Oracle® Hospitality Suite8
Quick Keys User Manual
Release 8.9

July 2015

ORACLE®

Contents

Preface

Audience

This user manual is intended for system users and system administrators.

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
- Screen shots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at
http://docs.oracle.com

Revision History

Date	Description of Change
July, 2005	• 8.5.0.0 - First Issue Small Business Edition
May, 2008	• 8.7 - Updated for Version 8.7
June, 2008	• 8.7.3.1 - Updated for Version 8.7.3.1
May, 2009	• 8.8 - Updates for Version 8.8
Sept, 2010	• 8.8 - Updates for Oracle 11gR1
Jan, 2012	• 8.9 - Updated for Version 8.9
Nov, 2012	• 8.9 - New cover page
July, 2015	• 8.9 – Oracle template applied

1   Introduction

Logging In

To use Suite8 you must first log into the system. You must have a valid user identification and password.

Logging into Suite8

1. From the desktop, click the Fidelio Suite8 icon.

   The Suite8 Splash screen is displayed for several seconds with the Payment Application Data Security Standard (PA-DSS) disclaimer

   The Fidelio V8 Login screen is then displayed.

2. Type your user identification (case sensitive) in the Login name box.

3. **Tab** to the Password box.

4. Type your secret password (case sensitive) in the Password box.

5. Click Lᴏɢɪɴ, the Suite8 main menu screen appears.

   You are now logged into the system.

> **Note:** If one of the following tables: WMLG, WLOG, ZPOS, WDAT, SHIS, SRPD, WRPD has no indices or a missing index, an alert is displayed when starting Suite8 with a message to contact support. It could happen that a table has no indices in the event that a table was renamed for support purpose. Renaming a table carries the indices to the renamed table. If an index is missing of one of the above mentioned tables, the alert is displayed when starting Suite8.

Navigation Keys

Accelerator keys

Accelerator keys are used for fast access to a box on a screen or dialog box. When a letter is underlined you can press the **Alt + letter** keys and the cursor moves into the appropriate box. For example, on the Profile Search screen the letter "A" is underlined in the Name box. By pressing the **Alt + A** keys, the cursor moves into the Name box.

To use the accelerator keys:

From the screen or dialog box, press **Alt + letter** to move the cursor into the appropriate box.

Shortcut keys

Suite8 has shortcut keys that allow you to perform actions directly from the keyboard without having to use the mouse. Using these keys saves you time.

Suite8 Shortcut keys

Shortcut Key	Description
F1	Displays the help.
Alt + F4	Closes the active window.
F10	Closes all active windows.
F12	Moves the cursor from a data box to the first record on the grid.
Alt + Down arrow	Displays a combo box.
Tab	Moves forward through the boxes/options. Moves to the next box and confirms the entry.
Shift + Tab	Moves backward through the boxes/options.
Ctrl + Tab	Moves forward through tabs.
Ctrl + Shift + Tab	Moves backward through tabs.
Escape	Cancels the current action. Removes a Combo box before a selection has been made.
Home	Moves the cursor to the beginning of a box.
End	Moves the cursor to the end of a box.

The Quick Keys

Suite8 allows you to select the Quick Keys main menu from any screen. The quick keys are shortcuts to screens, searches, and desktop tools. Using these keys allows rapid access to information without having to leave the section that you are currently working on. For example, a customer is making a new reservation while at the same time asking questions about restaurants in the area. You can use the Telephone Book quick key for restaurant information instead of aborting the new reservation screen, looking up the restaurant information, closing the Telephone Book, and reopening the new reservation screen.

To access the Quick Keys main menu

▪ Click the QUICK KEYS menu option.

The Quick Keys menu is displayed.
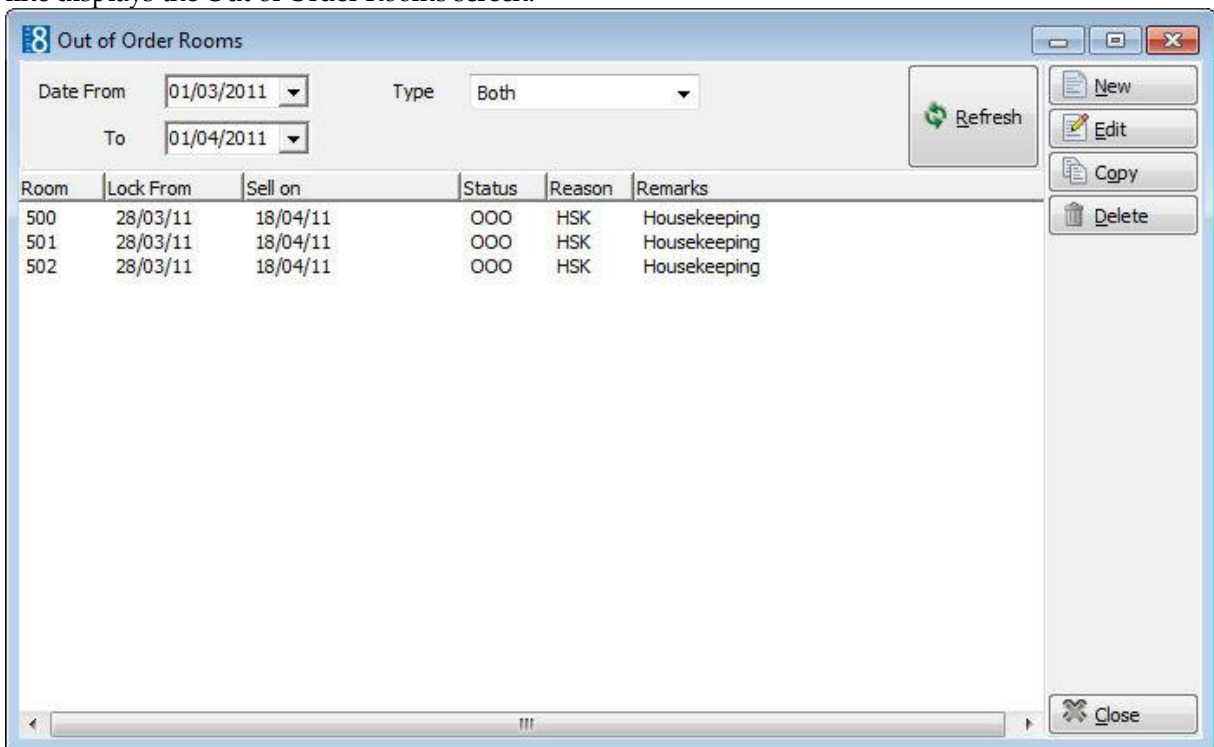
Arrivals	Ctrl+A
Availability	Ctrl+D
Billing	Ctrl+B
Calendar	F4
Conference Diary	F3
Conference Floor Plan	Shift+Alt+F3
Currency Calculator	Shift+Alt+R
Event Vacancies	Ctrl+Shift+F3
Event Waitlist Priority	Ctrl+W
Floor Plan	Ctrl+F
Goals	Ctrl+Shift+G
Group Reservation	Ctrl+G
Hotel Segment Statistics	Ctrl+Shift+S
House Status	Ctrl+H
Inhouse Guests	Ctrl+I
Interface Functions	Shift+F8
Logbook	Shift+Alt+L
Maximum Availability	Ctrl+Shift+M
Messages	Ctrl+M
New Reservation	Ctrl+N
Postings	Ctrl+E
Profiles	Ctrl+P
Quick Reservation	Ctrl+Q
Rate Query	Ctrl+R
Reports	Ctrl+Shift+R
Room Rack	Ctrl+L
Room Search	Ctrl+S
Room Type Availability	Ctrl+Shift+D
Space Occupancy	Ctrl+F3
Table Reservation	Ctrl+Shift+A
Telephone Book	Ctrl+T
Update Reservation	Ctrl+U

Using the blue drill down arrow

Many boxes have a blue drill down arrow ⬇ next them indicating that there is additional information that can be displayed.

Housekeeping	Total	Occupied	Vacant	
Clean Rooms	57	1	56	
Dirty Rooms	80	17	63	
Total		18	119	
Out of Order	0	0	0	⬇
Out of Service	0	0	0	⬇
Rooms in Queue			0	⬇

For example, on the House Status screen clicking the blue drill down arrow on the Out of Order line displays the Out of Order Rooms screen.

Room	Lock From	Sell on	Status	Reason	Remarks
500	28/03/11	18/04/11	OOO	HSK	Housekeeping
501	28/03/11	18/04/11	OOO	HSK	Housekeeping
502	28/03/11	18/04/11	OOO	HSK	Housekeeping

Out of Order Rooms — Date From 01/03/2011 To 01/04/2011, Type Both — Refresh, New, Edit, Copy, Delete, Close

HTML View

Suite8 offers the possibility to view information in HTML format. HTML is the abbreviation for "Hypertext Markup Language." This is the system of marking a document so it can be published on the World Wide Web and viewed with a browser. The main areas where information can be viewed in HTML format are as follows:

- Reservation Navigator
- Blocks
- Profiles
- Cashiering
- Tasks and Activities
- Events

- Conference Reservation

The HTML display on the reservation navigator can be hidden so that the reservation grid is expanded. Double-click in the blue reservation header bar or right-click and select/deselect LOWER PART OF THE SCREEN from the short-cut menu to view or hide the HTML display. This setting is stored per user and remains until the next time it is changed.
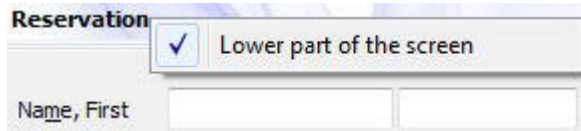
Expand the HTML tree

- Click the expand icon to show all available folders.
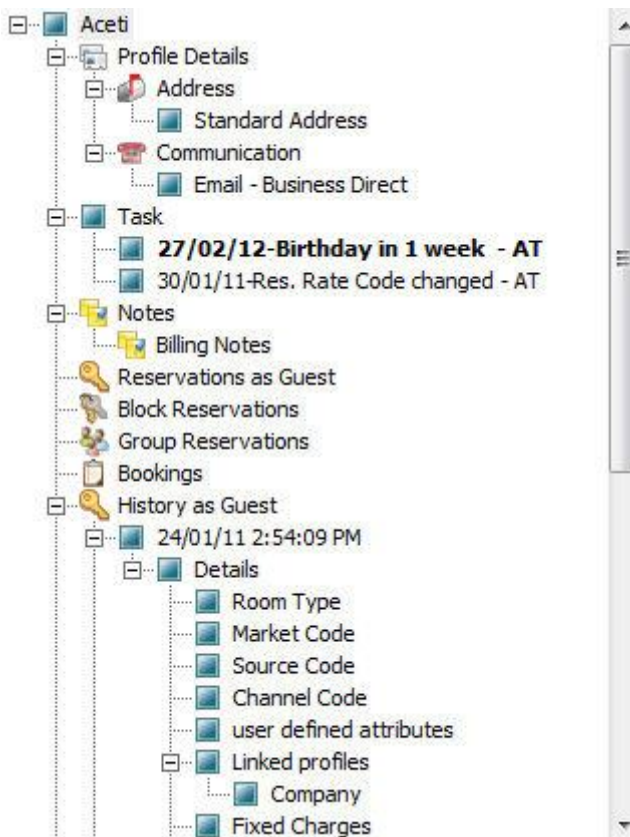
Collapse the HTML tree

- Click the collapse icon to collapse all folders to the uppermost level.
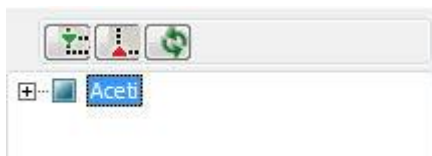
Refresh the HTML View

- Click the refresh icon

View information in HTML format

In this example we will display information in HTML format on the profile screen.

1. Click the CUSTOMER RELATION menu and select PROFILES to display the customer profile screen.

This main customer profile screen is called the Navigator and is divided into 3 distinct areas:

- Query - basic and advance profile search criteria

- Query Results - the results of the query shown in a grid format

- Tree Listing and HTML Page

    - A tree listing of all the details associated with this profile including address, communications, links, reservations or history

    - A freely definable HTML display which by default has a 'big' format where the details are displayed in a non-grid style format or a list format. The HTML display can be printed by using the right mouse click.

2. Enter the name to search for in the NAME box and click SEARCH.
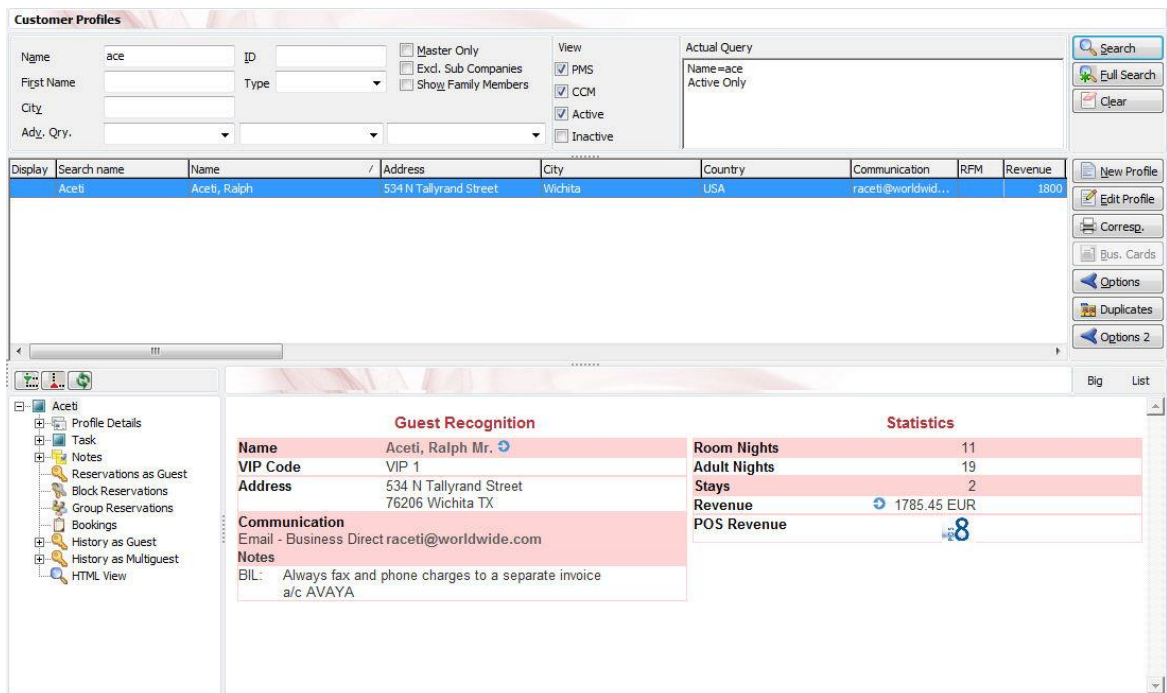
4. The query results are shown in grid format in the middle section of the screen and the tree and HTML formats are shown in the lower section of the screen.

5. In this instance the HTML view displays a summary of the profile details. The tree listing is displayed by default expanded by one level. A plus sign next to a folder indicates that it can be expanded to show more folders; a minus sign indicates that it can be collapsed.

Change the display of the HTML

Two additional buttons on the html display allow you to change whether certain details are displayed in a non-grid style or in a list format. By default the 'big' view is displayed.

1. To view in list format click the List button.

Arrival	Departure	Nights	Customer	Arrival day	Departure day	No of Rooms	Room type	Room	Market	Rate Code
20/04/11	22/04/11	2	Aceti Ralph	20/04/11	22/04/11	1	Double Room		Individual	
30/03/11	31/03/11	1	Aceti Ralph	30/03/11	31/03/11	1	Double Room	109 Double Room	Individual	

2. To view in a non-grid style, click the Big button.

20/04/11

Departure:22/04/11
Nights:2
Customer: Aceti Ralph
Arrival day: 20/04/11
Departure day: 22/04/11
No of Rooms: 1
Room type: Double Room
Room:
Market: Individual
Rate Code:

30/03/11

Departure:31/03/11
Nights:1
Customer: Aceti Ralph
Arrival day: 30/03/11
Departure day: 31/03/11
No of Rooms: 1
Room type: Double Room
Room: 109 Double Room
Market: Individual
Rate Code:

Copy to clipboard

It is possible to copy information from the HTML files to clipboard by selecting items from HTML, using right mouse short cut menu and selecting COPY TO CLIPBOARD or short cut key CTRL + C. This information can then be pasted to any open file by using right mouse menu option PASTE or short cut key CTRL + V.

The menu option COPY TO CLIPBOARD is controlled by the user right COPY TO CLIPBOARD FROM HTML under Users → User Definition → Rights → Miscellaneous

The Date Box

The format of the dates and the separators between the dates may vary from one hotel to another. The date format is defined in the Control Panel Windows Regional Settings/Options.
Typical date formats include the following:

- dd/yy
- MM/dd/yyyy
- yy/MM/dd
- yyyy-MM-dd
- dd-MMM-YY

You can type the date directly in the date box; however it must be typed exactly as per the pre-defined format.
There are many date boxes in the system, for example, Arrival Date or From Date. The date can be either a specific date or an as of date.

Arrival date   01/03/2011   From: 01/03/2011

A specific date is when you need to see what happened on that day. For example, you need to see which guests have departed 01/01/03.

An 'as of date' is when you need to find out information starting from that date. For example, you need to read the room rack starting from 09/09/03 through 12/09/03.

Changing the date

The date can be changed by typing a new date or with the use of the calendar.

To type a new date

1. Place the cursor in the Date box.

2. Type the new date in the Date box, in the defined format including separators.

3. Press the **Tab** key, the date is changed.

To change a date using the calendar

1. Click the drop down arrow next to the Date box.

   The calendar appears.
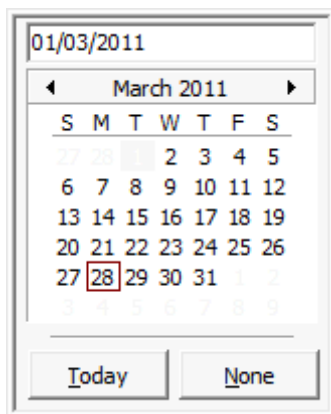
2. Change the month to a previous month or future month by clicking the horizontal arrows located on the top of the calendar or by pressing the **Ctrl + Page Up or Ctrl + Page Down key.**

3. Place the cursor on the date and click the left mouse button **or** move the keyboard arrow keys to locate the date and press **Enter**, the date is changed.

Customising Suite8 Grids

Many of the grids in Suite8 may be customised according to the needs of the property. The customization options available are:

- CUSTOMIZE - opens the customize dialog box so that columns on the grid can be added, changed or removed.
- RESTORE DEFAULTS - applies the default settings for this grid.
- SHOW DEFAULTS - applies the default settings to the current grid view, however, any customised settings are used the next time the grid is displayed.
- Select PRINT to print or export the existing grid layout, the possible export formats are ASCII File, CSV Format, HTML Document or an Excel Document.

> **Note:** The print or export function should be used before changes to the grid will be saved.

How to customize a grid

1. Place the cursor in the grid and right-click to display the short-cut menu.
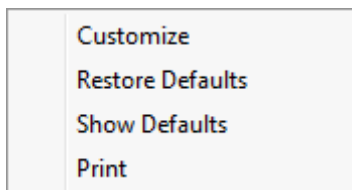
2. Select CUSTOMIZE to open the customize screen.
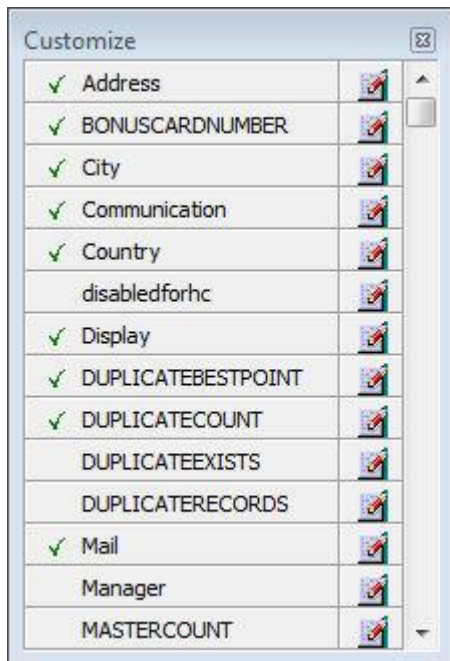
   The fields already used are marked with a green check mark.

3. Click the PENCIL button to view or change the column properties.
4. To move a field to the grid, select the field and drag it to the required position.
5. Click the ⊠ in the top right-hand corner to close the customize screen.
6. A message is displayed asking if you want to store the grid layout.

7. Select YES to save the changes or NO not to save any changes.

How to remove a column from a customized grid

1. Place the cursor in the grid and right-click to display the short-cut menu.
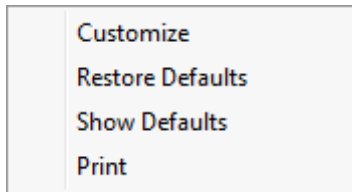
2. Select CUSTOMIZE to open the customize screen.

   The fields already used are marked with a green check mark.

3. On the grid point to the column to be removed and drag it to the customize screen; yellow arrows are displayed at each end of the column name.

   Once the column has been removed the green check mark is removed from the field name on the customize screen.

4. Click the 🔳 in the top right-hand corner to close the customize screen.

5. A message is displayed asking if you want to store the grid layout.

6. Select YES to save the changes or NO not to save any changes.

Column Properties

Field	Description
Field name	The field name as it is defined in the database table.
Caption	The field caption.
Fixed	Defines if the column will be fixed to the left side, when scrolling to the right to view additional fields of the grid. Columns marked as fixed are highlighted grey.

How to create a customised grid view for profile search

Users familiar with the Fidelio Suite8 table structure and fields can create a customised grid view for the profile search.

🛈 This functionality is controlled by the parameter CUSTOM VIEW IN PROFILE SEARCH under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.
To add fields to the Grid Customization dialog box, the view V8_SYS_CUSTOMXCMSSEARCH has to be amended.

Example: *"Adding the financial account long description to the profile navigator"*

The view has to be changed as follows:

CREATE OR REPLACE FORCE VIEW v8_sys_customxcmssearch

(customxcmssearch_xcms_id, zfac_longdesc)

AS SELECT xcms_id customxcmssearch_xcms_id,

(select zfac_longdesc from zfac where zfac_actvalidfrom is not null and zfac_actvaliduntil is null and xcms.xcms_id=zfac.zfac_xcms_id and rownum=1)

zfac_longdesc

from xcms;

The fields from the custom view are automatically added to the grid.

How to create a customised grid view for reservation search

Users familiar with the Fidelio Suite8 table structure and fields can create a customised grid view for the reservation navigator.

ⓘ This functionality is controlled by the parameter CUSTOM VIEW IN RES. NAVIGATOR under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.
To add fields to the Grid Customization dialog box, the view V8_SYS_CUSTOMXCMSSEARCH has to be amended.

Example: "Adding the housekeeping status to the reservation navigator"

How to create a customised grid view for booking search

Users familiar with the Fidelio Suite8 table structure and fields can create a customised grid view for the event booking search.

ⓘ This functionality is controlled by the parameter CUSTOM VIEW IN BOOKING SEARCH under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.
To add fields to the Grid Customization dialog box, the view V8_SYS_CUSTOMYBOMSEARCH has to be amended, however it must contain the field customybomsearch_ybom_id.

Example: "How to display the function type description"

The view has to be changed as follows:

CREATE OR REPLACE FORCE VIEW V8_SYS_CUSTOMYBOMSEARCH

AS

SELECT

ybom_id customybomsearch_ybom_id,

yfty_longdesc

from

ybom, yfty

where

ybom_yfty_id=yfty_id(+);

ⓘ Customization functionality is controlled by the user right EDIT under Setup → Configuration → Users → User Definition → Rights → Miscellaneous → Grid layout Customization.

ⓘ Print functionality is controlled by the user right PRINT GRID under Setup → Configuration → Users → User Definition → Rights → Miscellaneous.

Customising the HTML display

The HTML display may be customised according to the requirements of the property.
The customization options available when placing the cursor on the HTML display and right-clicking are:

- PRINT - prints an exact copy of the HTML display. The print page margins and the actions to take if the HTML printout is too large for the defined paper size can be defined in the configuration.
- PRINT WITH SETUP - displays the printer options and then print the HTML display.
- VIEW SOURCE - displays the HTML code; no changes can be made.
- EDIT TEMPLATE WITH NOTEPAD - opens the relevant *.htm and *.qry in notepad. Users with HTML programming knowledge can edit these files to meet the requirements of the property.
- EDIT TEMPLATE WITH ASSOCIATED APPLICATION - opens the relevant *.htm and *.qry with the program associated with these file types. Users with HTML programming knowledge can edit these files to meet the requirements of the property.

How to use HTML Expressions to customize the HTML display

Properties can configure and store customised html files in the Version 8 directory for htm files. The files are displayed in Suite8 either by logged in user, user language, customised htm files for all users or language specific htm files for all users.

The priority Suite8 uses to determine which file to use is in the sequence as listed:

- Customised htm file by user initials

  To display a customised htm file by user initials, the htm file has to be called USR_USERINTIALS_HTMFILENAME.HTM.

  Example: For a user with the initials DS the file has to be called usr_ds_quickinfo.htm.
- Customised htm file by user language

  To display a customised htm file by user language, the htm file has to be called CUST_LANG_LANGUAGE SHORT DESCRIPTION_QUICKINFO.HTM.

  Example: If the language short description is F for French, the user has to select this language under User Settings → Startup → Language and the file, such as quickinfo.htm has to be called cust_lang_f_quickinfo.htm.
- Customised version for all users

  To display a customised version of htm files for all users, the html files have to be called CUST_HTMLFILENAME.HTM.

  Example: cust_quickinfo.htm.
- Customised version by language

  To display a customised version by language, the html files have to be called LANG_SHORT DESCRIPTION OF THE LANGUAGE_HTMLFILE.HTM.

  Example: lang_f_quickinfo.htm, where f stands for the short description of the language.

If none of these files can be found then the standard htm file is displayed

How to hide or show expressions depending on activated features or license

The following expression can be used to hide for example, Conference Information on the HTM file when working with the small business edition:

if ({const isBnB})=(1)}{/if}{else} {if {feature Meeting Planner}} Conference {runquery 2}

ⓘ Customization functionality is controlled by the user right HTML source view and edit under Setup → Configuration → Users → User Definition → Rights → Miscellaneous.

ⓘ The print page margins and the actions to take if the HTML printout is too large for the defined paper size are defined via the option HTML PRINTOUT under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4.

Favourites

The Favourites shortcut toolbar allows you to keep your most frequently used options right where you can find them. Your most used options can be added to the Favourites shortcut toolbar where they are more noticeable and more easily organized to suit your purposes.

To make the most of the Favourites shortcut toolbar, you need to organize the options in it; this can be done using drag and drop.

In user settings the Favourites shortcut toolbar can be set to be listed first and will then be the default shortcut toolbar opened when logging on to Fidelio.

> **Note:** The Favourites shortcut toolbar cannot be removed from the toolbar.

How to add an option to the Favourites shortcut bar

1. Click one of the coloured shortcut toolbars on the left to list the options on that toolbar.

2. Right-click the option that you want to add, and then click ADD TO FAVOURITES on the shortcut menu.

   The option is now listed on the Favourites shortcut toolbar.

