

Oracle® Hospitality Cruise Shipboard Property Management System Spa User Guide



Release 8.0
F-18119-01
April 2020



Oracle Hospitality Cruise Shipboard Property Management System Spa User Guide, Release 8.0

F-18119-01

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Preface

Purpose

The purpose of this document is to provide an overview of the operations of the Spa module.

Audience

This document is intended for application specialists and end-users of the Oracle Hospitality Cruise Shipboard Property Management System (SPMS).

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

<https://support.oracle.com>

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received and any associated log files
- Screenshots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at <https://docs.oracle.com/en/industries/hospitality/cruise.html>

Table 1-1 - Revision History

Date	Description of Change
April 2020	Initial publication.

1 Setup

System Setup

Database Parameters

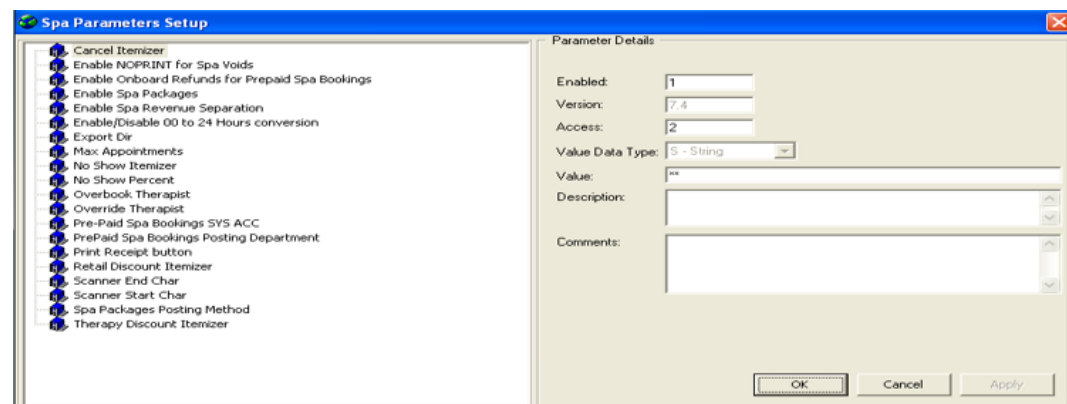
The system makes use of several parameters stored in the PAR table. These parameters can be updated through the Administration module, by selecting **Database Parameters** from the **System Setup** menu.

The parameters have the following definitions and acceptable values.

Table 1-1 - Description of the Options That Appear on the Database Parameters

Option	Description
Max Appointments	Used as the upper bound on appointments for a single day and Spa location. The parameter needed to improve processing speed by setting up the number of appointments at the start-up of the system. Suggest 500 as the initial value.
Itemizers	Appended to the partial Department_ID from Location Maintenance to create a full posting department for a charge for discounts, cancellations and no shows. See Spa Itemizers and Location Prefixes Setup for more information.
Start/End Scanner Characters	Characters used by the system to determine that bar code scanner code follows.
No Show Percent	The percent of the service charge that applies to a no-show guest.

Figure 1 – Spa Parameters Setup



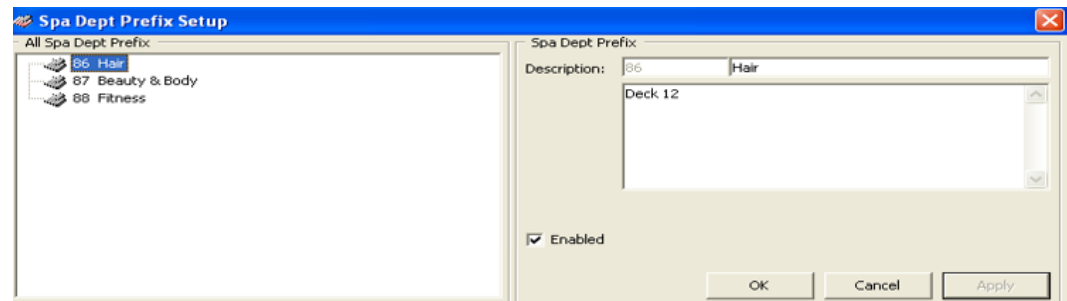
Financial Setup

Setting up the Spa Itemizers and Location Prefixes

The Spa Management System operates in a very similar way as a Point-of-Sale terminal when posting transactions to the SPMS. Each Spa workstation is assigned to a posting Financial Department prefix. Each item that posts to a guest is assigned to a posting itemizer. At the time of posting, these two (2) variables are joined to form the Department_ID to post to by appending the item's itemizer to the Department prefix assigned to the workstation. For example, if the workstation is assigned to the Department prefix "110" and the item being purchased is assigned to itemizer "41", then the posting would be sent to Department "11041".

Enter the Department prefix in the first field of the Description and a description for the prefix in the second field, and click the **Apply** button.

Figure 2 Spa Dept Prefix Setup



Modifying an Entry

To modify the information for a Spa Department Prefix entry, click on it in the tree view, make the modifications in the frame and click the **Apply** button.

Deleting an Entry

To delete an entry, right-click the code from the tree view, and select the **Remove** option. A message box will display “**Are you sure to want to delete this entry?**” Select **Yes** to complete the deletion.

NOTE:

Only the Spa Department Prefixes that are not in use can be deleted.

Spa Itemizers are maintained in a similar fashion by selecting **Spa Itemizers** from the Maintenance menu. Right-clicking on the tree view allows you to add an itemizer. Clicking on an item on the tree view allows you to update an existing itemizer or delete it. To delete, you need to right-click on the itemizer then choose the option.

After completing the Spa Department prefix or Itemizer, the system will check to ensure that all combinations of the Department Prefix and Itemizer will result in valid Department values in the database. If any discrepancies are found, the Itemizers that are not correct will be marked with “**Do Not Use**” in their Long Comment field and a list of the invalid itemizers will be displayed. You must either add the correct Department entries to the database or remove the invalid itemizer through the Administration module to ensure that invalid postings do not occur.

Retail Setup

Retail Items, Groups and Lines

Retail Items in the Spa Management System are a two-tiered hierarchy group and used for look-up purposes. At the top of the hierarchy is the “**Retail Group**”, which defines the type of Retail Item. Below the “**Retail Group**” is the “**Retail Line**”, which defines the manufacturer or the sub-type of item. Retail Groups are maintained by selecting **Retail Group** from the Retail Setup menu.

Adding a New Group

1. To add a new group, right-click on the tree view and select **Add New** from the option menu.
2. Enter the Code, the **Description**, and any comments.
3. Click **OK**.

Deleting a New Group

1. To delete a group, select the group to delete from the tree view.
2. Right-click and select **Remove** from the pop-up menu. You cannot delete Groups that are currently being used.

Updating a New Group

To update the description of a group, select it from the tree view. Make any changes required, and click **Apply** or **OK**.

Retail Items are maintained by selecting **Retail Items** from the Retail Setup menu. The tree view is sorted by Retail Group, Retail Line and Item Description.

To add or delete a Retail Item, right-click on the item in the tree view and select **Add New** or **Remove**. You cannot delete items that have been used.

To update an item, select the item from the tree view, make the required changes, and click the **Update** button.

The Retail Items information is divided into three (3) tabs.

- **General** - Displays General Information about each Retail Item.
- **Pricing & Sales** - Displays Pricing Period information.
- **Bar Codes** - Displays all available Bar Codes assigned to each Retail Item.

Table 1-2 - Description of the Options That Appear on the Retail Lines Setup Screen

Option	Description
Group	The Retail Group to which this item belongs.
Shore Code	The SKU number for this item. Based on recent discussion, this field will expand so that an unlimited number of SKU's can be defined for an item.
MMS Code	MMS or external F&B system Item Code (Crunch Time).
Active	If this field is checked, then the item is available for sale.
Name	The short name of the item.
Descriptions	A longer name or description for the item.
Line	The Retail Line for this item.
Prepaid Itemizer	The Prepaid posting suffix for this item (For Prepaid Retail). Items imported using the Data Import module.

Table 1-3 - Description of the Options That Appear on the Retail Lines Setup Screen (Bar Codes Tab)

Option	Description
Bar Code ID	Multiple Bar Codes associated for this item

Table 1-4 - Description of the Options That Appear on the Retail Lines Setup Screen (Pricing and Sales Tab)

Option	Description
From Date	The starting date for a new Price.
To Date	The ending date for a new Price.
Price	The price to apply for the period specified from The Starting Date to the Ending Date.
Price Grid	A list of all active prices for this item. The item must always have a price for all dates from today through Dec 31, 2099.

When adding and removing prices, always ensure that the range of dates is inclusive. For example, if a new price for October 1, 2019 through October 31, 2019 is added in the Item, the Pricing Grid will insert the new price, and split any old prices as required. The new price will reflect immediately once click on **Update**.

Treatment Setup

Treatment Items and Groups

Treatments are assigned to a Treatment Group for ease of search for specific Treatments. To make changes to Treatment Groups, select Treatment Groups from the Treatments Setup menu.

Adding a New Group

1. To add a new group, right-click on the tree view and select **Add New** from the option menu.
2. Enter the Code, the Description and any comments, and then click **OK**.

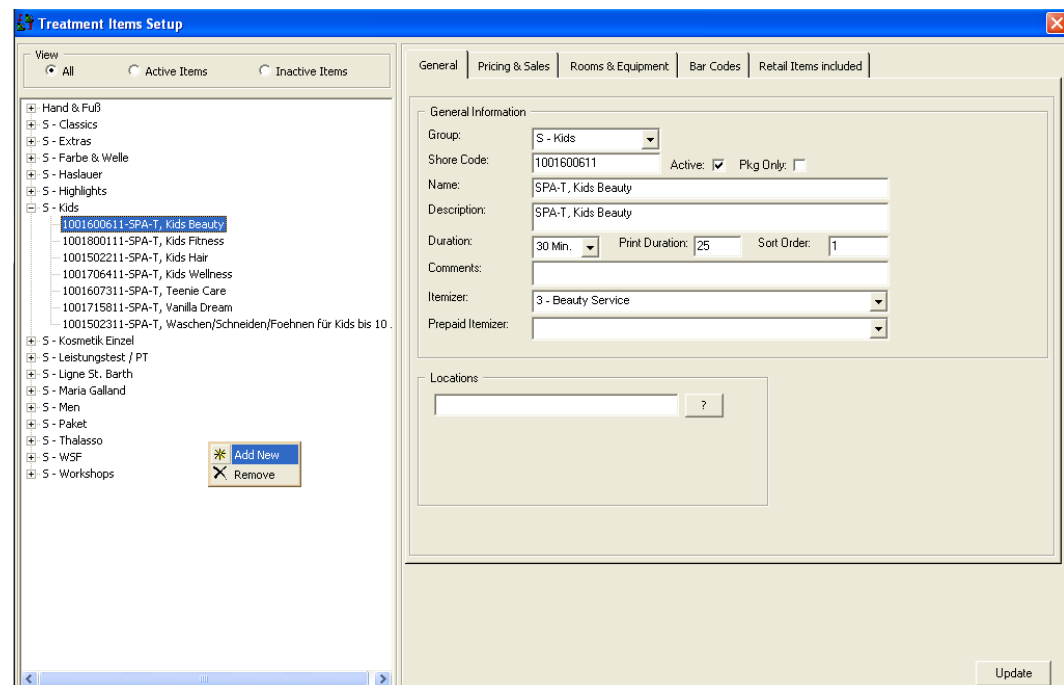
Deleting a Group

1. To delete a group, select the group from the tree view.
2. Right-click and select **Remove** from the pop-up menu. You cannot delete groups that are currently in use.

Updating a Group

- To update the description of a group, select it from the tree view, make any changes required and click **Apply** or **OK**.
- To update a Treatment, select **Treatment Items** from the Treatment Setup menu. Treatment Group and Treatment Name tree view displayed. Make the required changes and click **Update**.
- To add or delete a treatment, right-click on the **Treatment** from the tree view and select **Add New** or **Remove**. You cannot delete the treatments have been used. To update a treatment, click on the tree view and make the required change, then click **Update**.

Figure 1-3 - Treatment Items Setup



The Treatment Items setup is divided into five (5) tabs:

- General - displays General Information about each Retail Item.
- Pricing & Sales - displays Pricing Periods information.
- Rooms & Equipment - displays Pricing Periods information.
- Bar Codes - displays all available Bar Codes assigned to each Retail Item.
- Retail Items Included - displays retail items.

Table 1-5 - Description of the Options That Appear on the Retail Lines Setup Screen (General Tab)

Option	Description
Group	The treatment group to which this item belongs.
Shore Code	The SKU number for this item. This field will expand so that an unlimited number of SKUs can be defined for an item.
Active	If this field is checked, then the item is available for sale. If it is not checked, then this item is no longer available for sale.
Name	The short name for the item.
Description	A longer name or description for the item.
Duration	The number of minutes to block on the calendar for this treatment. Must be devisable by fifteen (15).
Print Duration	The number of minutes to print on the guests' reservation ticket. For example, a treatment may have a print duration of fifty (50) minutes, but sixty (60) minutes must be blocked in the Booking Calendar to account for the required cleanup of the room after the treatment is completed.
Sort Order	The order to display this treatment within a treatment group on the Booking Calendar.
Comments	Any additional comments or requirements for the Treatment.
Itemizer	The posting suffix for this item.
Prepaid Itemizer	The Prepaid-posting suffix for this item (For Prepaid Treatment Reservations imported using the Data Import module).

