATE
Date: 01/01/13

For: miguel ribeiro

Nationality Portugal	Email miguel.ribeiro@winsaas.com	Acc. nº 20230
Address	State	Zip Code
	Country	

ID	Room	Name	Agent	Nationality	Doc. ID	Arrival	Departure	Pax
16426	207	miguel ribeiro	Top Tours			04/07/12	08/07/12	2

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

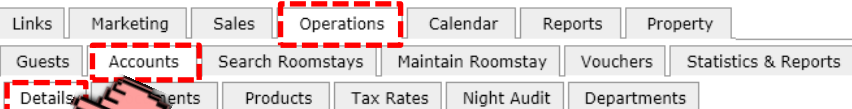
This page allows the hotel to view and manage the accounts. The transactions are created by using the POINT OF SALE page.

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

Hotel Alcaide - Operations

Jribeiro | [Website](#) | [Sign out](#) |



Page Description

Filter											
Edit	Room	Room Guest Name	Date in	Date out	Credit	Debit	Amount	Tax Amount	Folio	Status	Account Guest
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			4/15/2013	4/23/2013	0.00	756.00	756.00	87.00			
20433			4/15/2013	4/23/2013	0.00	756.00	756.00	87.00			
20230			7/4/2012	7/8/2012	0.00	1074.00	1074.00	123.74		OPEN	miguel ribeiro

STEP 1
SELECT ROW TO LOAD
ACCOUNT DETAIL

**GO TO ACCOUNT
PAGE**

ACCOUNT DETAIL | TRANSACTIONS

Transactions | Guests | Account Tax | Totals | Others

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	De				
1080021	1/10/2013	Beer	1.00	0.19	IVA 23%	Beer	De				

STEP 2
SELECT ROW TO LOAD
TRANSACTION DETAIL

TRANSACTION DETAIL

Transaction Detail										Help fo Find Accounts or Products	
Account nº	P&S	Quantity	Unit amount	Amount	Tax Rate	Tax %	Tax Amount	Department	Description	Trx. date	Transaction nº
20521	8708	1	88.00	88.00	IVA 13%	0.130	10.12		Day Room Charge (202)	08/12/2013	1080006

F7 Update

F8 Edit Product

Request Executed - 1/11/2013 2:38:42 AM (0.04s)

F1 Update account

F2 Create Account

F3 Reopen account

F4 Close account

F5 Delete Account

F6 View account documents

ACCOUNT DETAIL | TRANSACTIONS

Transactions Guests Account Tax Totals Others

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				

[xls](#) [csv](#)

TRANSACTION DETAIL

Transaction Help fo Find Accounts or Products

Room number

Guest Name

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
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 Guests Account Tax Totals Others

Payer ID

Payer Name

15153

miguel ribeiro

Guest Account ID

Guest Account Name

15153

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
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

Room Tax Rate

Product Tax Rate

[Update account](#)

[Create Account](#)

[Reopen account](#)

[Close account](#)

[Delete Account](#)

[View account documents](#)

ACCOUNT DETAIL | TOTALS

Edit	Room	Room Guest Name	Date in	Date out	Credit	Debit	Amount	Tax Amount	Folio	Status	Account Guest
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 Guests **Accounts** Totals Others

6a Credit -443.30
 6b Debit 445.30
 6c Amount 2.00
 6d Tax Amount 51.60

[Update account](#)
[Create Account](#)
[Reopen account](#)
[Close account](#)
[Delete Account](#)
[View account documents](#)

ACCOUNT DETAIL | OTHERS

Edit	Room	Room Guest Name	Date in	Date out	Credit	Debit	Amount	Tax Amount	Folio	Status	Account Guest
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 Guests Account Tax **Others**

7a Account n° 20521
7b Account status OPEN
7c Acc. Type Guest
7d Last change 01/10/2013

Comments

[Update account](#)
[Create Account](#)
[Reopen account](#)
[Close account](#)
[Delete Account](#)
[View account documents](#)

6.11.1 FIELDS

1) **ACCOUNT | 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 | TRANSACTION | Transaction detail** – show the detail of the selected transaction

Required a. **Account n°** – 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 | TRANSACTION | 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) ACCOUNT | 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) ACCOUNT | 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 n°** – 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

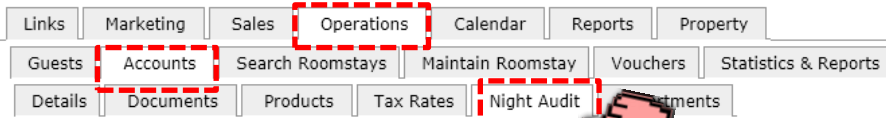
This page shows the log or history of the roomstay transactions processed automatically by the system. The night audit is a batch process that is automatically executed by the system that creates all the account entries for the room stay transactions.

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

Hotel Alcaide - Operations

Jrubeiro | [Website](#) | [Sign out](#) |



Page Description

Night Audit

Main Others

Date Account nº Roomstay Room nº Room Rate

F1 View Log **F2** Clean Log **F3** Execute Night Audit

Audit	Roomstay	Comments	Date	Account nº	Room nº	Name	Last name
1a	1b	1c	1d	1e	1f	1g	1h
1174581	16719	RS DAY: OK	8/12/2013	20521	202	miguel	ribeiro
1174582	16719	RS DAY: OK	8/13/2013	20521	202	miguel	ribeiro
1174583	16719	RS DAY: OK	8/14/2013	20521	202	miguel	ribeiro
1174584	16719	RS: FINISH [UPDATED T:440.00 DB:440.00 CR:0.00 TX:50.60]	1/10/2013	20521	202	miguel	ribeiro
1174363	16699	RS DAY: OK	7/8/2012	20230	205	Daniel	Zucca Aparicio
1174364	16699	RS DAY: OK	7/9/2012	20230	205	Daniel	Zucca Aparicio
1174365	16699	RS DAY: OK	7/10/2012	20230	205	Daniel	Zucca Aparicio
1174366	16699	RS DAY: OK	7/11/2012	20230	205	Daniel	Zucca Aparicio

Displaying items 1 to 10 from 43

Audit

Main Others

Id Amount Tax Amount Comments

View Log Clean Log Execute Night Audit

Comments	Date	Account nº	Room nº	Name	Last name	Room Rate	Amount	Tax Amount
	8/10/2013	20521	202	miguel	ribeiro	Double Bed	88.00	10.12
	8/11/2013	20521	202	miguel	ribeiro	Double Bed	88.00	10.12
	8/12/2013	20521	202	miguel	ribeiro	Double Bed	88.00	10.12
	8/13/2013	20521	202	miguel	ribeiro	Double Bed	88.00	10.12
	8/14/2013	20521	202	miguel	ribeiro	Double Bed	88.00	10.12
RS: FINISH [UPDATED T:440.00 DB:440.00 CR:0.00 TX:50.60]	1/10/2013	20521	202	miguel	ribeiro	Double Bed	88.00	10.12
	7/8/2012	20230	205	Daniel	Zucca Aparicio	Double Bed	79.00	9.09
	7/9/2012	20230	205	Daniel	Zucca Aparicio	Double Bed	79.00	9.09
	7/10/2012	20230	205	Daniel	Zucca Aparicio	Double Bed	79.00	9.09
	7/11/2012	20230	205	Daniel	Zucca Aparicio	Double Bed	79.00	9.09

Displaying items 1 to 10 from 43

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 n°** - the account id that is associated with the transactions.
 - f. **Room n°** - 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.

STEP 1
DOWNLOAD AND INSTALL
MICROSOFT SQL SERVER MANAGEMENT STUDIO

STEP 2
CONNECT TO
.SQLEXPRESS IN SQL
SERVER EXPRESS 2008 R2

STEP 3
OPEN DATABASE
WinSaaS_Pms_3_0_25

STEP 4
OPEN TABLE
tPms_AccountTransactions

STEP 5
OPEN DATA
MODEL

STEP 6
CHECK
tPms_AccountTransactions
TABLE MODEL

OPTIONAL FIELDS

Column Name	Data Type	Allow Nulls
AccountTrxID	int	<input type="checkbox"/>
ContextID	int	<input type="checkbox"/>
PropertyID	int	<input type="checkbox"/>
AccountTrxCID	int	<input checked="" type="checkbox"/>
AccountID	int	<input type="checkbox"/>
TransactionDate	datetime	<input type="checkbox"/>
Quantity	int	<input type="checkbox"/>
UnitAmount	decimal(18, 2)	<input type="checkbox"/>
TaxAmount	decimal(18, 2)	<input checked="" type="checkbox"/>
Amount	decimal(18, 2)	<input type="checkbox"/>
CurrencyCode	nvarchar(3)	<input checked="" type="checkbox"/>
IsTransactionTax	bit	<input checked="" type="checkbox"/>
TaxPerc	decimal(18, 3)	<input checked="" type="checkbox"/>
TaxRateID	int	<input checked="" type="checkbox"/>
DebitCredit	bit	<input type="checkbox"/>
AccountingAccountID	nvarchar(100)	<input checked="" type="checkbox"/>
ReconciliationCode	nvarchar(100)	<input checked="" type="checkbox"/>
ProductServiceID	int	<input checked="" type="checkbox"/>
DepartmentID	int	<input checked="" type="checkbox"/>
UserID	int	<input checked="" type="checkbox"/>
SystemDate	datetime	<input type="checkbox"/>
CreatedByUserID	int	<input checked="" type="checkbox"/>
LastChangedByUserID	int	<input checked="" type="checkbox"/>
LastChangedDate	datetime	<input checked="" type="checkbox"/>
DocIVRefID	int	<input checked="" type="checkbox"/>
DocIVDate	datetime	<input checked="" type="checkbox"/>
DocRCRefID	int	<input checked="" type="checkbox"/>
DocRCDate	datetime	<input checked="" type="checkbox"/>
DocCNRefID	int	<input checked="" type="checkbox"/>
DocCNDate	datetime	<input checked="" type="checkbox"/>
DocRFRRefID	int	<input checked="" type="checkbox"/>
DocRFDate	datetime	<input checked="" type="checkbox"/>
DocDNRefID	int	<input checked="" type="checkbox"/>
DocDNDate	datetime	<input checked="" type="checkbox"/>
PaymentID	int	<input checked="" type="checkbox"/>
RefRoomStayID	int	<input checked="" type="checkbox"/>
Notes	nvarchar(100)	<input checked="" type="checkbox"/>
Description	nvarchar(100)	<input checked="" type="checkbox"/>
TenantID	varbinary(85)	<input type="checkbox"/>
RecordID	uniqueidentifier	<input type="checkbox"/>
RecordTimeStamp	timestamp	<input type="checkbox"/>
RecordDate	datetime	<input type="checkbox"/>
HasExtensions	bit	<input type="checkbox"/>

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.

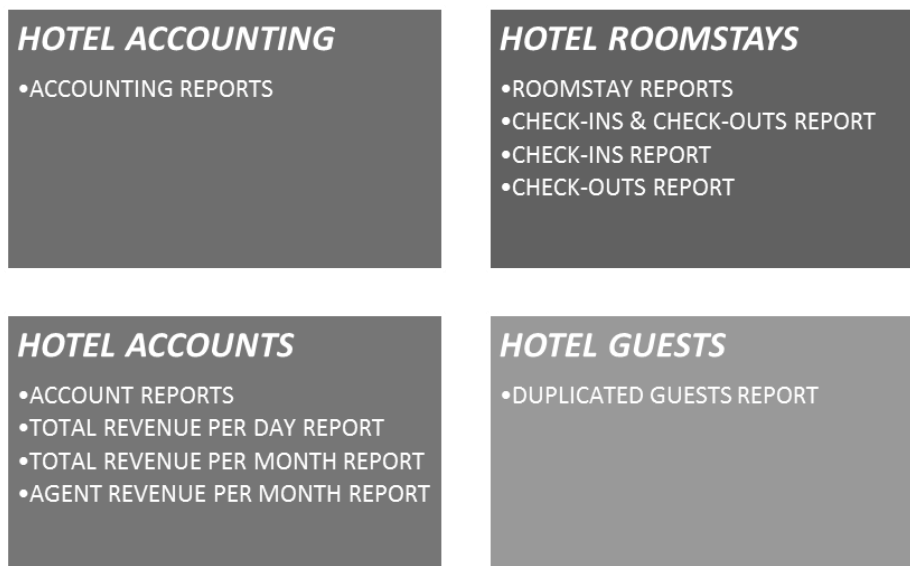


Figure 85 - Main Reports

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

Hotel Alcaide - Operations Jrubeiro | [Website](#) | [Sign out](#) |

Links | Marketing | Sales | **Operations** | Calendar | Reports | Property

Guests | **Accounts** | Search Roomstays | Maintain Roomstay | Vouchers | Statistics & Reports

Details | **Documents** | Products | Tax Rates | Night Audit | Departments

Configure Document Types | Document Directory | **Document Report**

Hotel Alcaide - Operations Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |

Links | Marketing | Sales | Operations | Calendar | **Reports** | Property

Roomstays | **Accounts** | Rooms | Agents | Guests

Accounting Documents | Total revenue by day | Total revenue by month

Report Description

1a Doc. type 1b Start date 1c End date 1d Payer Name 1e Guest Account Name 1f Payer ID 1g Guest Account ID 1h Account n° 1i S. Canceled

Refresh

F1 1 of 1 100% Find | Next F2 F3

1j

Invoice

ID	Date	Payer	Notes	Net	Tax	Total	Payments
6	01/01/13	Daniel Zuoca Aparicio		185.85	24.15	210.00	0.00

7.1.1 FIELDS

1) Filtering fields

- Doc. Type** – filter by document type. For example: invoice, receipt, credit note, refund note, credit\refund note and invoice\receipt.
- Start date** – select all documents with issue date equal or higher than the start date.
- End date** – select all documents with issue date equal or lower than the end date
- Payer name** - filter by payer name.
- Guest account name** – filter by guest account name.
- 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.