3. Repeat Steps 1 and 2 for each option that you want to add.

> **Note:** Options from Web Services cannot be added to the Favourites shortcut toolbar.

How to delete an option from the Favourites shortcut bar

1. Click the FAVOURITES shortcut toolbar on the left to list the options.

2. Right-click the option that you want to remove, and then click DELETE BUTTON on the shortcut menu.

   The option is removed from the Favourites shortcut toolbar.

3. Repeat Steps 1 and 2 for each option that you want to remove.

How to reorganise the options on the Favourites shortcut bar

1. Click the FAVOURITES shortcut toolbar on the left to list the options.

2. Select the option to be moved and then left-click and hold the mouse button while you drag the option to its new location on the toolbar.

3. Repeat Steps 1 and 2 for each option that you want to move.

ⓘ On the toolbar the Favourites shortcut bar can be listed first by selecting the option FAVOURITE BUTTONS ON TOP under Miscellaneous → User Settings → Appearance Tab.

ogging off, Exiting Suite8 and Locking the Station

The windows menu consists of the following options:

- Close All - closes all open screens and dialog boxes.
- Lock Station - locks the workstation.
- Logout - closes all open screens and logs off Suite8.
- Exit Application - closes all open screens and exits the application.

Options	Description
Close All	Click the WINDOWS menu and the option CLOSE ALL. All open screens and dialog boxes are closed.
Logout	1. Click the WINDOWS menu and the option LOGOUT All open screens and dialog boxes are closed and the Login screen appears. A new user can now login. 2. To close the application completely click CANCEL. Suite8 is closed and the desktop appears.
Exit Application	Click the WINDOWS menu and the option EXIT APPLICATION. Suite8 is closed and the desktop appears.
Lock Station	Click the WINDOWS menu and the option LOCK STATION. All open screens and dialog boxes are closed and the Login screen appears. A new user can now login.

ⓘ Lock Station - the open screens and dialog boxes from the user who locked the station will not be closed if the parameter LEAVE OPENED SCREEN ON SWITCH USER is selected under Setup → Configuration → Global Settings → Generic → Generic 3 tab.

2 Availability

The Availability screen can be switched to display either available or occupied rooms. The availability display shows the number of rooms that are available for sale, per day, per room type. The occupancy display shows the number of rooms occupied including or excluding tentative reservations.

The screen is divided into three sections:

- The upper section contains all the selection criteria. For example, you may want to view only definite reservations and exclude function spaces or you may want to view the total availability for a day and show the tentative number of reservations. If HOTEL SEGMENTATION functionality is active then the availability can be displayed by hotel segment; room type columns can be defined to be displayed in a different colour per segment, per weekday or per weekend. If the option STORE HOTEL SEGMENTATION PREFERENCES is active then the hotel segments selected are stored per user and will be automatically selected each time the screen is opened.

- The middle section displays either the number of rooms that are available for sale, per day, per room type or the number of rooms that are occupied per day, per room type.

- The lower section displays the following via seven tabs:
  - A control panel showing an overview of what is going on in the hotel for the selected period
  - The availability/occupancy in graphical format
  - Block Statistics details
  - Meal plan details
  - Conference and catering inventory
  - Group details
  - Trend details

Two additional buttons provide a quick link to entering a turnaway reservation and displaying Room Type Availability figures via the CROSS REF button.

> **Note:** Block Reservation functionality requires an additional license code.

ⓘ The screen refresh interval is defined via the option GENERIC SCREEN REFRESH INTERVAL IN SECONDS under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4 tab. The default refresh time is 3 minutes and the time to the next update is shown in the TIME INTERVAL dialog box; however the screen can be refreshed immediately by clicking the REFRESH button.

ⓘ Turnaway functionality is controlled by the parameter USE TURNAWAY FUNCTIONALITY under Setup → Configuration → Global Settings → Reservation 1 tab.

ⓘ The number of days which are displayed by default on the availability display is defined via the option DEFAULT NUMBER OF DAYS ON AVAILABILITY SCREEN under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4 tab.

ⓘ Booking Position functionality is controlled by the parameter BOOKING POSITION under Setup → Configuration → Global Settings → Reservation 1 tab. Booking Position functionality defines if tentative block rooms can be displayed as definite on the availability screen, for more details see Entering Block Details → Block Grid Selection.
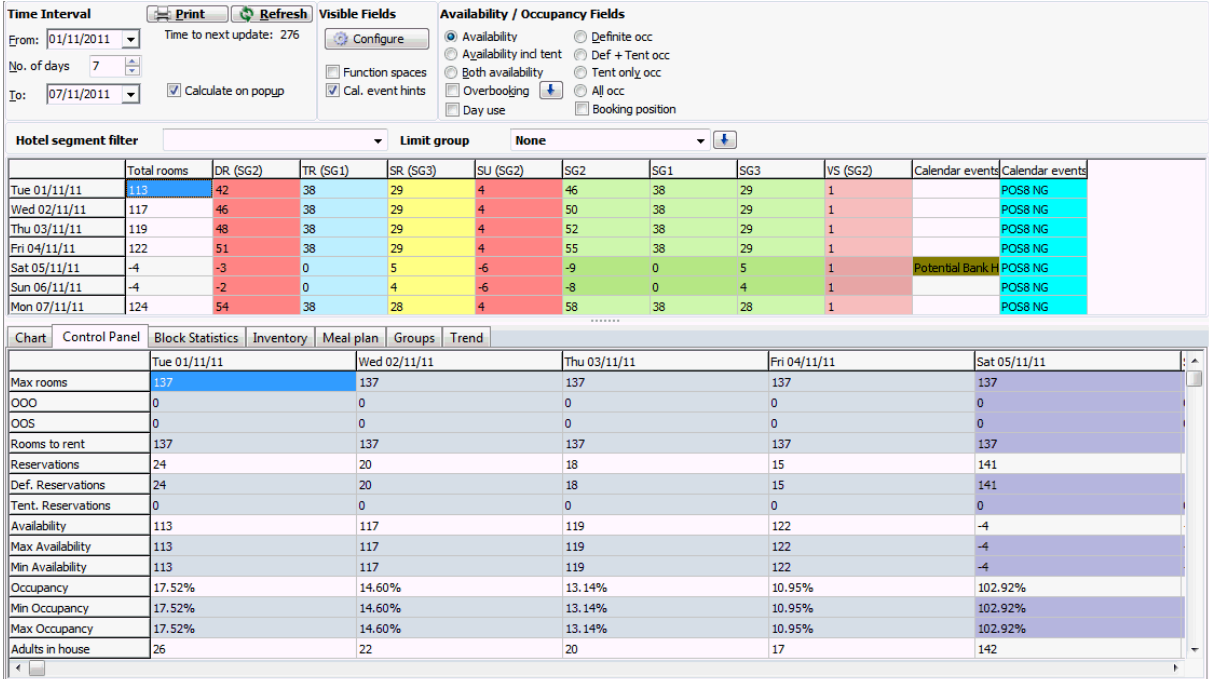
ⓘ Hotel Segmentation functionality is controlled by the parameter HOTEL SEGMENTATION under Setup → Configuration → Global Settings → Reservations → Reservation 4 tab. In addition HOTEL SEGMENTS must be configured under Setup → Reservations → Room Management → Hotel Segments and Hotel Segment Link. Hotel segmentation functionality is available for all the tabs on the availability screen.

ⓘ The storing of hotel segmentation preferences by user is controlled by the option STORE HOTEL SEGMENTATION PREFERENCES under Miscellaneous → User Settings → Appearance Tab. If the option STORE HOTEL SEGMENTATION PREFERENCES is selected then each time this user opens the availability screenHouse Status the selected hotel segment view is displayed. House Status (Ctrl. + H), Availability (Ctrl. + D) or Room Rack (Ctrl. + L).

How to view availability

Click the QUICK KEYS menu and select AVAILABILITY or press CTRL + D.

The Availability screen is displayed.

> **Note:** If the availability details are not displayed immediately then click the REFRESH button. To display the availability details automatically when the screen is opened select the check box CALCULATE ON POP. The blue arrow next to a field indicates a link to a corresponding screen. Click the arrow to display additional information.

How to view occupancy

1. Click the QUICK KEYS menu and select AVAILABILITY or press CTRL + D.

   The Availability screen is displayed.

2. In the AVAILABILITY / OCCUPANCY dialog box, click the DEFINITE OCC button.

   The Occupancy screen is displayed.

> **Note:** You can switch from the Availability screen to the Occupancy screen by clicking any one of the AVAILABILITY OR OCCUPANCY radio buttons on the Availability / Occupancy dialog box.

Changing the Availability/Occupancy view

You can change the view of the Availability or Occupancy screen using the selection dialog boxes at the top of the screen.

The VISIBLE FIELDS dialog box allows you to include or exclude function spaces, display calendar event hints and configure the fields to be shown both in the middle section where the number of rooms that are available for sale, per day, per room type are displayed and in the control panel.

The AVAILABILITY / OCCUPANCY FIELDS dialog box allows you to view availability or occupancy details and to include or exclude tentative reservations. The options selected are stored per user and will be automatically selected each time the screen is opened.

Changing the time interval

1. On the availability screen, type the start date in the FROM box or click the drop down arrow and select a date from the calendar.

2. Type the number of days in the NO. OF DAYS box or click the up or down arrow to select the number of days.

   Alternatively, type the end date in the TO box or click the drop down arrow and select a date from the calendar.

3. Click REFRESH to update the screen.

Changing the view

1. In the AVAILABILITY / OCCUPANCY FIELDS dialog box, click the required option. .

2. The Availability or Occupancy screen reappears with the view that you selected.

Availability Occupancy fields

Button	Displays
Availability	Available rooms.
Availability incl tent	Available rooms include tentative reservations.
Both availability	Both available rooms and available rooms including tentative reservations.
Overbooking	Overbooking levels are included in the available room's figures.
Definite occ	Occupied rooms.
Def + Tent occ	Occupied rooms including tentative reservations.
Tent only occ	Only tentative reservations.
All occ	Three occupancy figures; occupied rooms, occupied rooms including tentative and only tentative reservation
Booking Position	If selected then the number of rooms in a block which are marked as BOOKING POSITION will be shown as definite reservations instead of tentative reservations.

Configuring fields on the availability screen

To configure the fields to be displayed

1. In the VISIBLE FIELDS dialog box, click CONFIGURE FIELDS to display the Select fields dialog box.

	Top	Bottom
Function spaces	X	
Total rooms	X	
Room types	X	
Hotel segment room type	X	
Suite room types		X
Max rooms		X
OOO		X
OOS		X
Rooms to rent		X
Reservations		X
Def. Reservations		X
Tent. Reservations		X
Availability		X
Max Availability		X
Min Availability		X
Occupancy		X
Min Occupancy		X
Max Occupancy		X
Adults in house		X
Children in house		X
Domestic in house		X
Waitlisted reservations		X
Offers		X
Arrival room		X
Departure room		X
Arrival adult		X
Departure adult		X
Arrival child		X
Arrival domestic		X
Departure child		X
Departure domestic		X

2. All the available configurable fields are listed, see the Configurable Fields dialog box table.
   ▪ Fields which are included in the middle section of the screen are marked in the TOP column.
   ▪ Fields which are included in the control panel are marked in the BOTTOM column.

3. To select a field place the cursor in either the TOP or BOTTOM column next to the required field, click SELECT.

4. To remove a field from the display place the cursor in either the TOP or BOTTOM column next to the field, click UNSELECT.

5. Click OK to save the selection.

Configurable fields dialog box

Configurable Fields	Definition
Function Spaces	The available function spaces.
Total Rooms	The total number of available rooms.
Room Types	Displays the available room types.
Hotel segment room types	Displays the number of rooms per hotel segment.
Suite room types	The number of virtual suites.
Max rooms	The total number of rooms in the hotel.
OOO (Out of Order)	The number of rooms that are out of order and are not available for sale. For example: No electricity.
OOS (Out of Service)	The number of rooms that are taken out temporarily for a specific day but are included in the availability and can be brought at any time. For example: Closed Floor.
Rooms to rent	The total number of rooms in the hotel that can be sold. Max rooms less Out of Order rooms.
Reservations	The total number of definite and tentative reservations that have been made.
Def. Reservations	The number of reservations that have been made and have a definite reservation status.
Tent. Reservations	The number of reservations that have been made with a tentative status and are awaiting a final confirmation.
Availability	The maximum number of rooms that the hotel can sell. The number of rooms displayed depends on the selection. Selecting only Availability displays Rooms to Rent less Definite Reservations. Selecting Available incl tent displays Rooms to Rent less Definite and Tentative Reservations.
Max Availability	The maximum number of rooms that the hotel can sell. Rooms to Rent less Definite Reservations.
Min Availability	The minimum number of rooms that the hotel can sell. Rooms to Rent less Definite and Tentative Reservations.
Occupancy	Total Reservations divided by Rooms to Rent.
Min Occupancy	Definite Reservations divided by Rooms to Rent.
Max Occupancy	Total Reservations divided by Rooms to Rent.
Adults in house	The number of adults who will be in the hotel that night.
Children in house	The number of children who will be in the hotel that night.
Domestic in house	The number of domestics who will be in the hotel that night. (Switzerland only)

Waitlisted reservations	The number of reservations on waitlist for that day.
Arrival room	The number of rooms due to arrive that day.
Departure room	The number of rooms due to depart that day.
Arrival adult	The number of adults due to arrive that day.
Departure adult	The number of adults due to depart that day.
Arrival child	The number of children due to arrive that day.
Arrival domestic	The number of domestics due to arrive that day. (Switzerland only)
Departure child	The number of children due to depart that day.
Departure domestic	The number of domestics due to depart that day. (Switzerland only)
Calendar events	Displays events that are going on in the hotel or the city.
Day Types	Displays the day type. With day type rates the rate code amount can differ depending on the type of day. A defined amount or percentage can be added or deducted from the regular rate.

How to add custom fields to the availability grid

1. Run the required statement to define the view name and the custom fields to be displayed on the grid.

   Example Statement

   This example creates the view CUSTOM_AVAIL which will display the following custom fields on the availability grid: rooms from blocks, not picked up rooms and tentative block rooms.

   CREATE OR REPLACE FORCE VIEW CUSTOM_AVAIL

   (

   DAY,

   BLKS,

   NOTPICKEDUP,

   TENTATIVEBLOCKS

)

   AS

   SELECT wdat.WDAT_DATE Day,

   NVL ((a.BLOCKDEF + a.BLOCKTENT), 0) BLKS,

   NVL (

   (a.BLOCKDEF + a.BLOCKTENT - a.ACTPICKEDUP + a.TENTPICKEDUP),

   0

)

   NotPickedUp,

   NVL (a.BLOCKTENT, 0) TentativeBlocks

   FROM V8_SYS_BLOCK_SUMUP a, wdat

WHERE wdat.WDAT_DATE = a.YBLD_DATE(+);

2. Define the custom view name via the option AVAILABILITY CUSTOM VIEW NAME in the configuration, in our example this is CUSTOM_AVAIL.

3. On the Availability Grid (Ctrl. +D) the custom fields are displayed highlighted in a light orange colour.

> **Note:** Once a custom view has been entered in the configuration then the field CUSTOM VIEW is automatically selected via the CONFIGURABLE FIELDS option on the availability screen.

ⓘ Day type rate functionality is controlled by the parameter CALCULATE DAY TYPE RATES under Setup → Configuration → Global Settings → Reservation → Rates tab.

ⓘ The custom view name is defined via the option AVAILABILITY CUSTOM VIEW NAME under Setup → Configuration → Global Settings → Reservations → Reservation 3 tab.

Availability Limits

Availability limits functionality restricts availability per booking channel. The option is parameter controlled and users with the user right AVAILABILITY LIMITS can define availability groups and limits per booking channel.

How to view availability limits per group

1. Click the QUICK KEYS menu and select AVAILABILITY or press CTRL + D.

   The Availability screen is displayed.

2. Select the required LIMIT GROUP from the list box.

   The availability screen is displayed with the availability limits for the limit group selected.

   ▪ In the rooms grid room type availability restrictions are displayed in green.

   ▪ In the rooms grid house room type restrictions are displayed in red.

   ▪ In the control panel house availability restrictions are displayed in red

House availability restriction

Room Type availability restriction

How to define availability limits

1. Click the QUICK KEYS menu and select AVAILABILITY or press CTRL + D.

   The Availability screen is displayed.

2. Click the BLUE ARROW button next to LIMIT GROUP.

   The availability limit screen is displayed.

3. Select the required LIMIT GROUP from the list box.

4. Click HOUSE LIMIT or HOUSE LIMIT % to set the restriction based on available rooms.

   For example, a property with 70 rooms might restrict web booking to 20 rooms.

or

5. Click ROOMTYPE LIMIT or ROOMTYPE LIMIT % to set the restriction based on room type.

For example, a property with 30 single and 40 double rooms might restrict web booking to 5 single and 10 double rooms.

6. Place the cursor on the grid box for the room type and day on which the restriction is to be set.

7. In the VALUE field enter the number of rooms or the % depending on the option selected and click SET.

The restrictions are updated on the Availability limit grid.

8. Click CLOSE to close the Availability limit dialog box.

How to define availability limits using the range option

1. Click the QUICK KEYS menu and select AVAILABILITY or press CTRL + D.

The Availability screen is displayed.

2. Click the BLUE ARROW button next to LIMIT GROUP to display the availability limit screen.

3. Select the required LIMIT GROUP from the list box.

4. Click ROOMTYPE LIMIT or ROOMTYPE LIMIT % to set the restriction based on room type.

5. Click RANGE, the Date Ranges dialog box is displayed.
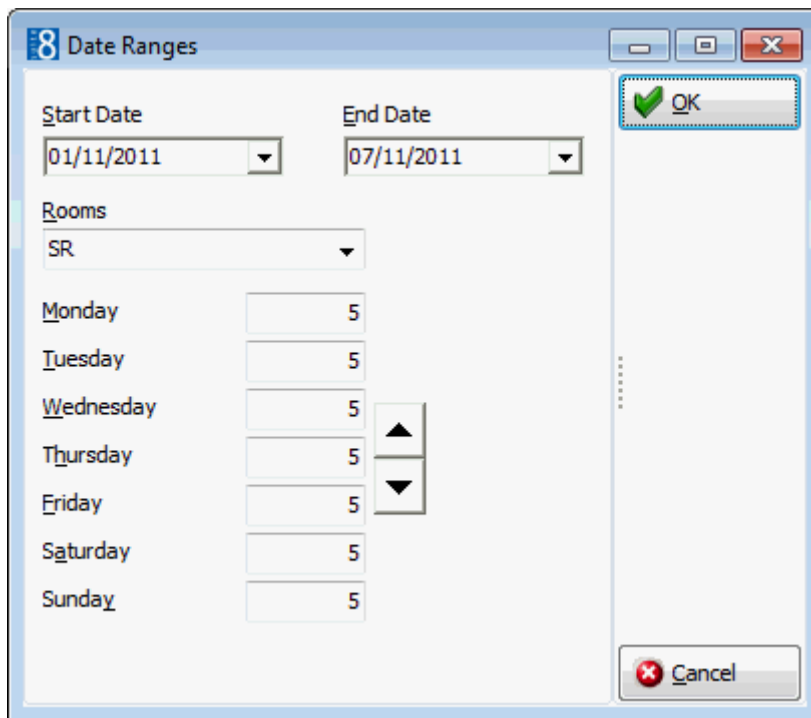
7. Set the start of the date range for the restriction by typing the start date in the START DATE box.

8. Set the end of the date range for the restriction by typing the end date in the END DATE box.

9. In the ROOMS box click the drop down arrow and select the required room types.

10. If the restriction is only applicable for certain days then enter the restriction value for the required days.

11. Click OK to update the restrictions to the Availability limit grid.

12. Click CLOSE to close the Availability limit dialog box.

How to configure an availability limit group

1. Click the QUICK KEYS menu and select AVAILABILITY or press CTRL + D.

    The Availability screen is displayed.

2. Click the BLUE ARROW button next to LIMIT GROUP.

    The availability limit screen is displayed.
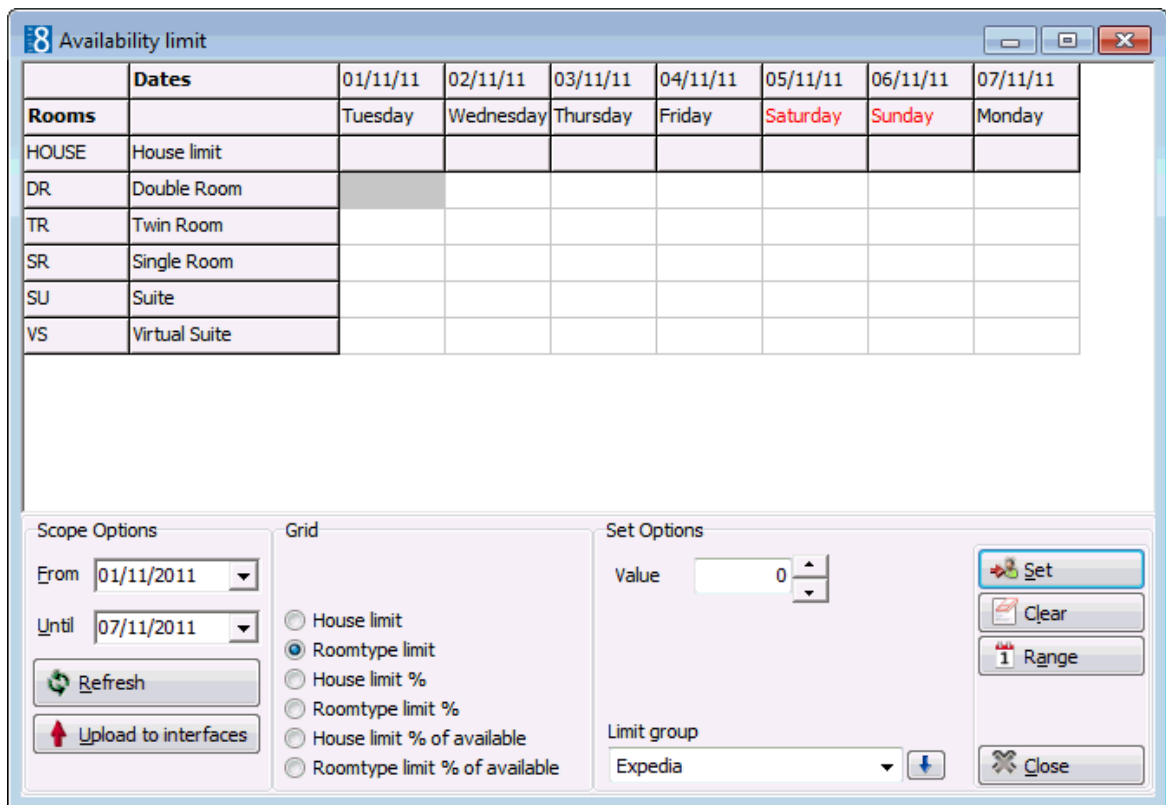
3. Click the BLUE ARROW next to LIMIT GROUP.

4. Click NEW to display the Availability limit group dialog box.
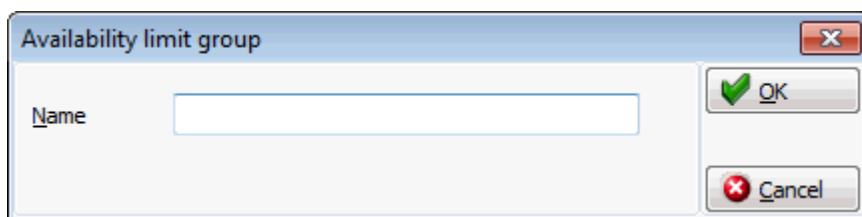
5. Enter an availability limit group NAME and click OK.

6. Click CLOSE to close the Availability limit groups screen.

Availability Limit Grid Options

Commands	Definition
From	Displays the Availability limit screen starting from that date.
Until	Displays the Availability limit screen up until that date.
Refresh	Refreshes the screen display.
Upload to interfaces	Uploads the restriction information to the interfaces configured for your property, for example, Suite 8 home page and the V8 Online Interface.
House limit	Select this option to enter availability restrictions based on all rooms.
Roomtype limit	Select this option to enter availability restrictions based on room type.

House limit %	Select this option to enter availability restrictions as a % based on all rooms.
Roomtype limit %	Select this option to enter availability restrictions as a % based on room type.
House limit % of available	Select this option to enter availability restrictions as a % based on available rooms.
Roomtype limit % of available	Select this option to enter availability restrictions as a % based on available room types.
Value	Enter the % or number of rooms to be restricted.
Limit group	Selects the group for which availability limits are to be set
Set	Updates the grid with the rate restriction values entered in the value field.
Clear	Clears the selected values on the grid.
Range	A range of consecutive dates with the same availability restriction. The restriction can be limited to certain days of the week within the date range specified.
Close	Closes the Availability limit grid.

ⓘ Availability limits by booking channel functionality is controlled by the parameter AVAILABILITY LIMIT USAGE under Setup → Configuration → Global Settings → Reservation → Reservation 3 tab.

ⓘ Availability limits functionality is controlled by the user right AVAILABILITY LIMITS under Setup → Configuration → Users → User Definition → Rights → Reservation.

> **Note:** The option UPLOAD TO INTERFACES is only available in debug mode.

Create a reservation from the availability screen

To create a reservation

1. Click the QUICK KEYS menu and select AVAILABILITY.

2. Point to the relevant date and room type and right-click to display the short-cut menu.

   New reservation
   Reset columns
   Show reservations
   Expected per guarantee code
   Available rooms
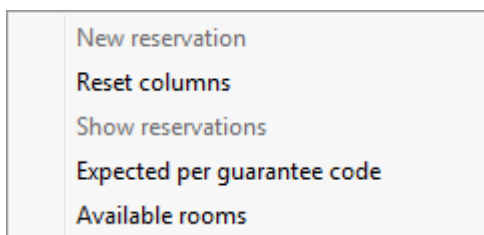
3. Select CREATE NEW RESERVATION FOR ROOM TYPE: on the shortcut menu to display the profile search dialog box.

4. Complete the profile selection; see the Suite8 Customer Relationship manual.

5. After selecting the profile the new reservation screen is displayed with the name, the selected date and the selected room type.

6. Complete the reservation.

7. Click OK to save the reservation and return to the availability screen.

View reservations from the availability screen

To display reservations for a specific date and room type

1. Click the QUICK KEYS menu and select AVAILABILITY.

2. Point to the relevant date and room type and right-click to display the short-cut menu.

   New reservation
   Reset columns
   Show reservations
   Expected per guarantee code
   Available rooms
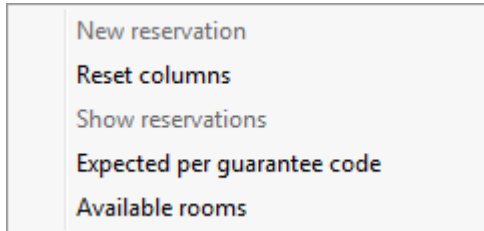
3. Select SHOW RESERVATIONS on the shortcut menu.

   The Reservations screen is displayed listing all the reservations for the room type and date selected.