Table 1-6 - Description of the Options That Appear on the Retail Lines Setup Screen (Room & Equipment Tab)

Option	Description
Rooms	Default Rooms assigned to be used for selected treatment.

Option	Description
Equipment	Default Equipment and its quantities assigned to be used with selected treatment.

Table 1-7 - Description of the Options That Appear on the Retail Lines Setup Screen (Bar Codes Tab)

Option	Description
Bar Code ID	Multiple Bar Codes associated to this item.

Retail Items Included

Any Retail Items that are associated with this Treatment. Retail Items can either be suggested or Included based on the “**Include**” check box. Items that are suggested appear on the Suggested Item grid on the Posting form. Items that are Included are automatically added to the Posting detail with the Treatment at a zero price. You can add or delete the retail items as required.

Figure 1-4 - Pricing & Sales (Add Price)

The screenshot shows the 'Pricing & Sales' tab in a software interface. It features a 'Pricing Periods' section with the following elements:

- From Date:** 01 Oct (dropdown)
- To Date:** 31 Oct (dropdown)
- Price:** (text input field)
- Buttons:** Add Price and Remove Price
- Table:**

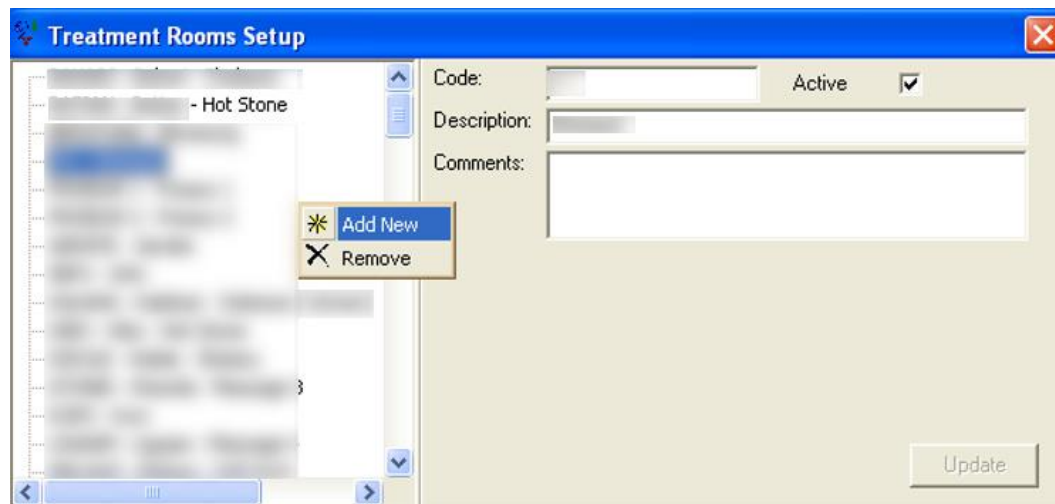
From Date	To Date	Price
01 Mar	30 Sep	20.00
01 Oct	31 Oct	22.00
01 Nov	31 Dec	20.00

Once a price has been added to an item, you can directly update the new price in the grid for that date range by typing over the old price, and clicking the **Update** button.

Treatment Rooms

Each treatment in the Spa Management System must be assigned to a predefined Treatment Room. The application ensures that the bookings do not overuse the available rooms. For example, the system will keep track of the room availability for a specific time and then warn the crewmember making a reservation when an appointment will overbook a specific room.

The descriptions are updated by selecting **Treatment Rooms** from the **Treatments Setup** menu. When selected, the following form will display.

Figure 1-5 - Treatment Rooms Setup (Add New)**Inserting a Room**

To insert a new Room, right-click on the tree view, select **Add New**, complete the form and click the **Insert** button.

Deleting an Existing Room

1. To delete an existing Room, select the **Room** on the tree view.
2. Right-click and select **Remove**.

Updating an Existing Room

1. To update an existing Room, click on the tree view and the information for that equipment is displayed.
2. Make the changes, if any and click **Update**.

Table 1-8 - Description of the Options That Appear on the Treatment Rooms Setup

Option	Description
Code	Short name for this room.
Description	Longer name for this room.
Active	If this field is checked, then the room is available for treatment.
Bookings	If it is not checked, then this room is no longer available for treatment bookings.
Comments	Any additional comments for this room.

Packages and Packages Groups Setup

This is the area where you create and maintain the Spa Packages.

Creating a New Package

1. To add the Package definition, click Setup, Packages Setup.
2. Before you can assign any Treatment and/or Retail Items to the Package, you will need to save the Package definition by clicking the Insert button. This tab contains the necessary controls to assign Treatment and/or Retail Items to the Package and maintain its package prices.
3. In order to assign a new Treatment Item to the Package, select the Item Type.
4. Choose the correct Treatment Item from the list box and click the Add Item button. The selected Treatment Item will be assigned to the Package and appear onto the Packaged Items Linking grid.
5. Repeat the above steps to assign to the Package all the necessary Treatment and/or Retail Items.

Packaged Items Price Definition

In order for a specific Package to be valid for sale, all Items assigned to the Package must also have their Package Prices assigned separately. The summary of the individual Packaged Items prices, make up the total amount that each Package will be sellable for. The pricing period's assignment for each Packaged Item is following the same methodology as already implemented for regular individual Items.

To view, edit, create or remove Pricing periods, select the Item from the grid. All previously assigned Pricing periods will appear in a new grid.

In the below example, there are no prices previously assigned, so we can start adding some.

1. Add the starting and ending dates of the pricing period and the price and click Add Price.
2. When you finish adding the prices for the specific Packaged Item, click Update to save all pricing definition for this Item.

Doing the same for all Items belonging to the Package will create the Package Price. As soon as the system finds that all Packaged Items have a price defined for today (system date), the summary of those individual prices will be displayed as the Package Current Price.

Therapists Setup

To maintain Spa Therapists, select **Therapist Setup** from the main Setup menu.

Figure 1-6 - Therapist Maintenance

Depending on the operational positions you have assigned earlier in **Location Maintenance** into Crew POS, the screen will list all assigned Crew members as-Therapists.

You can view Embarking / Disembarking Dates information as well as:

- Defining specific values for each Therapist:
 - Qualification Level.
 - Experience Level.
 - Guest Satisfaction Rating.
- Assign Commission percentage (%) each therapist receives on Therapy and/or Retail sales.
- Assign Therapies that each Crewmember has the skills and is qualified to perform.

Location Maintenance

A Spa Location is associated with a main revenue area within the Spa facilities. Usually a Spa is divided between Hair/Nail, Treatments and Fitness, but some ships may have additional locations, or some may only have one (1).

The Spa location is maintained in **Location Maintenance** from the main Setup menu.

Figure 1-7 - Location Maintenance

To add a new Location, right-click on the tree view, select **Insert**, complete the form and click the **Insert** button.

To delete a Location, select it on the tree view, right-click and select **Delete**. You can only delete a location that has not been used.

Table 1-9 - Description of the Options That Appear on the Location Maintenance Setup

Option	Description
Code	Short name for this location.
Name	Long name for this location.
Opening	The default opening time for this location in military time without a semicolon.
Closing	The normal time for this location in military time without a semicolon. If the location closes after midnight, the system accepts time beyond 2400 as closing time in the morning of the next day.
Post Dept	The “Departmental Prefix” – SDL for this location. This code prefixes itemizers to determine the Department ID to which a change is to post.
Schedules	The default number of schedules associated with this location. A schedule represents the calendar of appointments for a single therapist.
MMS_ID	MMS or external F&B system Department itemizer (Crunch time).

Option	Description
Crew Pos	A list of Operational Positions that are assigned to work at this location. Clicking question mark (?) button will open the list-box that lists all Crew Operational Positions. Check the boxes to select the Crew Position.
Schedule/Caption Grid	For each Schedule, enter the default caption for the Schedule. This caption appears on the booking calendar to help the crewmember taking reservations find a suitable therapist for a service.

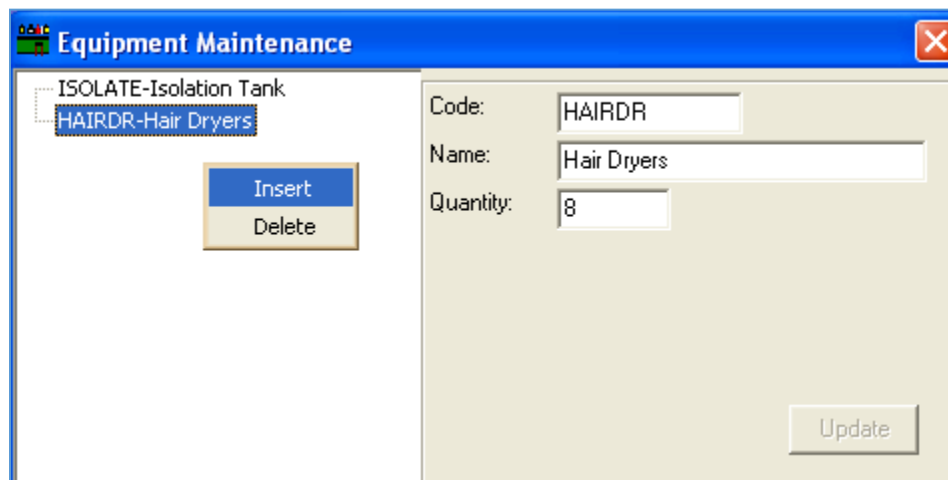
Equipment Maintenance

Equipment in the Spa Management System is defined as any type of resource that must be used when fulfilling a Spa Service. Possible types of equipment include Stylist Stations, Showers, Aroma Treatment Stones, and so on.

The system does not book individual resources when making an appointment. Instead, it ensures that the bookings do not overuse the available equipment. For example, if there are five (5) Stylist Stations, the system will keep track of the number of Treatments that are booked for a specific time and then warn the crew member making a reservation when an appointment will overbook a piece of equipment.

Equipment descriptions are updated by selecting **Equipment Maintenance** from the main Setup menu.

Figure 1-8 - Equipment Maintenance



Inserting an Equipment

1. To insert a new piece of equipment, right-click on the tree view.
2. Select **Insert**.

3. Complete the form and click **Update**.

Deleting an Equipment

1. To delete a piece of equipment, select the equipment on the tree view.
2. Right-click and select **Delete**.

Updating an Equipment

1. To update a piece of equipment, click on the tree view and the information for that equipment will display.
2. Make the changes, if any and click **Update**.

Table 1-10 - Description of the Options That Appear on the Equipment Maintenance Setup

Option	Description
Code	Short name for this equipment.
Name	Longer name for this piece of equipment.
Quantity	The number of pieces of equipment useable on board the Ship.

Miscellaneous Items

Other than the Treatment and Retail Items, the Spa module also provides the functionality to maintain and use various Items that cannot be accounted for as Treatment or Retail Items, for example Tips. Such items are the various Tips that can be used in the Posting screen while posting other Treatments and/or Retail Items.

Similarly, the setup of Treatments and Retail Items, which can be defined by various Bar Codes and Sales Price periods, as well as for Miscellaneous Items.

Figure 1-9 - Miscellaneous Items Maintenance

The screenshot shows a software window titled "Miscellaneous Items Maintenance". On the left, there is a tree view with "Ausflugsticket Rabatt" expanded, showing a sub-item "Tip". The main area contains the following fields and controls:

- Shore Code: TIP (text field) Active:
- Name: Tip (text field)
- Description: Tip (text field)
- Itemizer: 16 - Tips (dropdown menu)
- Bar Code ID: (text field) Add Code (button) Remove Code (button)
- From Date: 27 Jun (dropdown) To Date: 27 Jun (dropdown)
- New Price: (text field) Add Price (button) Remove Price (button)
- Table with columns: From Date, To Date, Price
- Update (button)

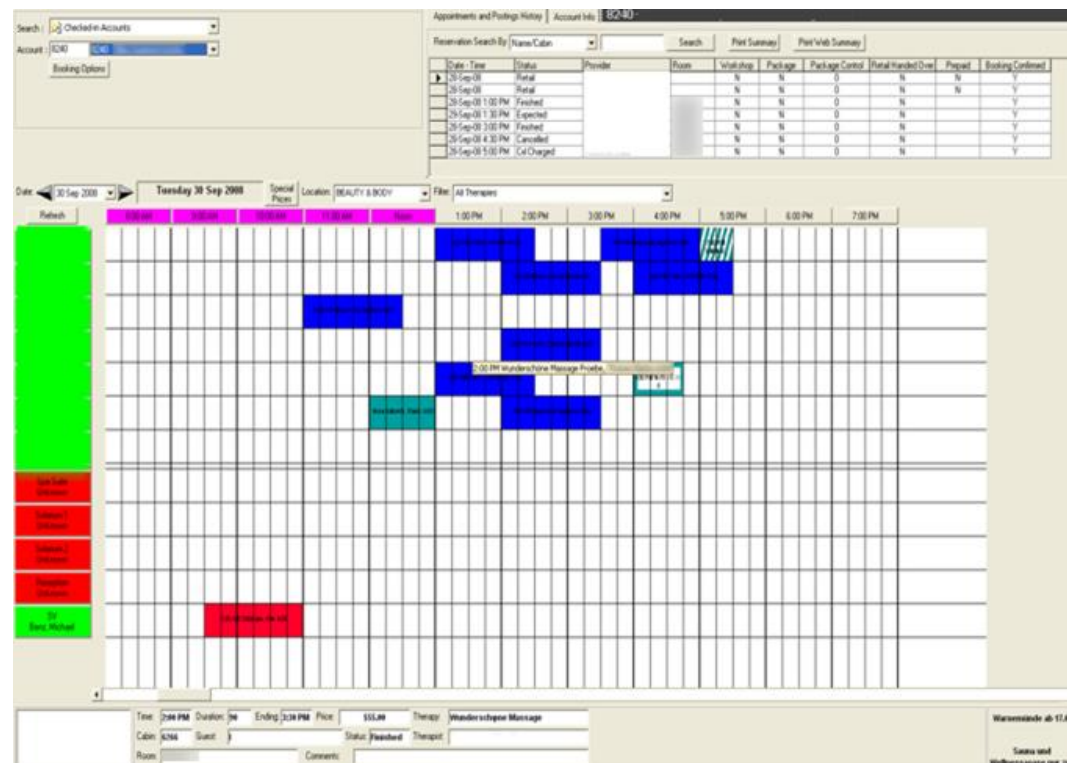
2 Operations

Reservations

Main Reservations Screen (Booking Calendar Overview)

The Booking Calendar is the main form in the Spa Management System. It is displayed by selecting **Reservations** from the Operations main menu. From the Booking Calendar you can add, update, cancel, check-in and complete a reservation. The form provides grids to look-up and display guest information by a variety of look-up criteria.