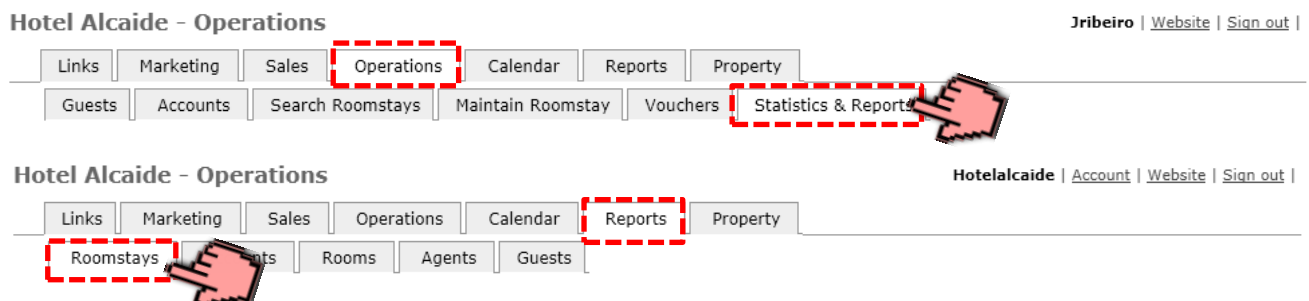
7.1.2 FUNCTIONS

- 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

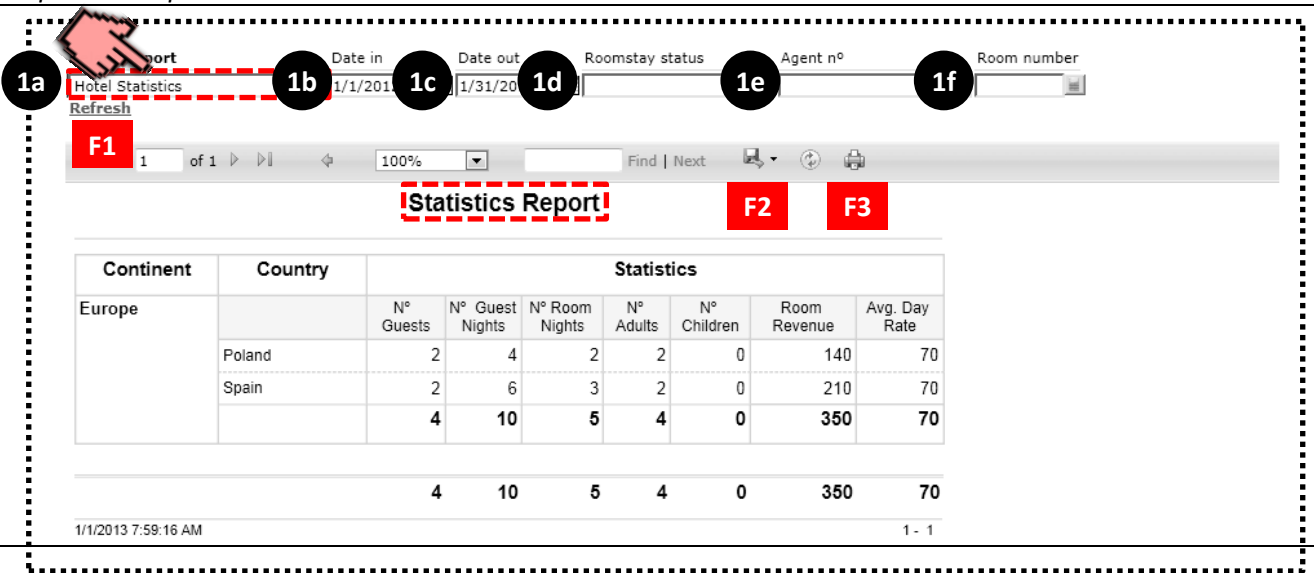
7.2 ROOMSTAY REPORTS

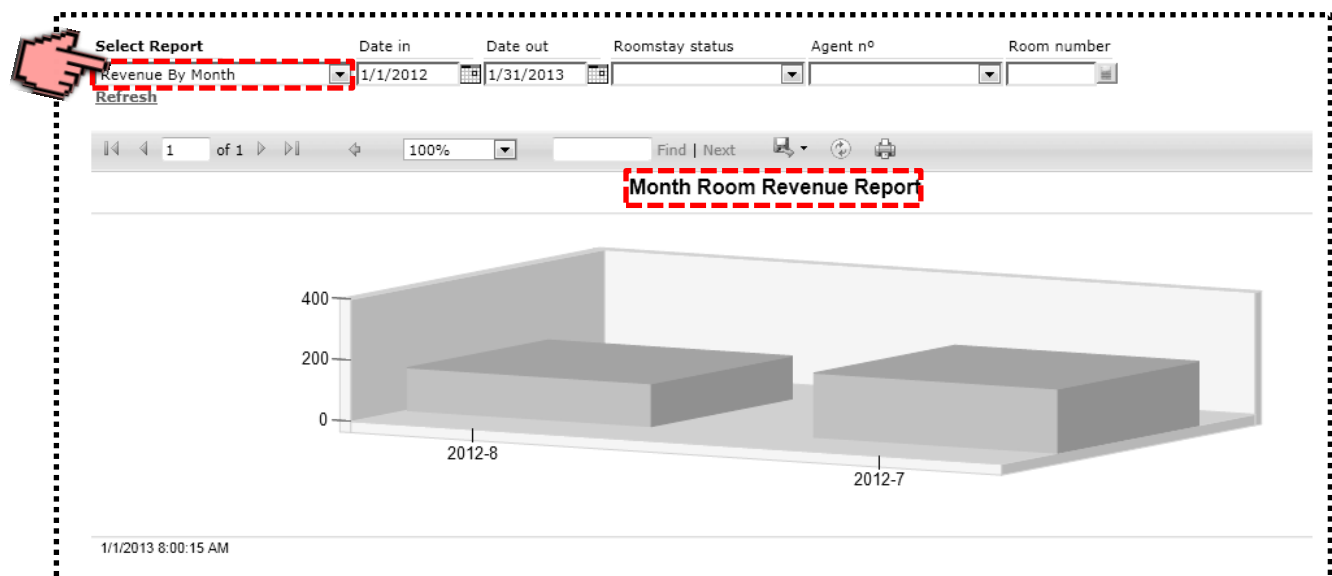
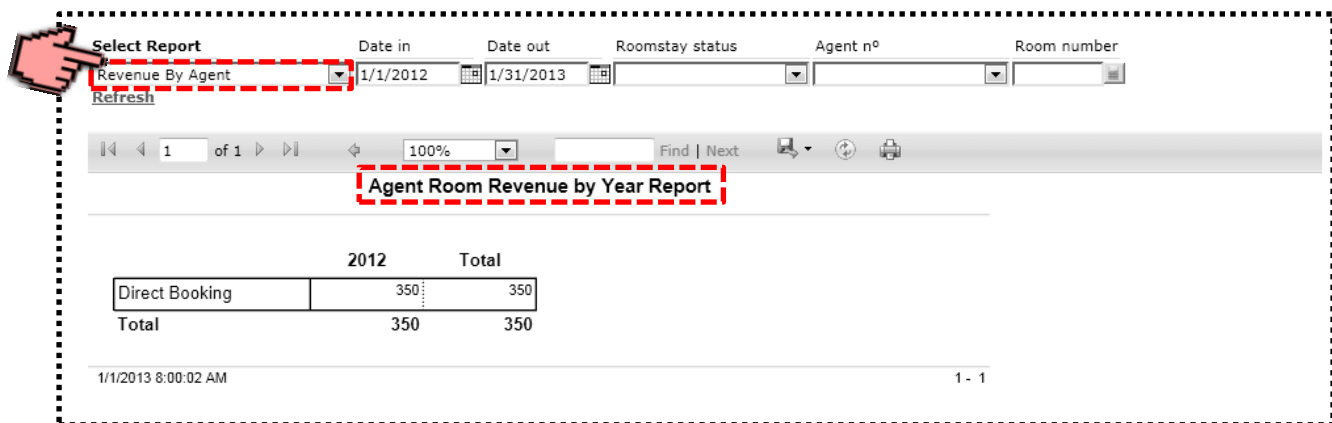
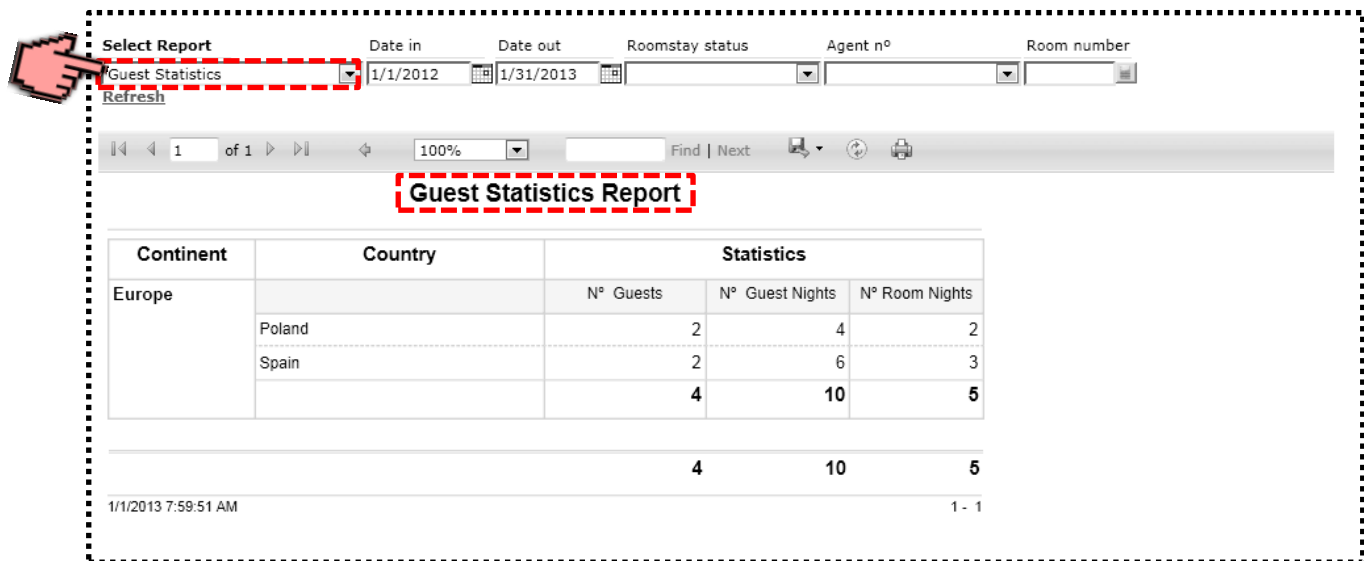
This report page includes reports such as “Hotel Statistics”, “Guest Statistics”, “Revenue by Agent”, “Revenue by Month” and “Room stay list”. These reports can be exported to Excel, Word or PDF. The structure and content of the mentioned reports are illustrated in the following figures.

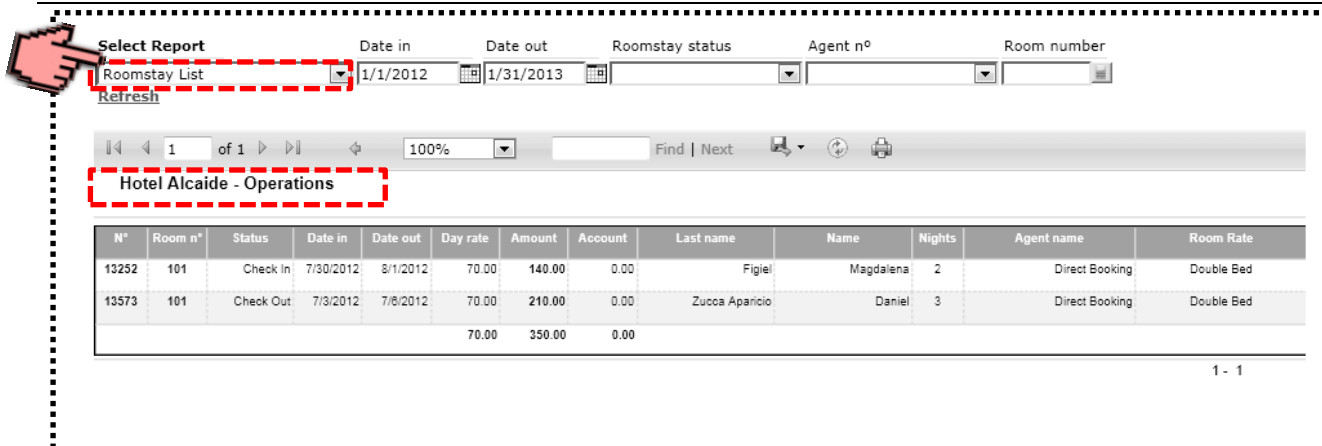
Report Location



Report Description







Select Report

Roomstay List | Date in: 1/1/2012 | Date out: 1/31/2013 | Roomstay status: | Agent n°: | Room number: | Refresh

Hotel Alcaide - Operations

N°	Room n°	Status	Date in	Date out	Day rate	Amount	Account	Last name	Name	Nights	Agent name	Room Rate
13252	101	Check In	7/30/2012	8/1/2012	70.00	140.00	0.00	Figiel	Magdalena	2	Direct Booking	Double Bed
13573	101	Check Out	7/3/2012	7/6/2012	70.00	210.00	0.00	Zucca Aparicio	Daniel	3	Direct Booking	Double Bed
					70.00	350.00	0.00					

1 - 1

7.2.1 FIELDS

1) Filters

- Select report** – select the report to load and view.
- Date in** – filter by check-in date.
- Date out** – filter by check-out date.
- Roomstay status** – filter by room status.
- Agent n°** - filter by agent.
- Room number** – filter by room number.

7.2.2 FUNCTIONS

- Refresh** – refreshes and updates the report accordingly to the selected filters.
- Export PDF** – export the report to PDF, word or excel.
- 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.

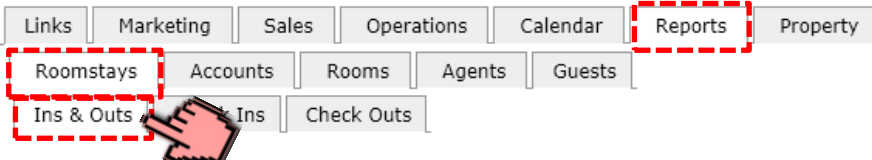
7.3 CHECK-INS & CHECK-OUTS REPORT

This report shows the check-ins and check-outs between a date range.

Report Location

Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |



Report Description

1a

1b

Next check ins and check outs

Stay start 6/1/2012

Stay end 7/15/2012

Select

F1

[xls](#) [csv](#)

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.

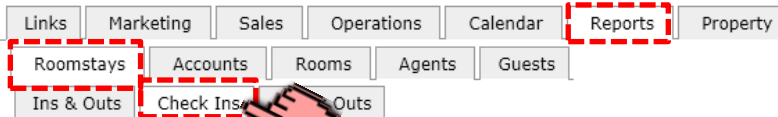
7.4 CHECK-INS REPORT

This report shows the check-ins for a certain date.

Report Location


Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |



Report Description

1a Search check ins

Date in 

Select F1

[xls](#) [csv](#)

Roomstay	Room number	Last name	Name	Date in	Date out	Nº of Nights	Agent name
16426	101	ribeiro	miguel	7/8/2012	7/20/2012	12	Top Tours
16698	209	& Richard KRIZ	Corinne	7/8/2012	7/12/2012	4	Top Tours
16699	205	Zucca Aparicio	Daniel	7/8/2012	7/12/2012	4	Top Tours

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.

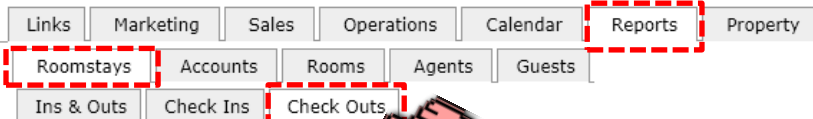
7.5 CHECK-OUTS REPORT

This report shows all the check-outs for a certain date.

Report Location


hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |



Report Description

1a Search check outs

Date out: 

Select:

F1

Roomstay	Room number	Last name	Name	Date in	Date out	Nº of Nights	Agent name
16427	204	ribeiro	miguel	7/4/2012	7/8/2012	4	Top Tours

[xls](#) [csv](#)

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

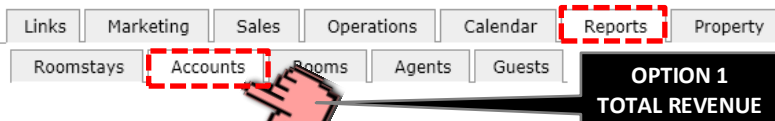
This page shows several reports related to the hotel total revenue and to the hotel room revenue.