View expected reservations by guarantee type

To view expected reservations by guarantee code

1. Click the QUICK KEYS menu and select AVAILABILITY.

2. Select the relevant dates and room type and right-click to display the short-cut menu.

   New reservation
   Reset columns
   Show reservations
   Expected per guarantee code
   Available rooms
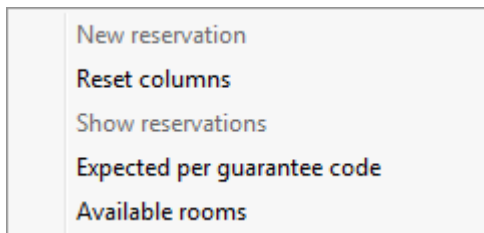
3. Select EXPECTED BY GUARANTEE CODE on the shortcut menu to display the Hotel segment statistics dialog box.
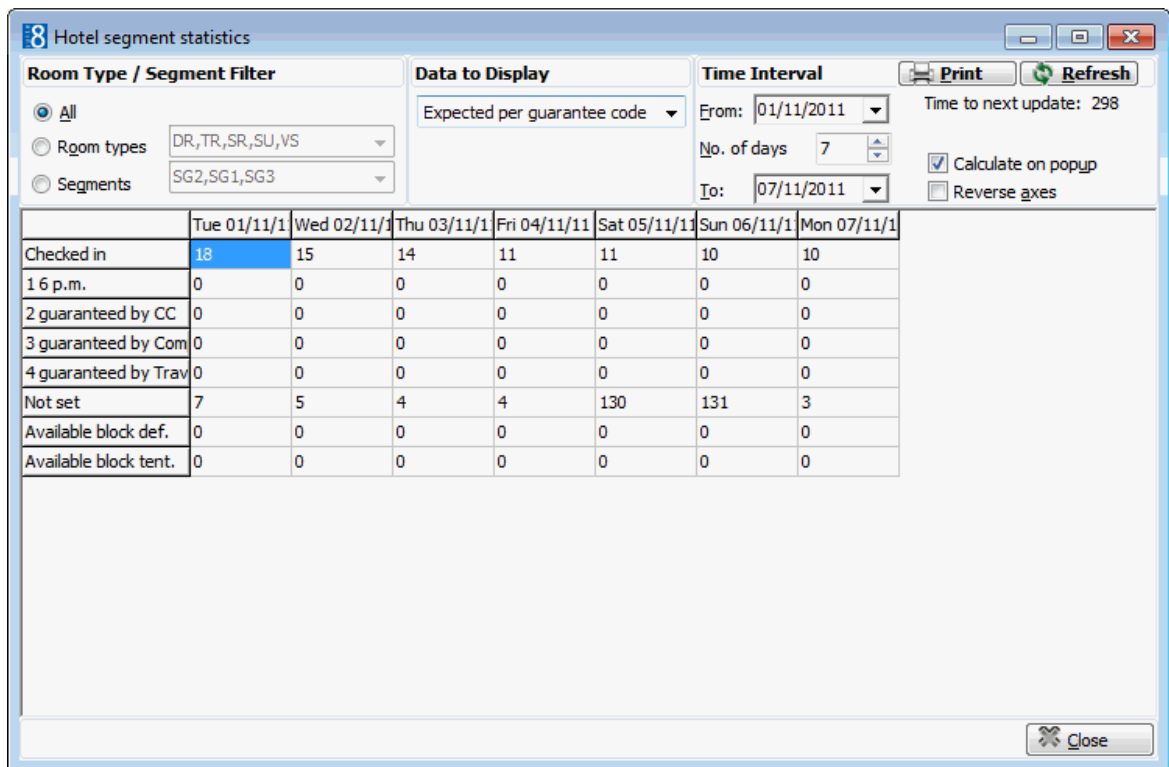
4. Click CLOSE to close the Hotel segment statistics dialog box and return to the availability screen.

Viewing the Control Panel screen

The Control Panel screen is an overview of what is going on in the hotel for the selected period. The information displayed here is configurable; see Configuring fields on the availability screen.

To view the control panel

1. Click the QUICK KEYS menu and select AVAILABILITY or press CTRL + D.

   The Availability screen is displayed with the control panel displayed by default.

2. If the control panel is not displayed by default, click the CONTROL PANEL tab.

Note: The blue arrow next to a field indicates a link to a corresponding screen. Click the arrow to display additional information.

Viewing Block Statistics

You can view the group blocks that will be in the hotel on a specific day.

To view block statistics

1. Click the QUICK KEYS menu and select AVAILABILITY or press CTRL + D.

   The Availability screen is displayed.

2. Click the BLOCK STATISTICS tab.

   The blocks in-house on the day selected are displayed in alphabetical order by block name.

3. To see the blocks on a different date, click the drop down arrow and select a date from the available list. The dates available are restricted by the date selection in the TIME INTERVAL dialog box.

4. Select the SHOW BLOCKS NOT AFFECTING AVAILABILITY check box to include blocks that do not affect availability, such as blocks with the status 'cancelled'. The default setting is to **not** show blocks with a status which does not affect availability.

5. The following options are available by selecting the required block and right-clicking to display the short-cut menu.
   - Block Edit - displays the block header dialog box.
   - Attached reservations - displays a list of the reservations attached to this block.
   - New reservation - displays the Block Selection screen.
   - Rooming List - displays the Block Selection screen.
   - Customize - opens the customize dialog box so that columns on the grid can be added, changed or removed.
   - Restore Defaults - applies the default settings for this grid.
   - Show Default - applies the default settings to the current grid view, however, any customised settings are used the next time the grid is displayed.
   - Print - prints or exports the existing grid layout, the possible export formats are ASCII File, CSV Format, HTML Document or an Excel Document.

Block Statistics grid details

Grid Headings	Definition
Block Name	The name of the group block.
Block Code	The block code of the group.
Status	The status of the group block.
Start Date	The start date of the group block.
Available	The number of rooms that are available to the group block and have not yet been picked up.
No. of Rooms	The number of rooms currently reserved.

Picked Up	The number of rooms that have a reservation created with a guest name.
% Picked Up	The percentage of rooms that have been picked up.
Cutoff Date	The date that non-picked up rooms will be released back to the house for sale.
Initial Rooms	The number of rooms initially reserved.
End Date	The end date of the group block.

Note: The field BOOKING POSITION can be added to the block statistic tab when customizing the grid by selecting EXPECTEDNOOFROOMRESTORE DEFAULTS.

Note: Block Reservation functionality requires an additional license code.

Viewing Inventory

The inventory displays a listing of all the inventory items defined for front office and conference and catering management. Depending on whether availability or occupancy is being displayed the inventory will list either the exact number available per day or the number used per day. The inventory includes items such as overhead projectors, tables, flip charts, candle sticks, extra bed and cots.

To view the inventory

1. Click the QUICK KEYS menu and select AVAILABILITY or press CTRL + D.

   The Availability screen is displayed.

2. Click the INVENTORY tab.

   The Inventory is displayed.

Chart	Control Panel	Block Statistics	Inventory	Meal plan	Groups	Trend
	Tuesday 01/11/11	Wednesday 02/11/11	Thursday 03/11/11	Friday 04/11/11	Saturday 05/11/11	Sunday 06/11/11	Monday 07/11/11
Flipchart with paper & pens	6 (-1 event)	6 (-2 event)	6	6	6	6	6
Screen (1.80 x 180m)	6	6 (-1 event)	6	6	6	6	6
Screen (3.60 x 3.60m)	2 (-1 event)	2 (-1 event)	2 (-1 event)	2	2 (-1 event)	2	2 (-1 event)
Overhead Projector	6 (-1 event)	6 (-2 event)	6 (-1 event)	6	6 (-1 event)	6	6 (-1 event)
Slide Projector	6	6	6	6	6	6	6
Speak's desk	2	2	2	2	2	2	2
Laser Pointer	2 (-1 event)	2	2 (-1 event)	2	2 (-1 event)	2	2 (-1 event)
Beamer	2	2 (-1 event)	2	2	2	2	2
Table	100	100	100	100	100	100	100
Microphone	6 (-1 event)	6	6 (-1 event)	6	6 (-1 event)	6	6 (-1 event)
Baby Cot	23	24	24	24	25	25	25
Extra Bed	75	75	74	74	75	75	75
Bed Board	50	50	50	50	50	50	50
Bath Robe	19	19	19	19	20	20	20
Speakers and Amplifier	6 (-1 event)	6	6 (-1 event)	6	6 (-1 event)	6	6 (-1 event)

Viewing Meal Plan

The meal plan displays a listing of the daily meal plan requirements. The tree can be expanded to show per day, a list of reservations and their meal plan details. The meal plan grid columns detail the reservations, groups, different meals, arrival and departure dates, reservation status, number of adults and number of children in the defined child age categories.

To view the meal plan

1. Click the QUICK KEYS menu and select AVAILABILITY or press CTRL + D.

   The Availability screen is displayed.

2. Click the MEAL PLAN tab.

The Meal Plan screen is displayed.

Date/Reservation	Group	Breakfast	Lunch	Dinner	Arrival	Departure	Status	Room	Adults	Pax	BAB	CHI	TEE
⊟ 15/11/11		9	5	0				7	9	0	2	0
Charles, Ray		1	1	0	10/11/11	15/11/11	Expected	1	1	0	0	0
Gaidi, Sascha		1	0	0	07/11/11	20/11/11	Expected	1	1	0	0	0
M·ller, Max		1	0	0	10/11/11	18/11/11	Expected	1	1	0	0	0
Salutona, Sandro		4	4	0	14/11/11	15/11/11	Expected	2	4	0	2	0
Ullrich, Monika		2	0	0	12/11/11	19/11/11	Expected	2	2	0	0	0
⊞ 16/11/11		4	0	0				4	4	0	0	0
⊞ 17/11/11		4	0	0				4	4	0	0	0
⊞ 18/11/11		4	0	0				4	4	0	0	0
⊞ 19/11/11		3	0	4				7	7	0	0	0
⊞ 20/11/11		5	4	4				5	5	0	0	0
⊞ 21/11/11		4	4	4				4	4	0	0	0

Tabs: Chart | Control Panel | Block Statistics | Inventory | Meal plan | Groups | Trend

Buttons: Expand | Collapse

3. To view the meal plan details for a specific date click the plus sign next to the date, the entry expands to display all the reservations with meal plans for that day.

4. To view all meal plan details click the expand button 🔽 at the bottom of the screen.

ⓘ Meal Plan functionality is controlled by the parameter MEAL PLAN FUNCTIONALITY under Setup → Configuration → Global Settings → Reservation → Reservation 1 tab.

ⓘ The inclusion of block reservations in the meal plan count is controlled by the parameter BLOCKS IN MEAL PLAN FORECAST under Setup → Configuration → Global Settings → Reservation → Reservation 1 tab.

Viewing Groups

The groups screen shows all the group reservations for the selected date range, ordered by arrival date. The tree can be expanded to show:

- All the group reservations per day
- The room types used by each group
- A listing of the reservations for each room type

Both group and individual reservation details can be displayed by right-clicking on the reservation.

To view groups

1. Click the QUICK KEYS menu and select AVAILABILITY or press CTRL + D.

   The Availability screen is displayed.

2. Click the GROUPS tab.

   The groups screen is displayed.

Group/Reservation	Start date	End date	Rooms	Adults	Status	Type	Guarantee type	Sharing	Company	Travel agent
⊟ 01/11/11			13/13	13/13						
⊟ SMW - Sales meeting worldwide	27/10/11	08/11/11	13/13	13/13	Pickup complete	Pickup complete	Pickup complete		Schmidt & Partner GmbH	
⊟ SU Suite			8/8	8/8						
Micros, F.	27/10/11	08/11/11	1	1	In house	Definitive			Schmidt & Partner GmbH	
Schmidt, F. P. H.	27/10/11	08/11/11	1	1	In house	Definitive			Schmidt & Partner GmbH	
Lampe, Heinz	27/10/11	08/11/11	1	1	In house	Definitive			Schmidt & Partner GmbH	
Bond, Hans-Joachim	27/10/11	08/11/11	1	1	In house	Definitive			Schmidt & Partner GmbH	
Garten, Y.	27/10/11	08/11/11	1	1	In house	Definitive			Schmidt & Partner GmbH	
Schlamm, Saskia	27/10/11	08/11/11	1	1	In house	Definitive			Schmidt & Partner GmbH	
Hannemann, Uschi	27/10/11	08/11/11	1	1	In house	Definitive			Schmidt & Partner GmbH	
Stramm, Rudolf	01/11/11	01/11/11	1	1	Day use history	Definitive			Schmidt & Partner GmbH	
⊞ DR Double Room			4/4	4/4						
⊞ SR Single Room			1/1	1/1						
⊟ 02/11/11			11/11	11/11						
⊞ SMW - Sales meeting worldwide	27/10/11	08/11/11	11/11	11/11	Pickup complete	Pickup complete	Pickup complete		Schmidt & Partner GmbH	
⊟ 03/11/11			11/11	11/11						
15/11/11										

Tabs: Chart | Control Panel | Block Statistics | Inventory | Meal plan | Groups | Trend

3. To view the groups for a specific date click the plus sign next to the date, the entry expands to display all the groups for that day.

4. To view the room types for a specific group, click the plus sign next to the group name, the entry expands to display the room types for that group.

5. To view the reservations for that room type, click the plus sign next to the room type, the entry expands to display all the reservations for that group with that room type.

6. To view all groups click the expand button 🔽 at the bottom of the screen.

7. To view reservation details, right-click the guest name and select EDIT from the short-cut menu, the reservation screen is displayed.

> **Note:** Groups where all reservations have been cancelled are not shown on this tab.
>
> **Note:** Rooms which are assigned to a room type marked as 'Do not count in availability' will be shown as reservations, but are not counted in the figures for ROOMS and ADULTS.

Viewing Trend

The trend displays in graphical format the booking trends for a certain date range, allowing better analysis of booking trends at a given date.

- Both definite and tentative rooms can be displayed as well as the number of definite and tentative adults.
- Trend statistics can be viewed by a set number of days or by month by selecting the relevant days on the upper panel with the mouse or keyboard.
- Last month values can be displayed by selecting the option LAST MONTH on the Trend dialog box.
- Last year values can be displayed by selecting the option LAST YEAR on the Trend dialog box.
- Up to five yearly or monthly history lines can be displayed by entering the number of lines to display in the HISTORY INTERVALS box.

To view the trend

1. Click the QUICK KEYS menu and select AVAILABILITY or press CTRL + D.

   The Availability screen is displayed.

2. Click the TREND tab.

   The Trend screen is displayed.
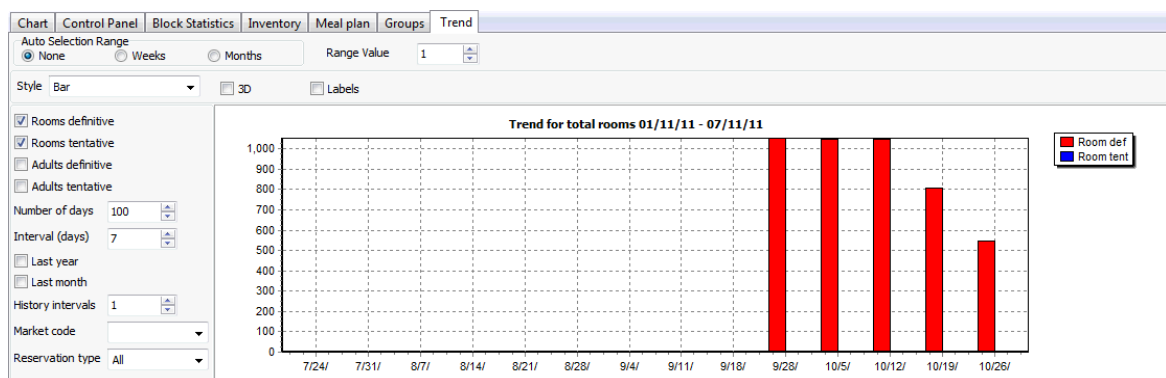
3. To view trend statistics by room type, select the required room type on the header row of the availability grid.
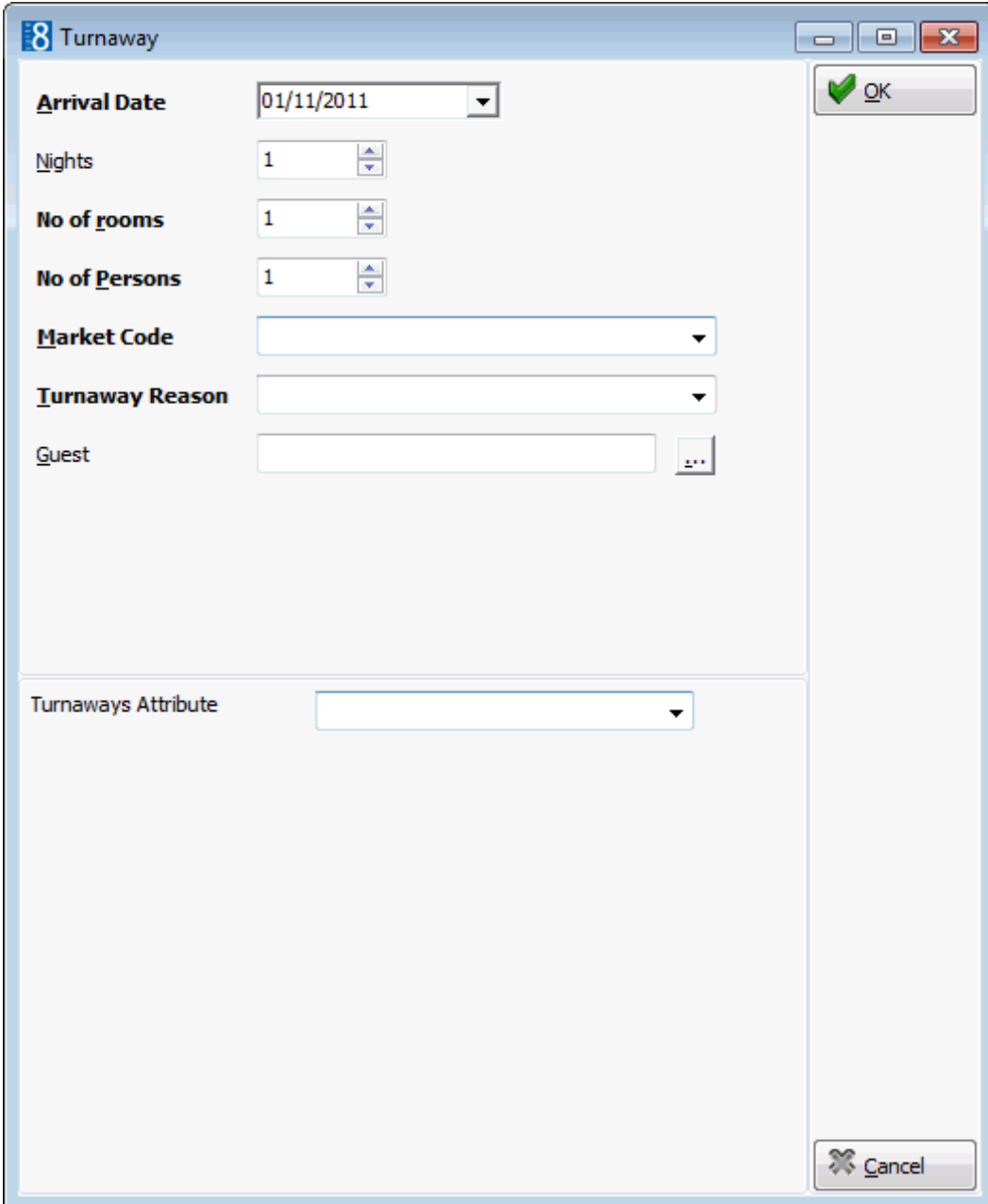
ⓘ Trend functionality is controlled by the parameter TREND CHART ON AVAILABILITY screen under Setup → Configuration → Global Settings → Reservation → Reservation 3 tab.

Turning away a reservation

A reservation is turned away for different reasons. For example, the hotel could not take the reservation due to being fully booked or the guest called to inquire about a rate and did not make a reservation. The hotel can keep the market code, reason for the turnaway and name for statistical purposes. In addition, marketing attribute categories can be linked to the turnaway screen in order to collect additional property specific information.

To turn away a reservation

1. Click TURNAWAY, the Turnaway dialog box is displayed.

2. Type the arrival date in the Arrival Date field box or click the drop down arrow and select a date from the calendar. The default is today's date.

3. Type the number of nights in the Nights field or click the up or down arrow to choose the number of nights. The default is one night.

4. Type the number of rooms in the NO OF ROOMS field or click the up or down arrow to choose the number of rooms. The default is one room.

5. Type the number of persons in the NO OF PERSONS field or click the up or down arrow to choose the number of persons. The default is one person.

6. Click the drop down arrow and select a marketing code from the MARKET CODE list.

7. Click the drop down arrow and select a reason from the TURNAWAY REASONS list.

8. Leave the Guest box blank, type the name in the GUEST box or click the selection icon ⬚ and choose a name from the Profile Search screen.

9. Complete any marketing attribute categories that have been added to the turnaway screen in order to collect additional property specific information.

10. Click OK.

ⓘ Turnaway functionality is controlled by the parameter Use turnaway functionality under Setup → Configuration → Global Settings → Reservation 1 tab.

ⓘ Marketing attributes can be added to the turnaway screen via the option ATTRIBUTE CATEGORIES under Setup → Configuration → CRM.

ⓘ For each attribute category defined a marketing info category is created. The elements for each new list box are defined via the option MARKETING INFO under Setup → Configuration → CRM.

3   Calendar

Using the Calendar

With the Calendar option, Suite8 can keep track of future activities and tasks, and of critical dates and calendar periods, such as Bank Holidays, Easter and Christmas. By default only not completed tasks & activities are displayed but all or only completed tasks & activities can also be displayed by changing the search criteria.

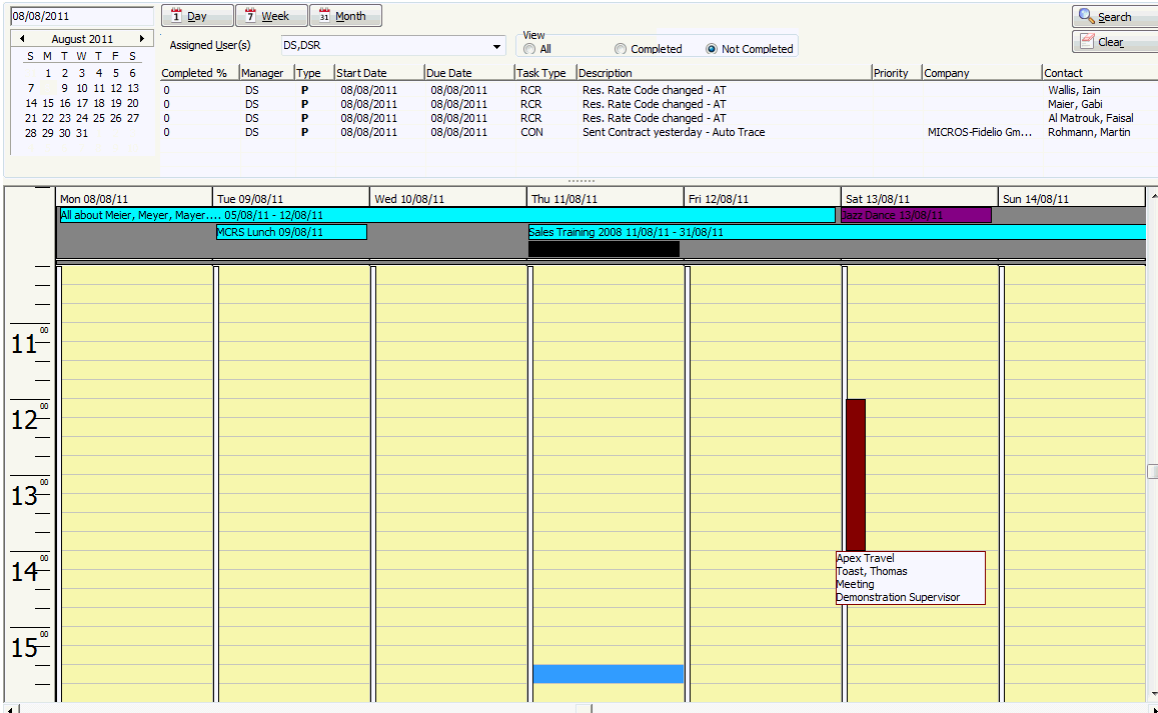**Key features of the Calendar are:**

- Offers a day, week and month view with an adjustable time scale.
- Creation of new activities or edit/deletion of existing activities.
- Creation of new tasks or edit/deletion of existing tasks.
- Drag and drop functionality for activities.
- Events such as public holidays can be entered and viewed via the calendar.
- Conference bookings can be automatically added to the calendar as a calendar event.
- Activities are coloured for at-a-glance identification.

To display conference bookings as calendar events select the parameter CONFERENCE BOOKINGS AS CALENDAR EVENTS under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

How to view the calendar

Click the CUSTOMER RELATION menu and select CALENDAR, or press F4.

The Calendar screen is displayed.

> **Note:** If the parameter USER ASSIGNMENT FOR TASKS & ACTIVITIES is activated under Global Settings → Profile tab then all assigned users are displayed by default in the ASSIGNED USERS box and all tasks & activities for those users are displayed. If no users are assigned then only the tasks & activities of the logged in user are displayed.

> If the parameter is active and the user right ASSIGN USERS TO TASK & ACTIVITIES is active then users can be assigned under Configuration → Users → User Definition → Assign Users for T&A.
>
> If the parameter is not active then users do not have to be assigned, the selection for MANAGER is empty and every user is able to see and work with all tasks & activities (depending on the user/owner rights). The MANAGERS to be displayed by default can be set under Miscellaneous → User Settings → Search Screens.
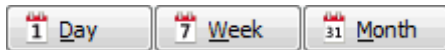
Changing the look of your Calendar

Change the Day/Week/Month view

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.

2. Click the DAY, WEEK OR MONTH button to change the look of the calendar.

**Change the time scale of the day and week view**

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.

2. Place the cursor on the anywhere on the calendar and right-click to display the short-cut menu.

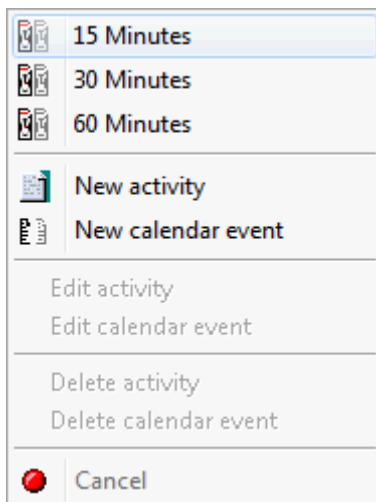3. Click 15 MINUTES, 30 MINUTES OR 60 MINUTES to change the time scale.