Figure 2-1 - Booking Calendar Overview



Right-click on a row of the Appointments Grid, on an appointment or on an empty space and it will display different pop-up menus. From the Guest selection, you can create a new regular Reservation, add a new Package or create a Retail posting for the selected guest.

From the Appointments grid, there are various functions you can perform, such as edit, cancel, no show, check-in, post, view posting, void posting or print the appointment ticket depending upon the status of the appointment.

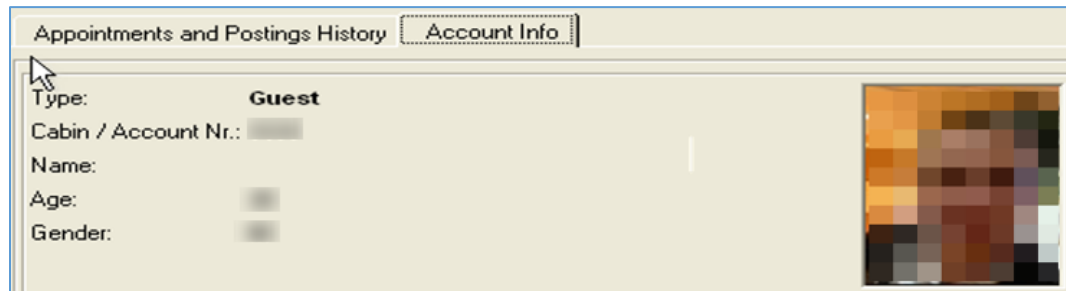
From the Booking Calendar, you can use the Suggest feature, Add a Reservation, Add a Package or a Workshop and Block the Schedule.

From an Appointment, you can Edit, Cancel, No Show, Check-In, Post, View Posting, Void Posting, Print the Appointment Ticket, create a new Block Schedule or Add a Reservation or a new Package or Workshop depending upon the status of the appointment.

Guest selection

Guest Information can be queried by **Guest Last Name** or **Stateroom Number** by entering look-up information into the **Account field** and hitting the **TAB Key**. All guests that match the information entered into the field will display along with basic information about that guest in the Account Info tab.

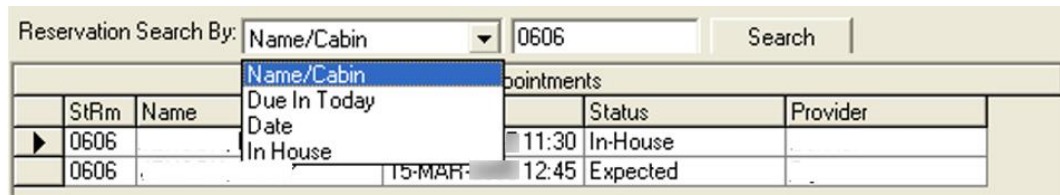
Figure 2-2 - Account Info



Query Appointments

Appointments can be queried by selecting which type of query to run, and then entering search criteria for that query. The system supports query by Name/Cabin for checked in guests, query of all reservations due in today, all reservations due in on a specific date, and all guests that are currently marked as in the Spa.

Figure 2-3 - Query Appointments



It is suggested that the appointment query normally be set to **Due In Today** so that the receptionist can easily take new reservations on other dates while checking in and completing appointments for today.

Viewing an Appointment Status

When the mouse pointer is hovered over an Appointment, the current information about that appointment is displayed in the selected **Appointment** Information frame.

Figure 2-4 - Status Appointment

The screenshot shows a booking system interface. At the top, a calendar grid highlights a slot for 3:00 PM. Below it, a form displays appointment details: 3:00 PM SPA-T, Akukunktmassage 25, Room: 8240. The form includes fields for Time (3:00 PM), Duration (30), Ending (3:30 PM), Price (\$39.00), Therapy (SPA-), Cabin (8240), Guest, Status (Expected), and Therapist. There are also fields for Room and Comments.

A tool tip is also displayed when hovering over an appointment with guest information.

Changing Locations

A booking calendar for a different location can be request by selecting the location for the **Location** drop-down combo box.

Figure 2-5 - Changing Locations

The screenshot shows a booking system interface. The Date is set to 30 Sep, Tuesday 30 Sep. The Location dropdown menu is open, showing options: BEAUTY & BODY, FITNESS, and HAIR. The current selected location is BEAUTY & BODY. The calendar grid shows time slots for 8:00 AM, 9:00 AM, 10:00 AM, and 11:00 AM. A green bar labeled 'Kosmetik' is visible on the left side of the calendar.

Changing Dates

You can request a booking calendar for a different date by clicking the arrow buttons on each side of the Date, or by clicking on the Date drop-down and selecting a new date.

Figure 2-6 - Changing Dates

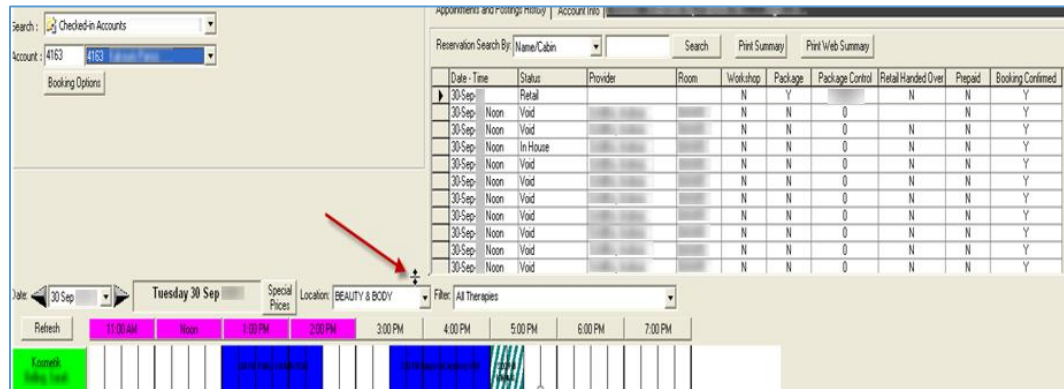
The screenshot shows a booking system interface. The Date is set to 30 Sep, Tuesday 30 Sep. A date selection calendar is open, showing the month of September. The calendar grid shows dates from 31 to 11. The current selected date is 30 Sep. The calendar grid shows time slots for 9:00 AM. A green bar labeled 'Kosmetik' is visible on the left side of the calendar.

Changing the Size of the Form

The width of the Guest Selection frame and the Appointment & Posting History grid can be change by placing the mouse pointer between the two grids. When the pointer turns into a double-headed horizontal arrow, left-click and drag the mouse to adjust the size of the grids

A similar form sizing ability is available between the lower displayed Booking Calendar and the upper Account Selection and Appointment & Posting History grid by placing the mouse pointer just above the Date/Area/Filter labels. When the pointer turns into a double-headed vertical arrow, left-click and drag the mouse to adjust the vertical size of the two areas.

Figure 2-7 -Changing Size Form



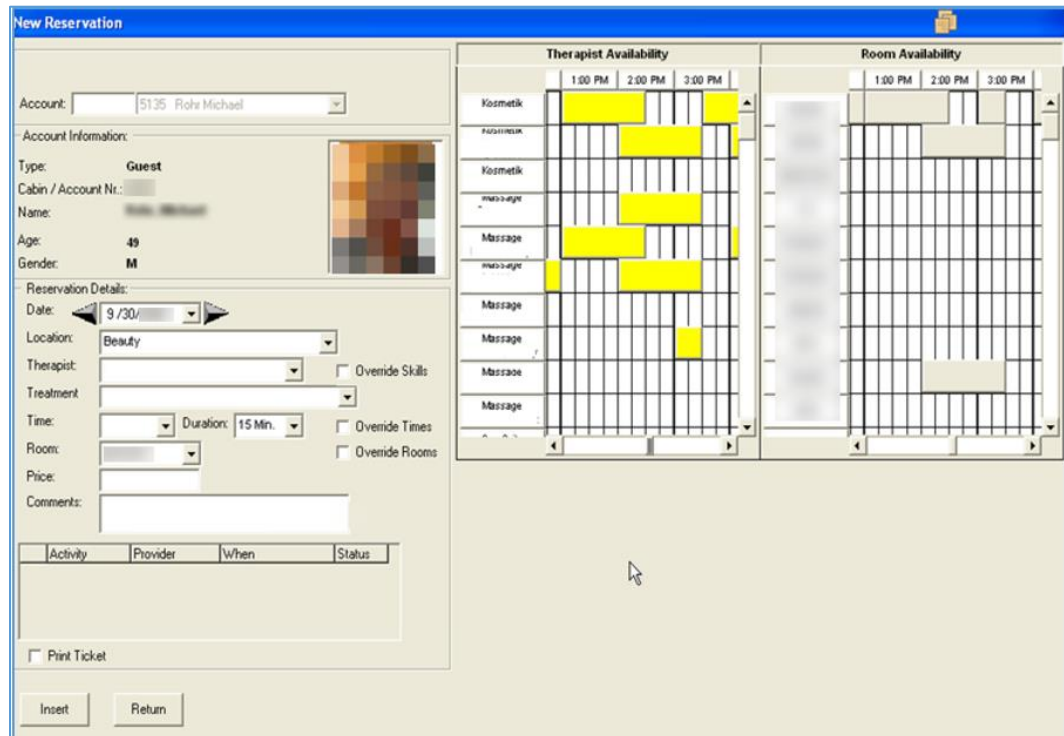
Making Reservations

To start the reservation process, do any of the following:

- Double-click on any white space on the Booking Calendar.
- Right-click anywhere on the Booking Calendar and select **Add Reservation**.
- Select a guest, click on **Booking Options** button and select **Add Reservation**.

The **New Reservation** form will display.

Figure 2-8 - New Reservation



On the left of the form is information about the Guest and Treatment booked.

- If a Guest is selected in the Guest selection, then the information for that guest is brought forward to this form.
- If the guest has any other Spa appointments, they will be listed in the grid at the bottom along with their status.
- If the start of the reservation is from the Booking Calendar, the Therapist name and Time of the reservation, will pre-fill based on where the Booking Calendar is selected.

When there is no Guest pre-selected, the **New Reservation** form offers a similar Guest selection area so that you can select the correct Guest for the upcoming Treatment appointment.

Table 2-1- Description of the Blocks That Appear on the New Reservation Setup

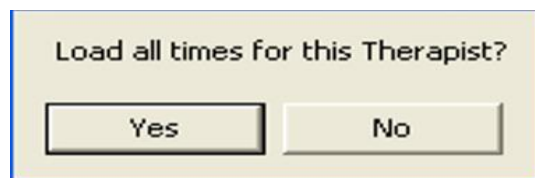
Blocks	Description
Gray & Dark Green	Therapist is blocked during that time.
Yellow	Therapist already has an appointment during that time.
Lighter Green	Current selected time and duration for the appointment.

The form will only display the Treatments that the selected Therapist has the skills to perform.

Performing Overriding Skills

1. If another Treatment is needed and you have sufficient authority, you can click on the **Override Skills** check-box.
2. Answer **Yes** to “Load all treatments regardless of skills?”
3. Only start times available to the Therapist will be initially loaded into the Time combo box. If you need to overbook the Therapist and have sufficient authority, you can click on the **Override Times** check-box.

Figure 2-9 - Load All Times



4. To complete the reservation, select **Treatment, Therapist, Time and Duration** and **Room** assignment for the appointment.
5. Click **Insert**. The form will validate the information and display an error message if there are any problems. If the form passes validation, the new appointment will be stored in the database and displayed on the Booking Calendar.

6. If the **Print Ticket** check box has been checked, the system will print a reservation ticket to the “**Ticket**” printer.

Editing Reservations

To make a change to an existing Reservation, right-click on the reservation on the Booking Calendar.