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

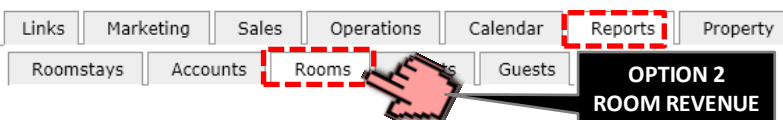
Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |

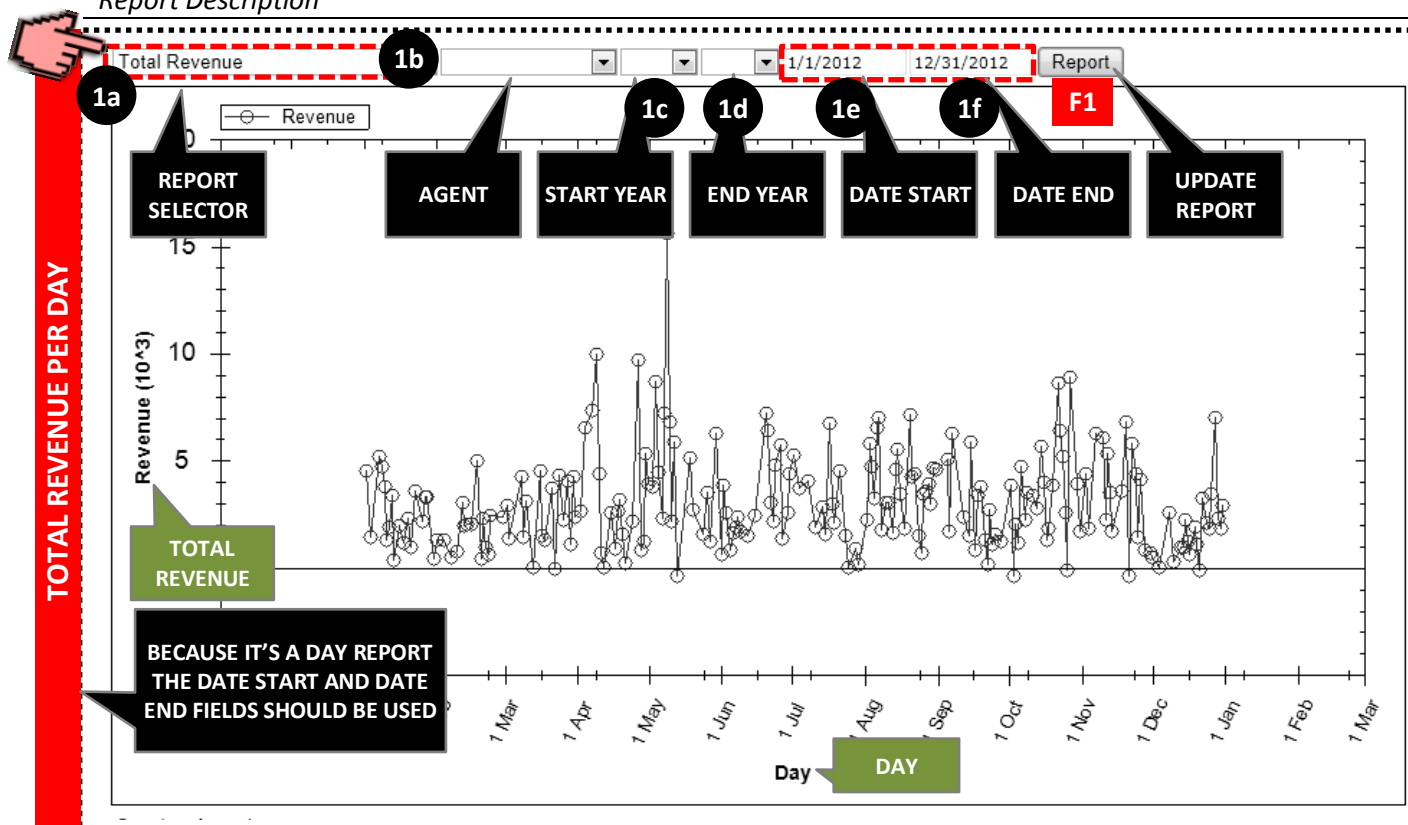


Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |

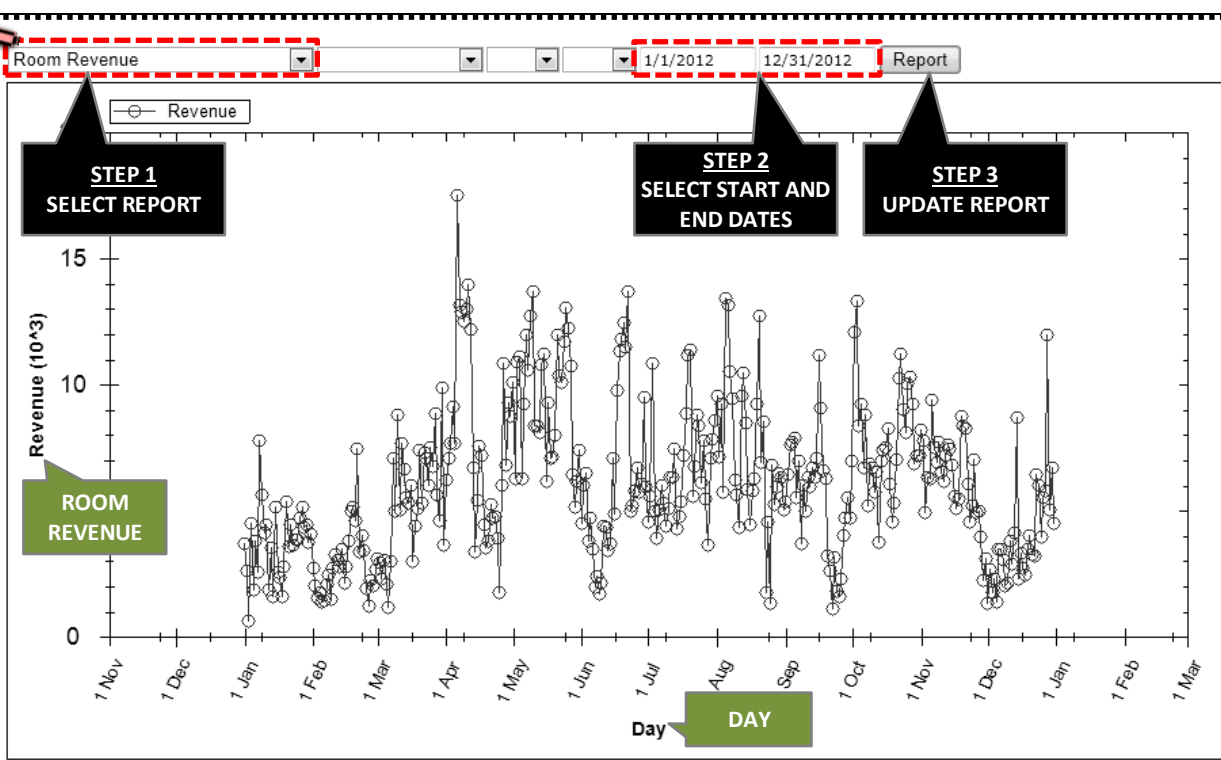


Report Description

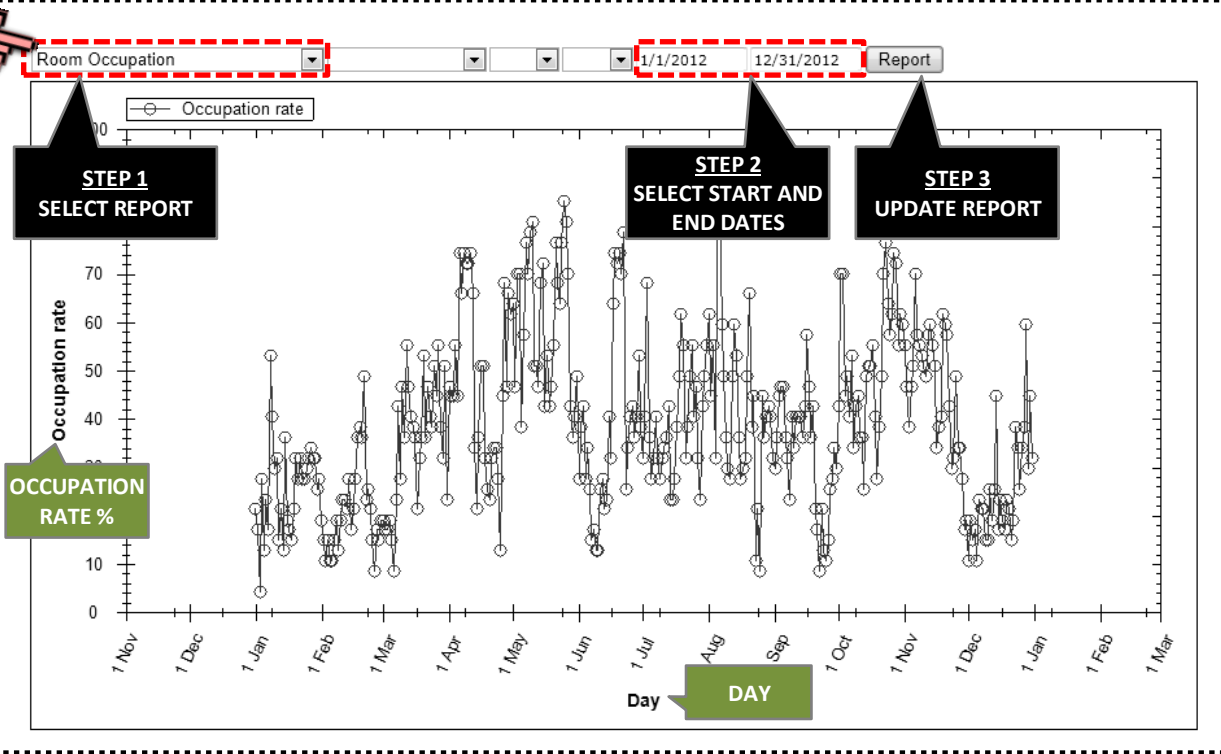


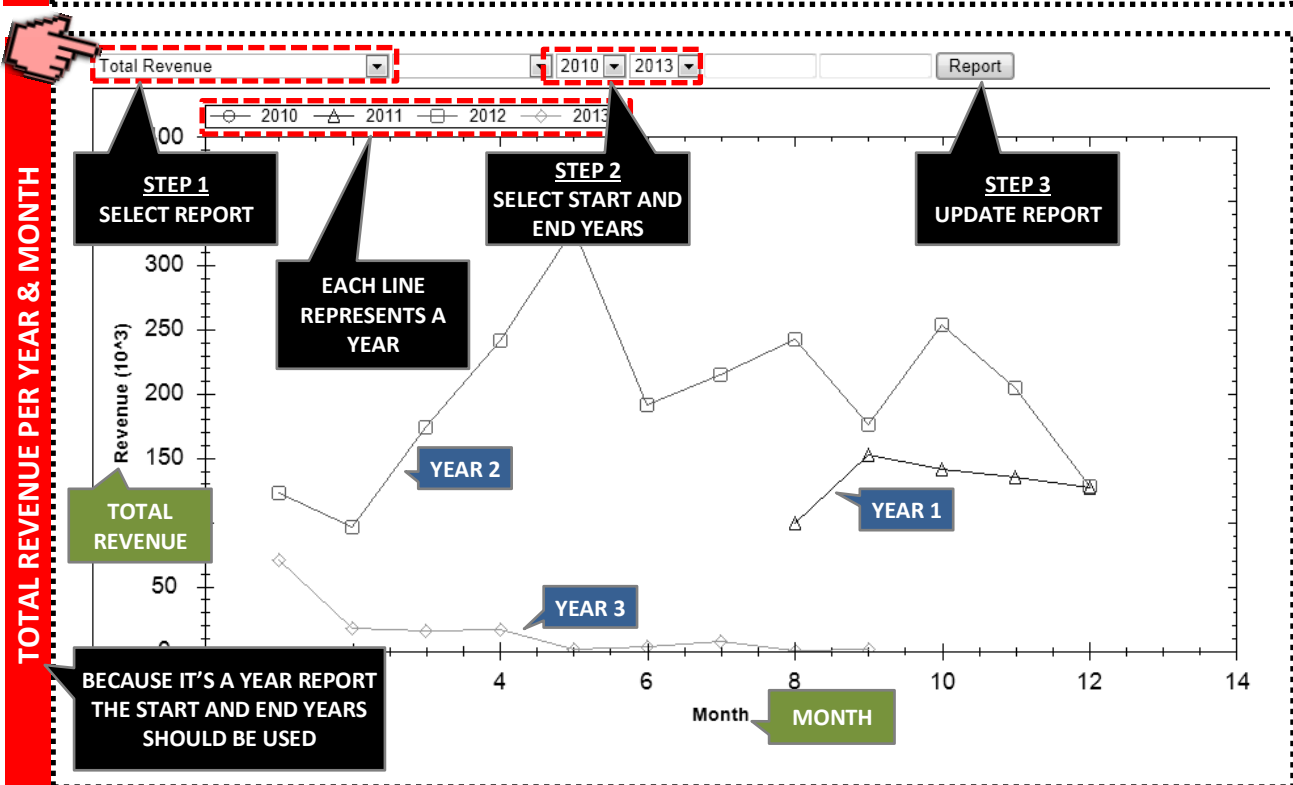
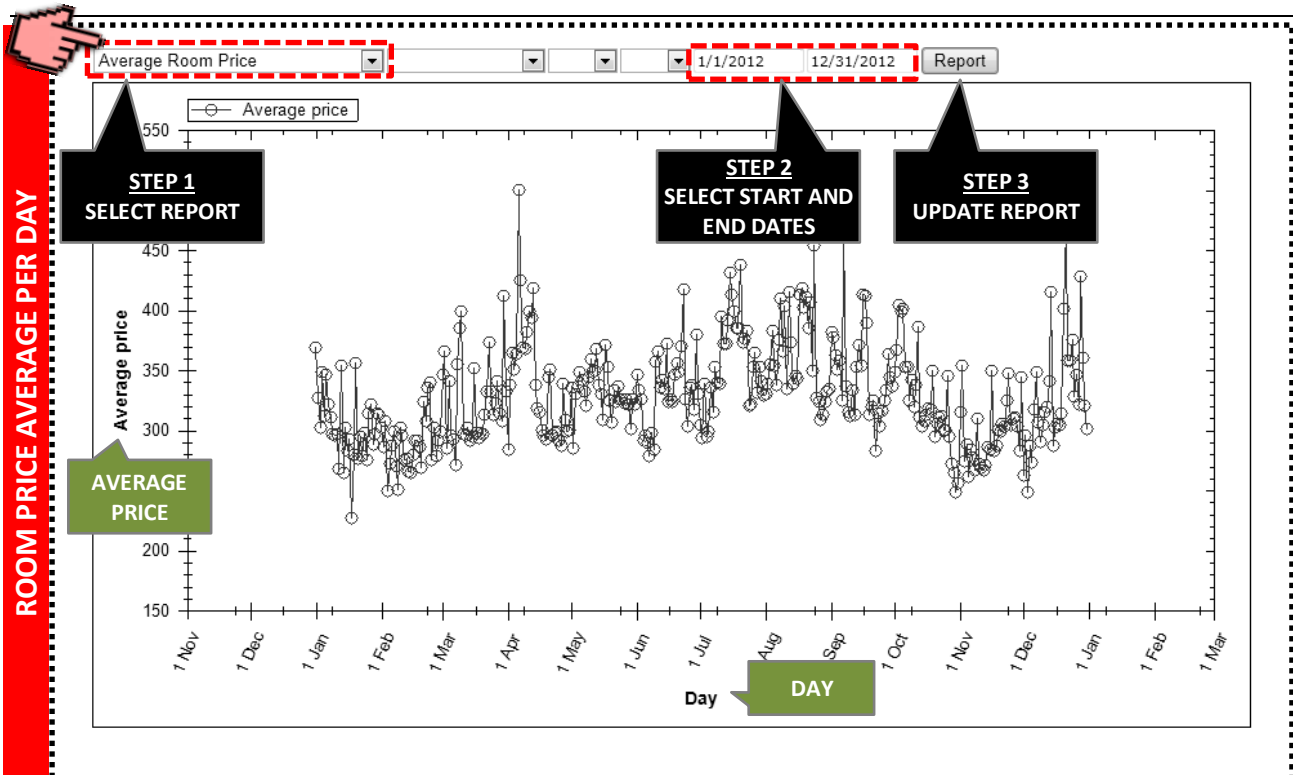