Calendar Events

New Calendar Event

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.
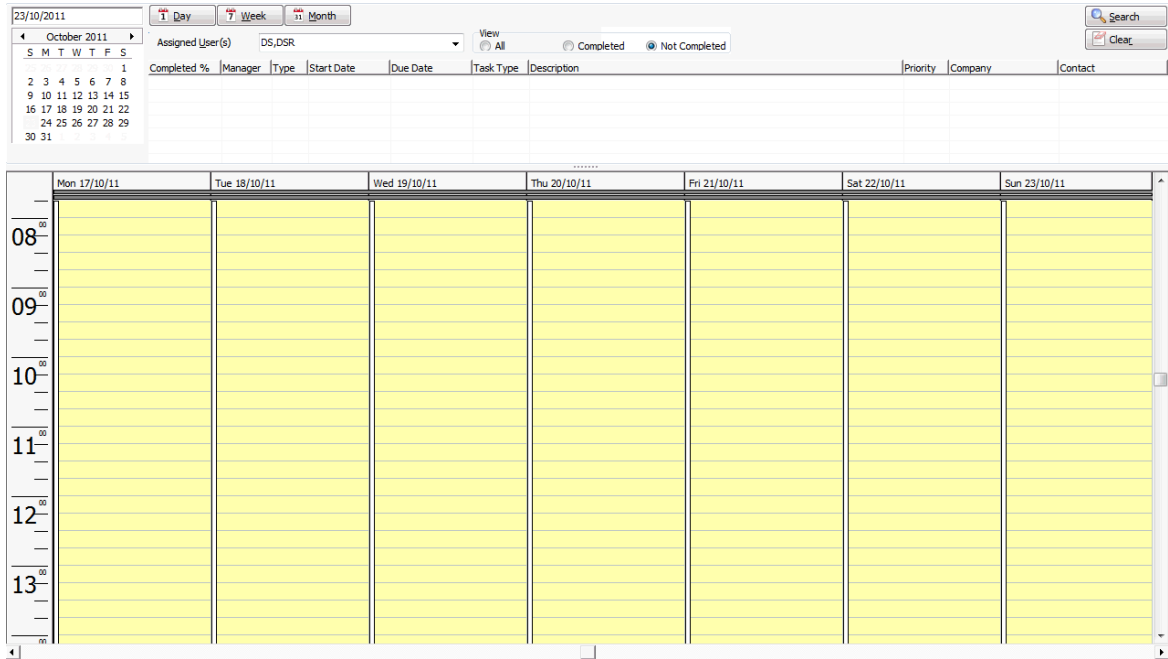
2. Place the cursor on the appropriate day and right-click to display the short-cut menu.

3. Click NEW CALENDAR EVENT on the shortcut menu to display the calendar event dialog box.

4. Type the date range for the calendar event in the DATE RANGE box **or** click the drop down arrow and select a date from the calendar.

5. In the TYPE box click the drop-down arrow and then select the event type.

6. In the DESCRIPTION box enter the description of the calendar event.

7. In the COLOUR box click the drop-down arrow and then select the colour in which the calendar event should be displayed.

8. In the NOTE box you can enter additional comments.

9. Click OK, the calendar event is displayed in the selected colour under the date field.

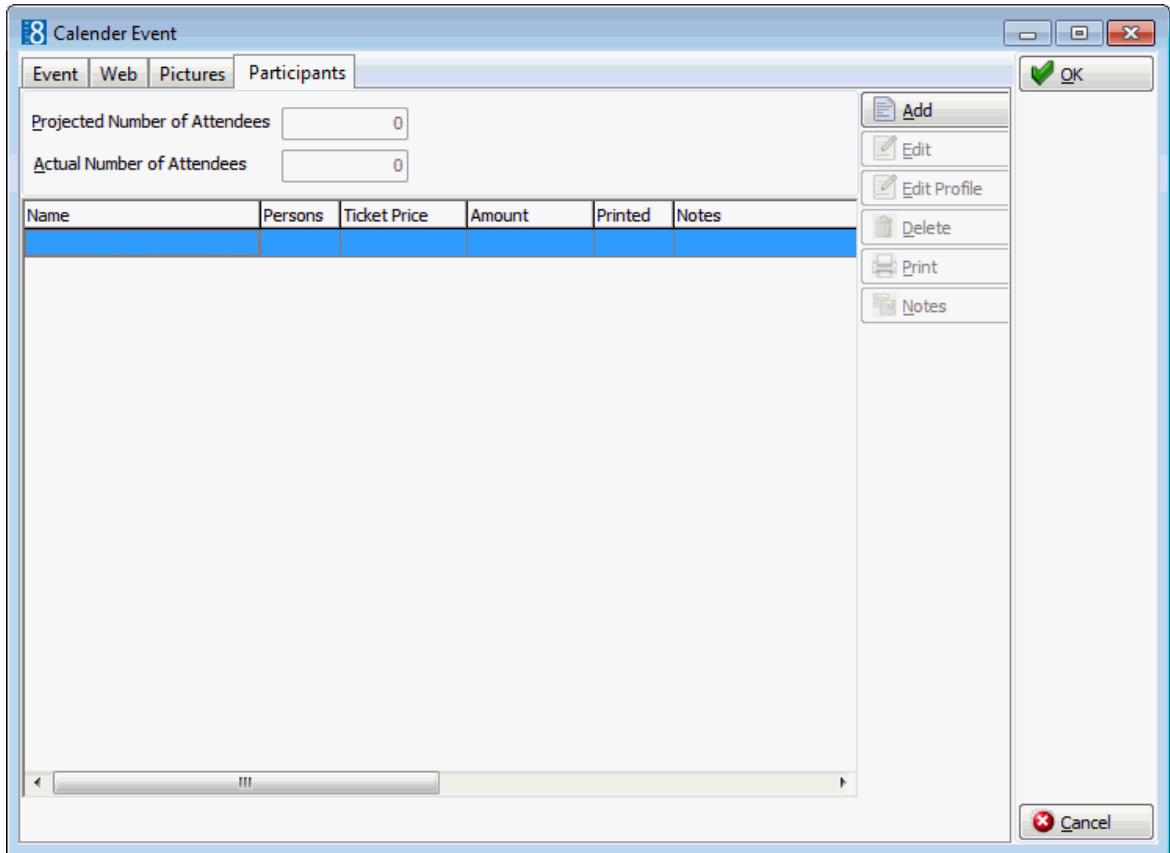> **Note:** A new event can also be entered by selecting CALENDAR EVENTS from the MISCELLANEOUS menu.

Linking Participants to a Calendar Event

Customer profiles can be linked to a calendar event and displayed along with the calendar event on the report FCR_PMS_3906_CALENDAR_EVENTS.rpt.

How to link participants to a calendar event

1. Select the PARTICIPANTS tab.

2. The PROJECTED NUMBER OF ATTENDEES is read-only; details are taken from the Event tab.

3. The ACTUAL NUMBER OF ATTENDEES is read-only and is completed based on the number of linked profiles.

4. Click ADD; the Participant Details dialog box is displayed.
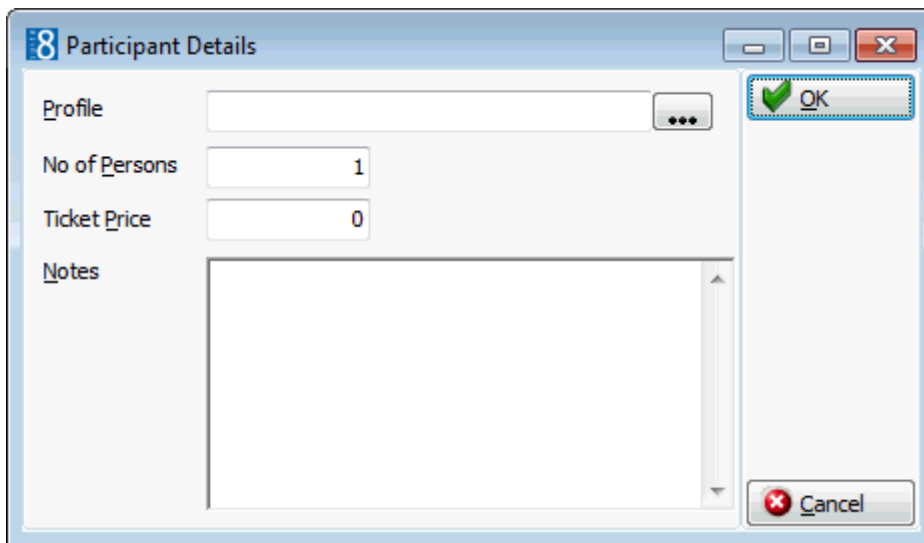
5. Use the ⋯ button to locate the required profile or create a new individual profile via the NEW PROFILE button.

6. Enter the NO. OF PERSONS associated with this profile.

7. Enter the TICKET PRICE if applicable.

8. In the NOTES box you can enter additional comments.

9. Click the OK button to add the profile to the calendar event.
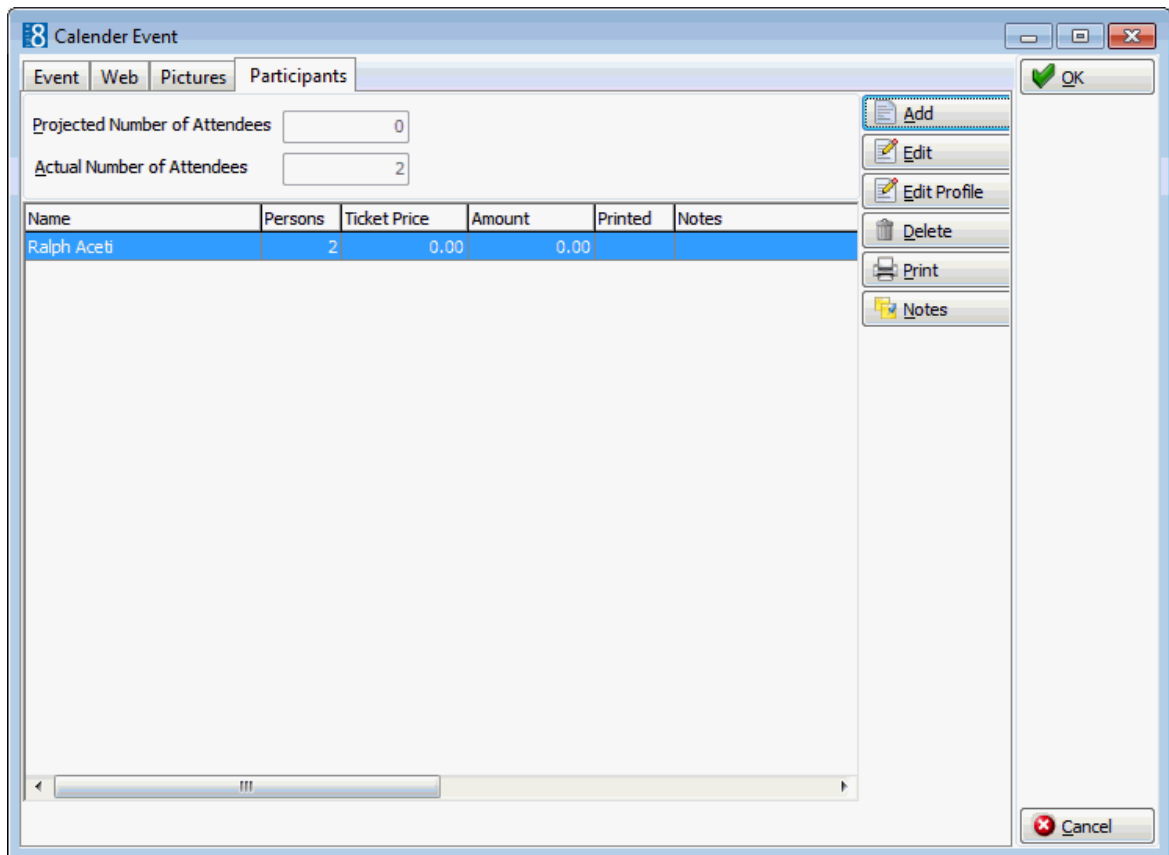
10. Repeat steps 4 -8 to add additional profiles to the calendar event.

11. Click OK to close the Calendar Event dialog box.

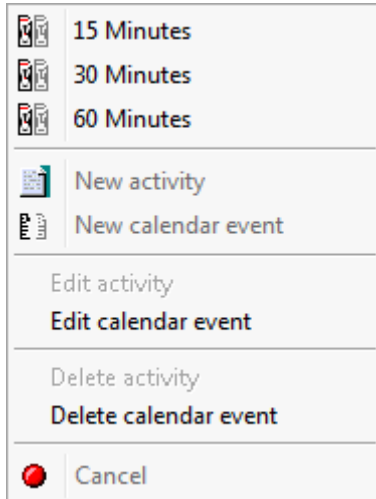**How to delete linked profiles from a calendar event**

1. Select the PROFILES tab.

2. Point to the profile to be deleted and click DELETE, a confirmation message is displayed.
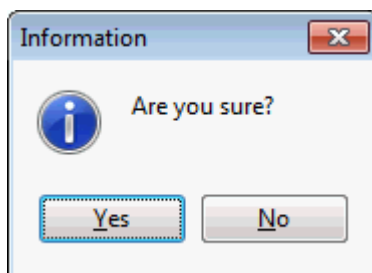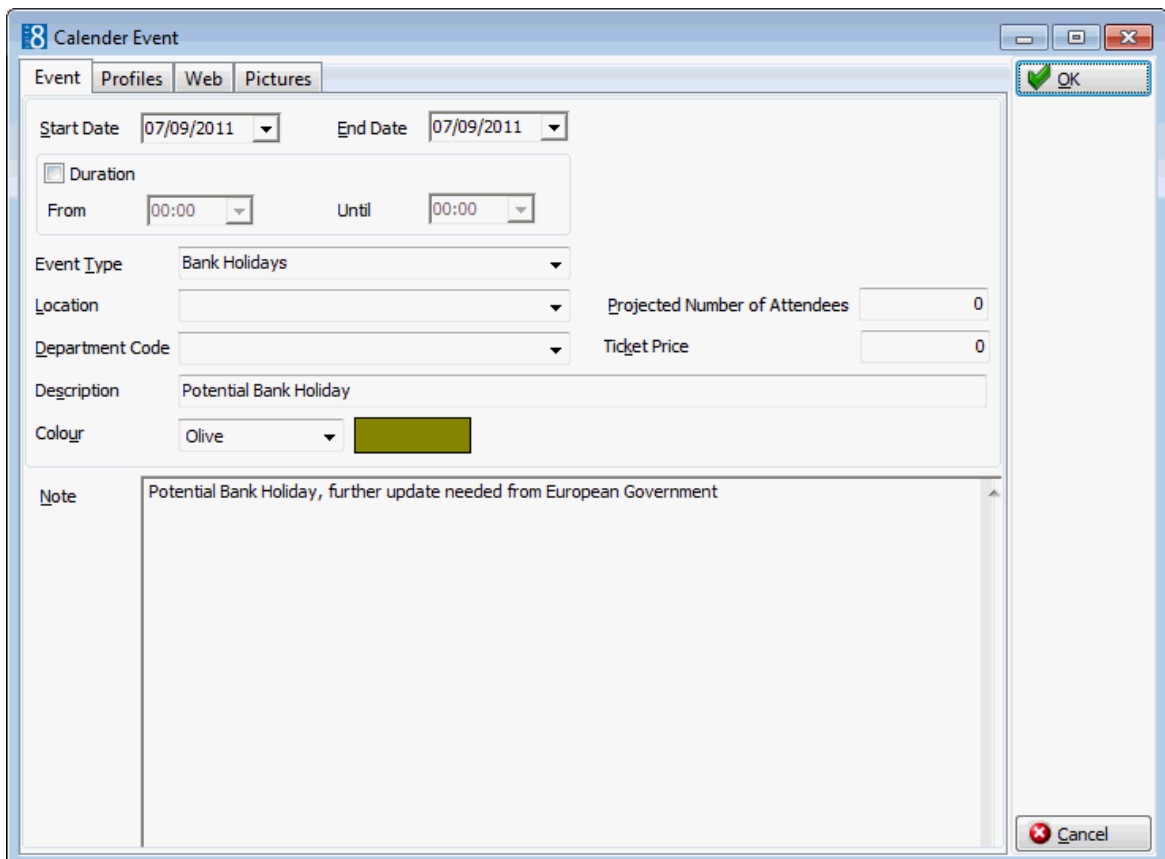
3. Click YES to un-link the profile from the calendar event.

4. Click OK to close the Calendar Event dialog box.

Editing a Calendar Event

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.

2. Point to the calendar event to be edited and double-click or right-click to display the short-cut menu.

3. Click EDIT CALENDAR EVENT, the calendar event dialog box is displayed.

4. Make any changes necessary.

5. Click OK to save the changes.

Deleting a Calendar Event

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.

2. Point to the calendar event to be deleted and right-click to display the short-cut menu.
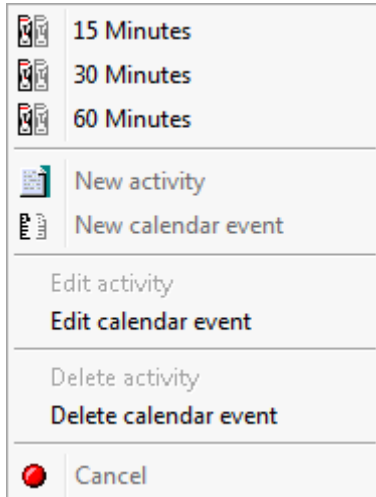
3. Click DELETE CALENDAR EVENT, a confirmation message is displayed.

4. Click YES to delete the event.

Activities

About Activities

Suite8 is capable of tracking any kind of activity. Generally activities are attached to a date and a specific time when they need to be carried out, but it is also possible to create an activity that is not linked to a time, it is then referred to as a Task. By default only not completed tasks & activities are displayed but all or only completed tasks & activities can also be displayed by changing the search criteria.

Activities are also linked to at least one manager (employee). It is mandatory to assign a manager as primary and optional to link additional managers as required. The Sales Manager logged on to the system is automatically marked as the primary assigned manager for the activity; however this can be changed as required.
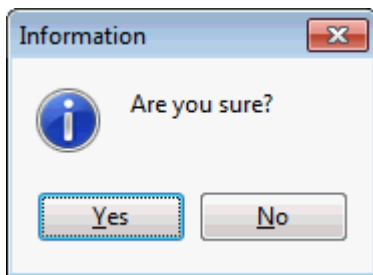
New Activity

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.
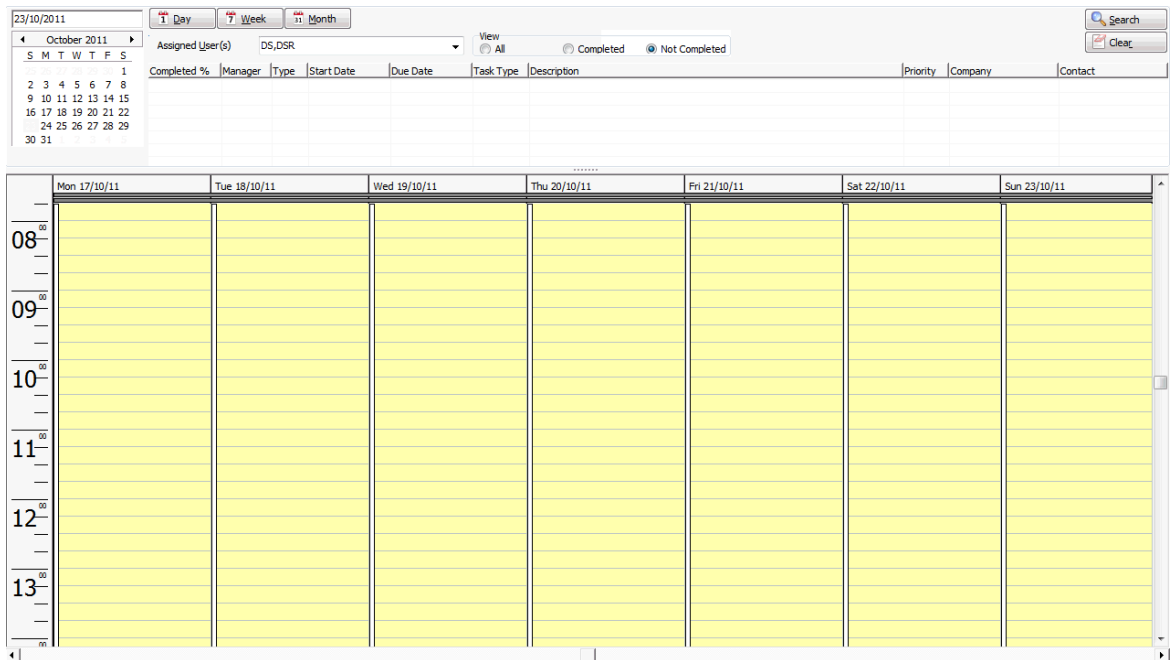
2. Place the cursor on the appropriate day and right-click to display the short-cut menu.
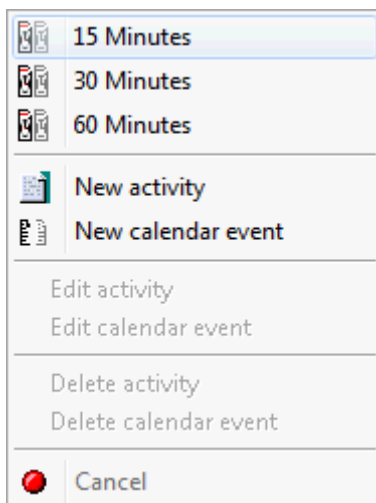
3. Click NEW ACTIVITY on the shortcut menu to display the activity edit dialog box.

4. Complete the fields as detailed in the table below.

5. Click OK, the activity is displayed in the calendar screen.

6. Pointing the cursor at the activity displays an information box showing a summary of the activity details.

Activity Edit dialog box

Fill in this field	With this information
Company Name	Link to a company profile.
Contact Name	Link to an individual (contact) profile.
Company T&A	Click this option to display the activity search screen. By default all the tasks and activities for the selected company are shown for one year in the past and one year in the future.
Contact T&A	Click this option to display the activity search screen. By default all the tasks and activities for the selected contact are shown for one year in the past and one year in the future.
Communication	Preferred communication method for the activity.
Booking ID	The ID number of the booking master. **Note:** This field is information only and is displayed only if the activity is linked to a conference booking.
Booking Name	The name of the conference booking. **Note:** This field is information only and is displayed only if the activity is linked to a conference booking.
Arrival Date	The arrival date or the booking. **Note:** This field is information only and is displayed only if the activity is linked to a conference booking.
Resp. Employee	Employee for whom this activity belongs.
Activity Type	Type of Activity.
Activity Description	Free format field to further define the purpose of the activity or to give a description of activity. By default the field is completed with the activity type as defined in the previous field.
All Day Event	Checking this field will mark the activity as an all day event. An activity marked as an all day event is displayed at the top of the column under the date field and not on the grid itself.
Check Availability	Select this checkbox to check availability when an activity is entered. If this option is active then each time an activity is entered for the resp. employee for that day and time, the availability message is displayed.
Start Date	The starting date of the activity.
Start Time	The starting time of the activity. The default starting time is defined in the Global Settings → Profile 1 tab.
End Date	The ending date of the activity.
End Time	The ending time of the activity. The default ending time is defined in the Global Settings → Profile 1 tab.
Show As	Selecting an entry from this list box shows whether the activity is taking place out of the office, if the Sales Manager is busy or free, etc.
Private	Checking this field will mark the activity as private.

|	
	Note: Functionality not yet implemented.
Reminder	A reminder can be set, ranging from 5 minutes to one month. Users then have the option to choose to 'Dismiss' or 'Snooze' the activity.
Date Completed	Date the activity was completed - select from calendar.
	Free format field to add any additional notes or information.

Note: A new activity can also be entered by drag and drop; place the cursor on the required date and start time and drag the cursor down to the end time, select NEW ACTIVITY from the shortcut menu and complete the fields as detailed above.

Editing an Activity

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.

2. Point to the activity to be edited and double-click or right-click to display the short-cut menu.
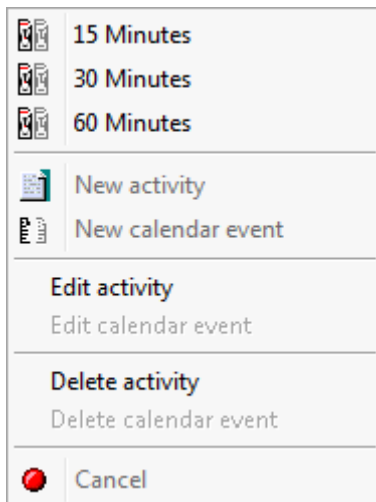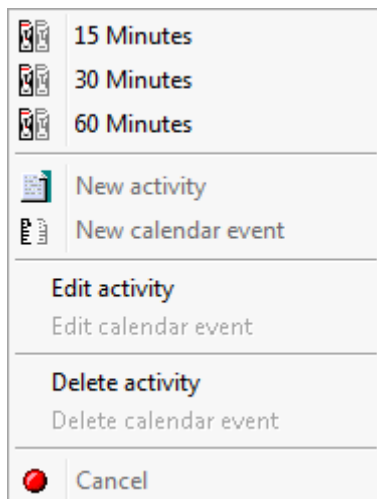

3. Click EDIT ACTIVITY, the activity event dialog box is displayed.
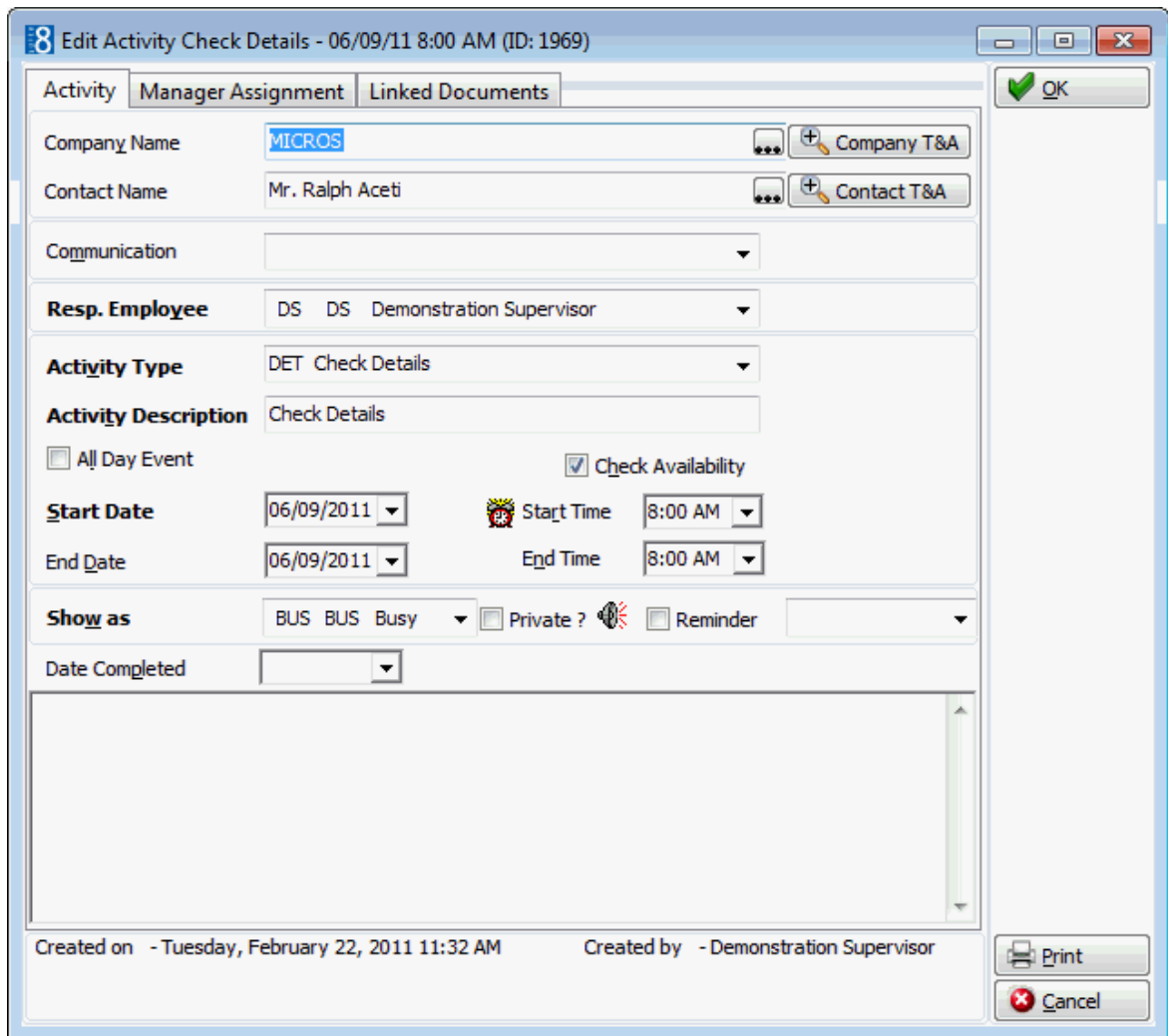
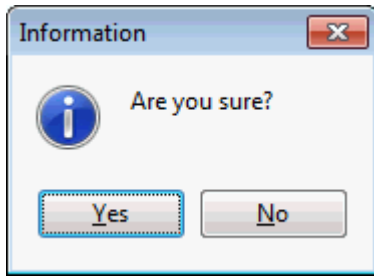4. Make any changes necessary.