1. Select **Edit Reservation** from the pop-up menu.
2. Alternatively, search for the appointment using the **Reservation Search By** area, select the appointment to be changed, right-click and select **Edit Reservation** from the pop-up menu.
3. Make any required changes to the reservation and click the Update button to store the change into the database. When the form closes, any changes will reflect in the Booking Calendar. If the Print Ticket check box is checked, a revised reservation ticket will print to the Ticket printer.

NOTE:

Only Expected Reservations can be edited. The current information about the reservation will display in the **Edit Reservation** form.

Checking-In Reservations

1. To Check In a reservation, right-click on the reservation in the Booking Calendar.
2. Select Check In from the pop-up menu.
3. Alternatively, search for the appointment using the Reservation Search By area, select the appointment to be check in, right-click and select Check In from the pop-up menu.

If the appointment includes a comment, the comment will be display in a Message Box. The color of the reservation will change to match the **In-House Appointment** image.

If an Appointment is incorrectly checked in, it can be placed back into expected by right clicking the appointment in the Booking Calendar or Appointments grid, and selecting **UnCheckIn** from the pop-up menu.

Finishing Reservations

There are two (2) ways to complete a reservation:

- Finish & Post the charges for the appointment to the selected Account.
- Finish without posting any charges (It is important to handle Gift Orders and Coupons correctly).

Finish & Post

1. To **Finish & Post**, right-click the appointment on the Booking Calendar Select **Finish & Post** from the pop-up menu

Alternatively, search for the appointment using the Reservation Search By area, select the appointment to **Finish & Post**, right-click and select **Finish & Post** from the pop-up menu. At the Spa Posting Logon, either swipe their board card or enter their user-id/password into the form.

2. Click the **OK** button.
3. Once the User ID and Password are accepted, the **Posting** form will display with the service and any associated retail items already in the posting box.

Figure 2-10 - Posting

To change where the charge will be posted (Payer Account), a new cabin, name or account can be entered in the **Post To** textbox, and a posting account selected from the drop-down box.

If the Treatment of the reservation includes suggested retail items, they will be displayed in the **Suggestion** grid. Double-click on a retail item in the **Suggestion** grid will move it to the posting box. Additional charges for other services or retail products can be added to the posting area by selecting a **Charge Type**, a **Charge Item**, entering a **Quantity** and clicking the **Add To Receipt** button.

Entering a Tip

On some ships, it may be normal for the guest to be given a receipt prior to posting the charges to the system so that a Tip can be entered.

1. Click the **Print Receipt** button to print a receipt of all pending charges to the **“Receipt”** printer. The receipt is given to the guest for signature and to capture Tip amount prior to Posting.
2. Select the Charge Type of Miscellaneous and the Charge Item of Tip.
3. Enter the Tip amount from the signed receipt.

4. The Spa Posting form will automatically calculate the Treatment and Retail discounts based on the start time of the appointment and the discount times set up for the day. Authorized users can change the price or discount percent on any item added to the posting area.
5. To remove a charge from the posting, select it in the **Post To** area, and click the **Remove** button.

All sales statistics for the Finish & Post of an appointment will be recorded to the Therapist that performed the service. This would include additional retail sales and tips. Once all charges for the appointment are moved to the Posting Area, clicking the **Post** button will record the charges to the database, post the charges (by Department) to the Guest Account and mark the Appointment as Finished.

NOTE:

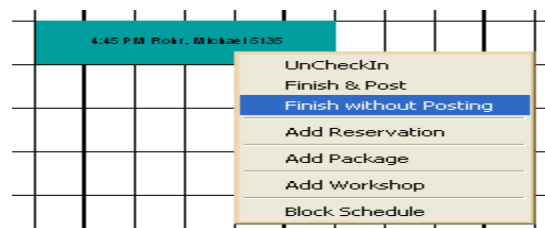
If the **Return** button is selected, additional charges added to the posting area will be removed, and will have to be re-entered the next time the **Finish and Post** option is selected for that Appointment.

Finish without Posting

The Finish without Posting allows you to complete the reservation without posting a change.

1. Right-click on the appointment on the Booking Calendar and select **Finish without Posting** from the pop-up menu
2. Alternatively, search for the appointment using the Reservation Search By area, select the appointment to **Finish without Posting**, right-click and select **Finish without Posting** from the pop-up menu. The following message will be displayed to confirm your selection “**Are you sure you want to set the status of this Reservation to Finished without Posting it?**”

Figure 2-11 - Finish Without Posting

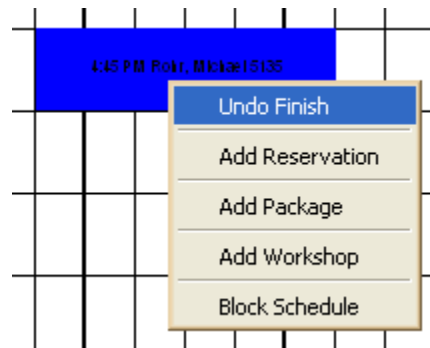


Undo Finish Option

Once an appointment is finished, you have the option to revert the Check in Status of an appointment using the Finish without Posting option, similar to the Void a Posting.

1. Right-click on the appointment you wish to revert and select **Undo Finish** from the pop-up menu.
2. The following message will display to confirm your selection “Are you sure you want to set this status of this Reservation to Inhouse (CheckedIn)?”
3. Click **OK**.

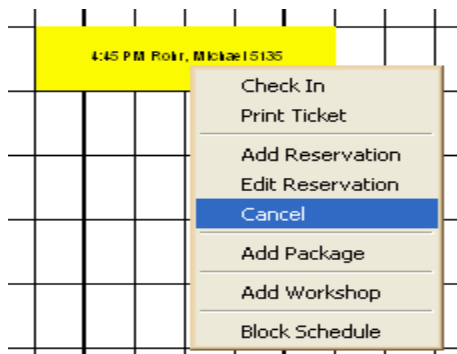
Figure 2-12 - Undo Finish



Cancelling Appointments to Cancel an Appointment:

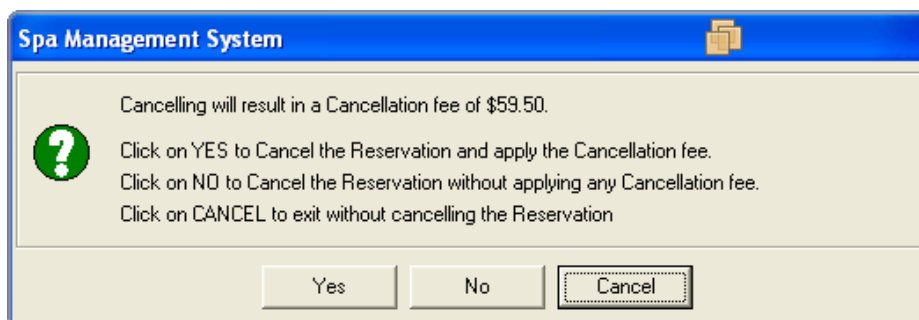
1. Right-click the appointment from the Booking Calendar.
2. Select Cancel from the pop-up menu.
3. Alternatively, search for the appointment using the Reservation Search By area, select the appointment to cancel, right-click and select Cancel from the pop-up menu.

Figure 2-13 - Cancel



If the reservation is within the cancellation period based on the cancellation rules, a message displays a warning that a cancellation fee will apply.

Figure 2-14 - Cancellation Fee



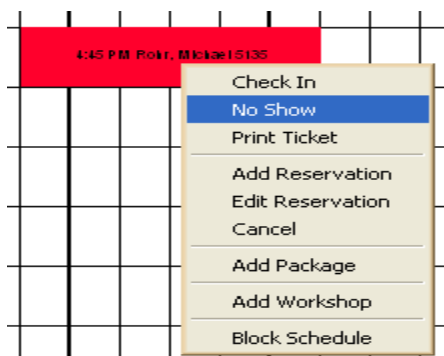
If you choose **Yes**, the Spa Posting form will display with the cancellation fee calculated and placed in the Posting Area. You can then adjust the fee if required and post it to the guest account. If you choose **No**, the selected appointment will be canceled without Posting a Cancellation Fee.

If you click the **Cancel** button, then the reservation will not be canceled.

No-Show Appointments

Once an appointment is late, the appointment on the Booking Calendar will display using the "**Late Appointment**" image.

Figure 2-15 - No Show



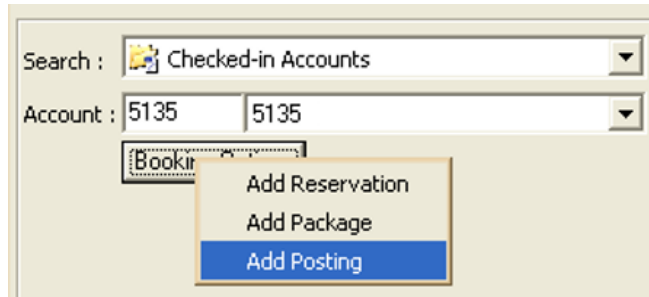
To acknowledge that the appointment is a no-show and to charge the no-show fee, you must right-click the Appointment on the Booking Calendar, or on the Appointments grid, and select **No Show** from the pop-up menu. A message will display warning you that a No-Show fee will apply.

If you choose **Yes**, the Spa Posting form will display with the No Show fee calculated and placed in the Posting Area. You can then adjust the fee if required and post it to the guest account.

If you choose **No**, the appointment will be set to No Show without a charge. If you choose to click the **Cancel** button, then the reservation will not be canceled.

Posting Services and Retail without a Reservation

To post the sale of Retail items or Services without an Appointment, first use the Guest selection area to find the guest that is making the purchase, select the appropriate guest, click the **Booking Options** button and select **Add Posting**.

Figure 2-16 - Add Posting

You would then either swipe their board card or enter their user-id/password into the form and click the **OK** button. You can then select **Charge Types** and **Charge Items** from the drop-down combos, then add them to the Posting Area, and post the transaction.

Ability to Assign % Discount on the Entire Invoice during a Posting Process

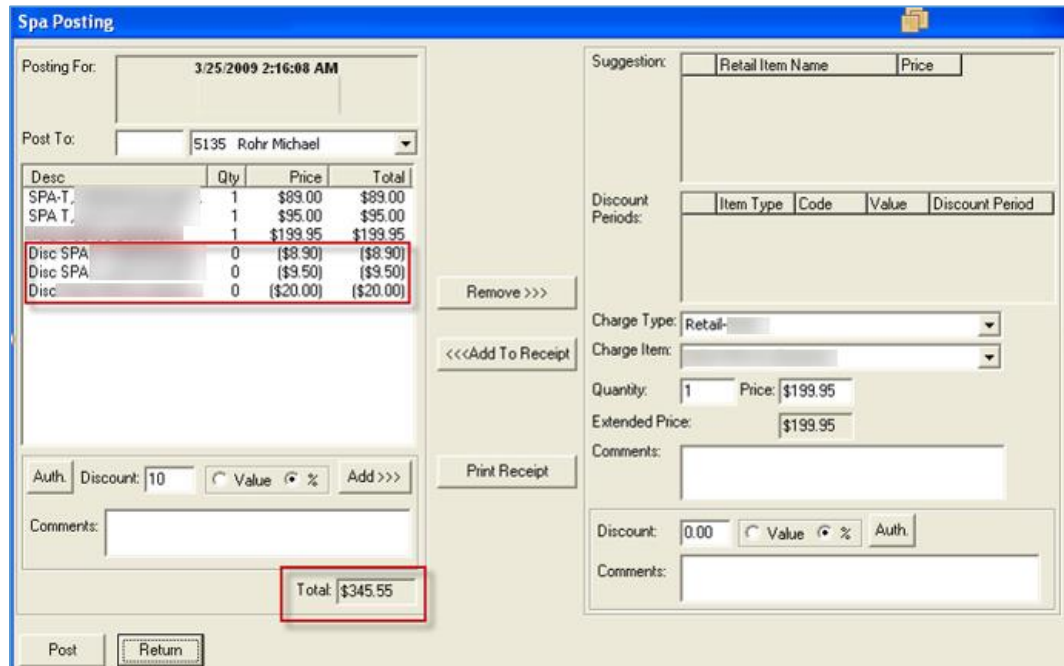
In addition to the existing capability of adding a Discount percentage (%) on a per item basis before clicking the **Add To Receipt** button, you can also apply a Discount% to all items listed on the left side of the SPA POSTING screen.

By default, the Discount percentage (%) textbox is disabled, as with the right side Discount% textbox, and is enabled if you have the User Access Rights checked after clicking the **Auth** button.

After the user has been verified, the Discount percentage (%) textbox gets enabled to accept valid Discount% values (0-100).

Only after those values have been verified as correct, the **Add>>>** button is enabled. Click the **Add>>>** button to start the process of applying a 10% Discount on all items listed on the left side, in this case on all three listed items:

Figure 2-17 - Spa Posting



We have applied a 10% Discount to all three (3) listed items in one easy step. The system only allows you to apply the discounts as long as there are no other Discounts already applied, this way or the existing way from the right side of the screen. For example, in a case where we have already applied a 10% Discount to all three (3) items, clicking the **Add>>>** button again, will result in the following warning message **“Discounts already exist! Adding more Discounts not possible.”** When the Discount percentage (%) has been correctly applied, clicking **Post** will post all items with their Discount% values into the Accounts. The Billing Image of this posting can be viewed in Management.