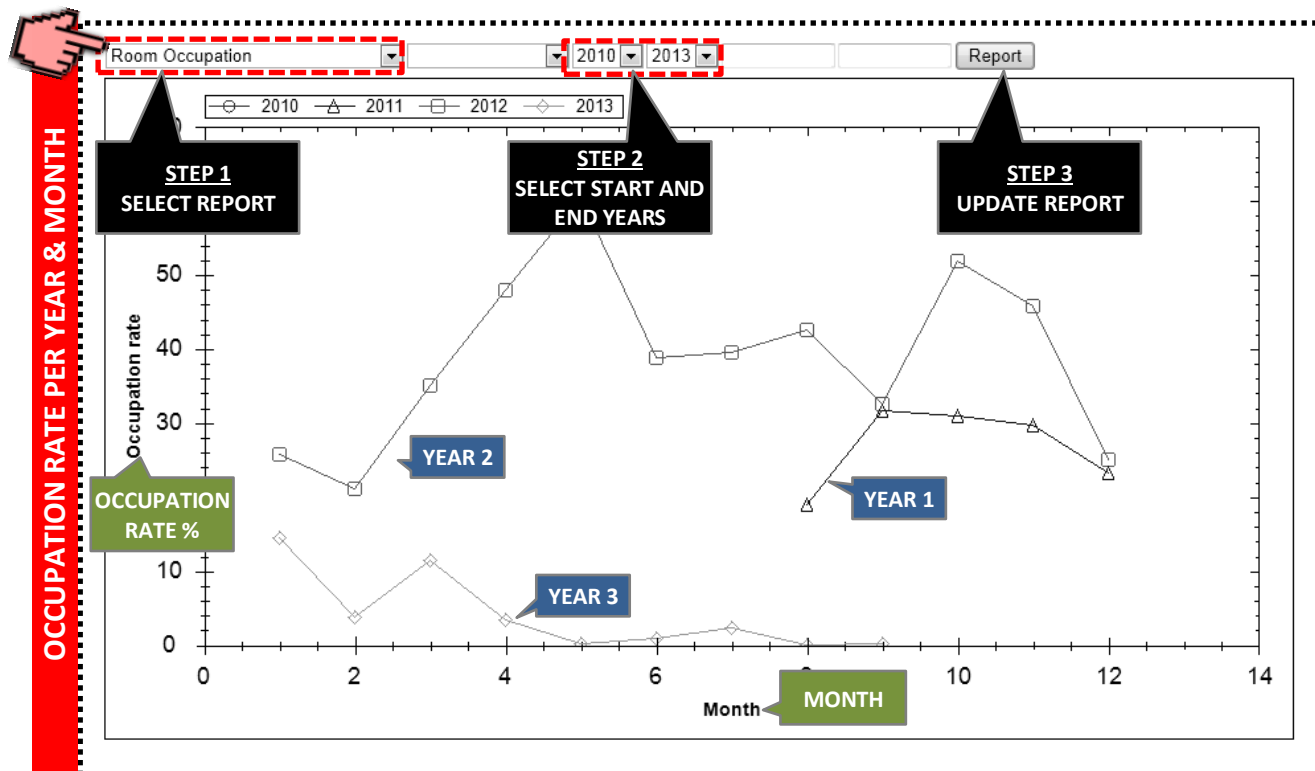
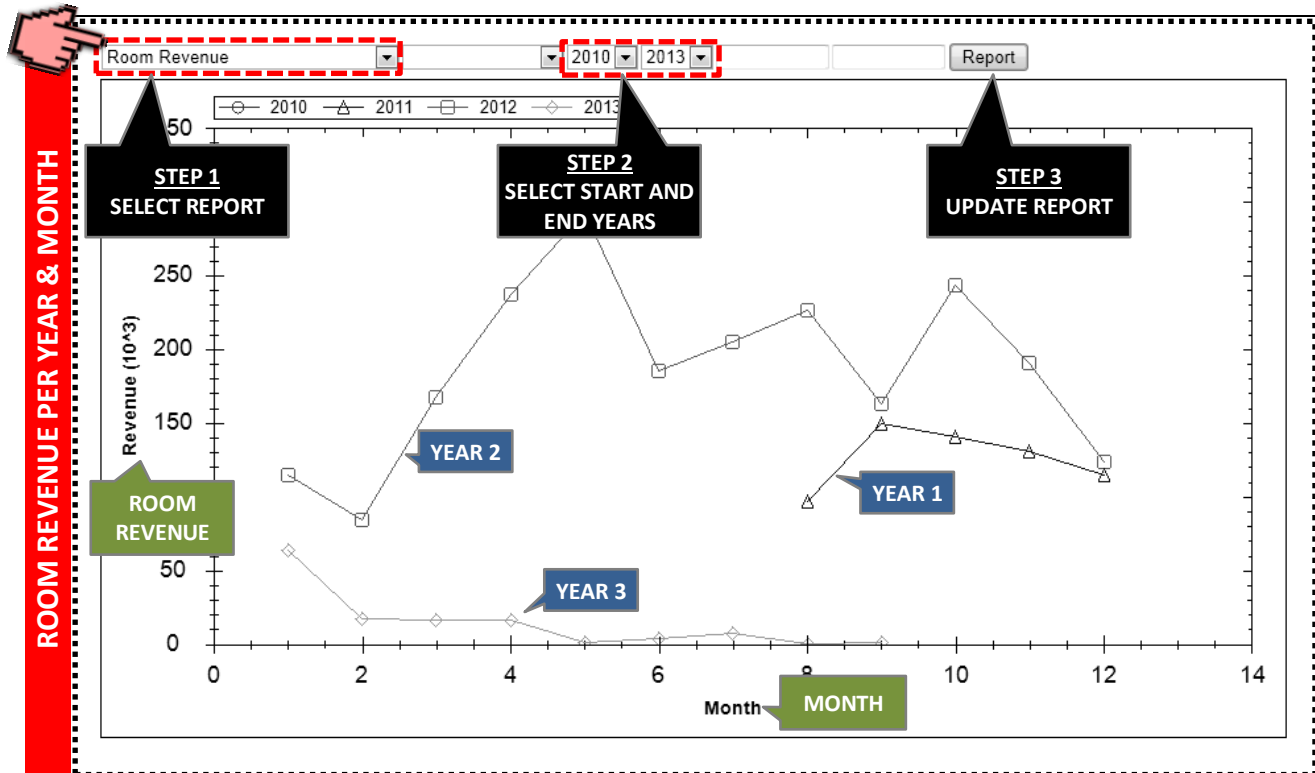
ROOM REVENUE PER DAY

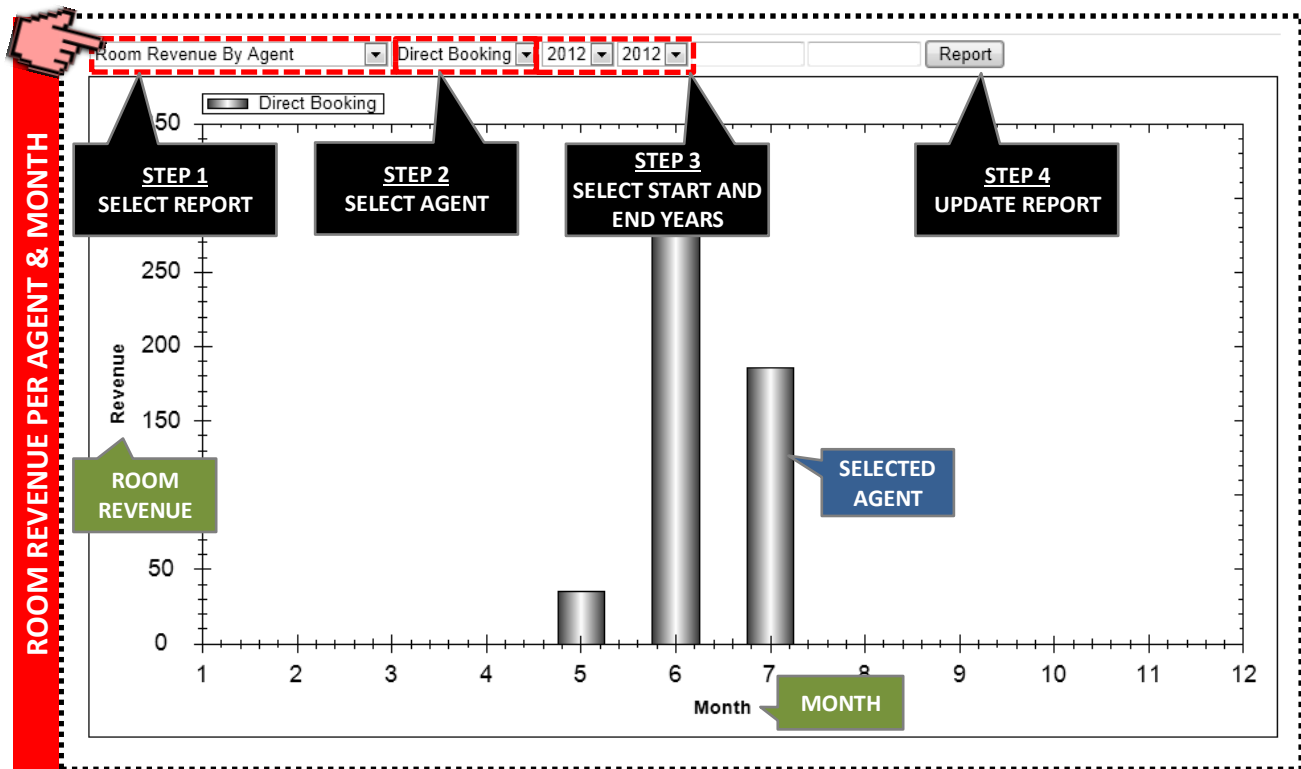
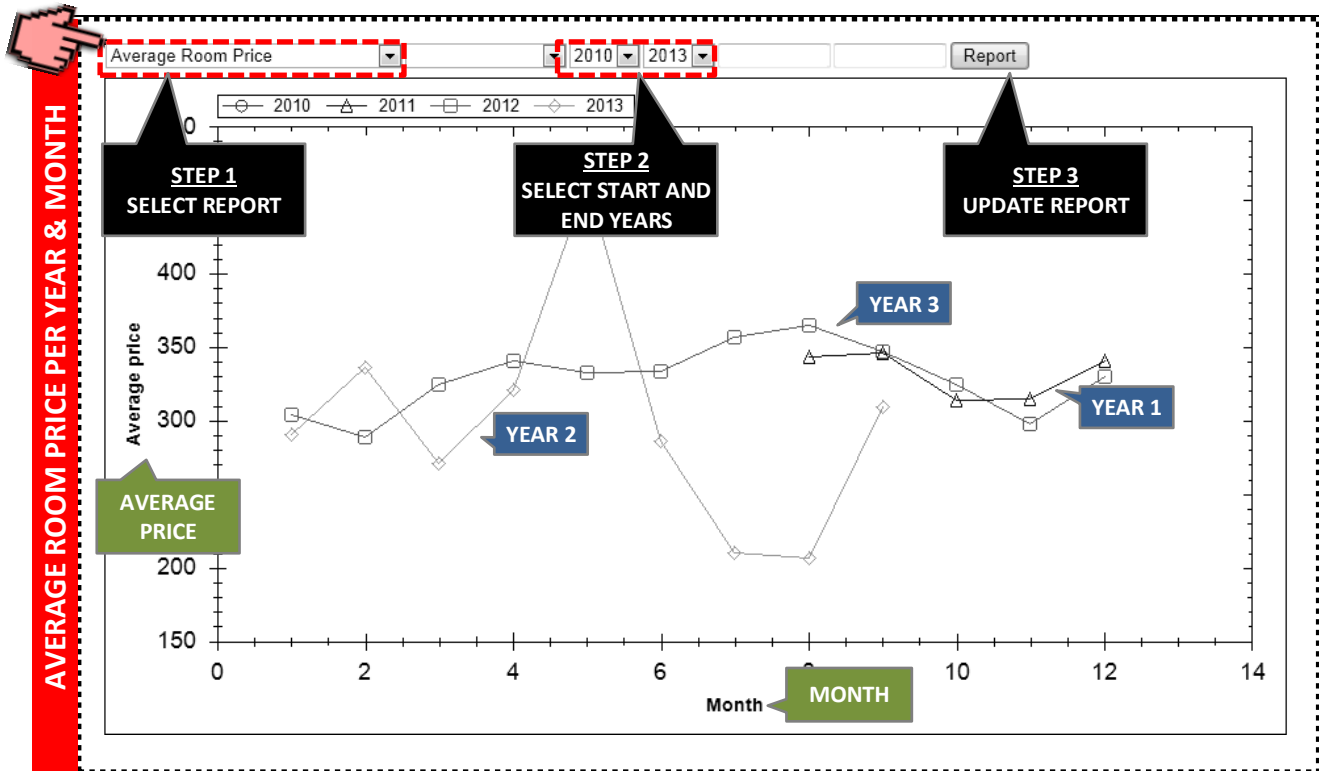