5. Click OK to save the changes.

Deleting an Activity

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.

2. Point to the activity to be edited and right-click to display the short-cut menu.

3. Click DELETE ACTIVITY, a confirmation message is displayed.


4. Click YES to delete the activity.

Tasks

About Tasks

Version 8 is capable of tracking any kind of task. A task may be used for an activity that needs to be done but not necessarily at a specific time; it is more like a 'to do', a note or a reminder for e.g. preparing a mailing or calling a customer. A task has a start date and a due date but no specific time. By default only not completed tasks & activities are displayed but all or only completed tasks & activities can also be displayed by changing the search criteria.

Tasks are also linked to at least one manager (employee). It is mandatory to assign a manager as primary and optional to link additional managers as required. The Sales Manager logged on to the system is automatically marked as the primary assigned manager for the task; however this can be changed as required.

New Task

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.
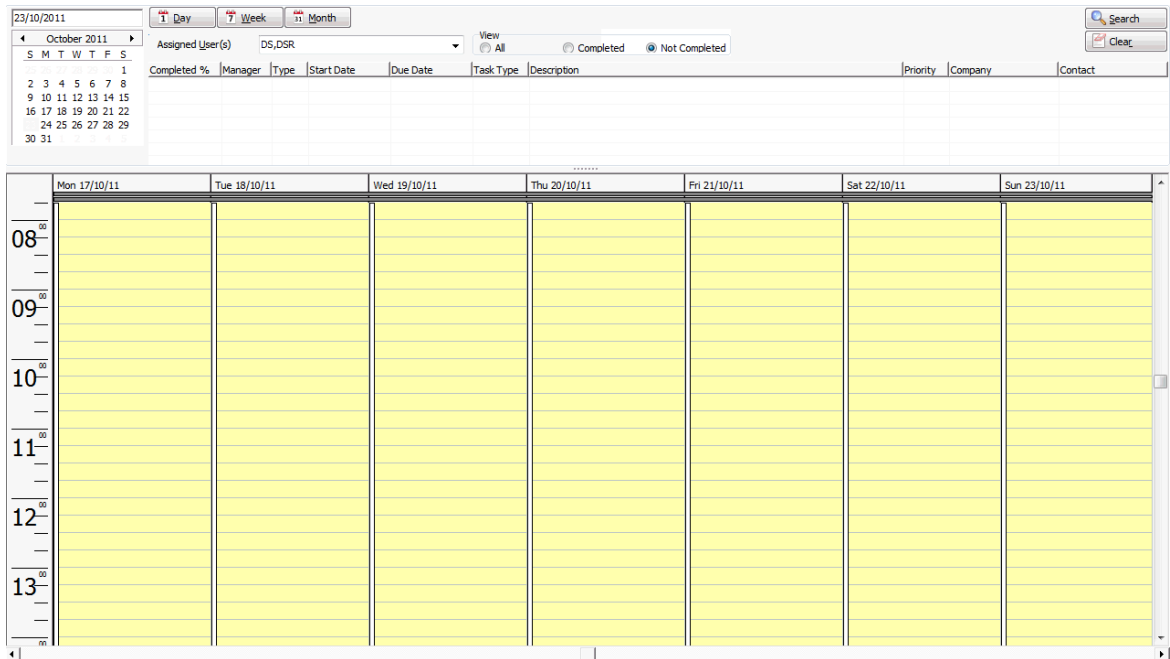
2. Place the cursor on the upper section of the calendar screen and right-click to display the short-cut menu.

New

Edit

Delete
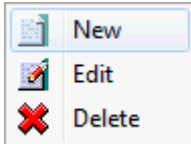
3. Click NEW on the shortcut menu to display the task dialog box.

4. Complete the fields as detailed in the table below.

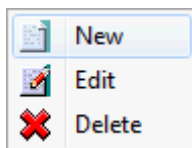5. Click OK, the task is displayed in the calendar screen.

Task dialog box

Fill in this field	With this information
Company Name	Link to a company profile.
Contact Name	Link to an individual (contact) profile.
Company T&A	Click this option to display the activity search screen. By default all the tasks and activities for the selected company are shown for one year in the past and one year in the future.
Contact T&A	Click this option to display the activity search screen. By default all the tasks and activities for the selected contact are shown for one year in the past and one year in the future.

Communication	Preferred communication method for the task.
Booking ID	The ID number of the booking master. **Note:** This field is information only and is displayed only if the task is linked to a conference booking.
Booking Name	The name of the conference booking. **Note:** This field is information only and is displayed only if the task is linked to a conference booking.
Arrival Date	The arrival date or the booking. **Note:** This field is information only and is displayed only if the task is linked to a conference booking.
Resp. Employee	Employee for whom this task belongs.
Task Type	Type of Task.
Description	Free format field to further define the purpose of the task or to give a description of task.
Check Availability	Select this checkbox to check availability when a task is entered. If this option is active then each time a task is entered for the resp. employee for that day, the availability message is displayed.
Start Date	Starting date of the task.
Status	The status of the task, e.g. Not Started, Deferred, etc.
% Completed	The % of the task completed.
Due Date	Due date of the task.
Priority	Task priority - Normal, Low, High.
Notes	Free format field to add any additional notes or information.
Date Completed	Date the task was completed - select from calendar. Also updates the STATUS field to completed and the field % COMPLETED to 100%.

Editing a Task

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.

2. Point to the task to be edited and double-click or right-click to display the short-cut menu.
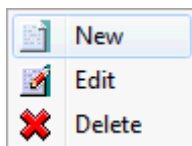
   New
   Edit
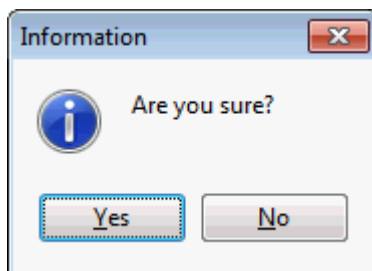   Delete

3. Click EDIT, the task dialog box is displayed.

4. Make any changes necessary.

5. Click OK to save the changes.

Deleting a Task

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.

2. Point to the task to be deleted and right-click to display the short-cut menu.

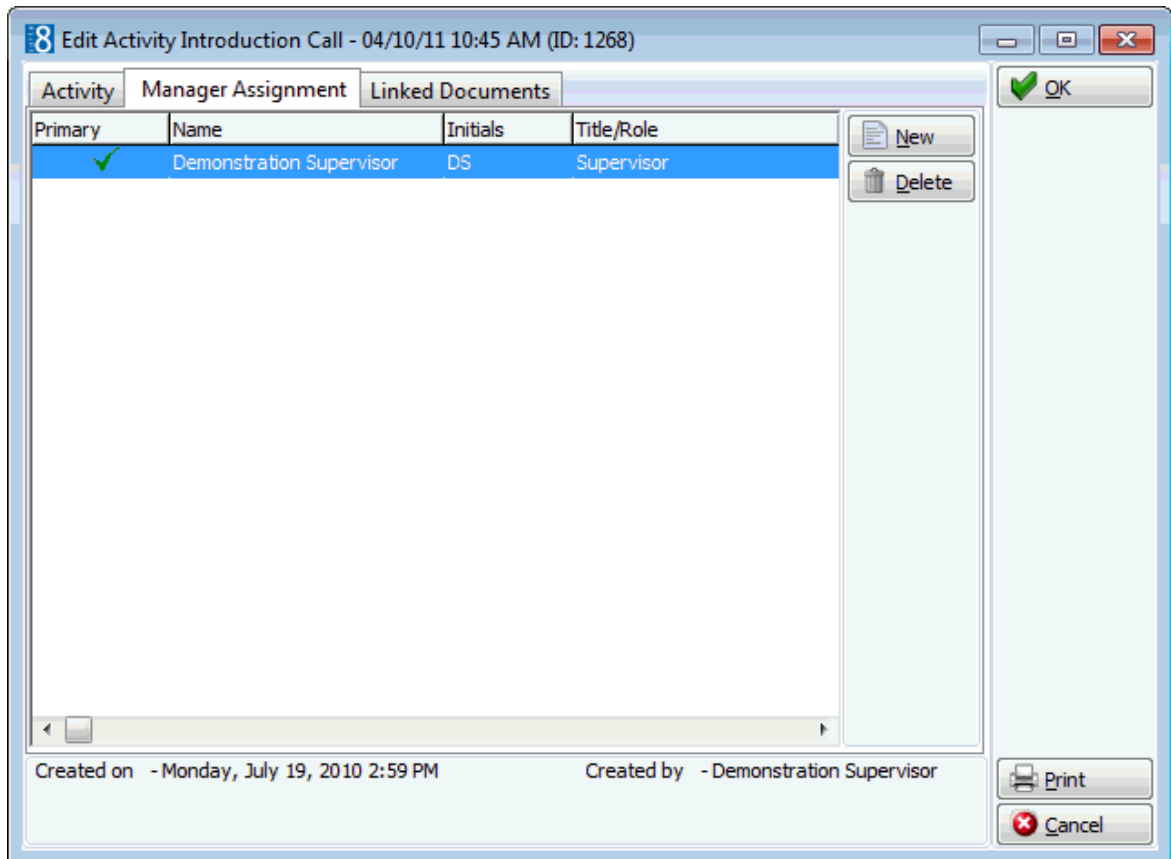3. Click DELETE, a confirmation message is displayed.

4. Click YES to delete the task.

Manager Assignment

The RESP. EMPLOYEE entered for the task or activity is automatically marked as the primary assigned manager. However, it is possible to link an unlimited number of managers.

How to add a new manager

1. Display either the ACTIVITY or TASK dialog box.

2. Select the MANAGER ASSIGNMENT tab.
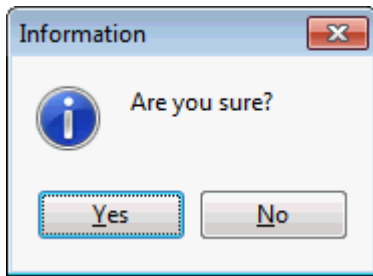

3. Click NEW, the Unassigned Managers dialog box is displayed.

4. Select the check box next to the required manager's name.

5. Click OK.

How to delete a manager assignment

1. Display either the TASK or ACTIVITY dialog box.

2. Select the MANAGER ASSIGNMENT tab.

3. Select the manager assignment to be deleted and click DELETE, a confirmation message is displayed.

4. Click YES to delete the manager assignment.

Linked Documents

This option enables the user to view, edit or add different types of documents to a profile, task or activity. It is recommended to place these documents on a shared network path to which all users have access. If a scanner is connected to the workstation you can also scan and attach documents such as contracts, letters or pictures. The scanner needs to be 'Twain' compatible.
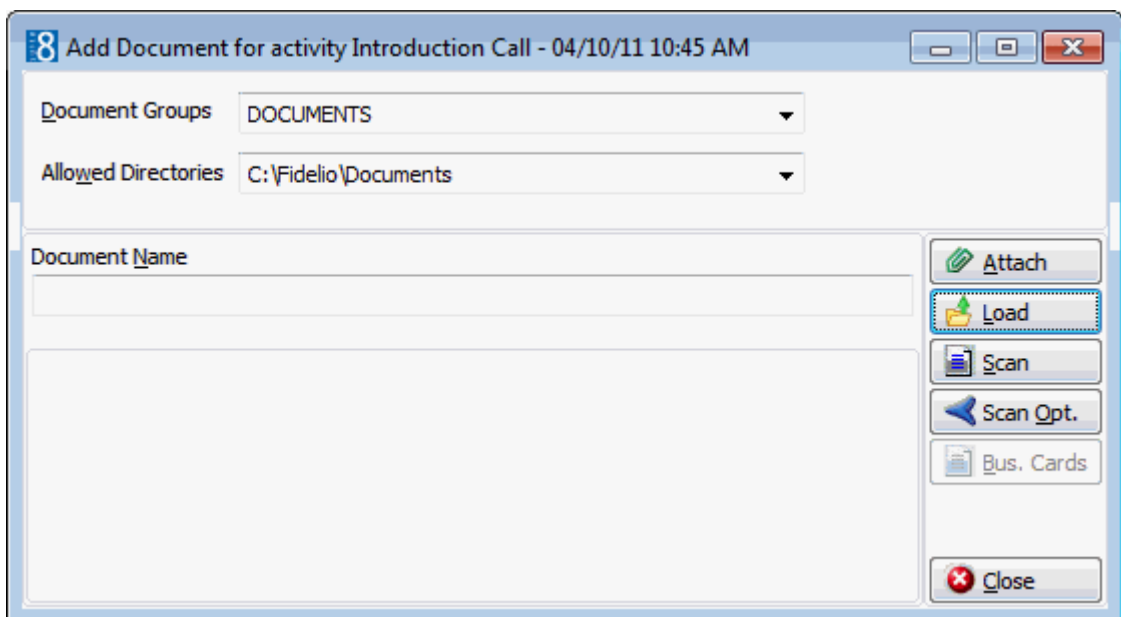
> **Note:** The linked documents dialog box may be viewed from various access points, access is via the linked documents tab or via the options button, if available.
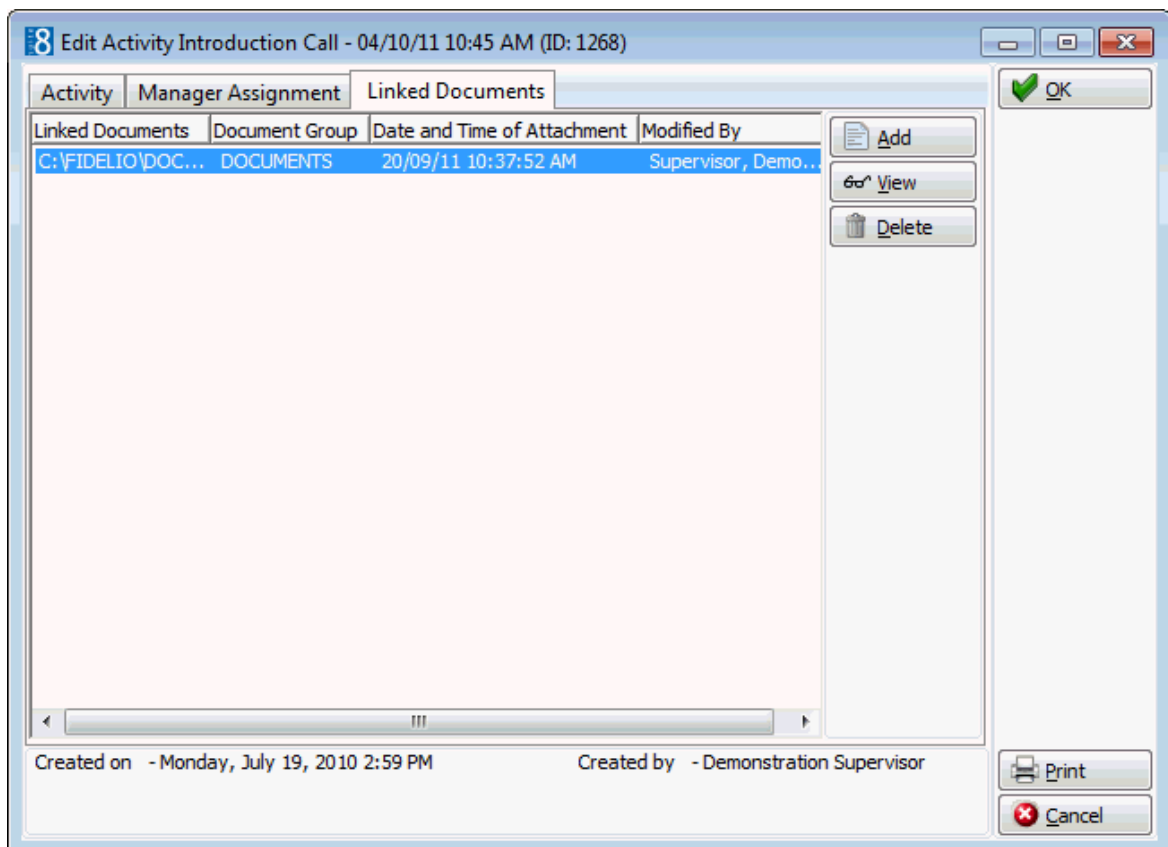
How to link a document

1. Select the LINKED DOCUMENTS tab.

2. Click ADD, the Attach documents dialog box is displayed.

3. In the DOCUMENT GROUPS list, select the document group required.

4. In the ALLOWED DIRECTORIES list, select the allowed directory required.

5. Click LOAD to display the list of documents.

6. Select the required document and click OPEN, the Document Name field is filled.
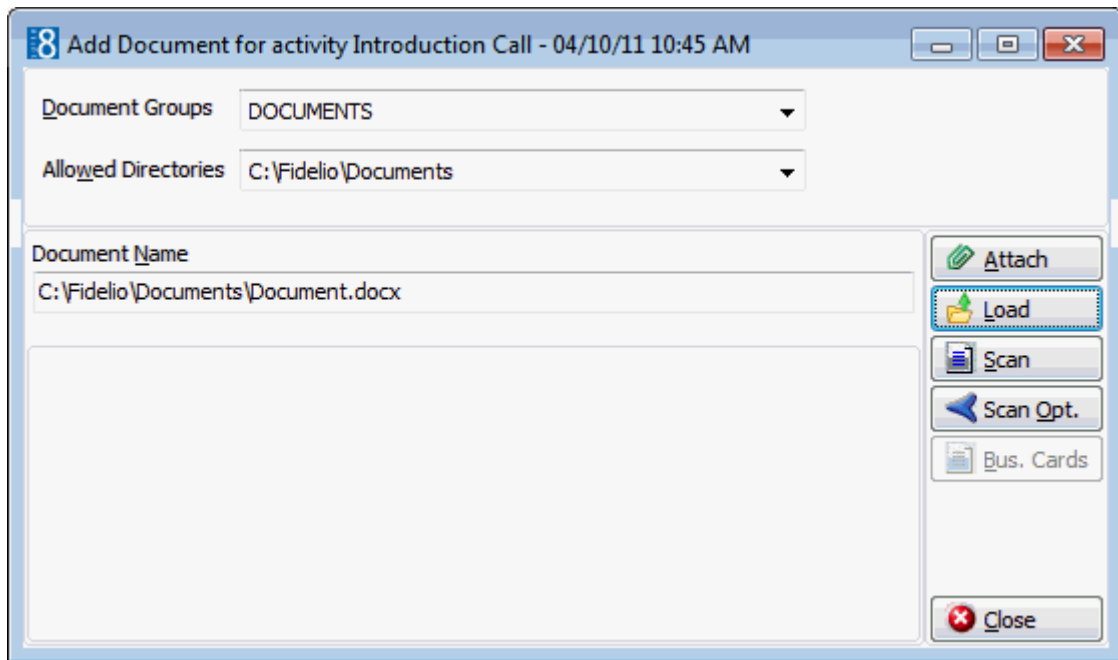
7. To attach the document, click Attach, the document is shown as linked on the linked documents tab.

> **Note:** Pictures or images may be attached in JPG or BMP format. The default setting is JPG, but this may be changed via the Options button. The selected settings will be saved for that user.

How to view/edit a linked document

1. Select the LINKED DOCUMENTS tab.

2. Select the document and click VIEW.

   Suite8 opens the relevant application, for example, Word if the document is a Word document.

   > **Note:** The document may be edited directly from within the opened application.

How to scan and link a document

1. Select the LINKED DOCUMENTS tab.

2. Click ADD, the attach documents dialog box is displayed.

3. In the DOCUMENT GROUPS list, click the document group required.

4. In the ALLOWED DIRECTORIES list, click the allowed directory required.

5. Click SCAN, the select source dialog box is displayed.
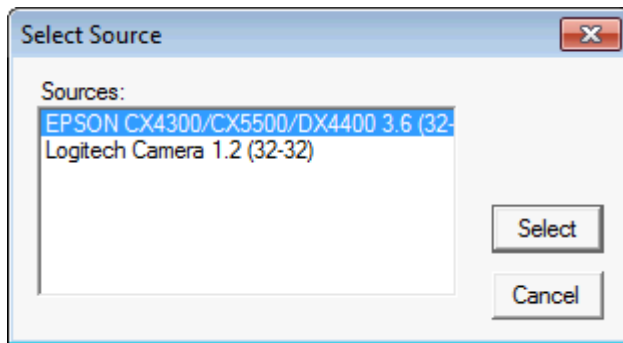
6. Select the source and click SELECT to open the scanner application.

7. Scan the document.

8. Click ATTACH to link the scanned document.

Document groups and path are defined via the option DOCUMENT TYPES under Setup → Configuration → Miscellaneous.

Adding or editing documents on the linked documents tab is controlled by the user right LINKED DOCUMENTS under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Attach documents.

4   Conference Diary

Viewing the Conference Diary

The conference diary is a graphical display of all the function spaces. It enables users to easily view the availability of function spaces and to start the booking process. In addition to creating new bookings, details of existing bookings and events can be viewed and changed, and calendar events and PMS availability are displayed.
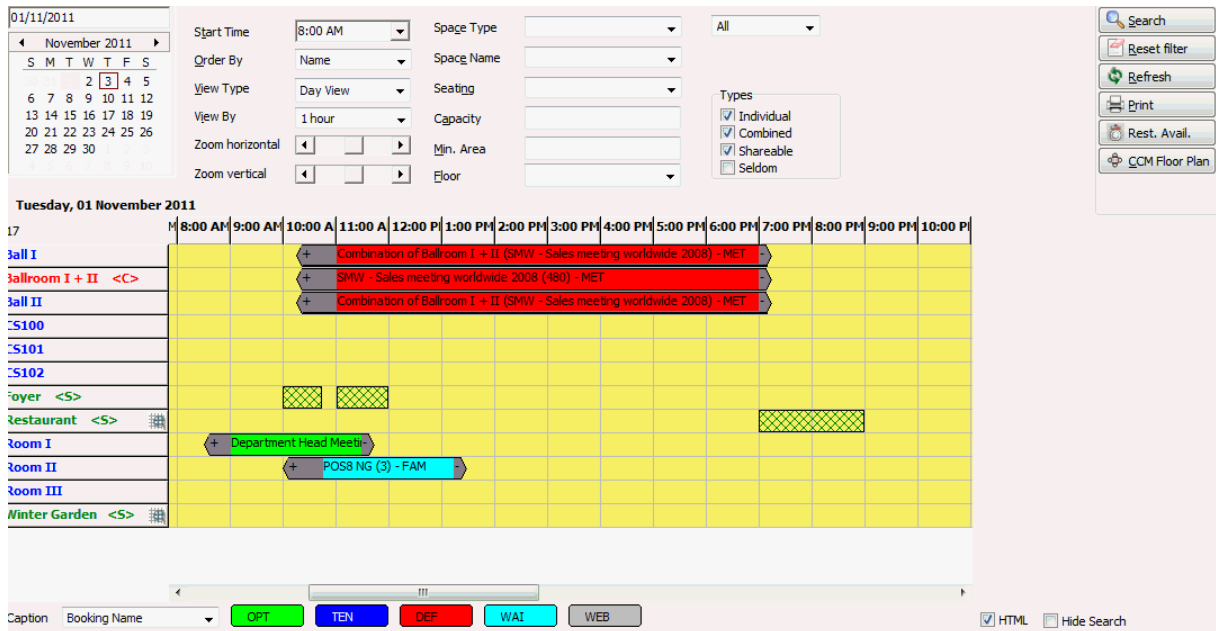
> **Note:** Calendar events with the type conference bookings are not displayed in the conference diary.

**How to view the conference diary**

Click the MEETING PLANNER menu and select CONFERENCE DIARY or press F3.

The Conference Diary is displayed.

The user can scroll up and down within the conference diary by rotating the wheel of the mouse.

The layout of the diary can be changed by activating the parameter DISPLAY FUNCTION SPACE FOR EACH BOOKING. Bookings entered in the same function space are then listed on a separate line; however events of the same booking are displayed in a single line. Bookings entered into shareable function spaces are also displayed on individual lines.
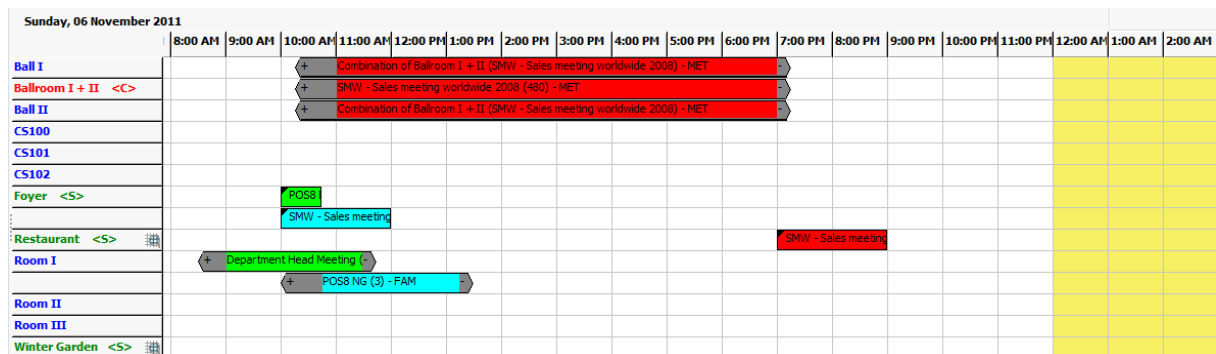
> **Note:** Placing the cursor on a booking displays a hint box with the following details if available:
> The Company Name, Contact, Booking Dates, Decision Date, Follow Up Date, Cutoff Date, Event Type, Dates, Time, Status, Number of Persons, Seating arrangement and the Rate.
>
> **Note:** Opening the diary via F3 from the Booking Master edit screen opens the diary on the arrival date of the booking. Pressing F3 on the event details or event edit screen the diary will be opened on the selected day; otherwise the default is to open the diary on the current date.