Figure 2-18 - Bill Details



Viewing a Posting

To view a posted Appointment or Retail sale, select the Appointment from the Appointments Grid or Booking Calendar and then, right-click, and select **View Posting**

from the pop-up menu. The Spa Posting form will display with all the details for the posted Appointment.

Once displayed, the receipt for the posting can be reprinted by clicking the **Reprint** button.

Figure 2-19 - Spa Posting

Desc	Qty	Price	Total
Mangobutter Creme, 50g ...	1	\$68.00	\$68.00

Voiding a Posting

To Void the POS transactions for an appointment, Retail sale or Cancellation/No Show Fee, select the appointment from the Appointments Grid or the Booking Calendar, right-click and select **Void Posting** from the pop-up menu.

The Spa Posting form will display with the information needed to Void the Posting. When the **Void** button is clicked, all charges will be reversed and the appointment will be marked as a status “**V**” for Voided. If the posting was for a true appointment, the new Appointment record created with a status of “**I**” for “**In-House**”.

Blocking Time

Blocked Time represents time when a therapist is not available to take appointments.

There are four (4) types of available Blocking Time types:

- Free Time.
- Working Time.
- Security Control.
- Internet Block.

In order to distinguish those different Blocked Time options in the screens where the schedules are display, the following colors are use:

Table 2-2- Description of the Blocks That Appear on the New Reservation Setup

Block Colors	Description
--------------	-------------

Block Colors	Description
Original Gray	Free Time.
Dark Gray	Working Time.
Dark Green	Security Control.
Black	Internet.

On the Reservations screen, where lot of information is displayed, the Working Time Type is displayed in a dark gray color on white fonts. To enter a Blocked Time, right-click on the Booking Calendar and select **Block Schedule** from the pop-up menu.

Figure 2-20 - Block Time

Quick Time Blocking

Quick Time Blocking provides the ability to define the same Time Blocks for multiple Therapists in one process.

1. You must select the **Enable Multiple Therapists selection** checkbox in order to expand the Block Time form and display the Multiple Therapists assignment list box.
2. Once you have selected all necessary Therapists, click the **OK** button to automatically create all Blocked Times for all selected Therapists.

NOTE:

Editing a Blocked Time schedule is only allowed on a one to one Therapist basis.

Multiple Reservations – Workshops

Workshops are defined as specific Group Treatments, such as Yoga, Walking and Aerobic or Hairstyling workshops, where multiple Participants (Attendees) are assigned.

Similar to regular Spa Reservations, Workshops are handled in the daily schedule as appointment blocks using the following options:

Figure 2-21 - Description of the Multiple Reservation Workshops Overview

Option	Description
Add Workshop	Create the original Workshop Reservation.
Edit Workshop	Add or remove Workshop Attendees.
Check-In / Un-Check-In Individual Workshop Attendees	Check-In or Un-Check-In Individual Workshop Attendees as they show up.
Cancel Workshop	Cancel entire Workshop with option to apply Cancellation Fees to all or selected Workshop Attendees (supports Cancelling Workshops without any Cancellation Fee posting).
No Show Workshop	No Show entire Workshop with option to apply No show Fees to all or selected Workshop Attendees (supports the No Show Workshop without any No Show Fee posting).
Finish & Post Workshop	Finishing the Workshop with the option to apply the Workshop therapy amounts to all or selected Workshop Attendees.

To distinguish between regular Guest Reservations blocks, and Workshop Reservations blocks, you can use the same colors but different style.

Figure 2-22 - Expected Workshop



Figure 2-23 - Expected Workshop (Delayed)

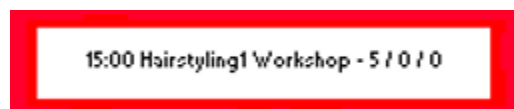


Figure 2-24 - Checked In Workshop (partially or complete)



Figure 2-25 - Finished & Posted Workshop (complete All Attendees)

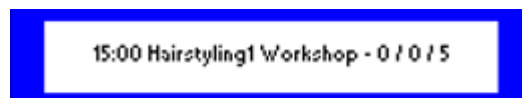
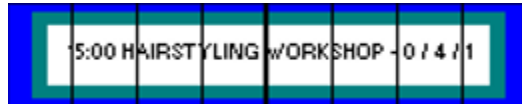


Figure 2-26 - Finished & Posted Workshop (Partial Attendees)



Since there is limited space to display all Workshop participants into the Daily schedule block, the Workshop Reservation block contains the following information.

Figure 2-27 - Workshop Hairstyling

14:00				15:00				16:00				17:00			
14:00 Gast-Acker, Sonja 7243				15:00 Hairstyling Workshop - 5 / 0 / 0											
15:00 - Workshop Hairstyling - Hairstyling Workshop - 5 / 0 / 0															

Hover the mouse pointer over the Workshop Reservation block, to display the following information in the Tooltip text, as shown in the above figure.

Another way of displaying more detailed information about each Workshop Reservation is at the bottom of the Reservations screen, where an enhanced Workshop Information area is created to display all Workshop relevant data when hovering the mouse pointer over the Workshop Reservation block:

Figure 2-28 -Workshop Reservation

Time:	15:00	Duration:	120	Ending:	17:00	Price:	£20.00	Therapy:	Workshop Hairstyling
Workshop:	Hairstyling Workshop.			Status:	Expected	Room:	01MAS1	Therapist:	
Attendees Expected:	5	CheckedIn:	0	Posted:	0	Comments:			

For detailed listing of all Workshop Reservation related data as well as the Workshop participants, the above described **Edit Workshop** option will display all necessary information related to the selected Workshop.

Creating a Workshop Reservation

Similar to regular Spa Reservations, Workshops can be created by selecting the option Add Workshop from the right-mouse click pop-up menu options.

The New Workshop Reservation screen that opens is very similar to the regular Spa Reservation screen with additions in order to handle Workshop specific requirements.

Figure 2-29 - New Workshop Reservation

- There is a non-mandatory option to assign a description to the Workshop that is used in the main Reservations time plan display to identify the Workshop, together with the assigned Treatment description.
- An account selection area created in order to search for Accounts and assign them to the workshop.
- A list box displays all Expected Workshop Attendees as well all Checked In Attendees.

Within the two (2) list boxes, the following options are available:

- Check In a selected Expected Attendee.
- Check In All listed Expected Attendees in one single step.
- Un-Check In a selected Checked In Attendee.
- Un-Check In All listed Checked In Attendees in one single step.
- Remove selected Expected Attendee from Workshop.
- Print individual Workshop Tickets for selected Checked In Attendees.

When you first create a Workshop Reservation using the Add Workshop option, you can only create the Workshop reservation during initial creation of the Workshop Reservation, all areas to assign Accounts and Check In or Un-Check In attendees are disabled. First, you need to create the Workshop Reservation and then you will see the necessary options to control the Workshop attendees (assign Attendees, Check In Attendees, Un-Check In Attendees).

In the example shown in the screenshot above, we created a Workshop and gave it the description “Hairstyling Workshop”. Then we selected the appropriate Treatment,

Workshop Hairstyling, and assigned the correct starting time and Room. When ready, we created it by clicking the Insert button.

Immediately, the Workshop we just created will appear in the main Reservations time plan.

Figure 2-30 - New Attendees

The screenshot shows a reservation time plan with columns for 15:00 and 16:00. A yellow highlighted row represents a reservation for '5:00 HAIRSTYLING WORKSHOP - 0 / 0 / 0'. A red circle highlights the '0 / 0 / 0' values, indicating zero attendees assigned, checked in, or posted.

There we are able to see that there are still no Attendees assigned (all values for Assigned / Checked In / Posted attendees are 0).

Editing Workshop Reservations and assigning Attendees into Workshops

1. To assign the necessary Workshop Attendees, right-mouse click over the Workshop Reservation and select Edit Workshop. The Edit Workshop Reservation screen that opens is the same as the one you used before to create the Workshop Reservation except now you are able to assign Attendees to the Workshop.
2. You can also review and change all Workshop Reservation related information from within this screen. The cursor is positioned into the Account Identifier field in the upper left corner and is ready to search for Accounts.
3. Select the appropriate account and click Assign to Workshop.
4. The selected Account is moved to the Expected Attendees list box and the Expected Attendees count shows 1.

Figure 2-31 - Workshop Attendees Handling

The screenshot shows the 'Workshop Attendees Handling' interface. It includes an 'Account Identifier' field with an 'Assign to Workshop >' button. Below is the 'Account Information' section with fields for Type (Guest), Cabin / Account Nr., Name, Age, and Gender. To the right are two list boxes: 'Expected Attendees' (Expected: 1) and 'Checked In Attendees' (Checked In: 0). Between these boxes are buttons for 'Check In >', '< UnCheck In', 'Check In All >', '< UnCheck In All', 'Print Ticket >', and 'Remove Assigned Reservation'.

You can also assign more Accounts at the same time. This is with assumption that you know other Guests that would like to participate in this Workshop. If you do not know at this time, you can always assign them later. There is no reason to click a button to confirm the Attendee assignment.

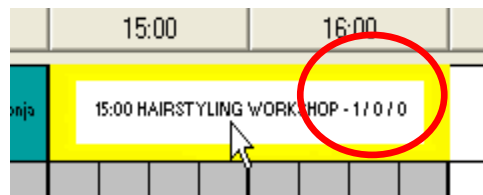
All actions applied to the Workshop attendees (assign – check in – un-check in) are saved automatically.

NOTE:

The Remove Assigned Reservation option becomes available once you have an Attendee assigned to the Workshop. You can remove an Attendee you select from the Expected Attendees list box, if you want to correct a wrongly entered assignment.

- You can click on the Return button to close the Edit Workshop and get back to the Main Reservations time plan.
- To edit Workshop Reservation related data, such as Room or starting time or Comments, click the Update button to close the Edit Workshop screen and save the Workshop Reservation related data you just updated.
- The Workshop Reservation block reflects the addition of the first Attendee.

Figure 2-32 - Expected



This can be confirmed by the Workshop Reservation data displayed on the bottom of the screen.

Figure 2-33 - Expected Workshop

Time:	15:00	Duration:	120	Ending:	17:00	Price:	£20.00	Therapy:	Workshop Hairstyling
Workshop:	HAIRSTYLING WORKSHOP,		Status:	Expected	Room:	04MAS4	Therapist:		
Attendees Expected:	1	Checked in:	0	Posted:	0	Comments:			

1. You can assign more Attendees by following the exact same steps as described above:
2. Right-mouse click while over the Workshop Reservation and select Edit Workshop from the pop-up menu options.
3. Select the appropriate account and click the Assign to Workshop button.
4. Click the Return button to close the Edit Workshop screen and get back to the Main Reservations time plan.

Checking-In Workshop Attendees

After all Attendees have been successfully assigned to the Workshop as Expected, you can check them in using one of these options.

- Checking in all the Workshop Attendees in one single step.
- Checking in the individual Workshop Attendees one by one, as they come to participate.

The system provides the above options by right clicking the booking menu. Selecting the first option, Checkin Entire Workshop, will automatically Check In all Workshop Attendees. Simply, confirm your selection by answering Yes in the pop-up message.

The system automatically checked in all Expected Attendees and the Main Reservations time plan is being refreshed to reflect this change.

To Check In each Attendee manually Select the option Checkin Workshop Attendees.

This opens the Edit workshop reservation screen, where all Expected Attendees are listed in the appropriate Expected Attendees list box.

The buttons Check In > and Check In All > have been enabled in order to allow you to Check In specific or all Expected Attendees.

Selecting the correct name from the Expected Attendees list and clicking the Check In button will:

- Check In the selected Attendee and move it into the appropriate Checked In Attendees list box.
- Remove the selected Attendee from the Expected Attendees list box.

While checking In the Workshop Attendees, the Edit Workshop Reservation screen allows you to complete any of the following tasks that you might want to do:

- Selecting and assigning new Attendees into the Workshop by using the Account Identifier search capability as well as using the Assign to Workshop button.
- Removing already assigned Attendees from the Workshop, by selecting the Remove Assigned Reservation button for a selected Expected Attendee.
- Editing Workshop Reservation related data, such as Room, starting time or Comments.

Click the Return button to close the Edit Workshop screen and go back to the Main Reservations time plan. (Remember to click on Update button in case you have performed any changes in the other Workshop Reservation related data that needs to be saved).

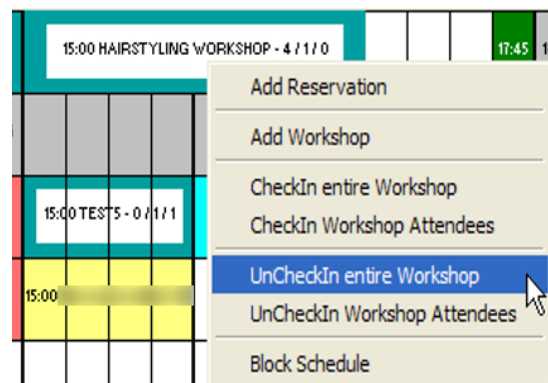
The Workshop Reservation block reflects the status change of the first Checked in Attendee.

Un-Checking-In Workshop Attendees

- If there are situations where you would like to Un-Check In some or all of the Workshop Attendees, below are the available options for Un-Checking In all the Workshop Attendees in one single step.
- Un-Checking In the individual Workshop Attendees one by one.