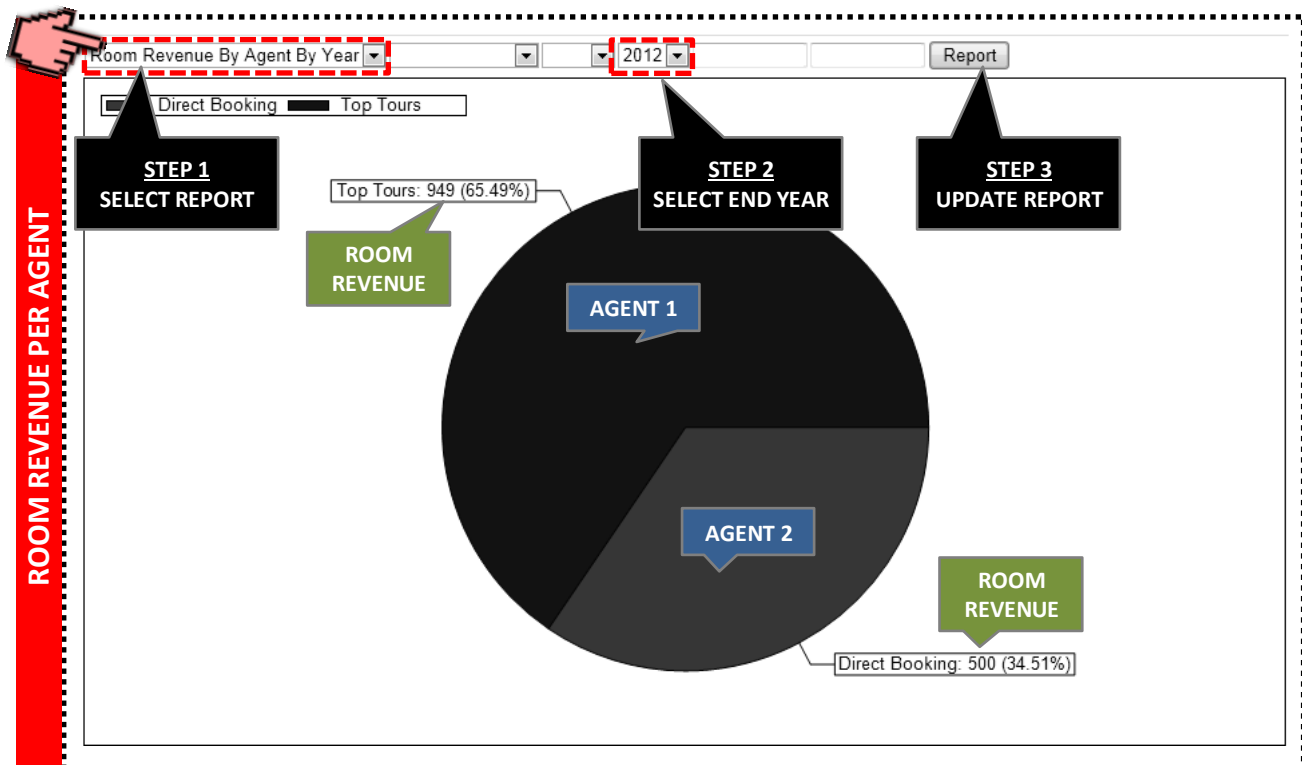
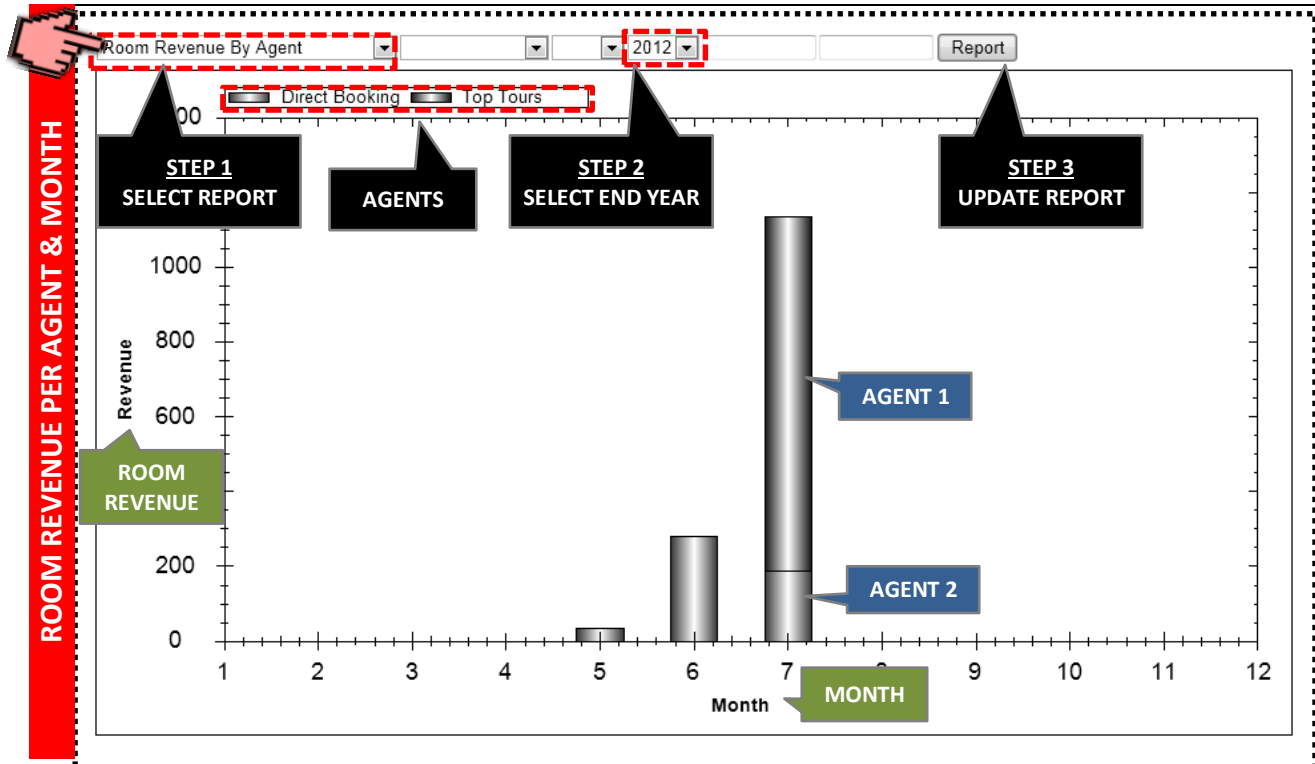
OCCUPATION RATE PER DAY











7.6.1 FIELDS

1) Main

- Report selection** – select the report to show.
- 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.

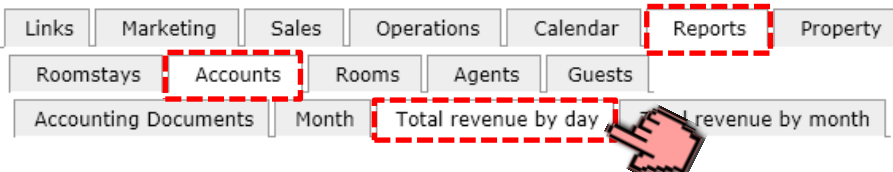
7.7 TOTAL REVENUE PER DAY REPORT

This report shows the total revenue amounts per day.

Report Location

Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |



Report Description

Total revenue by day

1a Trx. date	1b Category	1c Quantity	1d Amount	1e Currency	1f Max. Rec.
1/4/2013					100

[Search](#)

F1

[xls](#) [csv](#)

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.

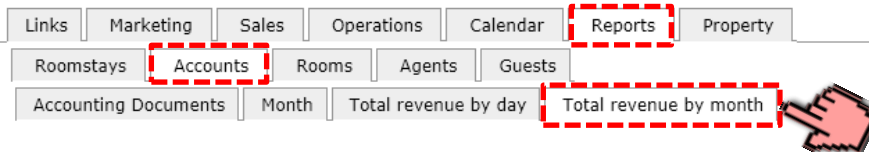
7.8 TOTAL REVENUE PER MONTH REPORT

This report shows the total revenue per month.

Report Location

Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |



Report Description

Total revenue by month

1a

Year

2012

1b

Month

1c

Month

1d

Quantity

1e

Amount

1f

Currency

1g

P&S Category

Search

F1

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

[xls](#)
[csv](#)

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.

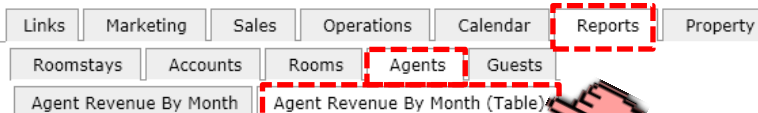
7.9 AGENT REVENUE PER MONTH REPORT

This report shows the total revenue per agent.

Report Location

Hotel Alcaide - Operations

Hotelalcaide | [Account](#) | [Website](#) | [Sign out](#) |



Report Description

Room revenue by agent

1a

1b

1c

1d

1e

1f

Year

Month

Agent name

Amount

Balance

Nº of stays

2012

Search

F1

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

xls

csv

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.

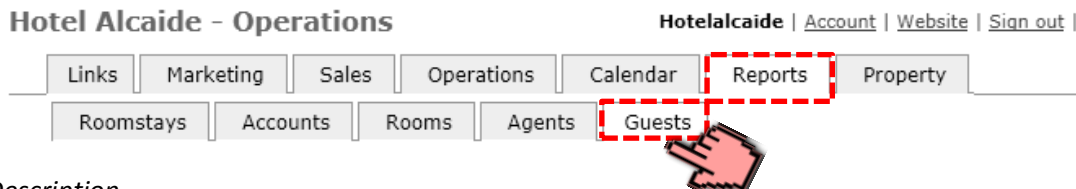
7.9.2 FUNCTIONS

- 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

Guest duplicates

1a

1b

1c

Search

F1

xls csv

Name	Last name	Occurrences
hotelasp@hotelasp.com		5
miguel	ribeiro	5
hotelasp@netcabo.pt		3
Magdalena	Figiel	2
m	m	1
Mariano	Quinter	1
Daniel	Zucca Aparicio	1
mogu		1
Corinne	& Richard KRIZ	1
Max	de Oliveira	1
Web Agent	Entity	1

1

Displaying items 1 to 11 from 11

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.

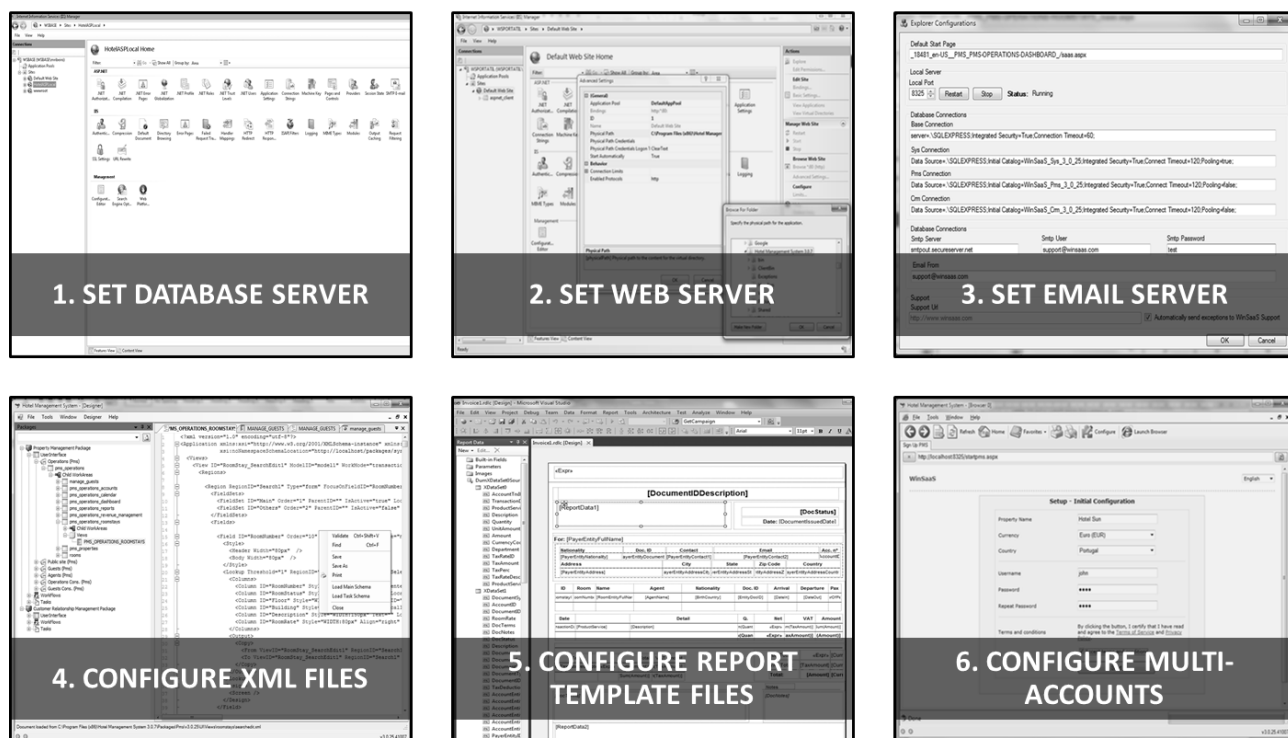


Figure 87 - Configure Local Version: Main Steps

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:

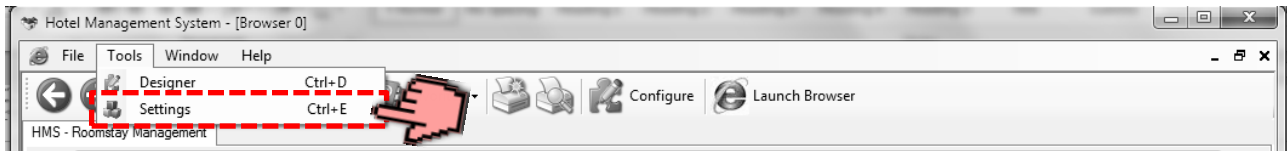
1. **Attach databases** – Read and execute the ATTACH DATABASES HELP CARDS chapter.
 - The databases by default are not attached to the SQL server.
 - The *Hotel Explorer* when executed attaches the databases and when is closed detaches the databases.
 - The help cards explain how the user can attach 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.

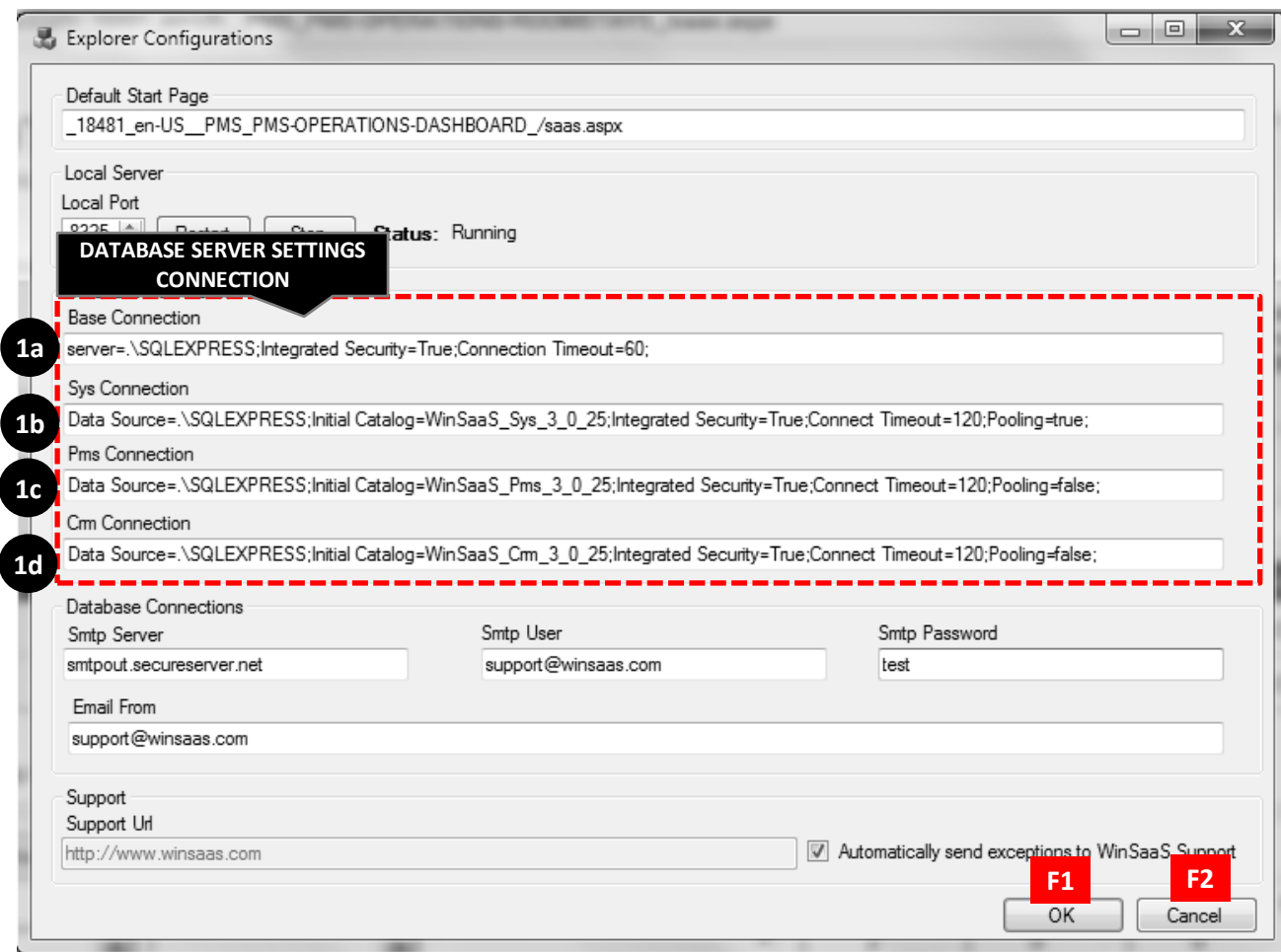
8.1 SET DATABASE SERVER

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.