🛈 The default start time for the conference diary is defined via the option CONFERENCE DIARY START TIME under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

🛈 The default number of days to be displayed on the conference diary is defined via the option DEFAULT LOADED DAYS FOR DIARY under Setup → Configuration → Global Settings → CCM → Conference 1 tab. It is recommended to set the default number of days to two.

🛈 The type of availability displayed in the Date column is defined via the option DISPLAY AVAILABILITY IN ROOM RACK under Miscellaneous → User Settings → Appearance Tab. Types of availability available are Maximum Availability, Minimum Availability, Def. Occupied and Def. + Tent. Occupied.

🛈 Linking a view type to a login so that the preferred view is automatically used when the user calls the conference diary is defined via the option FUNCTION SPACE VIEW TYPE IN DIARY under Miscellaneous → User Settings → Appearance Tab.

🛈 Linking a custom order to a login so that the preferred custom order is automatically used when the user calls the conference diary is defined via the option FUNCTION SPACE ORDER IN DIARY under Miscellaneous → User Settings → Appearance Tab.

🛈 Bookings entered in the same function space can be listed in a separate line by activating the parameter DISPLAY FUNCTION SPACE FOR EACH BOOKING under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

🛈 The event type can be displayed before the name by activating the parameter DISPLAY EVENT TYPE FIRST IN CONFERENCE DIARY under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

🛈 Events with the status non-deduct inventory using combined rooms are displayed with an indicator on the conference diary by activating the parameter DISPLAY DOUBLE OCCUPANCY IN CONFERENCE DIARY under Setup → Configuration → Global Settings → CCM → Conference 1 tab. If the parameter is not activated then no indicator is shown on these events.

Understanding the Conference Diary

Conference Diary search criteria

Fill in this field	With this information
Start Time	The start time is used as the start time for showing the availability and occupancy of function spaces. A default start time can be defined in the configuration.

Order By	Can be used to change the order in which the function spaces are displayed on the left hand side, the default is by Name. Standard orders are: by Name, Area, Min. Capacity and Max. Capacity. In addition to the standard orders, an unlimited number of custom orders can be defined. A custom order can also be linked to a login so that the preferred custom order is automatically used when the user calls the conference diary.
View Types	Day View: Allows viewing one or multiple days depending on the zoom settings and the default days in global settings. The columns are displayed in time slots. Week View: Allows viewing one or multiple weeks depending on the zoom settings. The columns are displayed in date slots. Monthly View: Allows viewing a single day or a full month depending on the zoom settings. The columns are displayed in date slots.
View By	Used to change the view time slots, i.e. 30 minutes, 1 hour or 4 hour slots. This can be used in connection with the Day View.
Zoom Horizontal	Used to change the zoom settings horizontally of the time/date slots, to expand the view for example. The zoom settings are stored per user. After an upgrade or if using them for the first time, the zoom settings can be by default set to the minimum, but once changed they will be the same every time the user logs on.
Zoom Vertical	Used to change the zoom settings vertically, i.e. enlarge the function space names on the left hand side.
Space Type	One of the pre-defined space types can be selected for filtering. Once a space type has been selected, click SEARCH to display only function spaces of the selected space type.
Space Name	From the drop down list select one of the function space names and click SEARCH to display only the selected function space.
Seating	Select one of the seating arrangements from the list and click SEARCH to display only those function spaces that are defined with the selected seating arrangement. This option can be used in connection with minimum capacity in order to find a suitable room.
Min. Capacity	May be used to search for function spaces that have the minimum capacity entered. Only those function spaces that are defined with the minimum capacity, for example 10 or larger will be displayed. The minimum capacity is taken from the function space configuration screen and does not consider seating arrangement.
Min. Area	May be used to search for function spaces that have the minimum area defined. Only those function spaces that equal or have more than the entered area will be displayed. The area is taken from the function space configuration screen.

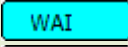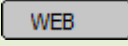|	
All/Availability	Determines whether all function spaces or just the available ones should be displayed. If the 'Availability' option is selected, a time from/to screen will be displayed. Enter the time (from/to) an available function space should be searched for. This option can be used in connection with any other filter.
Individual	If selected, only individual rooms will be shown, for example room A.
Combination	If selected, only combination rooms will be shown, for example rooms A/B.
Shareable	If selected, shareable function spaces will be shown
Seldom	Seldom - only function spaces that have been defined as not to SHOW IN DIARY will be displayed. By default individual, combination and shareable are selected and are displayed unless defined otherwise
Caption	This option is displayed on the lower left-hand corner of the screen. The two options currently available are BOOKING NAME and COMPANY/CONTACT. The caption is applied to the event bar so that it either shows the booking name or the company/contact name.
Hide HTML	In order to hide the HTML panel, select the check box HIDE HTML in the lower left-hand corner of the screen. **Note:** The selection is stored per user and is automatically selected each time the screen is opened
Hide Search	In order to hide the search criteria panel and display more function spaces, select the check box HIDE SEARCH in the lower left-hand corner of the screen.

In addition to the standard orders, an unlimited number of custom orders can be defined via the option CUSTOM ORDERS under Setup → Configuration → Conference Management → Function Spaces.

When selecting the function space type SELDOM only function spaces that have been defined as not to SHOW IN DIARY under Setup → Configuration → Conference Management → Function Spaces → Function Space Definition will be displayed.

Conference Diary screen icons

Icon	Legend Term	What it represents
	Noisy	Indicates that this event is a noisy one, such as a dinner party with live music.
	Do not move	Indicates that this event should not be moved from this function space.
M	Master Event	Indicates that this event is a master-event.
S	Sub-Event	Indicates that this event is a sub-event.
	Shared Function Space	The black triangle indicates that this event is in a shared function space. **Note:** Only displayed if the parameter DISPLAY FUNCTION SPACE FOR EACH BOOKING is active.
+	Set up time	Indicates the set up time for this event.
-	Set down time	Indicates the set down time for this event.
<S>	Shareable	Indicates that this function space is shareable.
<C>	Combination	Indicates that this function space is a combination of two or more individual function spaces. Combination rooms are automatically blocked as soon as one of the combination rooms is booked. The name of the company, contact or booking name is shown on the main function space and again within brackets on the combination rooms.
	Shared Function	Indicates that this event is booked as shareable.
OPT TEN DEF WAI WEB	Event Status	Each event status has a defined colour. Events are displayed in the colour according to their event status.
Events are displayed in different colours depending on the event status. However, each booked event displays the Company, contact or booking name, number of persons and the type of event on the coloured bar. Additional icons are displayed as described above and for combination rooms the combination description is also displayed.		

How to search for a function space

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY or press F3.

   The Conference Diary is displayed.

2. Complete the search criteria.

3. Click SEARCH.

   The function spaces available according to the entered criteria are displayed.

   > **Note:** In order to hide the search criteria panel and display more function spaces, select the check box HIDE SEARCH in the lower left-hand corner of the screen.

How to display function space details

Function space information includes the function space measurements, possible seating arrangements and rates. This information may be displayed from the conference diary in a view only format.

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY or press F3.

2. Point to the function space name and right-click to display the short-cut menu.

3. Select VIEW DETAILS.

   The function space detail screen is displayed in view only format.
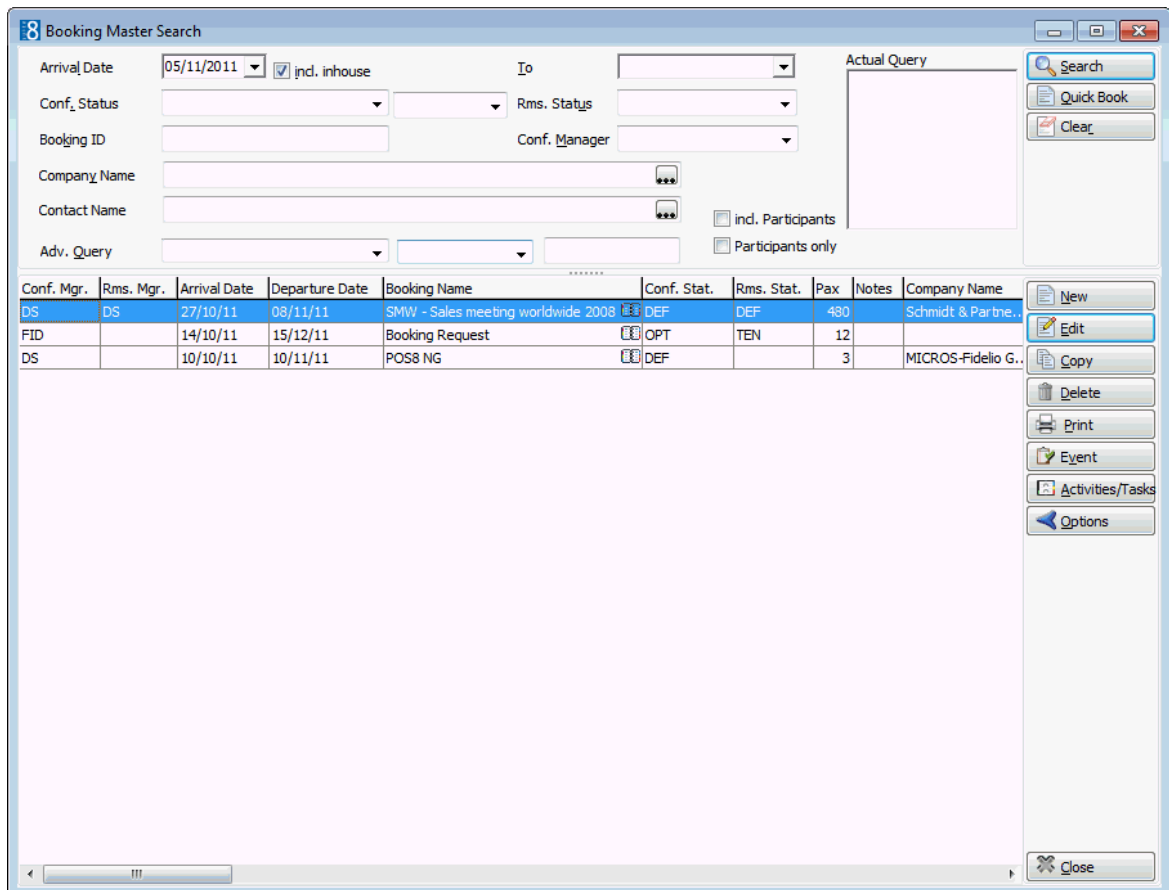
Creating a New Booking or Event

Accessing the Booking Master Search screen

How to access the booking master search screen

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY or press F3.

   The Conference Diary is displayed.

2. Place the cursor on the grid box for the function space name, date and time on which the event should start.

3. Left-click and hold down the left-mouse button.

4. Drag the mouse to the right until the required date and time are selected, release the left-mouse button, the short-cut menu is displayed.

Conference Booking
Close off Function space
Clear Selection
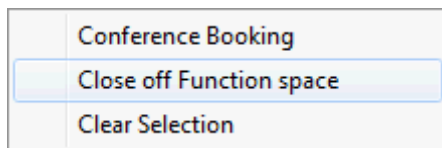
5. Select CONFERENCE BOOKING, the booking master search screen is displayed; displayed by default are all bookings within the date range with the same arrival/departure date as the booking/event you are about to create.

6. If a new event should be added to an existing booking, select the booking and click the EVENT button on the Booking Master search screen.

7. If this new event belongs to a new booking, the new booking can be created via:
   - The Quick Book option.
   - The New booking option.

Quick Book

The QUICK BOOK option can be used to create both the booking and the event at the same time. The quick booking screen is split into two parts; the upper part contains the booking information and lower part the event information. Only the main fields are displayed for the booking, however once the quick booking screen is completed, additional booking information can be entered by editing the booking.

To create a new booking using quick book

1. On the booking master search screen click the QUICK BOOK button to open the Quick Booking screen. See: "Bookmark" Accessing the booking master search screen.

2. Complete the booking screen, for a detailed explanation of the options see the Quick Booking table below.

3. Click OK to save the new booking.

Quick Booking dialog box

Fill in this field	With this information
Company Name	Enter the company name and press tab; if only one company exists with that name it will be filled automatically, otherwise the profile search screen is displayed. Click on the three dots next to the company name field to open customer profile search screen directly and search for the company profile or create a new one.
Contact Name	Enter the contacts last name and press tab; if only one individual exists with that name it will be filled automatically, otherwise the profile search screen is displayed. Click on the three dots next to the contact name field to open the customer profile search screen directly and search for the contact profile or create a new one. Either the company or the contact name has to be filled in for the booking master.

Contact on site	Enter the name of the contact on site if known.
Booking Name	Enter the booking name.
Market Segment	Select the market segment applicable to the booking.
Source	Select a source code that best defines on how the booking was received.
Credit Status	The credit status option is view only and depends on the company/contact profile that was selected. C - for cash-listed. R - for credit status restricted. A - if city ledger status has been approved. **Note:** Depending on the companies/contacts credit status, a warning message may be displayed, with the option to continue.
Decision Date	Select a date from the calendar, if the customer has to decide by a certain date. This will be completed automatically if a default has been defined in global settings.
Follow up Date	Select a date from the calendar, if the property would like to follow up with the customer, for example the date when the signed contract has to be returned. This will be completed automatically if a default has been defined in global settings.
Event Information	
Event Status	Select the event status.
Event Type	Select the event type.
Event Name	Will be filled in automatically depending on the event type selected, but can be changed.
No of Attendees	Enter the number of attendees for this event.
Min Guarantee	If agreed with the customer, enter the minimum number of guaranteed attendees for this event.
Start Date	The start date of the event is completed as it was already selected via the conference diary.
End Date	The end date of the event is completed as it was already selected via the conference diary.
Start Time	The start time of the event is completed as it was already selected via the conference diary.
End Time	The end time of the event is completed as it was already selected via the conference diary.
Info Board	Enter the information that should be placed on the info board outside the function space such as Fidelio Software Dealer Conference.
Info Board Profile	This option allows the property to enter a different name to be displayed on the info board. For example, the booking was made by Star Conferences for the company IBM; so on the info board IBM should be displayed.

	The handling is such that when a company and a contact are entered, the entry in the field Info Board Profile replaces the company, if only a contact is entered, the entry in the Info Board Profile replaces the contact. If no entry is made in the Info Board Profile then the company/contact name from the booking will be displayed.
Noisy	If this event is going to be a noisy one, select this option. Other users can then see in the conference diary that the event is going to be noisy.
Block	This is a view only field and shows the start time and the end time of the event or when a function space is booked the setup time plus event start time and event end time plus set down time. This is completed automatically.
Function Space Information	
Function Space	Filled with the function space selected in the conference diary.
Seating Arr.	Select the seating arrangement. The seating arrangement defined as default will be filled in.
Rate	Select a pre-defined rate or enter a special rate. The rate defined as default will be filled in.
Amount	The rate amount will be completed depending on the selected rate but can be changed.
Dept Code	The department code for room rental.
Special Rate	The check box will be selected automatically as soon as a different amount than that defined for the rate code is entered in the amount field.
Shareable	This option is displayed and selected automatically only if a shareable function space has been selected, but can be changed as required.
Hourly Rate	This option is displayed only if the selected rate is defined as an hourly rate, but can be changed as required.
Setup Time	Filled with the setup time defined for the selected seating arrangement, but can be changed.
Setdown Time	Filled with the set down time defined for the selected seating arrangement, but can be changed.
Don't move	Select this box if the function space should not be moved.

New Booking on the Booking Master Search

When creating a booking via the NEW booking option, first the booking needs to be created and then the booking needs to be selected in order to enter the event, therefore, the times and function space selected on the conference diary are not automatically completed via this option.

To create a new booking using the booking master search

1. On the booking master search screen click the NEW button.

2. Complete the booking screen; see the Suite8 Conference & Catering Management manual for a detailed explanation of the fields and tabs.

3. Select OPTIONS and then EVENTS to enter a new event, click OK to save the new booking.

Moving an event to another function space

The easiest way to move an existing event from one function space to another is to drag and drop it via the conference diary. Various messages may be displayed depending on where the event is being moved to.

How to move an event

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen.

2. On the Conference Diary screen, select the event to be moved.

3. Left-click and hold the mouse button while you drag the event to the new function space.

   The message "Confirm move?" is displayed.
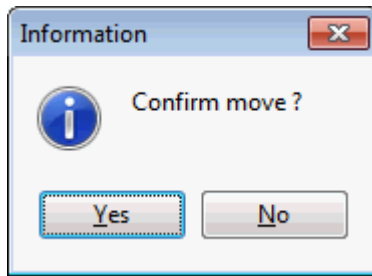
4. Click YES to confirm the event move.

5. If the event is being moved to a shareable function space then the message "Allow function space in share mode?" is displayed.
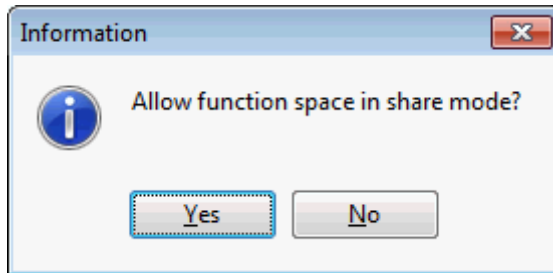
6. Click YES to allow the function space in share mode and NO if the function space should not be shared.

7. If the new function space has the same seating and rate it will be updated automatically. If the seating or rate is different in the new function space then the message "Seating or Rate differs! Do you want to change?" is displayed.
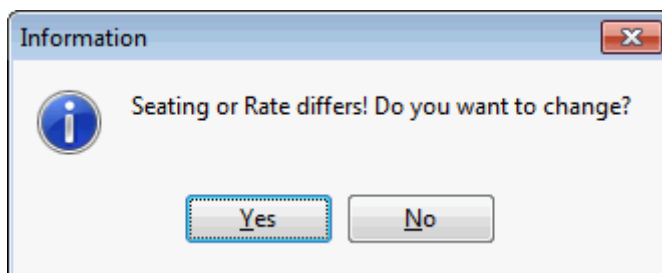
8. If changes need to be made to either the rate or seating arrangements, select YES. If the seating arrangement or rate defined on the original function space is not available on the newly selected function then they will be removed, but the amount will be kept.

9. If the calendar is being viewed in Week or Month view then the message "Do you want to keep the original function space time?" is displayed.
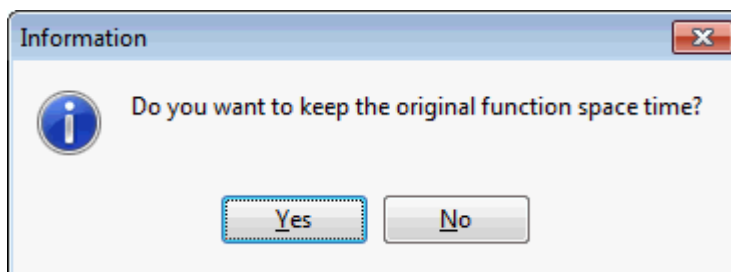
10. Click YES to keep the original function space time.

11. If the new function space has default miscellaneous items defined then the message "Do you want to add the default misc. items?" is displayed.
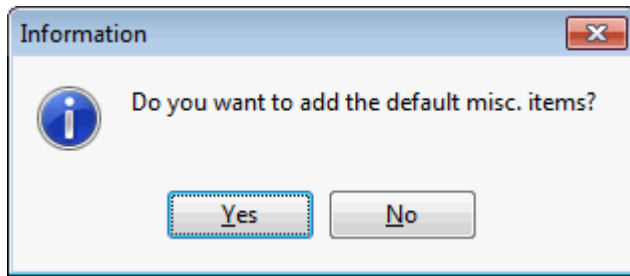
12. Click YES to add the default misc. items.

13. If the number of pax on the event is not within the minimum and maximum defined for the selected seating arrangement. Then the message "Seating capacity Min. =XX and Max. =XX. Continue?" is displayed.
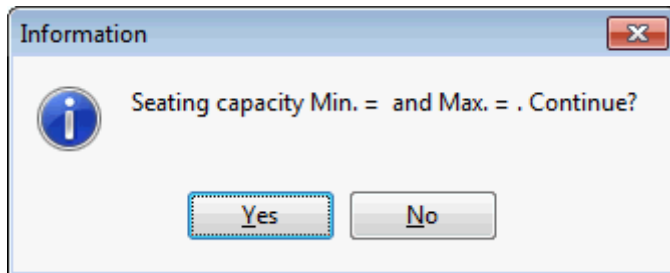
14. Selecting YES will move the event.

    The event is moved on the Conference Diary screen.

Change the Event Start/End Time

You may change an event's start and/or end time, by doing one of the following:

- Change the start/end time by moving the event time on the grid.
- Change the start/end time via the Edit Event screen.

How to change an event start/end time

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen.

2. On the Conference Diary screen, select the event.

3. Right-click to display the short-cut menu, select EDIT EVENT and change the start and/or end time on the Edit Event dialog box.

   or

4. Left-click on either the start or end of the event, when the cursor appearance changes hold the mouse button down while you drag the mouse to the left or right or left-click on the event and hold the mouse button while you drag the entire event to the new time spot.

   The message "Confirm move?" is displayed.

5. Click YES to confirm the event time change.

Shareable Function Space

Certain function spaces such as the main lobby and restaurant may be configured as SHAREABLE, this allows users to book these function spaces either in share mode or exclusively. Booking a function space in share mode allows multiple groups to be booked into the same function space without double booking or waitlisting events. Booking in exclusive mode only allows one event to be booked into the function space, any others will be waitlisted.

Function Spaces that are defined as SHAREABLE are displayed in green with <S> for shareable on the left hand side of the conference diary. Events which are booked as sharing a function space are displayed with a green trellis.

Foyer <S>

Shareable Function Space - how does it work?

- When only one event is booked into a shareable function space the event status will not be changed to waitlist when the entered no. of attendees exceeds the max. capacity of the function space.
- When more than one event is booked then event status will not be changed to waitlist as long as the total no. of attendees is within the max. capacity of the function space.
- When more than one event is booked the event status of the last event entered will be set to waitlist if the total no. of attendees is more then the max. capacity of the function space.
- If the no. of attendees from other events is reduced so that the total no. of attendees is within the max. capacity then the user will be prompted to change the status of any waitlisted events.

Example:

If we have a shareable function space such as a restaurant with a maximum capacity of 200 pax

- Booking an event with 100 pax - this is within the 200 limit so there is no need to waitlist the event.
- Booking a second event with 20 pax - with both events the total number of pax (120) is within the 200 pax limit so there is no need to waitlist this event.
- Booking a third event with 90 pax - this now takes the total number of pax to 210 which is over the 200 pax limit therefore this event will be waitlisted as the total no. of attendees exceeds the max. capacity of the function space.

However:

- If the no. of attendees of the 1st event is now reduced to 80, the 3rd event will no longer be waitlisted.
- If the no. of attendees of the 2nd event is now increased to 110, then this event will be waitlisted and the 3rd event no longer waitlisted.

How to create an event into a shareable function space

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen or press F3.

2. Point to the function space name, date and time to be booked.

3. Left-click and hold down the left-mouse button.

4. Drag the mouse to the right until the required date and time are selected, release the left-mouse button, the short-cut menu is displayed.

5. Select CONFERENCE BOOKING, the share mode message is displayed.

6. Select YES to book the function space as shareable, this allows other groups to be booked into the same function space. Selecting NO will book the function space in exclusive mode which will not allow other groups to be booked into the same function space without waitlisting them.

7. Select QUICK BOOK or NEW to create a new booking or select an existing booking and then the EVENTS button to add a new event to an existing booking.

How to view shareable function space events

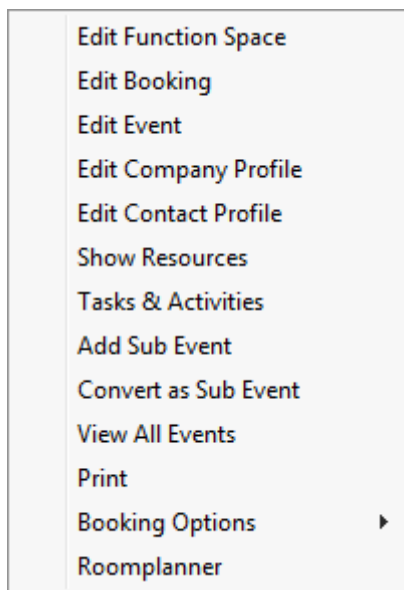To view the list of groups booked into the shareable function space:

1. Highlight the event bar in the conference diary, the hint bar lists the groups that are sharing the function space.

2. Right-click to display the short-cut menu, select VIEW SHARE LIST.

    From here, all related information can be accessed.

There are a variety of options available from the conference diary/floor plan screen for viewing or changing information that is related to an event or booking.

Displaying the conference diary/floor plan options

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY or press F3.

    The Conference Diary is displayed.

2. On the conference diary screen, highlight an event.

3. Right-click to display the short-cut menu, the pop-up menu appears displaying the following options:

    | Edit Function Space |
    | Edit Booking |
    | Edit Event |
    | Edit Company Profile |
    | Edit Contact Profile |
    | Show Resources |
    | Tasks & Activities |
    | Add Sub Event |
    | Convert as Sub Event |
    | View All Events |
    | Print |
    | Booking Options ▶ |
    | Roomplanner |

Edit Function Space

Via this option any details related to the booked function space can be viewed or changed such as the rate, seating arrangement or don't move flag.

1. Select EDIT FUNCTION SPACE from the short-cut menu.

    The Edit Function Space dialog box is displayed.

2. Make any necessary changes, and then click OK to save the changes.

    Note: The start and end time must be within the start and end time of the event.

Edit Booking

Via this option any details related to the booking can be viewed or changed such as the company, the decision date or market segment.

1. Select EDIT BOOKING from the short-cut menu.

    The Edit Booking Master screen is displayed.

2. Make any necessary changes, and then click OK to save the changes.

Edit Event

Via this option any details related to the event and function space can be viewed or changed such as the no. of attendees, the info board, the rate or the seating arrangement.

1. Select EDIT EVENT from the short-cut menu.

    The Edit Event screen is displayed.

2. Make any necessary changes, and then click OK to save the changes.

Edit Company Profile

This option is only available if a company profile has been linked. Via this option any details related to the company profile, such as the address, notes or marketing information can be viewed, added or changed.

1. Select EDIT COMPANY PROFILE from the short-cut menu.

   The Edit Company Profile screen is displayed.

2. Make any changes necessary, and then click OK to save the changes.

Edit Contact Profile

This option is only available if a contact has been linked. Via this option any details related to the contact profile, such as the address, notes or marketing information can be viewed, added or changed.

1. Select EDIT COMPANY PROFILE from the short-cut menu.

   The Edit Company Profile screen is displayed.