The system provides the above options using the right -click menu options.

Figure 2-34 - UnCheck entire Workshop



Selecting the first option UnCheckIn entire Workshop will automatically Un-Check In all Workshop Attendees. Confirm the selection by selecting Yes in the pop-up message.

The system automatically un-checked in the Expected Attendees and the Main Reservations time plan is refreshed to reflect this change.

NOTE:

Due to all Attendees status being updated to Expected, the entire Workshop Reservation block also turned Yellow to reflect the overall Workshop Expected status.

- To manually uncheck each attendee:
- Select the option UncheckIn Workshop Attendees. The Edit Workshop Reservation screen will show the Expected Attendees (listed in the appropriate Expected Attendees list box) and the Checked In Attendee (listed in the appropriate Checked-In Attendees list box), if any.
- Select one of the Checked-In Attendees from the Checked-In Attendees list and click on the UncheckIn button and move it into the appropriate Expected Attendees list box. This removes the selected Attendee from the CheckedIn Attendees list box.

NOTE:

The < **UnCheck In** and < **Un Check In All** buttons will become unavailable when there are no any attendees in the list.

In the process of Un-CheckIn the Workshop Attendees, the Edit Workshop Reservation screen will still allow you to complete any of the following tasks.

- Selecting and assigning new Attendees to the Workshop by using the Account Identifier search capability as well as using the Assign To Workshop button.
- Removing already assigned Attendees from the Workshop Use the Remove Assigned Reservation button for a selected Expected Attendee to remove an assigned attendee.

- Editing Workshop Reservation related data, such as Room, starting time or Comments.

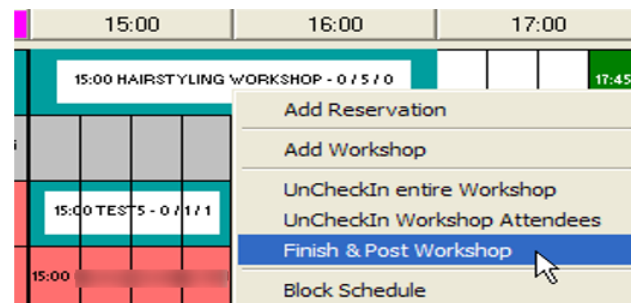
When finished click Update and then the Return button to close the Edit Workshop screen to ensure that the changes you have performed in other Workshop Reservation related data is saved. The Workshop Reservation block reflects the status change of the first Checked In Attendee back to Expected.

Finishing & Posting the Entire Workshop

When the Workshop is completed, the system gives you the option to assign it as **Finished and Post** the appropriate Treatment fees into the Attendees accounts.

To Finish & Post a Workshop Reservation, right click and select the Finish & Post Workshop option.

Figure 2-35 - Finish & Post Workshop



The Spa Workshop Posting screen is very similar to the regular Spa Posting screen with additions to handle Workshop specific requirements.

- An accounts Information area where information is displayed for every selected Workshop Attendee.
- There are list boxes that displays all Checked In Workshop Attendees as well all Finished & Posted Attendees.

Within the two list boxes, there are buttons that give the options to:

- Finish & Post only selected Checked In Attendee.
- Finish & Post All listed Checked In Attendees in one single step.

In our example, the Hairstyling Workshop lists five (5) Checked In Attendees which we would like to go on and charge with the displayed Workshop Hairstyling treatment charge of \$20.00.

The Post button on the lower right corner is disabled which means that we still have not selected any of our five (5) Checked In Attendees to assign them as Finished.

To do so, we simply click the **Finish & Post All >** button which will result in:

- Mark all five (5) Attendees as Finished and list them into the appropriate Finished Attendees list box.
- Removing all five (5) Attendees from the CheckedIn Attendees list box.

As soon as minimum one (1) Attendee will appear into the Finished Attendees list box, the **Post** button on the lower right corner becomes available and we are ready to Post the \$20.00 Treatment charge.

1. Clicking on the Post button, as with regular Spa Reservations Postings.
2. Posting the defined Workshop Treatment charge to each Attendee account.
3. Print a posting receipt for each Attendee account.
4. Assign each Attendee account to **Finished** status.
5. Assign the complete Workshop Reservation to Finished status.
6. As soon as all above actions are completed, the Spa Workshop Posting screen closes and system refreshes the Main Reservation time plan with the Workshop status change to Finished.

Figure 2-36 - Finished

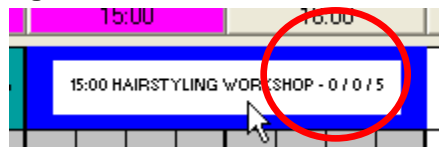


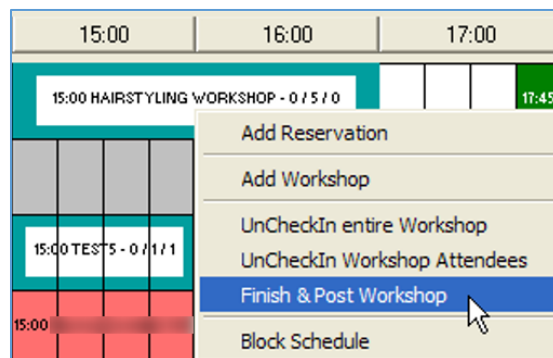
Figure 2-37 - Finished Workshop

Time:	15:00	Duration:	120	Ending:	17:00	Price:	£20.00	Therapy:	Workshop Hairstyling
Workshop:	HAIRSTYLING WORKSHOP,		Status:	Finished	Room:	04MAS4	Therapist:		
Attendees Expected:	0	CheckedIn:	0	Posted:	5	Comments:			

Finishing & Posting selected Workshop Attendees

The above described the procedure to Finish & Post the entire Workshop with all its Attendees. Apart from that, the system also provides the option to Finish & Post each Workshop Attendee one by one, as they appear into the Spa Reception desk. In order to do that we need to select again the same option Finish & Post Workshop from the right mouse click pop-up menu.

Figure 2-38 - Finish & Post Workshop



As explained previously, the Spa Workshop Posting screen lists all Checked In Attendees. We select the Attendee that we want to Finish & Post first, by selecting it with the mouse in the CheckedIn Attendees list box and the clicking on button **Finish & Post**.

This will:

- Mark the selected Attendee as Finished and list it into the appropriate Finished Attendees list box.
- Remove him/her from the CheckedIn Attendees list box.

Clicking on the **Post** button – as with regular Spa Reservations Postings - will result in

- Posting the defined Workshop Treatment charge to the one listed Finished Attendee account.
- Print a posting receipt for this Attendee account.
- Assign only this Attendee account to **Finished** status.
- Assign the complete Workshop Reservation to Finished status.

As soon as all above actions are completed, the Spa Workshop Posting screen closes and system refreshes the Main Reservation time plan with the Workshop status change to FINISHED (but the Workshop Reservation block combines the blue and cyan colors which indicate the partial completion of the Workshop):

 **NOTE:**

The Workshop Reservation block will keep this Blue & Cyan color combination until all Workshop Attendees have been Finished & Posted.

Viewing Workshop Postings

As with regular Spa Reservations that have been Finished & Posted, there is functionality to View Workshop Postings for reviewing purposes as well Reprinting of Receipts. Select the Finished Workshop you wish to View its postings and select the option View Workshop Postings from the right mouse click pop-up menu.

This option will open the View Spa Workshop Postings screen in three (3) different areas.

- An accounts Information area where you get displayed information for every selected Workshop Attendee.
- The Finished Attendees list box that displays all Workshop Attendees that have been marked as Finished.
- The Postings List that lists all posted transactions as part of the current Finished & Posted Workshop of each selected Finished Attendee.

Clicking on **Reprint** button will reprint Posting Receipt for the current selected Finished Attendee.

Voiding Workshop Postings

Same as for Viewing Workshop Postings that have been Finished & Posted, there is functionality to Void Workshop Postings.

Select the Finished Workshop you wish to View its postings and select the option Void Workshop Postings from the right mouse click pop-up menu.

This option will open the Void Spa Workshop Postings screen in three (3) different areas:

- An accounts Information area where you get displayed information for every selected Workshop Attendee.
- The Finished Attendees list box that displays all Workshop Attendees that have been marked as Finished.
- The Postings List that lists all posted transactions as part of the current Finished & Posted Workshop of each selected Finished Attendee.

Clicking on **Void** button will void all the listed Transactions that have posted as part of the current Finished Workshop for the current selected Workshop Attendee and will print a Void Receipt.

Deleting Workshop Reservations (No-Shows)

If for any reason the entire Workshop Reservation has not been shown up and therefore marked as late in the Main Reservations time plan (Red color), the system provides the necessary option to define this Workshop as No Show.

As with regular Reservations, the No Show definition gives you the option to:

- Define the Workshop Reservation as No Show and charge the predefined No Show fee to all or selected attendees accounts.
- Define the Workshop Reservation as No Show without charging any No Show fees to the Attendees accounts.

To define a Workshop Reservation as No Show, select the option No Show Workshop from the right mouse click pop-up menu. The system will display a confirmation message.

Click **No** will result in deleting the entire Workshop Reservation and will reflect in the Main Reservation time plan. Click **Yes** will open the Spa Workshop Posting screen, which will handle the requirements for charging the predefined No Show Fee to the Workshop Attendees.

- An accounts Information area where you get displayed information for every selected Workshop Attendee.
- List boxes that display all Expected Workshop Attendees as well all No Show & Charged Attendees.

Within the two list boxes, the following options are available:

- No Show & Post only selected Expected Attendees.
- No Show & Post All listed Expected Attendees in one single step.
- The predefined Treatment No Show Fee is listed and ready to be charged.

In order to proceed with charging the No Show Fee to the Workshop Attendees, select some or all of the Expected Attendees and move them into the Attendees To Be No Show & Posted list box, so that the POST button in the lower right corner is enabled. In this example, we want to charge only the first two (2) Workshop Attendees with the No Show Fee and assign the other three (3) Attendees only the No Show status without charging anything. So, we select each of the first two Attendees and click on the **No Show & Post >** button. As soon as it appears in the Attendees To Be No Show & Posted list box, the Post button is enabled.

Clicking on the **Post** button will:

- Post the predefined Treatment No Show Fee to the two Attendee's accounts listed in the Attendees to be No Show & Posted list box.
- Print posting receipts for both Attendee's accounts.
- Assign those two (2) Attendee's accounts to No Show & Posted status and the rest to No Show status.
- Assign the complete Workshop Reservation to No Show & Posted status.

As soon as the above actions are completed, the Spa Workshop Posting screen closes and the system refreshes the Main Reservation time plan with the Workshop status changed to No Show & Posted (the Workshop Reservation block is being displayed in blue to indicate that something has posted to the Attendee's accounts. This way you still have the options to View & Reprint as well as Void those posted transactions.

Canceling Workshop Reservations

If for any reason the entire Workshop appointment needs to be cancelled, right-click on it from the Booking Calendar and select Cancel Workshop from the pop-up menu.

If the reservation is within the cancellation period, based on the cancellation rules, a message will display, warning you that a cancellation fee will apply.

As with regular Reservations, the Cancel definition gives you the option to:

- Define the Workshop Reservation as Cancelled and charge the predefined Cancellation fee to, all or selected Attendees' accounts.
- Define the Workshop Reservation as Cancelled without charging any Cancellation fees to the Attendees' accounts.

Answering with **No**, will result in Cancelling & Deleting the entire Workshop Reservation and this reflects the same moment into the Main Reservations time plan.

Answering with **Yes**, will open the Spa Workshop Posting screen, which has been updated to handle the requirements for charging the predefined Cancellation Fee to the Workshop Attendees. The Spa Workshop Posting screen now shows:

- An accounts Information area where you get displayed information for every selected Workshop Attendee.
- List boxes that display all Expected Workshop Attendees as well as all Cancelled & Posted Attendees.

Within the two list boxes, the following options are available:

- Cancel & Post only selected Expected Attendees.
- Cancel & Post All listed Expected Attendees in one single step.
- The predefined Treatment Cancellation Fee is already being listed and ready to be charged.

Clicking on the **Post** button will result in:

- Posting the predefined Treatment Cancellation Fee to the two Attendees account listed in the Attendees To Be Cancelled & Posted list box.
- Printing posting receipts for both Attendees account.
- Assign those two Attendee account to Cancelled & Posted status and the rest to Cancelled status.
- Assign the complete Workshop Reservation to Cancelled & Posted status.

As soon as all above actions are completed, the Spa Workshop Posting screen closes and system refreshes the Main Reservation time plan with the Workshop status change to Cancelled & Posted (the Workshop Reservation block is being display in Blue color to indicate that something been posted into the Attendee accounts. This way you still the options to View & Reprint Receipts as well as Void those posted transactions).

Packages Handling

Similar to regular Spa Reservations, Packages are handled in the daily schedule as appointment blocks thus there are options:

- **Add Package:** assign a specific Package to an Account.
- **View/Edit Package:** assign a Reservation to a Package Treatment, edit a Package Treatment Reservation or assign Package Retail Items as Handed Over or Not Handed Over.
- **Cancel Package:** Cancel entire Package with all included Treatment Reservations with option to apply Cancellation Fees to all Treatment Reservations.
- **No Show Package:** No Show entire Package with option to apply No Show Fees to all Treatment Reservations.
- **Edit Reservation:** Update specific information of a Treatment Reservation that is part of a Package.
- **Finish & Post:** Finishing a Packaged Treatment Reservation will result in posting the entire Package into the payer's Account.