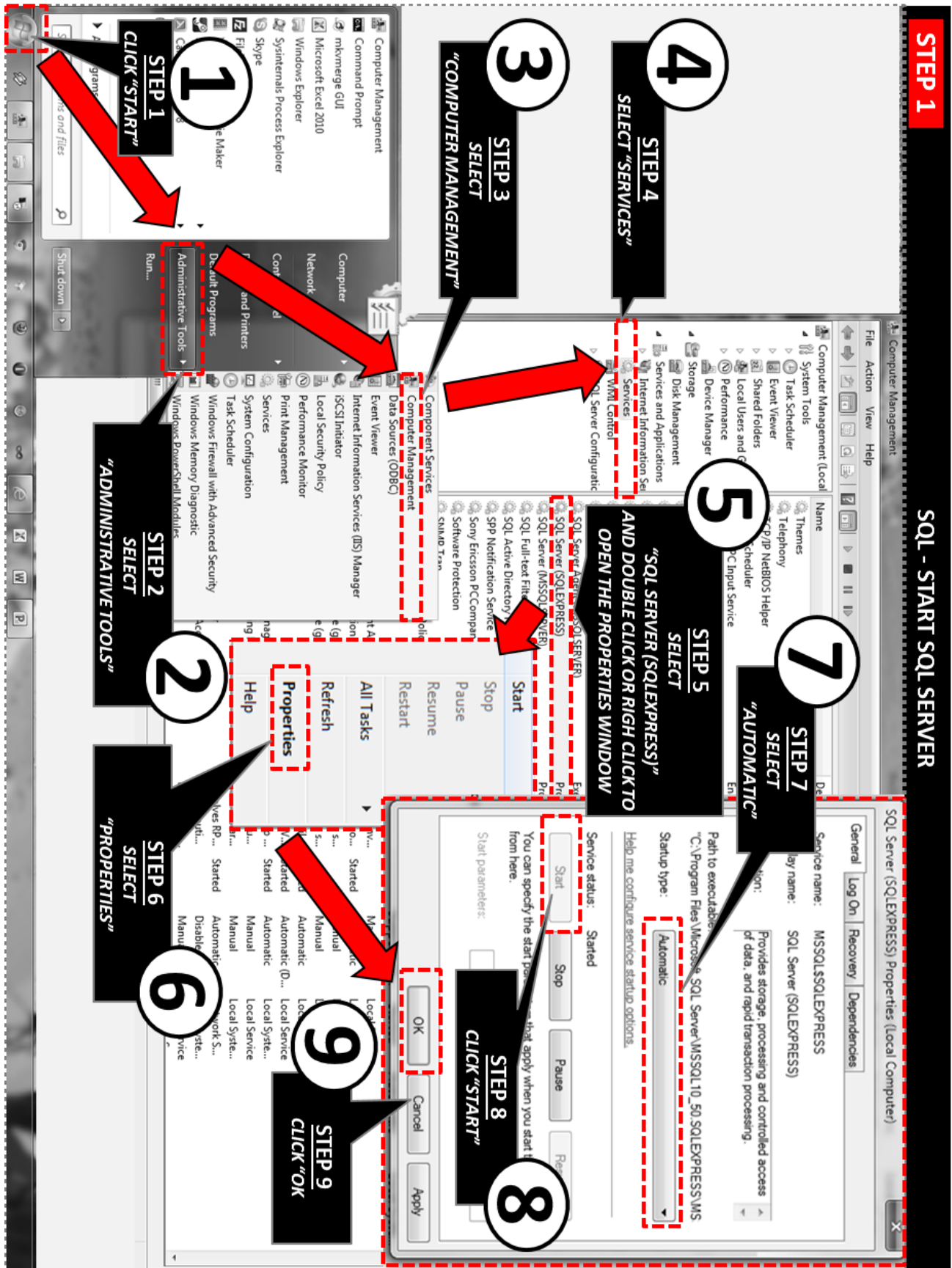
The **SQL_CONNECTION_TO_SYSTEM_DATABASE** is the SQL connection to the system database (*WinSaaS_Sys_3_0_25*).

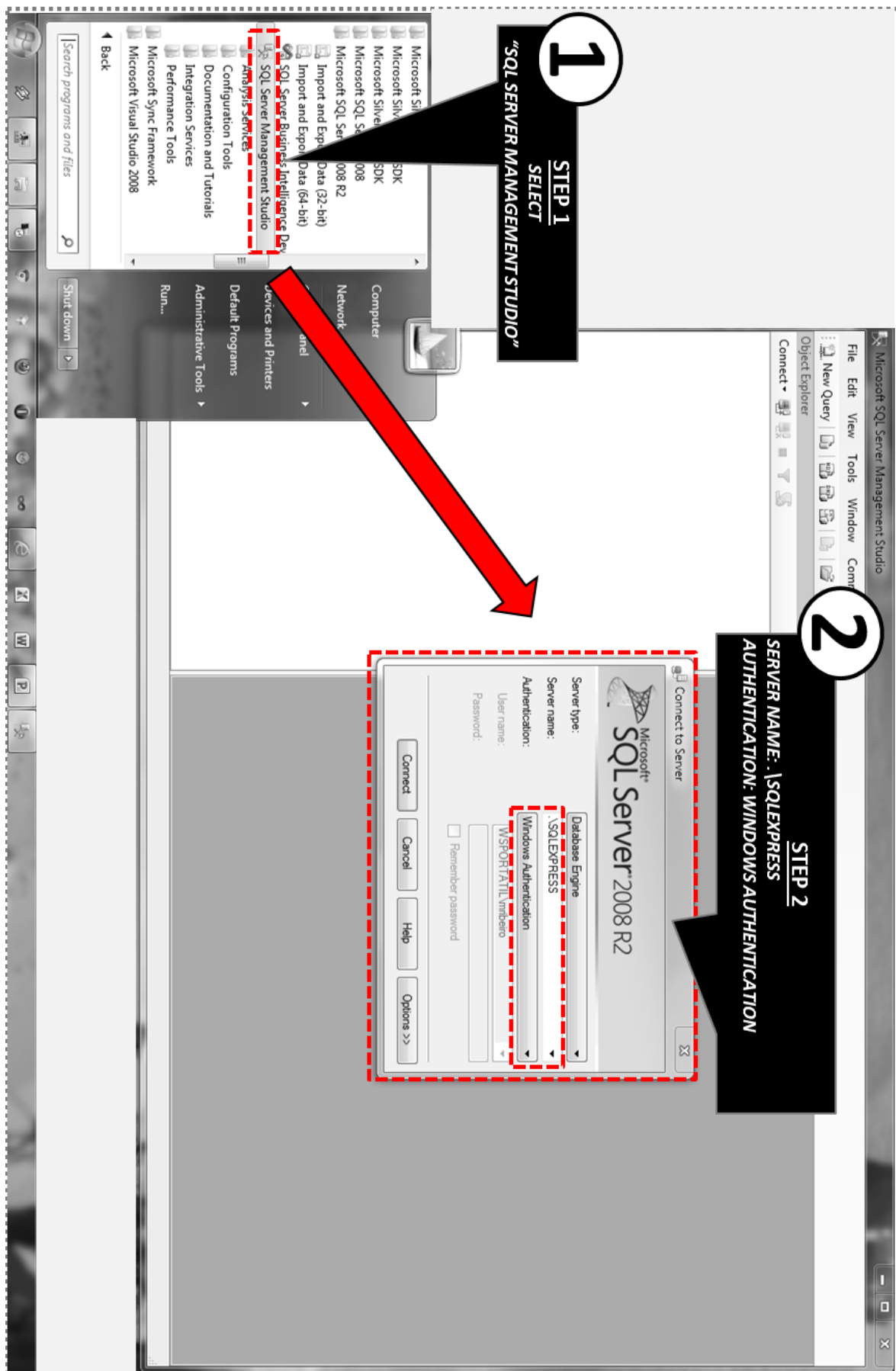
The **SQL_CONNECTION_TO_PMS_DATABASE** is the SQL connection to the property management system database (*WinSaaS_Pms_3_0_25*).

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 3

SQL – ATTACH DATABASES

STEP 1
SELECT
"DATABASES"
AND RIGHT CLICK

STEP 2
SELECT
"ATTACH"

STEP 3
SELECT
"ADD"

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"

STEP 5
CLICK
"OK"

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"

STEP 7
CLICK
"OK"

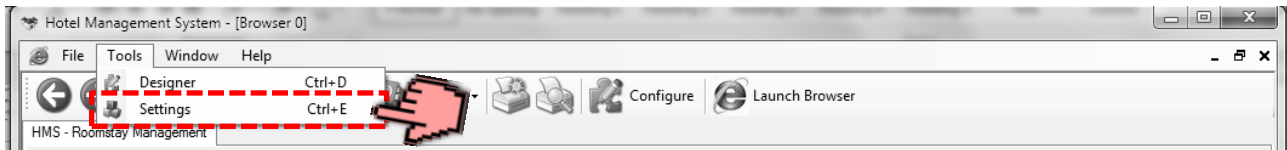
STEP 8
CONFIRM THAT THE 3
DATABASES ARE ATTACHED

8.2 SET WEB SERVER

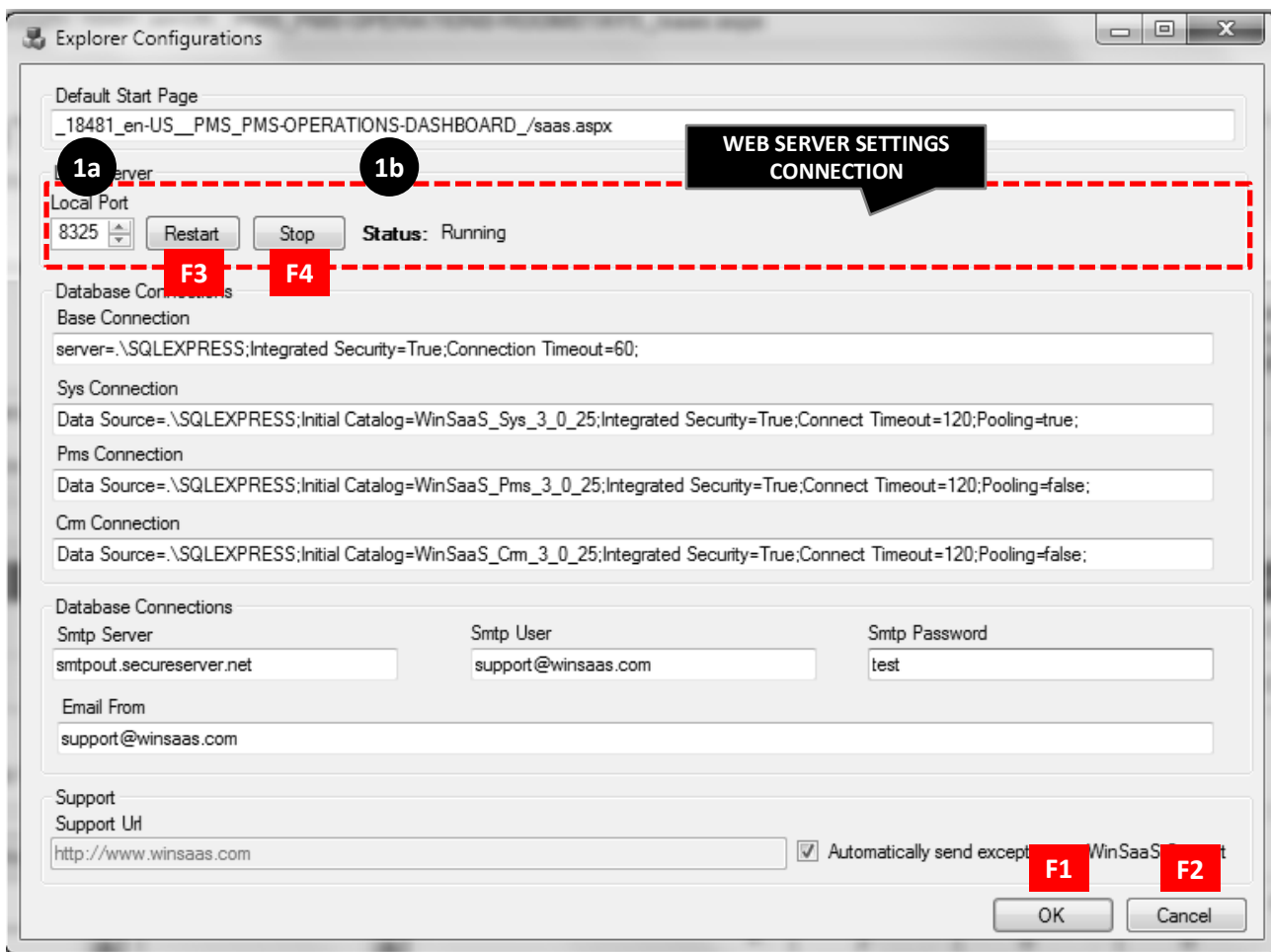
This page allows the hotel to set the *Hotel Explorer* web server settings. As an alternative web server the hotel can configure the *Internet Information Server* as explained in the CONFIGURE IIS HELP CARDS chapter.