2. Make any changes necessary, and then click OK to save the changes.

Show Resources

Via this option all resources are displayed, resources such as menu details, notes and miscellaneous items can be viewed, changed or new ones added.

1. Select SHOW RESOURCES from the short-cut menu.

   The Event Details screen is displayed.

Everything that gets booked to an event is known as a resource.

Typical resources are:
- Function Spaces
- Miscellaneous Items such as decoration, technical equipment etc.
- Standard Menus - food and beverage items

Resources are displayed in the order in which they are booked. They are grouped according to item type - all miscellaneous items together and all standard menu items together, it is not possible to group different item types together, but the order can be changed within a group by moving the items up and down on the resources grid.

The FORECAST/REVENUE tab displays information about the expected, forecasted and posted revenue of the event; the tab is split into two parts:
- Package items
- Non package items

Tasks & Activities

Use this option to view, edit, delete or create new tasks or activities that are specific to the booking. A typical example for a task linked to a booking master would be a 'follow up' on the signed contract.

1. Select TASKS & ACTIVITIES from the short-cut menu.

   The Tasks & Activities dialog box for the selected booking master is displayed.
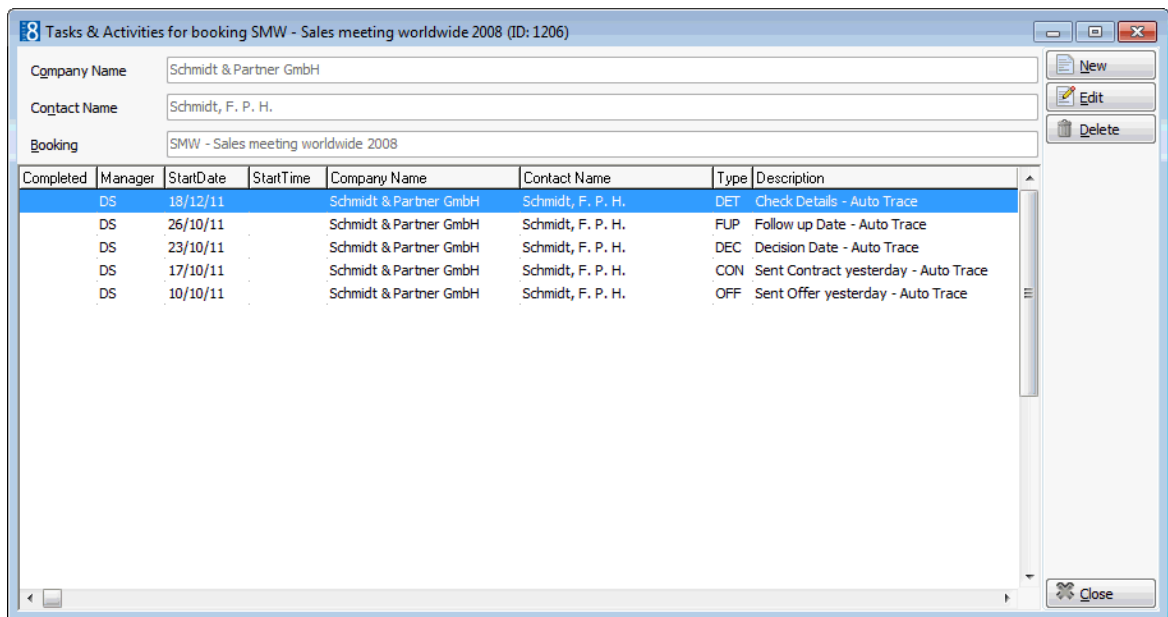
2. Click NEW to add a new task or activity or select an existing entry and click EDIT and then make any changes necessary.

3. Click CLOSE to close the task & activity screen.

Show Wait List

If waitlist events exist then they may be viewed from the Conference Diary or via the quick key Waitlist Priority (Ctrl + W). Viewing the waitlist via the quick key allows the user to view all events which are currently waitlisted for a particular day. Viewing the waitlist via the conference diary shows the waitlisted events of the selected function space or event.

1. Select SHOW WAITLIST on the shortcut menu to display the Event Waitlist screen.
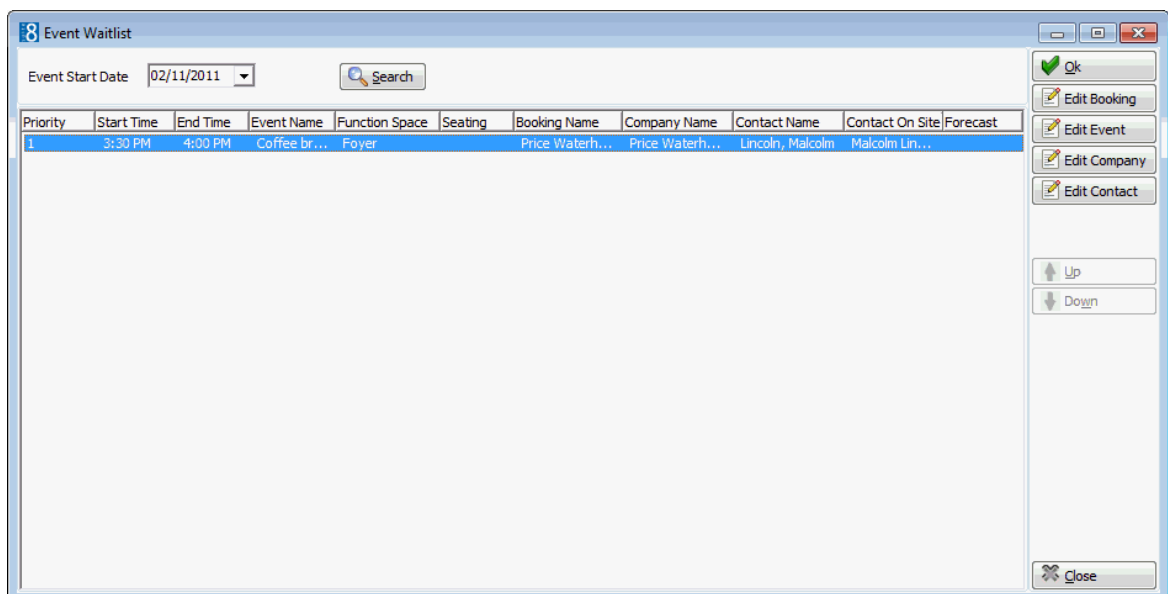
- The priority order of the waitlisted events may be changed by pressing the up and down arrows.

- The Booking, Event, Company or Contact may be edited.

Add Sub Event

This option allows the creation of a sub event linked to the selected master event.

1. On the Conference Diary select the required event.

2. Select ADD SUB EVENT from the short-cut menu.

   The New Event screen is displayed with a comment indicating that this is a Sub Event of 'Event Name'.

3. The Event Status, No. of Attendees and Function Space Information is taken from the master event, complete the remaining options - the start and end times must be within or overlap with the start and end times of the master event.

4. Click OK to save the sub event.

Convert as Sub Event

This option prompts the user to convert the selected event into a sub event. The option is only available for events which are not sub events and if other events exist in the same time period.

1. On the Conference Diary select the event to be converted to a sub event.

2. Select CONVERT AS SUB EVENT from the short-cut menu.

   A list of all events within the time period is displayed.

3. Select the required event and click OK.

   The event is now converted to be a sub event.

View Sub Events

If an event has sub events then this option displays all the sub events linked to the selected master event with the possibility to edit or change; the event, the function space, the company and/or contact as well as displaying or adding new resources, tasks or activities.

1. On the Conference Diary select a master event.

2. Select VIEW SUB EVENTS from the short-cut menu.

   A list of all sub events for the selected event is displayed.

Convert as Master Event

This option prompts the user to convert the selected sub event into a master event. This option is only available for sub events.

1. On the Conference Diary select the event to be converted to a master event.

2. Select CONVERT AS MASTER EVENT from the short-cut menu.

3. Select either NEW FUNCTION SPACE to select a new function space or select WAITLIST to keep the existing function space but set the status to Waitlist.

4. If NEW FUNCTION SPACE is selected then the New Function Space dialog box is displayed and another function space can be booked.

5. If WAITLIST is selected then the event status is changed to waitlist. If waitlisted events already exist, then a message is displayed asking if you want to adjust the priority list.
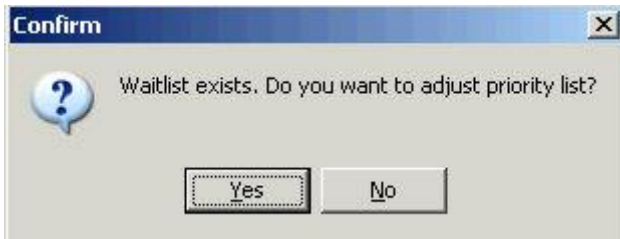
6. Select YES to view the priority waitlist

View Master Event

If a master event exists then this option displays the master event linked to the selected sub event with the possibility to edit or change; the event, the function space, the company and/or contact as well as displaying or adding new resources, tasks or activities.

1. On the Conference Diary select a sub event.

2. Select VIEW MASTER EVENT from the short-cut menu.

The Master Event Details dialog box is displayed.

Note: Sub events are displayed with a green S and green triangle

and master events with a pink M and pink triangle

 Sub Event functionality is controlled by the parameter USE MASTER-SUB EVENTS under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

View all events

This option is used to view all events for a particular booking. Events and resources can be added, edited or deleted; in addition all other options can be accessed.

Print

This option is used to print correspondence related to the booking. See the *Suite8 Conference & Catering Management manual*.

Roomplanner

This option opens the Roomplanner module; see the *Suite8 Roomplanner manual*.

Booking Options

- Notes
- Billing Instructions
- User Log
- Financial Accounts
- Postings
- Participants List

See the *Suite8 Conference & Catering Management manual* for more details on the Conference Diary Booking Options.

Function Space – Closed Periods

Occasionally a function space or combination of function spaces needs to be closed off for a period of time for reasons such as maintenance or refurbishment. A function space which already contains an event cannot be closed off.

You may close a function space via:

- The conference diary
- Function Space Definition under Setup → Configuration → Conference Management → Function Spaces

ⓘ The colour to display closed periods in the conference diary is defined via the option COLOUR FOR CLOSED PERIOD under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

How to create a closed period

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen or press F3.
2. Point to the function space, date and time to be closed.
3. Left-click and hold down the left-mouse button.
4. Drag the mouse to the right until the required time is selected and release the left-mouse button, the short-cut menu is displayed.

> **Note:** To close more than one day drag the mouse to the right in order to access the short cut menu and then define the dates and times on the Closed Periods dialog box.

5. Select CLOSE OFF FUNCTION SPACE, the closed periods dialog box appears.
6. Complete the dates, times and reason for closing the function space.
7. Click OK.

   The closed period is displayed in the conference diary in the colour defined for closed periods.

How to edit a closed period

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen or press F3.
2. Point to the closed period to be edited and right-click to display the short-cut menu.
3. Select EDIT CLOSE PERIOD.
4. Make the changes on the closed period dialog box.
5. Click OK.

   The closed period is updated on the conference diary.

> **Note:** Closed periods for the past can not be updated.

How to delete a closed period

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen or press F3.
2. Point to the closed period to be deleted and right-click to display the short-cut menu.
3. Select DELETE CLOSE PERIOD, a confirmation message is displayed.

4. Click YES.

   The closed period is removed on the conference diary.

Printing the Conference Diary

You can print the Conference Diary either for a single day, for a week, for a month or for a selected date range. In order to print the conference diary the required VIEW TYPE must be selected before pressing the PRINT button.

- On the monthly view calendar weeks are displayed on both the preview and the print out.
- On all views a legend of the booking statuses is displayed on both the preview and the print outs.

To print the Conference Diary

1. Click the MEETING PLANNER menu and select CONFERENCE DIARY to display the Conference Diary screen.

2. From the Conference Diary screen, select DAY, WEEK or MONTH in the VIEW TYPE box.

3. Click PRINT, the display print dialog box is displayed.

4. Select the print settings. For details on the print settings see the Conference Diary Print Options table below.

5. Click PRINT to print the conference diary.

   If the view type MONTH is selected then the conference dairy can also be exported to Excel by pressing the EXCEL button.

Conference Diary Print Options

Field	Definition
Display horizontal lines	If selected, horizontal lines will be shown in the printout of the diary.
Horizontal lines type	Select the type of horizontal lines that should be displayed.
Display vertical line	If selected, vertical lines will be shown in the printout of the diary.
Vertical lines type	Select the type of vertical lines that should be displayed.
Font	Select the font that should be used for the print out.
Display status colour	If selected the diary will be displayed and printed in the original colours. In other words, it will print in the colours that have been defined in the status definition.
Default colour	Select the default colour in which the diary should be printed.
Default Colour	If selected the diary will be displayed and printed in the default colour defined.
Row Height	Select the height for each row on the printout.
Print 2 weeks layout	Select this option to print the monthly view with two weeks on one page. If not selected then all days will be printed on one page. **Note:** This option is only displayed if the VIEW TYPE Month is selected.

Print Range	The defined range (date/time) will be printed. If the FULL DIARY check box is selected then the default number of days defined in configuration will be printed.
	Note: The Full Diary check box is only displayed if the VIEW TYPE Day is selected.

The number of days to be printed in the conference diary when FULL DIARY is selected is defined by the parameter DEFAULT LOADED DAYS FOR DIARY under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

5   Conference Floor Plan

Conference Floor Plan

The CCM Floor Plan screen displays all the function rooms in the property, by floor, in a graphic diagram format.

The conference floor plan shows the status of each function room at a glance, enabling the employees to see the details and location of each function space and floor; a general overview for all function spaces can also be defined.

How to view the floor plan

Click the QUICK KEYS menu and select CONFERENCE FLOOR PLAN or press SHIFT + ALT + F3.

The CCM Floor Plan screen is displayed showing the conference rooms defined on the first tab.

CCM Floor Plan screen buttons and icons

Click this button	To do this
[icon: scale to screen]	Scale the floor plan to the size of the screen
[icon: resize]	Resize the floor plan to its original size.
[icon: zoom in]	Increases the size of the floor plan.
[icon: zoom out]	Reduces the size of the floor plan.
100% ▼	Change the size of the screen display.
↻ Refresh	Refresh the floor plan screen.
☑ HTML	Displays the Print the floor plan screen.
Events with no assigned function spaces ☐	Displays a list of events which have not yet been allocated a function space.
<S>	Indicates that this function space is shareable.
<C>	Indicates that this function space is a combination of two or more individual function spaces. Combination rooms are automatically blocked as soon as one of the combination rooms is booked. The name of the company, contact or booking name is shown on the main function space and again within brackets on the combination rooms.
OPT TEN DEF WAI WEB	Each event status has a defined colour. Events are displayed in the colour according to their event status. However, each booked event displays the Company, contact or booking name, number of persons and the type of event on the coloured bar. Additional icons are displayed as described above and for combination rooms the combination description is also displayed.
✖ Close	Close the CCM floor plan screen.

Changing the view of the Floor Plan screen

You can change the view of the CCM floor plan screen by:

- Viewing a different floor - you can view each floor of the hotel on the floor plan screen by selecting the respective floor tab.

- Selecting a zoom option - you can change the view of the CCM floor plan screen by selecting one of the zoom options. The zoom options allow you to change the view by either making the rooms on the screen appear larger, smaller, or fit to the size of the screen.

Zoom Options

Click this button	To do this
	Scale the CCM floor plan to fit the size of the screen.
	Re sizes the CCM floor plan to its original size.
	Increases the size of the CCM floor plan display.
	Reduces the size of the CCM floor plan display.

Moving an event on the floor plan

1. Click the QUICK KEYS menu and select CONFERENCE FLOOR PLAN or press SHIFT + ALT + F3.

2. Point to the event to be moved and hold down the left-mouse button.

3. Drag the event to the function space; release the left-mouse button, a confirmation message is displayed.

4. Click YES to move the event to the new function space.

> **Note:** For shareable function spaces up to 10 events can be displayed in the graphical function space box; all events are displayed in the HTML.
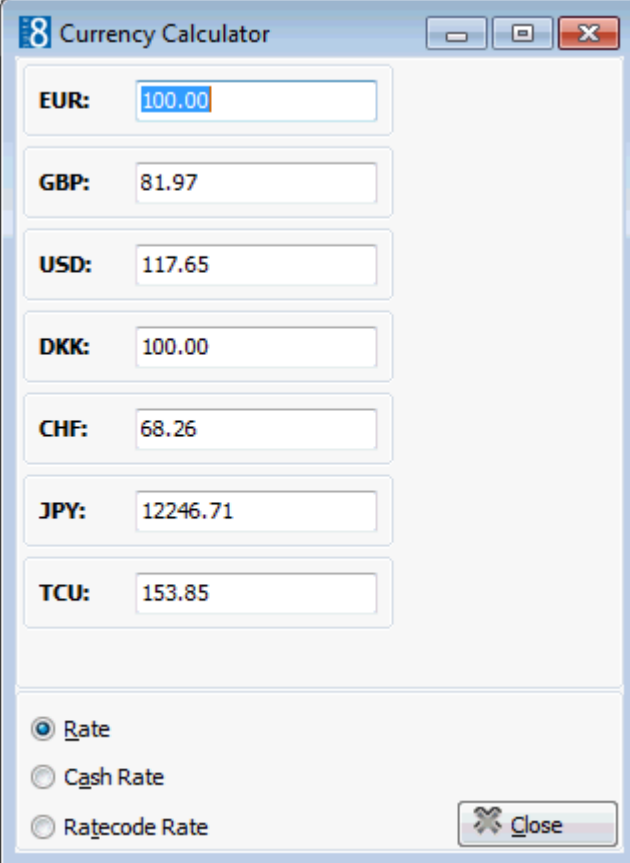
6   Currency Calculator

The Currency Calculator may be used to enter an amount in any currency defined in the system and see the value of this amount in any other currency defined in the system.

How to open the currency calculator

Click the QUICK KEYS menu and select CURRENCY CALCULATOR or press SHIFT + ALT + R.

The Currency Calculator screen is displayed.

How to operate the currency calculator

1. Click the QUICK KEYS menu and select CURRENCY CALCULATOR or press SHIFT + ALT + R to display the Currency Calculator dialog box.

2. Click one of the EXCHANGE RATE ACTIONS radio buttons.

3. Select a foreign currency and type the monetary amount.

    The foreign currency monetary amounts are updated.

4. Click CLOSE, the currency calculator dialog box is closed.

Currency calculator exchange rate actions

Radio button	Definition
Rate	The exchange rate used when closing or paying a bill with foreign currency.
Cash Rate	The exchange rate used when a guest wants to exchange money.
Rate Code Rate	The rate used in the conversion of foreign rate codes. Rate codes can be configured in foreign currency, but the posting is made in local currency.

The exchange rates displayed are defined via the option EXCHANGE RATES under Setup → Configuration → Cashiering.

The home currency is listed first and the remaining currencies according to the order defined via the option CURRENCIES under Setup → Configuration → Cashiering.

7   Event Vacancies

The Event Vacancies quick key allows the user to search for repeating vacancies. For example, this option may be used to check function space availability for every 2nd Monday from 7pm to 9pm for the next year.

How to search for event vacancies

1. Click the QUICK KEYS menu and select EVENT VACANCIES or press CTRL + SHIFT + F3.

    The Event Vacancies screen is displayed.
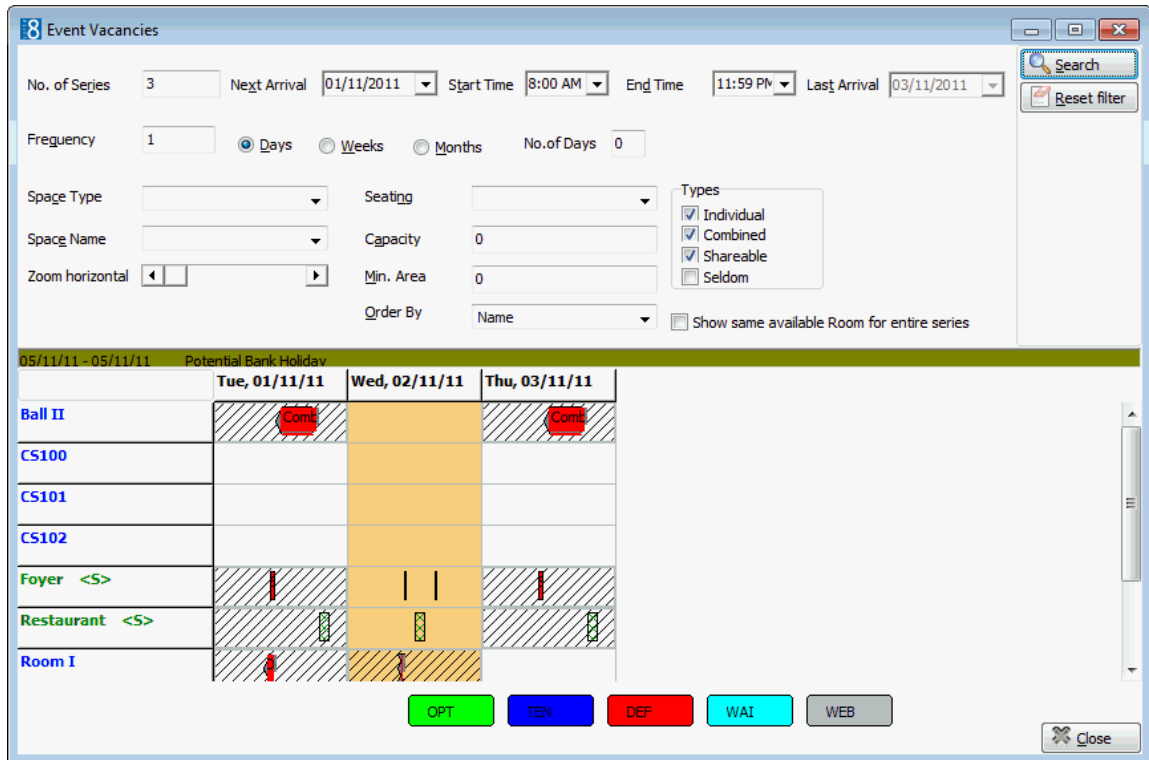
2. In the NO. OF SERIES box enter the number of bookings required. This option can also be left blank and the number of series will be calculated based on the Next Arrival and Last Arrival dates.

3. Type the arrival date of the first vacancy required in the NEXT ARRIVAL box or click the drop down arrow and select a date from the calendar.

4. In order to limit the search to a valid time range type the start time in the START TIME box and the end time in the END TIME box or click the drop down arrow and select a time. The start time is completed automatically with the default start time for the conference diary and the end time is completed automatically with 23:59.

5. If the NO. OF SERIES option is not used then type the date of the last vacancy required in the LAST ARRIVAL box or click the drop down arrow and select a date from the calendar.

6. Enter the FREQUENCY, this is the interval of the repeating vacancies, click either DAYS, WEEKS or MONTHS, for example:

    If the vacancies required are every 10 days then enter **10** and select the DAY option, the system will search every 10th day.

    If the vacancies required are every 5 weeks then enter **5** and select the WEEK option, the system will search every 5th week.

If the booking occurs every month then a day may be defined. If the vacancies required are every 2nd month on a Monday then enter **2**, select the MONTH option and select MONDAY, the system will search for vacancies on a Monday in every 2nd month, the day takes priority which means that the interval may not be exactly two months but maybe 2 months and 2 days.

If the vacancy should be every 2nd month exactly then select the day NOT DEFINED, this way the vacancies will be exactly two months apart regardless of the day.

7. In the NO. OF DAYS option enter the number of consecutive days to search for, e.g. available room between June and July, but must be available for 4 consecutive days.

8. Select the SPACE TYPE required from the drop-down list.

9. If a specific space is required, then select the SPACE NAME from the drop-down list.

10. Select the SEATING STYLE required from the drop-down list.

11. Enter the CAPACITY required.

12. Enter the MIN. AREA required.

13. Select the order in which the function spaces should be listed from the ORDER BY drop-down list.

14. In the TYPES selection, select the options which apply to your search.

15. If the option SHOW SAME AVAILABLE ROOM FOR ENTIRE SERIES is selected, then the rooms which are available over the whole period will be displayed with a green circle next to the room name.

16. Click SEARCH, a processing message is displayed.

The vacancies available are displayed in the grid, function spaces which are not available are marked with grey lines.

Event Vacancies

Event Vacancies Search Criteria

Fill this field	With this information
No. of Series	Enter the number of bookings required. This option can also be left blank and the number of series will be calculated based on the Next Arrival and Last Arrival dates.
Next Arrival	Enter the arrival date of the first vacancy required.
Start Time	Type the start time for showing the availability of vacant spaces. The start time is completed automatically with the default start time for the conference diary.
End Time	Type the end time for showing the availability of vacant spaces. The end time is completed automatically with 23:59.
Last Arrival	If the No. of Series option is not used then enter the date of the last vacancy required.
Frequency	Enter the Frequency; this is the interval of the repeating vacancies, click Days, Weeks or Months.
Space Type	One of the pre-defined space types can be selected for filtering. Only those function spaces that apply to the selected space type will be displayed when the search is activated.
Space Name	From the drop-down list select one of the function space names. Only the selected function space will be displayed when the search is activated.
Zoom Horizontal	Used to change the zoom settings horizontally of the time/date slots, to expand the view for example. The zoom settings are stored per user. After an upgrade or if using them for the first time, the zoom settings can be by default set to the minimum, but once changed they will be the same every time the user logs on.
Seating	Select one of the seating arrangements from the list. Only those function spaces that are defined with the selected seating arrangement will be shown when the search is activated. This option can be used in connection with minimum capacity in order to find a suitable room.
Capacity	May be used to search for function spaces that have the minimum capacity entered. Only those function spaces that are defined with the minimum capacity, for example 10 or larger will be displayed. The minimum capacity is taken from the function space configuration screen and does not consider seating arrangement.
Min. Area	May be used to search for function spaces that have the minimum area defined. Only those function spaces that equal or have more than the entered area will be displayed. The area is taken from the function space configuration screen.
Order By	Can be used to change the order in which the function spaces are displayed on the left hand side, the default is by Name. Standard orders are: by Name, Area, Min. Capacity and Max. Capacity. In addition to the standard orders, an unlimited number of custom orders can be defined. A custom order can also be linked to a login so that the preferred custom order is automatically used when the user calls the conference diary.
Types	Individual - only individual rooms will be shown, for example room A.

	Combined - only combination rooms will be shown, for example rooms A/B.
	Shareable - only shareable function spaces will be shown.
	Seldom - only function spaces that have been defined as not to SHOW IN DIARY will be displayed. By default individual, combination and shareable are selected and are displayed unless defined otherwise
Show same available room for entire series	May be used to display rooms which are available over the whole period, an indicator is displayed next to the room name.

ⓘ In addition to the standard orders, an unlimited number of custom orders can be defined via the option CUSTOM ORDERS under Setup → Configuration → Conference Management → Function Spaces.

ⓘ Linking a custom order to a login so that the preferred custom order is automatically used when the user calls the conference diary is defined via the option FUNCTION SPACE ORDER IN DIARY under Miscellaneous → User Settings → Appearance Tab.