To distinguish between regular Guest Reservations blocks, Package blocks use the same colors but different style, as shown below.

Figure 2-39 - Expected Package Treatment Reservation



Figure 2-40 - Expected Package Treatment Reservation (Delayed)



Figure 2-41 - Checked In Package Treatment



Figure 2-42 - Finished & Posted Package Treatment Reservation



Another way of displaying more detailed information about each Package Reservation, is the bottom of the Reservations screen, where an enhanced Package Information area has been created to display Package relevant data upon hovering with the mouse pointer over the Package Reservation block.

Figure 2-43 - View Package

The screenshot shows a reservation summary for 'WELLSTART - Wellness Starter'. Key details include: Ending: 6:30 PM, Price: \$30.00, Therapy: SPA, Status: In House, and Therapist: [blank]. The package name 'WELLSTART - Wellness Starter' is highlighted in pink.

- For detailed listing of all Package Reservations related data, the above described **View Package or Edit Reservation** option will display all necessary information related to the selected Package block.

Assigning Packages to Accounts

Similar to regular Spa Reservations, Packages are assign to Accounts by selecting the option Add Package from the right mouse click pop-up menu options. Assigning Packages can also be achieve by clicking on button Booking Options and selecting the Add Package option.

The Add New Spa Package screen that opens gives you the options to select certain Spa Packages from certain Package Groups.

Figure 2-44 - Add New Spa Package

The screenshot shows the 'Add New Spa Package' screen. It includes sections for Account Information, Package selection (Spa Packages group, WELLSTART - Wellness Starter package), and a table of Packaged Items. The table shows items like 'Body Lotion Lile, 125ml' and 'SPA-' treatments with their respective prices and assignment status. The 'Assigned' column for the SPA items shows red 'X' marks, indicating they are not yet assigned. The total 'Current Package Price' is 70.00.

Code	Description	Type	Handed Over	Assigned	Posted	Status	Today's Price	Treatment Date/Time	Duration	Therapist	
	Body Lotion Lile, 125ml	Retail	X	-	-	-	15.00				
	SPA-	Treatment	-	X	-	-	30.00				
	SPA-	Treatment	-	X	-	-	25.00				
							70.00				

As soon as a Spa Package selected, all Items included are being display as well as the Package's current Price. At first, all Treatment Items appear as not assigned because there is not any Treatment Reservation created yet. In order to proceed with inserting the Package into the selected Account, the Insert button remains disabled and we will need to assign all Package Treatment Reservations.

To do that, select each Treatment Reservation from within the grid and right-click in order to display the menu.

The screen that opens, called New Reservation For Packaged Treatment is an enhanced New / Edit Reservation screen that we use for regular Treatments. Here, we can select the **Date, Time, Therapist** and **Room** in order to create the Packaged Treatment

Reservation. By clicking on **Insert**, the Packaged Treatment Reservation is created and the Package Treatment Reservation creation is reflected into the Packaged Items grid.

The Treatment Reservation appears as Assigned with Expected Status and all Treatment Reservation information are listed (Treatment Date/Time, Duration, Therapist, Room). Doing the same for the second, Packaged Treatment will enable the Insert button so that we can assign the current Spa Package into the selected Account.

Viewing & Editing Packages

Editing a Packaged Treatment Reservation can be done in two ways:

- Using the known Edit reservation option from the pop-up menu options.

This option will open the known Edit Reservation screen which is now enhanced with Spa Packages related information:

- Using the View Package option from the pop-up menu options.

Selecting any Treatment Reservation and right clicking on it, will display the pop-up menu with the Edit Reservation available where you can edit certain Treatment Reservation settings. Selecting any Retail Item and right clicking on it, will display the pop-up menu with option to Hand Over the Retail Item to the customer.

The following confirmation message will be display “Are you sure you want to Hand over the selected Retail Item”.

Clicking on Yes, will assign the selected Packaged Retail Item as Handed Over and will refresh the relevant information into the data grid:

If for any reason anyone of the Package Treatment Reservations or the entire Package needs to be cancel, the system provides the necessary **Cancellation** options.

The available menu options are to either:

- Cancel the selected Package Treatment.
- Cancel the entire Package and all its included Treatment Reservations.

Choosing to Cancel the selected Package Treatment, the system will ask you to confirm once more the available options:

- Cancel all expected Treatment Reservations for this Package.
- Cancel the selected Package Treatment Reservation only.
- Cancel the selected Package Treatment only (clicked on **No** button).

The Cancel Selected Spa Packaged Treatment screen opens showing the following information:

- All Package Items (Treatments and Retail Items) listed with their Package Price as well as their Regular onboard Price.
- The Treatment selected to cancel marked with Red and a Cancellation Fee price appears based on the existing Cancellation Percent value.
- At the lower left corner, detailed information about the necessary steps that will perform in order to complete the Cancellation of the selected Treatment.

Cancelling the selected Packaged Treatment will result in restoring the entire Package to a non-Package status by performing the following actions:

- Void the entire Package with the Package Price.
- Re-Charge the already finished Package Treatments with Regular Price.
- Re-Charge the already handed over Package Retail Items with Regular Price.
- Update all expected Package Treatments with Regular Price.
- At the lower right corner, the available user actions:

Click on **Yes** to Cancel the selected Packaged Treatment Reservation and apply the Cancellation Fee. Click on **No** to cancel the selected Packaged Treatment Reservation without applying any Cancellation Fee. Click on **Cancel** to exit without cancelling this package.

Unassigned Bookings Handling

The Unassigned Bookings Handling screen lists all single Treatment or Package Reservations that have been import through the Data Import module before they are confirm and assigned a Treatment Room.

In order to ease the imported Reservations handling, the system provides separation of those Bookings by system Cruise.

The screen is divided into two (2) main areas:

- The Unassigned Cruise Bookings grid. This grid lists all imported Cruise Treatments Reservations sorted by the scheduled Treatment Date & Time. The sorting order can be modify by clicking on the grid column Headers.
- A smaller edition of the main Reservations & Schedules screen which displays all current (already confirmed) Appointments for the selected Date in gray color in order to distinguish those Appointments from the Unassigned Appointments that you selected on the top grid so that the system can process it and propose the correct Therapist Schedule according to the predefined Treatment Date & Time.

Clicking on every imported Unassigned Treatment Reservation will initiate the internal process of finding the necessary available-open time space that fits the Booking's requested Treatment Date & Time as well as the first available Therapist that is able to perform it. As soon, as an available period found, the system will place the Unassigned Treatment Reservation into the Reservations & Schedules time scale on the lower part of the screen, colored in Yellow to identify it as an Expected Appointment.

There are only two (2) options available for the Unassigned Expected Appointments:

- Assign Room & Confirm Booking.

Which means that the Unassigned Treatment Appointment is ready to be confirm and added into the system as a regular Expected Treatment Reservation assigned to a valid & available Date, Time & Therapist. The last step is to define the Treatment Room.

- Edit Reservation.

System should provide a way to Edit specific Reservation data before we can proceed to confirm the Booking. Note that system will not allow updating the Treatment and Price for imported Prepaid Treatment Reservations.

As soon as you select the Room and confirms the selected Unassigned Treatment, the Treatment will appear in the Reservations Schedule in gray color similar to the rest of the regular Bookings. At the same time, it will disappear from the Unassigned Bookings grid on top in order for the user to continue confirming the rest of the Unassigned Bookings still listed in the grid.

If no availability for requested Period found, the system will place the Unassigned Treatment Reservation into the first Therapist Schedule colored in Red indicating the overlap with another existing Appointment or Time Block. There is still the option to assign the Appointment to another Time and/or Therapist by either selecting Edit Reservation or move the Red colored Reservation Block using the Mouse (Drag & Drop) and position it to the desired available Time and/or Therapist.

3

Assigned Prepaid Bookings Overview

The Assigned Prepaid Bookings Overview screen provides a central place where you can Print Web Summaries in a batch process using specific data filters as well specialized sorting options.

Printing Web Summaries for Prepaid Bookings can initiate for all Bookings displayed on the screen as well as for a selected number of bookings (rows) using the Mouse selecting keys (Ctrl and Shift).

4

Daily Setup

Daily Setup Overview

The Daily Setup screen contains the following information:

- Location Schedule information.
- Therapists Schedule information.
- Discount Periods setup and maintenance.

Before you can create a setup for a specific Location and Date, the system must already have been prepared with information about the Location – see [Location Maintenance](#) – as well as the Therapists assigned to each Location – see [Therapists Setup](#).

Location Schedule information

The following information is being use from Location Maintenance in order to prepare the Daily setup with default values:

- Opening & Closing Times.
- Schedules number.
- Schedules captions.

These default values can be alter to the values appropriate for each Daily Setup.

Additionally, the following information can be enter in order to have it displayed in the main Reservations screen:

- Port Info.
- Therapist Info.

Therapists Schedule information

In the same way as for Location Schedule, the appropriate Therapists are being load from the Therapists Setup into the Therapists drop-down list boxes in order to assign later the appropriate Therapist to each schedule.

Each displayed Therapist's schedule number color is using similar to main Reservations screen colors.

- Red: for Expected Therapists (and for schedules that are not link to any Therapist).
- Green: for Checked-In Therapists.

Each displayed Therapist's tooltip text is showing the word Expected or Checked-In next to the existing Expected Disembarkation Date.

Inside the Therapists drop-down selection box, an additional column Status has add to display each Therapist's Reservation Status (Expected or Checked-In) next to its Name.

Figure 4-1 - Expected

Schd	Caption	Therapist	Default Room
1			
2			
3			
4	Massage		
5	Massage		
6	Massage		
7	Massage		

 **NOTE:**

Only Expected Therapists, for which the current selected Setup Date is between their Expected Embarkation and Disembarkation Dates, is shown in the Therapists drop-down selection box.

Next to each Therapist Schedule, we are able to see an exact overview of the actual Booking Calendar of the selected Date and Location. The time blocks displayed here have the following colors:

- The Blocked Times are being displayed with the default gray / dark gray / dark green & black colors.
- All other Treatment (Expected & In House) Reservations are being display in yellow.

 **NOTE:**

Only Expected & In House Treatment Reservations are display here since this is a pure availability overview

Multiple Discount Periods

This functionality extends the existing single Discount Period per Day into Multiple Discount Periods for each Day in Daily Setup screen.

Additionally, you can now define selected or all Item Groups and/or selected or all specific Items (Retail & Therapies) that will be assign to the specific Daily Discount period.

The default Discount percentage definition has been extend to include option to define Discount value or Discount percentage.

Setting up a Day

To setup a Day, choose the Location and Date from the calendar.

As soon as you click on the Calendar into a Date that does not exist as a Spa Location Daily Schedule, the system will load the default values for this Location as found in the Location Maintenance as well as in the Therapists Setup.

The default values loaded are:

- Number of Schedules.
- Opening and Closing times.
- The system will create the Therapists Schedules with their default captions, will load all appropriate Therapists into each Schedule's Therapist drop-down list box and prepare them for further editing.
- The system will also load all available Rooms into each Schedule's Default Room drop-down list box.

Having all this information in place, you can now edit each Schedule.

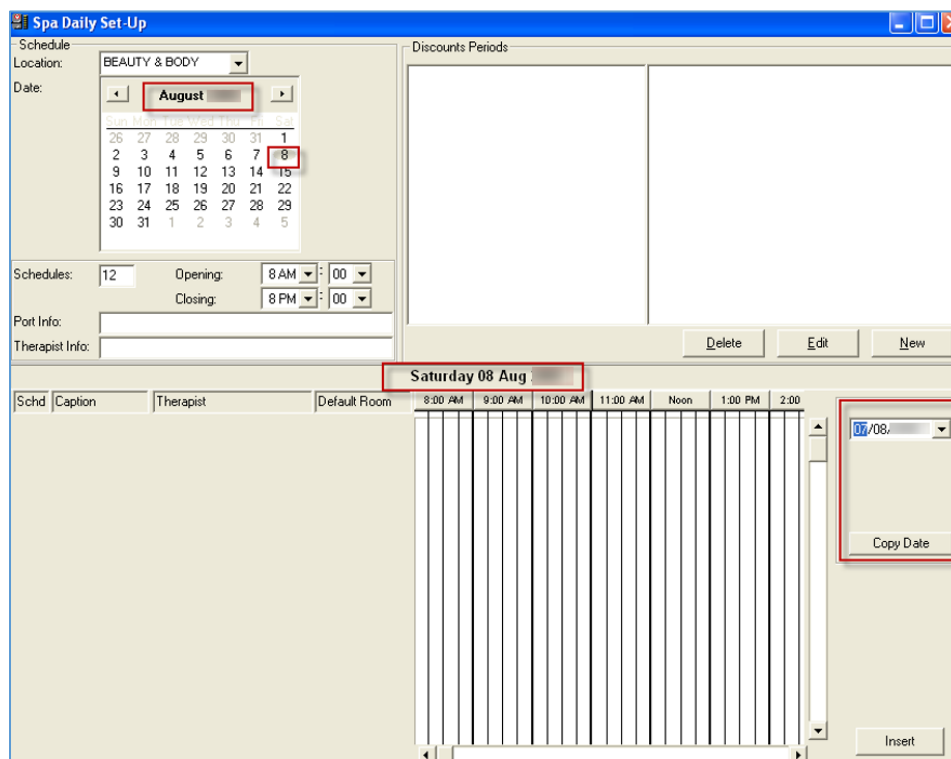
1. Accepting the default, Schedule caption or edit it.
2. Select the correct Therapist for each Schedule from the Therapist drop-down list box.
3. Select the default Room for each Schedule from the Default Room drop-down list box.
4. When done creating the schedule, click on **Insert** button to save it.