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 1

INSTALL INTERNET INFORMATION SERVER [IIS]

STEP 1
CLICK "START"

STEP 2
CLICK "CONTROL PANEL"

STEP 3
CLICK "PROGRAMS AND FEATURES"

STEP 4
CLICK "TURN WINDOWS FEATURES ON OR OFF"

STEP 5
CHECK THE BOX "INTERNET INFORMATION SERVICES"

STEP 6
CHECK THE BOX "ASP.NET"

STEP 7
CLICK "OK"

STEP 8
WAIT AND GO TO THE NEXT STEP

STEP 2

REGISTER ASP.NET 4.0

STEP 1
CLICK
"START"

1

STEP 2
NAVIGATE TO
"ALL PROGRAMS\ACCESSORIES\COMMAND PROMPT"

2

STEP 3
RIGHT CLICK IN "COMMAND PROMPT" AND SELECT
"RUN AS ADMINISTRATOR"

3

STEP 4
EXECUTE IN COMMAND PROMPT
`C:\Windows\Microsoft.NET\Framework\v4.0.30319\ASPNET_REGIS.EXE -i`

4

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_regis-
exe -i
Start installing ASP.NET (4.0.30319).
Finished installing ASP.NET (4.0.30319).
C:\Windows\system32>

STEP 3

IIS - START INTERNET INFORMATION SERVER

STEP 1
CLICK "START"

STEP 2
CLICK "ADMINISTRATIVE TOOLS"

STEP 3
CLICK "INTERNET INFORMATION SERVICES (IIS) SERVER"

STEP 4
CLICK "DEFAULT WEB SITE"

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"

STEP 5

IIS - SET ASP .NET 4.0

The screenshot shows the IIS Manager console with the 'Application Pools' feature selected. The 'Default Web Site' is expanded, showing the 'Application Pools' folder. A table lists the application pools, with 'DefaultAppPool' selected. A dialog box 'Edit Application Pool' is open, showing the 'DefaultAppPool' configuration. The 'NET Framework version' is set to '.NET Framework v4.0.30319'. The 'Managed pipeline mode' is set to 'Integrated'. The 'Start application pool immediately' checkbox is checked. The 'OK' button is highlighted.

STEP 1
SELECT "APPLICATION POOLS"

STEP 2
SELECT "DEFAULTAPPPool"

STEP 3
CLICK "BASIC SETTINGS"

STEP 4
SELECT ".NET FRAMEWORK V4.03019"

STEP 5
CLICK "OK"

STEP 6

IIS – SET 32-BIT APPLICATIONS

1 STEP 1
SELECT "APPLICATION POOLS"

2 STEP 2
SELECT "DEFAULTAPPOOL"

3 STEP 3
CLICK "ADVANCED SETTINGS"

4 STEP 4
SELECT TRUE IN "ENABLE 32-BIT APPLICATIONS"

5 STEP 5
CLICK "OK"

The screenshot shows the IIS Manager console with the 'Application Pools' feature selected. The 'DefaultAppPool' is highlighted in the list. The 'Advanced Settings' dialog box is open, and the 'Enable 32-Bit Applications' checkbox is checked. The 'OK' button is highlighted.

Name	Status	.NET Fram...	Managed Pipel...	Identity	Applications
Classic .NET Ap...	Started	v2.0	Classic	ApplicationPoo...	0
DefaultAppPool	Started	v4.0	Integrated	ApplicationPoo...	1

Advanced Settings

(General)

☒ **Enable 32-Bit Applications**

Managed Pipeline Mode

Name: DefaultAppPool

Queue Length: 1000

Start Automatically: True

CPU

Limit: 0

Limit Action: NoAction

Limit Interval (minutes): 5

Processor Affinity: Enabled

Processor Affinity Mask: 4294967295

Process Model

Identity: ApplicationPoolIdentity

Idle Time-out (minutes): 20

Load User Profile: True

Maximum Worker Processes: 1

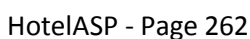
Ping Enabled: True

Enable 32-Bit Applications
[enable32BitAppOnWin64] If set to true for an application pool on a 64-bit operating system, the worker process(es) serving the application pool will be in WOW64 (Windows on Windows64) mode. Processes in WOW64 mo...

OK **Cancel**

Actions

Add Application Pool...
Set Application Pool Defaults...
Application Pool Tasks
Start
Stop
Recycle...
Edit Application Pool
Basic Settings...
Recycling...
Advanced Settings...
Rename
Remove



STEP 8

LAUNCH HOTELASP

Hotel Management System

NAVIGATE TO
HTTP://LOCALHOST

Sign In

Email: manager

Password: *****

☐ Remember me on this computer

[I forgot my password](#)

Sign In

Administrator User

Username : admin

password : admin

Default Account User

Username : manager

Password : manager

©2012 v3.0.25.41007 (9.62s)

English

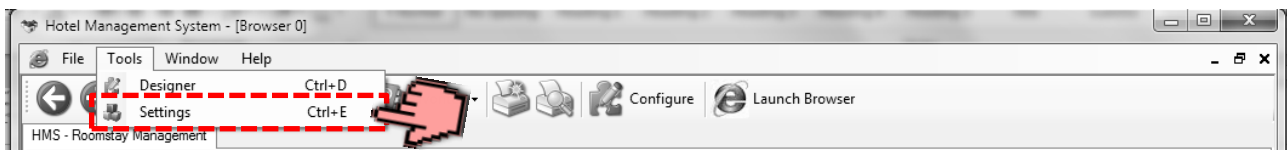
8.3 SET EMAIL SERVER

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](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.

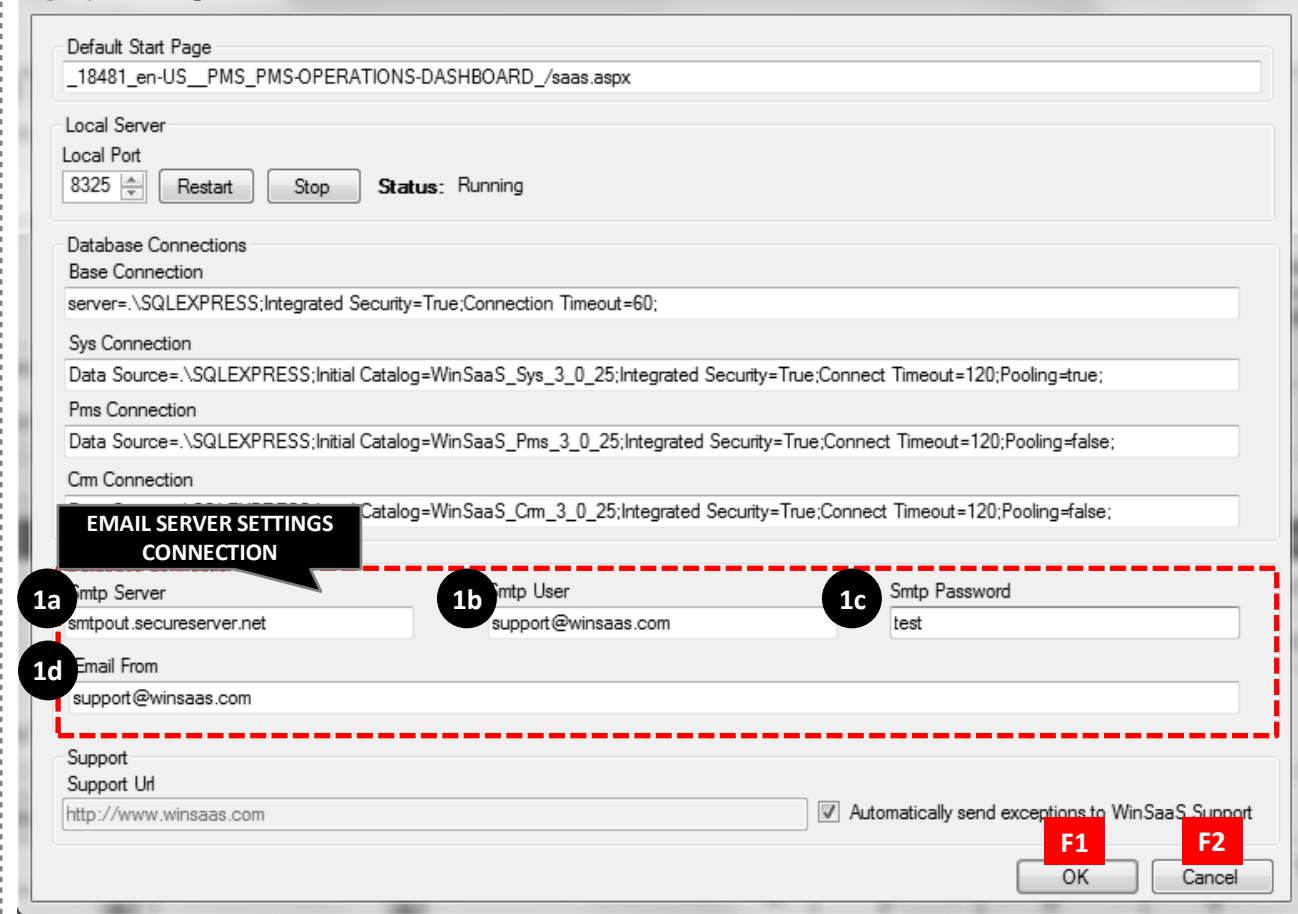
Feature Location



Feature Description

STEP 1

CHANGE EMAIL SERVER



Default Start Page
 _18481_en-US_PMS_PMS-OPERATIONS-DASHBOARD_/saas.aspx

Local Server
 Local Port
 8325 Restart Stop Status: Running

Database Connections
 Base Connection
 server=.\SQLEXPRESS;Integrated Security=True;Connection Timeout=60;

Sys Connection
 Data Source=.\SQLEXPRESS;Initial Catalog=WinSaaS_Sys_3_0_25;Integrated Security=True;Connect Timeout=120;Pooling=true;

Pms Connection
 Data Source=.\SQLEXPRESS;Initial Catalog=WinSaaS_Pms_3_0_25;Integrated Security=True;Connect Timeout=120;Pooling=false;

Cm Connection
 Catalog=WinSaaS_Cm_3_0_25;Integrated Security=True;Connect Timeout=120;Pooling=false;

EMAIL SERVER SETTINGS CONNECTION

1a Smtp Server
 smtpout.secureserver.net

1b Smtp User
 support@winsaas.com

1c Smtp Password
 test

1d Email From
 support@winsaas.com

Support
 Support Url
 http://www.winsaas.com ☒ Automatically send exceptions to WinSaaS Support

F1 F2
 OK Cancel

STEP 2

CHANGE USER EMAILS (ADMIN USER & MANAGER USER)

CRM PMS Sys

Standard Application Services Console Account Console System Administration

Dashboard Accounts Applications Contexts Users Packages Mashups Localizations Reports Workareas

Users Roles Favorites Messages Recover password

Search Report

STEP 1
NAVIGATE TO
HTTP://LOCALHOST:8325/_0_EN-US_23000___/SAAS.ASPX

Search Users

Main Others

Id	User name	Email	First name	Last name	Account n°	Default Application	User Status
1	admin	support3025@winsaas.com			1	0	
21481	manager	some@email.com			3,654	18,479	

Search

STEP 2
DOUBLE CLICK IN ROW TO LOAD THE USER DETAIL FORM.
CHANGE EMAILS FROM BOTH USERS (ADMIN AND MANAGER).

2a

Displaying items 1 to 2 from 2

Sys > System Administration > Users > Users > Search Users

Send feedback

STEP 3

CHANGE USER EMAILS (ADMIN USER & MANAGER USER)

CRM PMS Sys

Standard Application Services Console Account Console System Administration

Dashboard Accounts Applications Contexts Users Packages Mashups Localizations Reports Workareas

Users Roles Favorites Messages Recover password

Search Manage User Authorizations States Types

STEP 3
CLEAR CACHE

STEP 1
CHANGE EMAIL

3a

Manage Users

Main X

Id	User name	Email	Account n°	Default Application	User Guid
1	admin	support3025@winsaas.com	1	0	fd68cbd3-9563-49c5-b9c3-8fa811e656dc

Details X

First name	Middle name	Last name	Gender	Company	Last location	Birth date	Newsletter
system			0	WinSaaS		1/1/1900	

Default culture Weather Loc. ID Weat. Unit Type Creation date

en POXX0039 c 1/1/1900

Other Details X

User Status User Type

Active Master

Addresses X

Street	Address city	Zip code	State	Country
		1600	0	Portugal

Contacts X

Phone Work	Phone Home	Mobile	Fax Work

Statistics V

Other Data V

User Interface V

Messages X

STEP 2
SAVE CHANGES IN DATABASE

Select Ins F4 Update Delete Clear Fields

8.3.1 FIELDS

1) Email Connections

Requireda. ***Smtip Server*** – the smtp server.**Required**b. ***Smtip User*** – the username to access the smtp server.**Required**c. ***Smtip 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

Requireda. ***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.SmtipServer"

- **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.

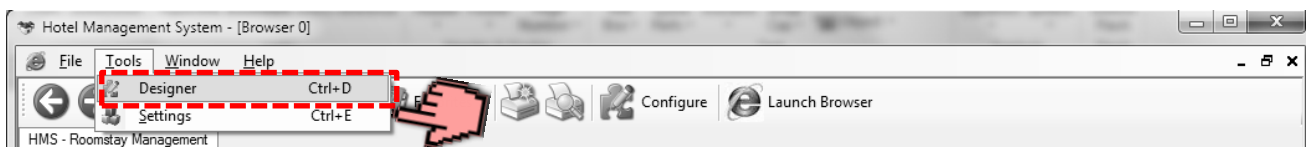
8.4 CONFIGURE XML FILES

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.

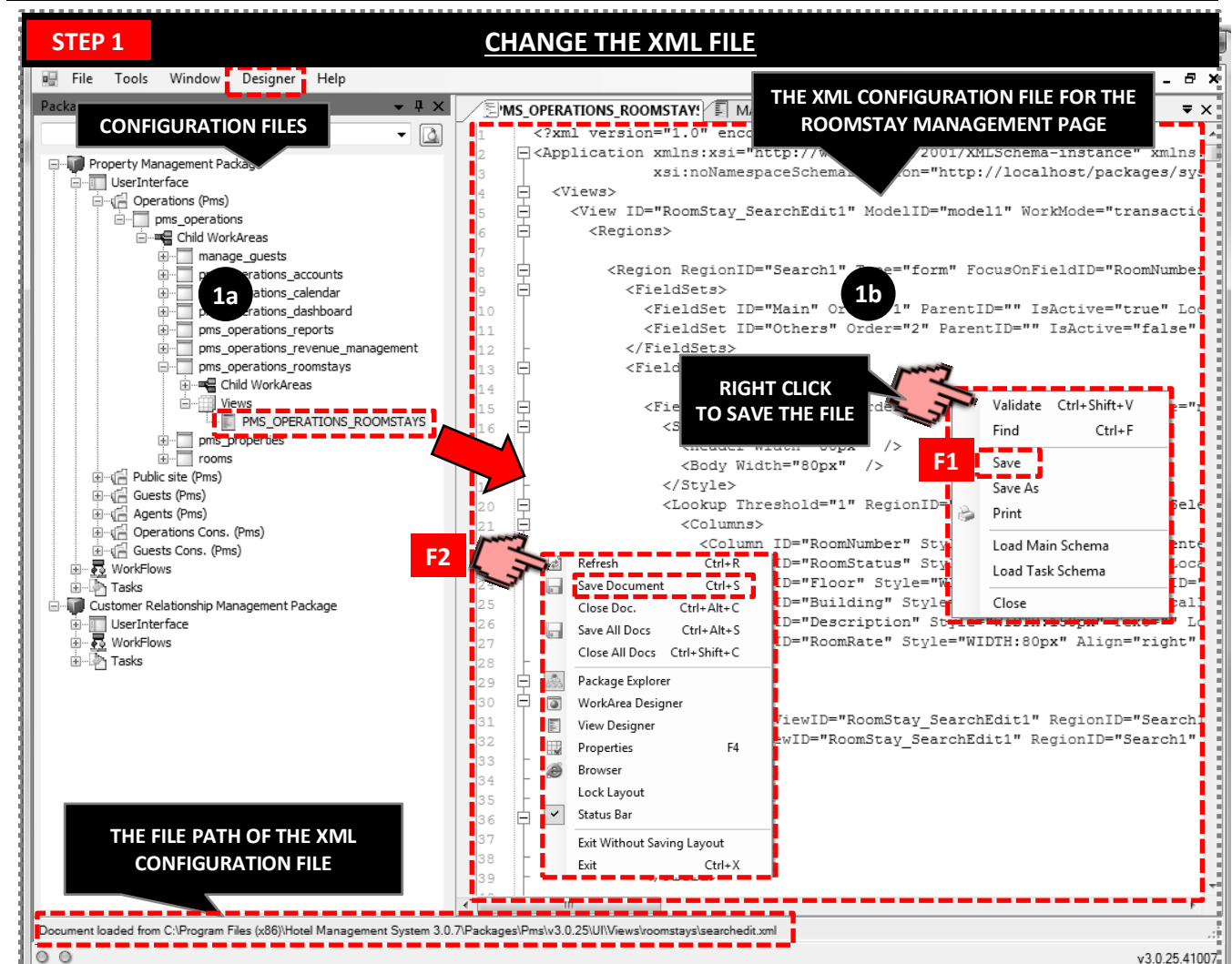
The location of the xml file can be found using the designer or using the path located in VIEW MANAGEMENT page. After changing the xml file the hotel must compile the file by executing the following steps:

- Navigate to the *SYSTEM ENGINE* page at:
 - [HTTP://LOCALHOST:8325/_0_EN-US_22789___/SAAS.ASPX](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 |

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

STEP 3 CLEAR CACHE

F4

IMPORTANT INFORMATION

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 checks below.

Master Engine Configurations Configure

Main	V
Details	X

Master Next Check **Batch Next Check**

11/30/2035 1/25/2013

2a **2b**

Compile All **Validate All**

☒ ☒

Currency

Euro

**STEP 1 ENABLE COMPILE ALL
ENABLE VALIDATE ALL**

Messages X

Select Update Transfer Message Mails

F3

STEP 2 UPDATE ENGINE SETTINGS

Sys > System Administration > Applications > Engine configuration

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" OnEvent="onchange" 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="false"
786 <List ServiceID="SRoomRateSelect" HeaderTextDefault="RoomRateID"
787 <Data ValueField="RoomRateID"
788 <Items>
789 <Item Enabled="true" Selected="true" Text="" Value="" />
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

```

**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 3.0.7Packages\Pms\v3.0.25\UI\Views\roomstay\searchedit.xml

EXAMPLE

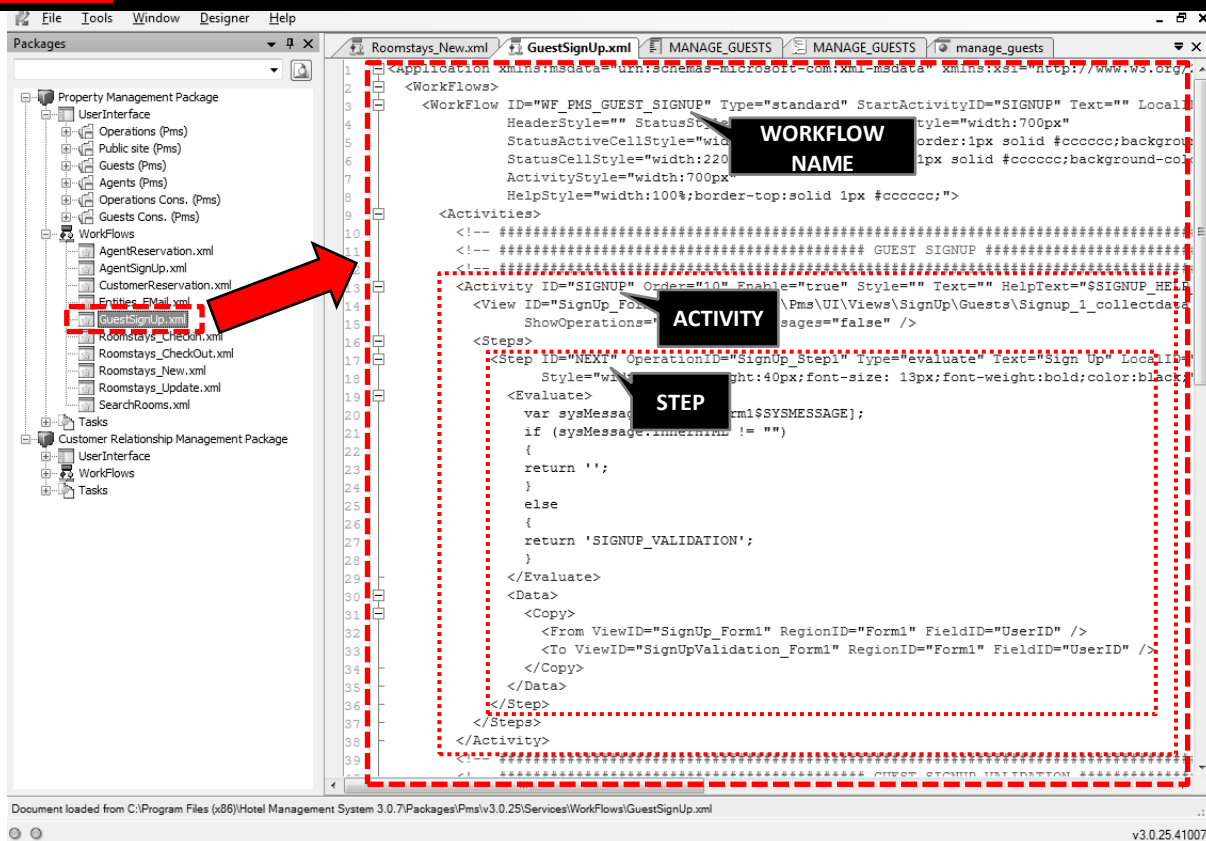
OPERATION XML CONFIGURATION

EXAMPLE

TASK XML CONFIGURATION

EXAMPLE

WORKFLOW XML CONFIGURATION



8.4.1 FIELDS

1) Designer

- Navigation Tree** – the tree view allows the hotel to view and select the configuration files associated with the webpages.
- XML File** – the XML configuration file content.

2) Engine Configuration

- Compile All** – compile the configuration file when the page is loaded.
 - The compilation happens only when the hotel accesses the webpage.
- Validate All** – validates the configuration before compiling the file.

8.4.2 FUNCTIONS

- Save Document** – saves the xml configuration file in the disk.
 - The physical location of the file is displayed in the window footer.
- Save** – saves the xml configuration file in the disk.
- Update** – saves the engine settings in the database.
- Clear Cache** – clear the configuration cache. This step is required for the new settings to be activated.

8.5 CONFIGURE REPORT TEMPLATE FILES

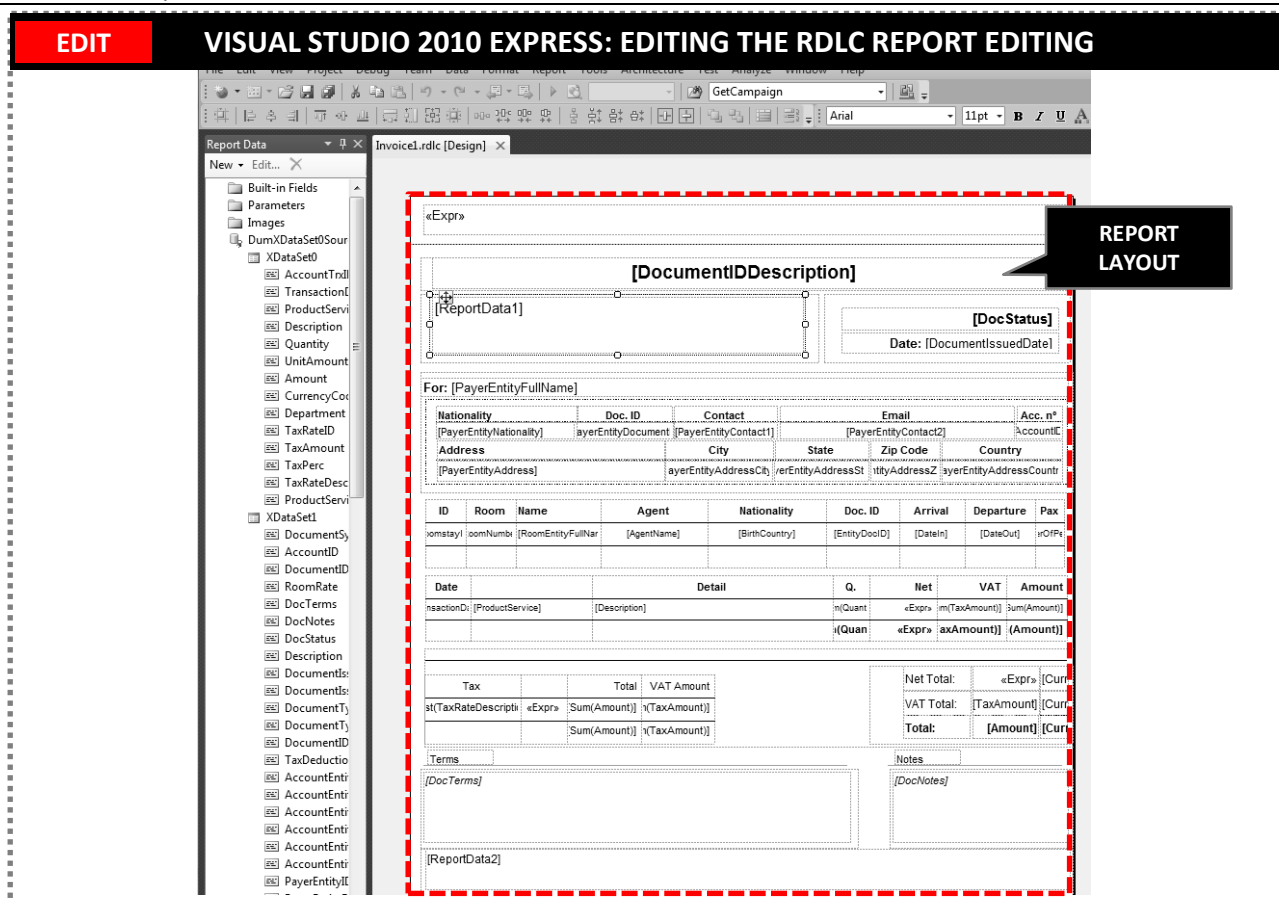
The report configuration files can be changed and edited by using the Visual Studio 2010 Express. The Visual Studio 2010 is a free tool and is available in the Microsoft site. The RDLC report files are located at:

"C:\Program Files (x86)\Hotel Management System 3.0.7\Packages\Pms\v3.0.25\UI\Views\Documents\Templates".

Feature Location



Feature Description

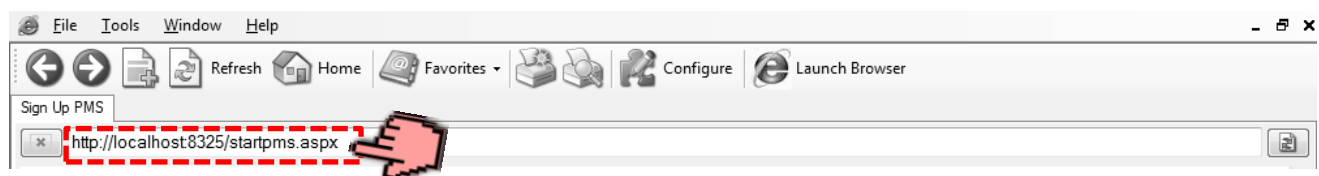


8.6 CONFIGURE MULTI-ACCOUNTS

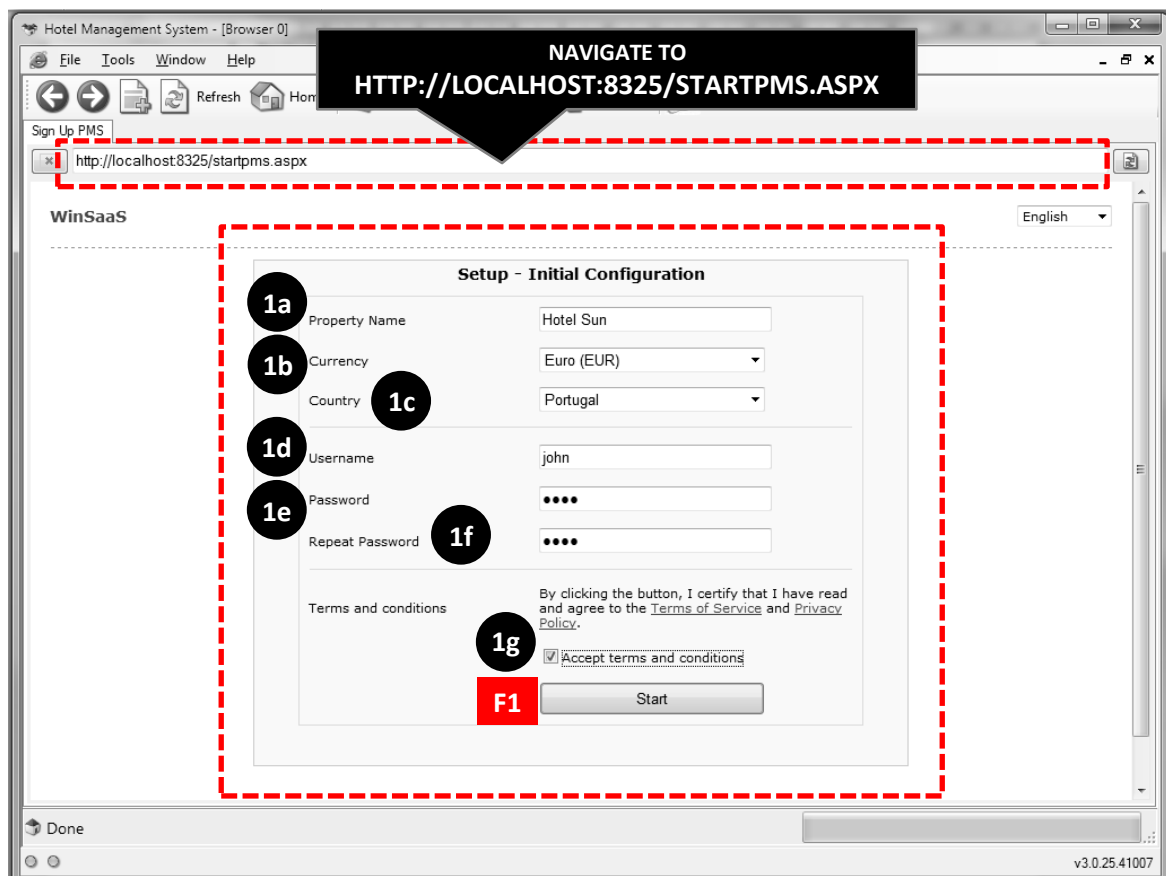
A hotel chain or a hospitality service provider can create additional accounts to each of their hotels or customers. The steps to configure the local system for multi-accounts are the following:

- 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



NAVIGATE TO
HTTP://LOCALHOST:8325/STARTPMS.ASPX

WinSaaS

Setup - Initial Configuration

1a Property Name: Hotel Sun

1b Currency: Euro (EUR)

1c Country: Portugal

1d Username: john

1e Password:

1f Repeat Password:

Terms and conditions: By clicking the button, I certify that I have read and agree to the [Terms of Service](#) and [Privacy Policy](#).

1g ☒ Accept terms and conditions

F1 Start

Done

v3.0.25.41007

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.