Copying a Previous Day

In order to avoid setting up each single working day, the system provides the functionality to setup a Day by copying the setup of an existing working Day.

Choose the Date you want to setup by selecting it from the calendar. The system will display you an empty working Day as well as the option to select an existing Working Day and copy this Day's Setup into the selected empty Setup.

Figure 4-2 - Spa Daily Setup



- Select the working Date you want to copy the setup from and then click on **Copy Date**.
- Immediately the system will start processing the Copying request and soon the selected Date will have the same Setup as the one requested to be copy from.
- Additionally, the system will display two more buttons to either Update the proposed/copied setup or Remove Date in order to remove the proposed setup.
- Clicking on **Remove Date** will result in removing the Daily Setup for selected Day **“Are you sure you want to remove the Daily Setup for selected Date: 08/08/2019”**

Adding & Removing Schedules

Assuming that the current Daily Setup has four (4) Schedules and you want to add two (2) more schedules for two (2) additional therapists for this Date.

Figure 4-3 - Schedules

Schd	Caption	Therapist	Default Room
1	Trainer		NONE
2	Trainer		NONE
3			NONE
4			NONE

In order to do that, place the cursor to the Schedules text box and replace four (4) with six (6) and click Tab. The system will create two additional schedules where you can now enter their captions as well as select Therapists and default Rooms.

After finishing all necessary changes, clicking on **Update** will save everything into the DB. In the same way, you can remove existing Schedules from a Daily Setup, by reducing the Schedules number and clicking Tab key. Clicking on **Yes**, will result in removing the last two (2) schedules and bring the total Schedules for this working Date to four (4) Schedules.

NOTE:

When you try to remove a Schedule that already has Appointments or Blocked Times assigned, the system will not allow it and will display the following warning message **“There are already appointments for one of the schedules you are trying to delete. Cannot continue.”**

Assigning Crew members to Schedules

In the previous example where we added 2 more Schedules into the Daily Setup, the system by default leaves the Captions, Therapists and Default Rooms empty for the newly created Schedules.

You can assign Therapists to those Schedules, by selecting the Therapist from the Therapist drop-down combo box and then click on **Update**.

Multiple Discount Periods

The Daily Setup screen displays all Multiple Discount Periods assigned to each day on the upper right.

The Discounts Periods displays the list of assigned Discount Periods and the Retail or Therapy Groups and Items assigned to each Discount Period:

The main Discount Periods frame consist of two separated frames:

- A tree view listing of all Discount Periods grouped by Retail and Therapies types.
- A tree view listing of all Groups and Items assigned to each Discount Period.

The necessary buttons needed to **Create, Edit** or **Delete Discount Periods**, are placed at the bottom of the Discounts Period frame.

The first listing on the left, lists all available Discount Periods of selected Date including the following information:

- Short Code description.
- Discount value as amount or percentage (%).
- Starting & Ending time of Discount Period.

While the listing on the right, displays all Retail or Therapies Groups and Items that are currently assigned to the selected **Discount Period** of the left side.

Creating & Editing Multiple Discount Periods

The assignment of Groups and Items works in the same way as the assignment of Trained Therapies in the Therapists Setup screen.

You are able to assign to each Discount Period an entire Group of Items or selected Items.

This can be done during the creation of a Discount Period (New button) or when editing an existing Discount Period (Edit button).

1. To create a new Discount Period, simply click on **New** button.
2. A new window will open where you can enter all necessary information in order to create a Discount Period.
 - Code: Enter a short description for the new Discount Period. This will be used later one to describe this Discount Period in the Reservations and Posting screen.
 - Discount: Enter the amount of the Discount and its type: Value
 - Percentage (%): 2.50 or 10%.
 - Type: Select whether this Discount Period will include Retail or
 - Therapies Items: Clicking on each type, will result in automatic loading of Retail or Therapies Groups and Items on the right side tree view listing.
 - From Time: Enter the starting time of the Discount Period.
 - To Time: Enter the ending time of the Discount Period.
3. On the right side of the window, you will see all available Groups and Items that you could assign into the Discount Period.
 - Click on the checkbox of a Group to select the entire Group and all Items belonging to the Group.
 - Double-click on the Group in order to expand the listing to display the individual Items that each Group contains in order to select specific Items to include into the Discount Period.

In the above example, we have entered information for the following Discount Period, 5% Discount from 10:00 -12:00 for both Sport Massage items.

1. Click **OK** button to create this Discount Period and save it into the current displayed Date. The Daily Setup screen will be automatically updated to display the addition of the new Discount Period:
2. To edit some or all of the information of a Discount Period, simply click on the **Edit** Button. The same window as before will open in order to edit the information you wish the change. Clicking on **OK** button will save the changes and will update the Daily Setup screen automatically.

Discount Periods Overlaps

The Discount Periods functionality has a limitation in multiple Discounts Periods overlapping. Discount periods of the same type (Retail or Therapies) cannot be overlapped or system will not accept multiple periods existing for the same type in the same or overlapping period with another Discount Period of the same type.

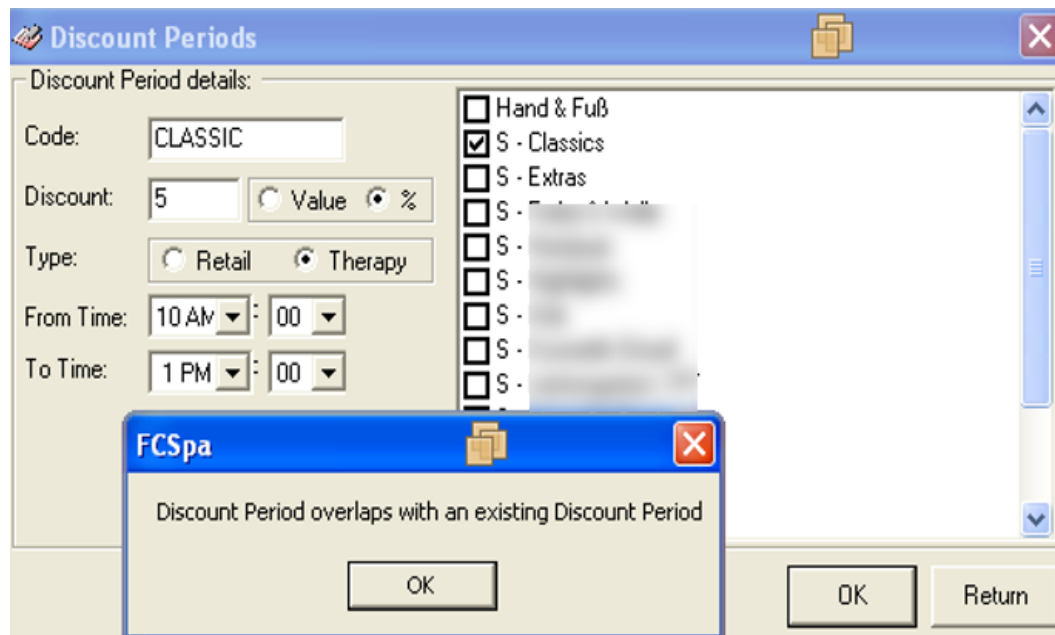
In other words, looking at the screen above, we are having 2 Discount Periods for Therapies:

The first is CLASSIC from 10:00 – 12:00 for 5% for the 2 SPORT MASSAGE Therapies.

1. The second is HARMONY from 12:00 – 17:00 for 20% for all Therapies.

If we try to extend the ending time for the first period – CLASSIC – from 12:00 to 13:00, we will get the following message:

Figure 4-4 - Discount Period



In other words, looking at the screen above, we are having 2 Discount Periods for Therapies:

1. The first is CLASSIC from 10:00 – 12:00 for 5% for the 2 SPORT MASSAGE Therapies.
2. The second is HARMONY from 12:00 – 17:00 for 20% for all Therapies.

If we try to extend the ending time for the first period – CLASSIC – from 12:00 to 13:00, we will get the following message “Discount Period overlaps with an existing Discount Period.

But, system will allow creating as many as you wish new Discounts Periods for Retail Items, as long as they do not overlap with the existing one from 10:00 – 14:00.

Discount Periods and Reservations

When Discount Periods exists for the selected-displayed Date & Location, the system displays the Multiple Discount Periods in the lower left corner of the main Reservations screen, using the same tree view listing as in the Daily Setup screen.

The Multiple Discount Periods handling during reservations is implement as follows. The first time the system checks about Reservations that include Therapies that might be assign into Discount Periods, is during Checking-In of appointments. At this time, the system checks and looks for all Therapies Discount Periods that might contain the currently checked-in Therapy that falls inside the specified Starting and Ending Time.

If the system finds that the current Reservation includes a Therapy that applies for a Discount, it automatically updates the Reservation record internally with the Discount amount and type (value or %). Now, after the Reservation record has been update with all necessary Discounting information, you will be able to see in the Reservation Info layout at the bottom of the screen, the Original Treatment’s price and the discounted price. At a later point, during the Finish & Post process, the Discount will be automatically calculated and displayed in the Posting screen. Additionally, the posting screen will list on the right side all available Discount Periods of current selected Date, sorted by Type (Retail or Therapies) and then by Starting Time.

Discount Periods and Retail Items

When posting Retail Items, the Posting screen will not only show the Multiple Discounts Periods, but also will check if a selected Retail Item falls into an existing Discount Period.

In this case, the system will:

1. Calculate the Discount and display the new Extended Price (after discount).
2. Display the Discount value and type (underneath the Extended Price).

When you finally click on **Add To Receipt**, the calculated Discount amount will be displayed together with the Retail Item on the Invoice list (left side). The Total Amount will automatically reflect the final price. The same way, the system will calculate Discounts that are assign as Discount values (instead of %).

Daily Export

This is the option where at the end of the day, the Manager would go and generate the Daily Sales Export file that can be used to import the Daily Items consumption into various Inventory systems like Materials Management System, Crunch Time etc.

The system will display the default preset File Location where the Daily Export Sales file will be place upon completion of the export process. You need to select the **Sales Date** and click on **Export** button.

 **NOTE:**

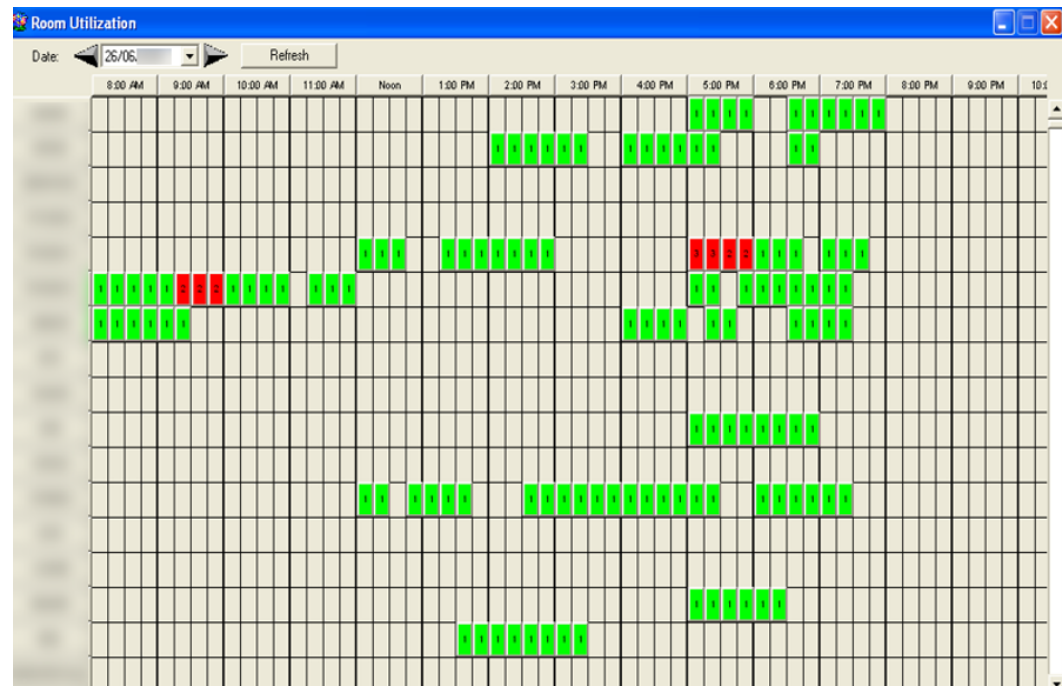
Once the Sales Data have been exported for a specific date, the Sales Data resets and system will not be able to reproduce Sales Data Export for the same Date again.

Daily Schedule Overview

The Daily Schedule Overview screen is a graphical representation of the actual main Reservations screen using the same default colors to represent all Appointments and Time Blocks.

Room Utilization

Figure 4-5 - Room Utilization



The Room Utilization screen is a graphical representation of the actual times each Treatment Room has been used during a sales date in the default fifteen (15) minutes time intervals.