ⓘ When selecting the function space type SELDOM only function spaces that have been defined as not to SHOW IN DIARY under Setup → Configuration → Conference Management → Function Spaces → Function Space Definition will be displayed.

8   Event Waitlist Priority

The Event Waitlist Priority quick key allows the user to view events which are currently waitlisted for a particular day. All waitlisted events for the selected day are shown sorted by priority; the priority can be changed manually via the up and down arrows or if the parameter CHANGE WAITLIST PRIORITY AUTOMATICALLY is active then the priority order is changed as soon as a function space becomes available.

To open the event waitlist screen

Click the QUICK KEYS menu and select WAITLIST PRIORITY or press CTRL + W.

The Event Waitlist screen is displayed.
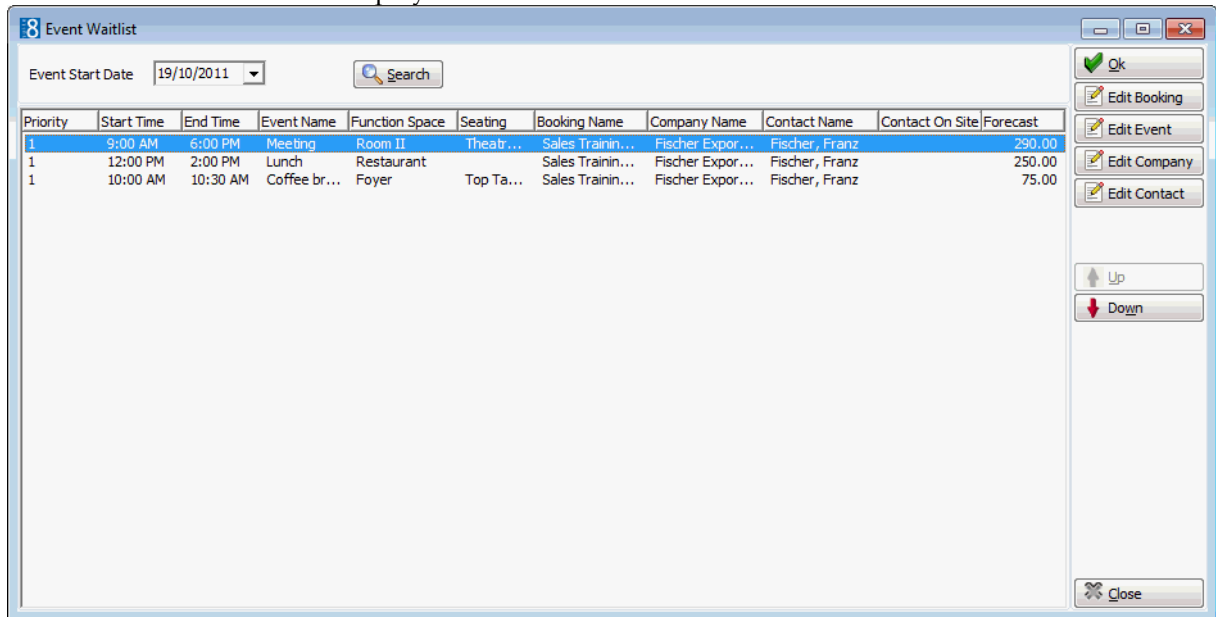
The following options are available from the event waitlist screen:

- Edit Booking - displays the Edit Booking Master screen.
- Edit Event - displays the Edit Event screen.
- Edit Company - displays the profile of the company attached to the booking.
- Edit Contact - displays the profile of the contact attached to the booking.

ⓘ Changing event waitlist priority automatically is controlled by the parameter CHANGE WAITLIST PRIORITY AUTOMATICALLY under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

9 Floor Plan

Using the Floor Plan

The Floor Plan screen displays all the rooms in the hotel, by floor, in a graphic diagram format. The Floor Plan screen allows you to view the status of all the rooms, change the room status, edit an existing reservation, edit out of order information, block a room and display other dialog boxes. The date of the floor plan screen is the system date.

How to view the floor plan

Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

The floor plan screen is displayed showing the floor defined by the first tab, usually the 1st floor.
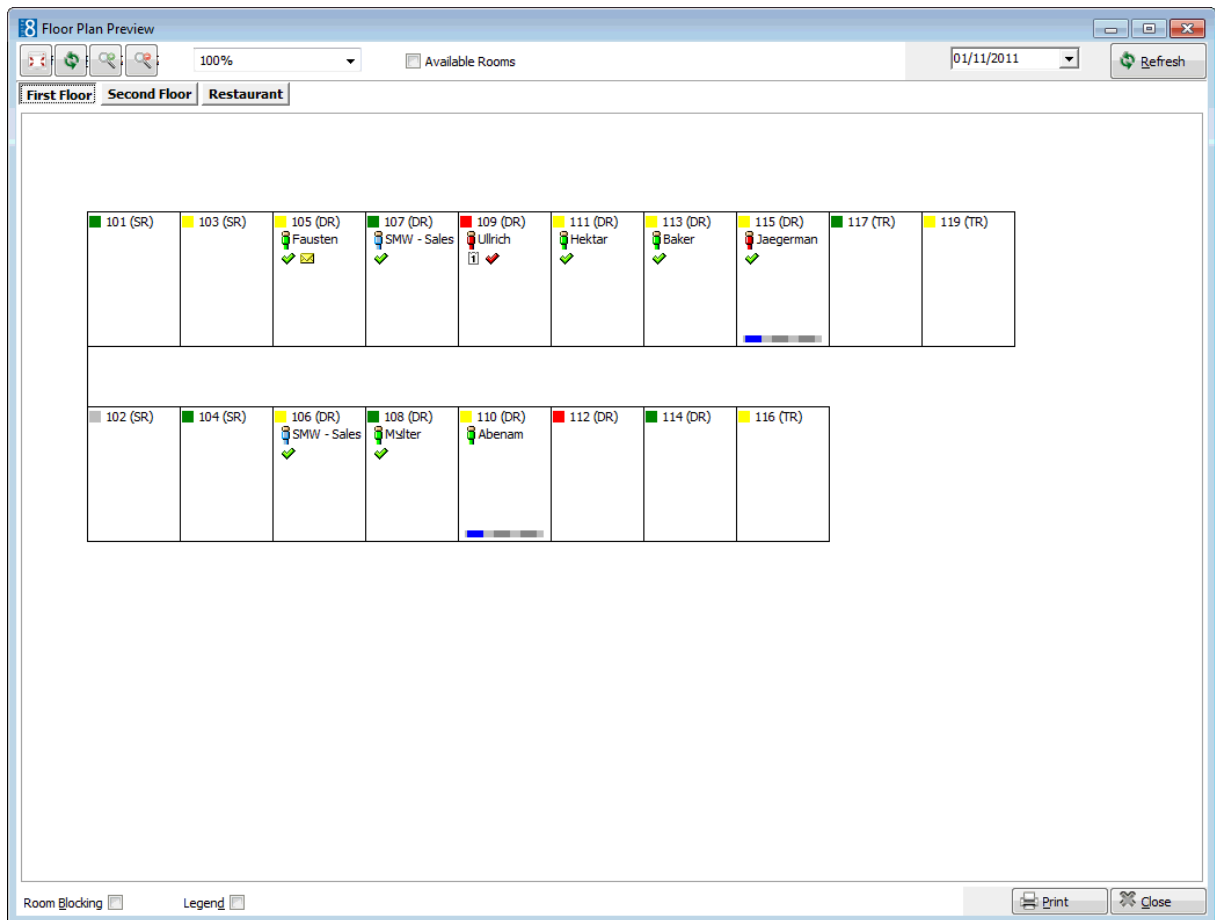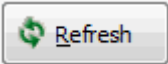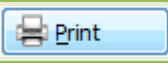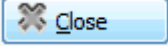
Understanding the Floor Plan

Floor Plan screen field names

Field Name	Explanation of the field
Available Rooms	All rooms which are vacant are highlighted on the grid.
Room Blocking	Opens a dialog box that allows you to block a room for a specific guest.
Legend	Displays a map that lists the icons used on the Floor Plan screen.

Floor Plan screen buttons

Click this button	To do this
	Scale the floor plan to the size of the screen
	Re sizes the floor plan to its original size.
	Increases the size of the floor plan.
	Reduces the size of the floor plan.
100%	Change the size of the screen display and the size of the room grid box.
Refresh	Refresh the floor plan screen.
Print	Print the floor plan screen.
Close	Close the floor plan screen.

Floor Plan screen legend icons

Icon	Legend Term	Description of the icon
107 (DR) Aceti		The room grid box that is selected.
	Dirty	The room is dirty.
	Clean	The room is clean.
	Touched Up	The room needs to be touched up.
	Inspected	The room is inspected.
	Inspected by GM	The room is inspected by the General Manager.
	Checked-In	The guest has checked into the hotel.
	Checked-Out	The guest has checked out of the hotel.

	Arrival	The guest is due to arrive or has arrived today.
	Departure	The guest is due to depart or has departed today.
	Stayover	The guest is a stay over.
	Shared	Two or more guests are sharing a room.
	Day Use	The room is in use for the day only.
	Message	The guest has a message.
	Locator	Indicates that the guest can be found at a specific location at a specific time.
	Trace	Indicates that a trace exists for this reservation.
	Scheduled Room Move to	Indicates that a reservation is scheduled to be moved to this room.
	Scheduled Room Move from	Indicates that a reservation is scheduled to be moved from this room.
	Room Move to	Indicates that a reservation was moved to this room.
	Room Move from	Indicates that a reservation was moved from this room.
	Out of Order / Service	Indicates that this room is out of order or out of service.
	Multi-guest	Indicates that this is a multi-guest reservation.

Displaying the legend

The legend is a map of the icons used in the floor plan screen.

To display the legend

From the floor plan screen, check the check box next to LEGEND.

The legend is displayed on the right-hand side of the screen.

Legend

Front Office Status

✔ Checked-In

✔ Checked-Out

Guest Information

🔲 Arrival

🔲 Departure

🔲 Stayover

👥 Shared

🔢 Day Use

✉ Message

🔍 Locator

📄 Trace

🔺 Scheduled Room Move to

🔺 Scheduled Room Move from

🔺 Room moved to

🔺 Room moved from

Housekeeping Status

🔲 Out Of Order /Service

⬛ Dirty

⬛ Clean

⬛ Touched up

⬛ Inspected

⬛ Checked by GM

Displaying corresponding dialog boxes

From the floor plan screen you can display corresponding dialog boxes. Point to a room on the floor plan diagram and right-click to display the short-cut menu.

The dialog boxes available from the short-cut menu are:

- Select Reservation - displays the edit reservation screen with the reservation information for that guest.
- Room Info - displays the room information dialog box with the current room status and room details.
- Room Type Info - displays the room type info dialog box with the housekeeping status statistics for this room type.
- Room Status - displays the edit housekeeping status dialog box with the options to change the housekeeping status of the room.

Corresponding dialog boxes

Select this command	To display this dialog box
Select Reservation	The edit reservation screen appears displaying the reservation information for that guest.
Room Info	The room information dialog box appears displaying the current room status and the room details. The Extras tab displays additional room configuration details, such as additional text or a picture of the room.
Room Type Info	The room type info dialog box appears displaying statistics and details about the room type.
Room Status	The edit housekeeping status dialog box appears displaying the options to change the housekeeping status of the room. For example, you change a dirty room to a clean room.

How to display the current room status and room details

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Point to a room on the floor plan diagram and right-click to display the short-cut menu.

3. Select ROOM INFO, the Room Information dialog box is displayed.

4. Click the EXTRAS tab to display additional room information.

5. Click CLOSE, the Room Information dialog box is closed.

Room Information dialog box

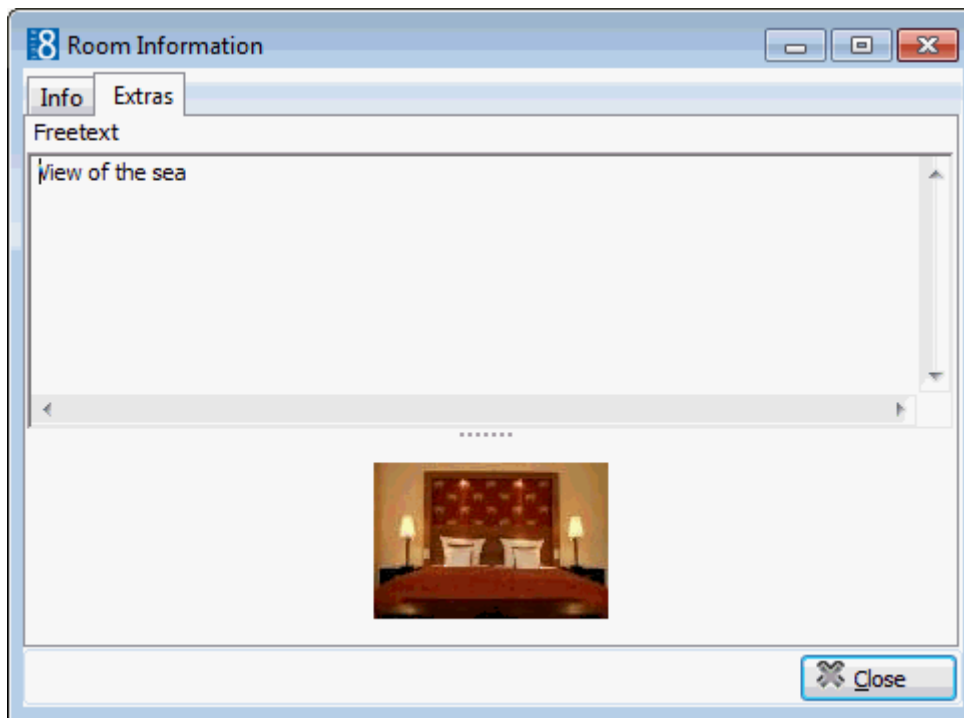| Field Name	Explanation of the field
Room	The number of the room.
Type	The room type.
Section	The day and evening housekeeping sections that the room is assigned to.
Description	The room type description.
Blocked From	The date the room is blocked from.
Blocked To	The date the room is blocked to.
Remark	Additional information regarding the room blocking.
Features	The room features.
FO Status	The current front office status - Occupied or Vacant.

How to display the room type info

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Point to a room on the floor plan diagram and right-click to display the short-cut menu.

3. Select ROOM TYPE INFO, the Room Type Info dialog box is displayed.
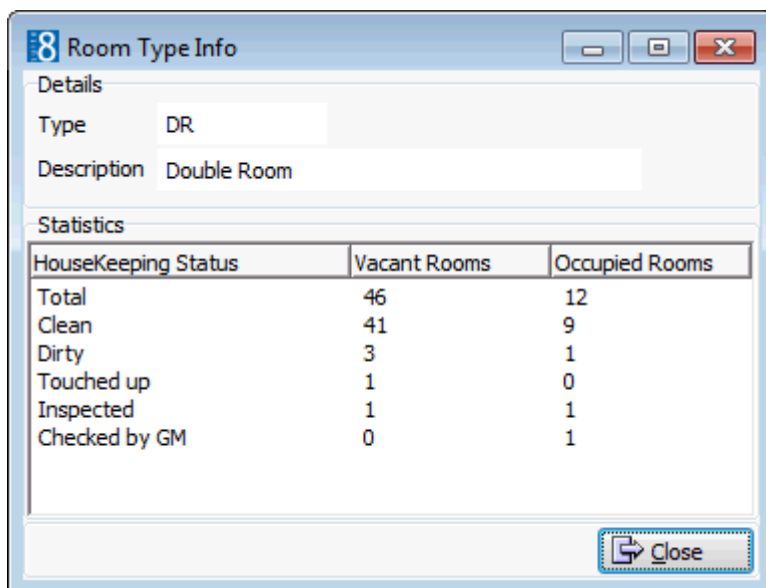
4. Click Cʟᴏꜱᴇ, the Room Type Info dialog box is closed.

Room Type Info dialog box

Field Name	Explanation of the field
Type	The room type.
Description	The room type description.
Total	The total number of vacant rooms and the total number of occupied rooms for this room type.
Clean	The number of clean vacant rooms and clean occupied rooms for this room type.
Dirty	The number of dirty vacant rooms and dirty occupied rooms for this room type.
Touched Up	The number of touched up vacant rooms and touched up occupied rooms for this room type. (Only if configured in setup.)
Inspected	The number of inspected vacant rooms and inspected occupied rooms for this room type. (Only if configured in setup.)

How to change the housekeeping status of the room

1. Click the Qᴜɪᴄᴋ Kᴇʏꜱ menu and select Fʟᴏᴏʀ Pʟᴀɴ or press Cᴛʀʟ + F.

2. Point to a room on the floor plan diagram and right-click to display the short-cut menu.

3. Select Rᴏᴏᴍ Sᴛᴀᴛᴜꜱ, the Edit Housekeeping Status dialog box is displayed.

4. Select a status from the housekeeping status list.

5. Click OK, the Edit Housekeeping Status dialog box is closed and the housekeeping status of the room is changed.

Changing the view of the floor plan screen

You can change the view of the floor plan screen by:

- Viewing a different floor - you can view each floor of the hotel on the floor plan screen by selecting the respective floor tab.

- Selecting a zoom option - you can change the view of the floor plan screen by selecting one of the zoom options. The zoom options allow you to change the view by either making the rooms on the screen appear larger, smaller, or fit to the size of the screen.

Zoom Options

Click this button	To do this
	Scale the floor plan to fit the size of the screen.
	Re sizes the floor plan to its original size.
	Increases the size of the floor plan display.
	Reduces the size of the floor plan display.

New reservation on the floor plan

To create a new reservation

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Point to a vacant room and right-click to display the short-cut menu.

3. Select NEW RESERVATION, the Profile Search screen appears.

4. Select a profile and complete the reservation.

   When you click OK from the edit reservation screen, the reservation screen is closed and the floor plan screen reappears. If the reservation is for today then the guest name and a green person icon are displayed in the room grid box indicating that the guest is due to arrive today.

Editing a reservation on the floor plan

To edit and/or view a reservation

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Select the reservation that you want to edit and/or view and double click.

   The Edit Reservation screen is displayed.

   or

   Point to the selected reservation and right-click to display the short-cut menu.

3. Select EDIT, the Edit Reservation screen is displayed.

4. Make the changes on the Edit Reservation screen.

5. Click OK.

   The floor plan screen is displayed.

Checking in a reservation on the floor plan

To check in a reservation

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Point to the reservation to be checked in and right-click to display the short-cut menu.

3. Select CHECK IN, a message is displayed indicating that the check-in was successful.

4. Click OK, to close the check-in successful message

    Depending on the interfaces installed additional messages may be displayed.

    For example, if an interface for key cards is installed, the Make Key dialog box is displayed.

5. Click the MAKE KEY button to print a key card.

    A green check mark appears in front of the guest name on the floor plan indicating that the reservation has been checked in.

🛈 The check in successful message is controlled by the parameter DISPLAY MESSAGE WHEN CHECK IN WAS SUCCESSFUL under Miscellaneous → User Settings → Reservation.

🛈 Prompting for a credit card at check-in is controlled by the parameter ASK FOR CREDIT CARD AT CHECK-IN under Setup → Configuration → Global Settings → Reservation → Reservation 1 tab.

🛈 Daily charges can be posted automatically after check-in by selecting the parameter POST DAILY CHARGES AFTER CHECK-IN under Setup → Configuration → Global Settings → Reservation → Reservation 3 tab. The charges are posted using the night audit cashier ID and there is no user notification that the daily charges have been posted.

The cashier login and then the guest folio for the checked-in guest can be displayed right after check in by selecting the parameter SHOW BILLING AFTER CHECK-IN under Setup → Configuration → Global Settings → Reservation → Reservation 3 tab. If sharers were checked-in then the guest folio is displayed for all sharing guests.

Undoing a check in on the floor plan

To undo a check in

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Point to the reservation to be unchecked in and right-click to display the short-cut menu.

3. Select UNDO CHECK IN, the select room status dialog box is displayed.

4. Select a room status from the list.

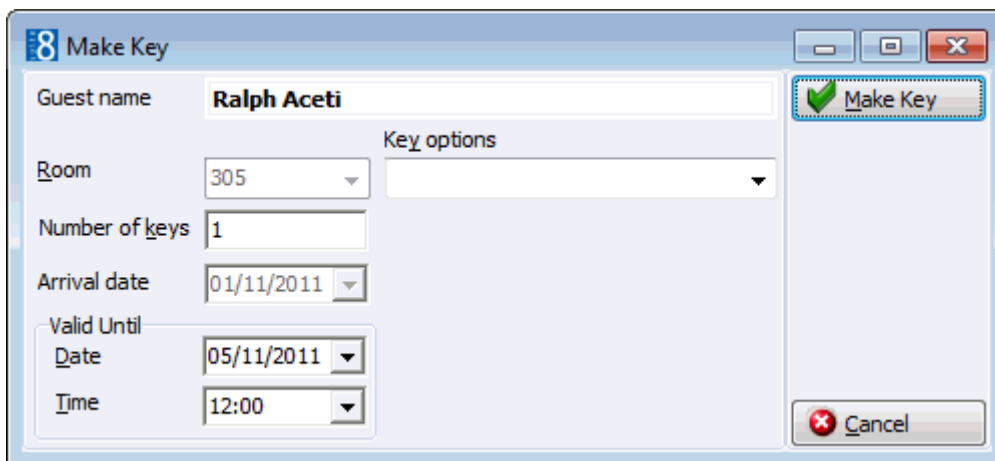5. Click OK, the green check mark indicating that the reservation has checked in is removed.

Checking out a reservation on the floor plan

To check out a reservation

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Point to the reservation to be checked out and right-click to display the short-cut menu.

3. Select CHECK OUT, the Cashier Password dialog box to access the check out options is displayed.

4. Login and check out the guest.

5. Click CLOSE on the Check Out screen, the check out screen is closed.

6. The floor plan reappears with a red check mark in the room grid box indicating that the reservation has been checked out.

Undoing a check out on the floor plan

To undo a check out

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. To undo a check out, select the required reservation by placing the cursor on the room grid box, then right-clicking to display the short-cut menu.

3. Select UNDO CHECK OUT, the reinstate message is displayed.

4. Click YES, the undo check out message is displayed.

5. Click OK.

6. The floor plan screen reappears with a green check mark in the room grid box indicating that the reservation has been checked back in.

Reinstate/Undo checkout functionality is controlled by the user right REINSTATE/UNDO CHECKOUT under Setup → Configuration → Users → User Definition → Rights → Cashiering.

Changing the housekeeping status on the floor plan

You can change the housekeeping status of a room. For example, you change a dirty room to a clean room.

To change the housekeeping status of the room

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Point to a room on the floor plan diagram and right-click to display the short-cut menu.

3. Select ROOM STATUS, the Edit Housekeeping Status dialog box is displayed.

4. Select a status from the housekeeping status list.

5. Click OK, the Edit Housekeeping Status dialog box is closed and the housekeeping status of the room is changed.

Moving a reservation on the floor plan

There are several different ways to move a guest reservation to a different room.

Move the reservation via drag-and-drop before check in

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Point to the reservation to be moved and hold down the left-mouse button.

3. Drag the reservation to the desired room; release the left-mouse button, a confirmation message is displayed.

4. Click YES to move the reservation to the new room.

> **Note:** If the room type is different, a confirmation message to change the room type is displayed.

Move the reservation via drag-and-drop after check in

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Point to the reservation to be moved and hold down the left-mouse button.

3. Drag the reservation to the desired room; release the left-mouse button, a confirmation message is displayed.

4. Click YES to move the reservation to the new room.

   A second dialog box is displayed asking you to confirm if the guest is physically moving room now.

5. If the actual room move is taking place now then select YES, if the actual room move will take place at a later time then select NO.

   The room number is changed and the reservation is moved to another room on the floor plan screen.

> **Note:** If the room type is different, a confirmation message to change the room type is displayed.

Move the reservation via the edit reservation screen

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Point to the reservation to be moved and double-click to display the edit reservation screen.

3. In the ROOM box type the new room number or click the drop-down arrow and select a room number from list.

4. Click OK to move the reservation to the new room.

Perform a scheduled room move

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Point to the reservation with the scheduled room move, indicated by 🏠 and right-click to display the short-cut menu.

3. Select PERFORM ROOM MOVE, the Room Move dialog box is displayed.

4. Select the reservation and click the MOVE button, a confirmation message is displayed.

5. Click OK to move the reservation to the new room.

6. Click CLOSE.

Cancelling a reservation on the floor plan

A reservation can be cancelled if the guest has not checked in.

To cancel a reservation

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Point to the reservation to be cancelled and right-click to display the short-cut menu.

3. Select CANCEL RES, the cancel reservation dialog box is displayed.

4. In the REASON box click the drop-down arrow, and select a reason from the reasons list.

5. Click YES, a confirmation message is displayed.

   The reservation is cancelled and is no longer shown on the floor plan screen.

Out of Order and Out of Service rooms on the floor plan

From the floor plan screen you can change the status of a room to Out of Order or Out of Service and edit all relevant information.

Place a room out of order or out of service

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Point to the out of order/out of service room and right-click to display the short-cut menu.

3. Select OUT OF ORDER ROOM STATUS, the Out of Order dialog box is displayed.

4. Type the starting date for the out of order block in the DATE RANGE field or click the drop down arrow and select a date from the calendar.

5. Type the end date in the TO field box or click the drop down arrow and select a date from the calendar.

6. Click the drop down arrow and select a room blocking STATUS from the status list. Depending on the status type selected it may be necessary to enter a Return time.

7. Click the drop down arrow and select a REASON for blocking the room from the reason list.

8. After the reason is entered, the reason is copied automatically by the program into the REMARKS box. You may keep the existing text or enter new or additional text.

9. Click the drop down arrow and from the RETURN STATUS list select the return status to which you want the room to revert when the Out of Order status is removed.

10. Click SAVE to place the room out of order/out of service, the room is displayed on the Floor Plan marked as out of order/service.

Edit the out of order/out of service information

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. Point to the out of order/out of service room and right-click to display the short-cut menu.

3. Select EDIT, the Out of Order Rooms dialog box is displayed.

4. Make the required changes to the out of order/service record.

5. Click SAVE, the updated out of order/service record is displayed on the floor plan.

 Out of Order functionality is controlled by the user rights VIEW, EDIT, INSERT and DELETE under Setup → Configuration → Users → User Definition → Rights → Housekeeping → Out of Order.

 Out of Service functionality is controlled by the user rights VIEW, EDIT, INSERT and DELETE under Setup → Configuration → Users → User Definition → Rights → Housekeeping → Out of Service.

Available rooms on the floor plan

To highlight available rooms

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. On the floor plan screen, select the check-box next to AVAILABLE ROOMS.

3. All available rooms will be highlighted in pale green [   ] on the floor plan screen.

Blocking a room

You can block a room by opening the Room Blocking dialog box and selecting a room. The room blocking dialog box lists the names of the guests who are due to arrive today and have not yet been assigned a room.

To block a room

1. Click the QUICK KEYS menu and select FLOOR PLAN or press CTRL + F.

2. On the floor plan screen, select the check-box next to ROOM BLOCKING; the Room Blocking dialog box is displayed.

3. To display available rooms, select the check-box next to AVAILABLE ROOMS.

4. Select the guest name from the list.

   Available rooms of the type reserved by the selected guest will appear highlighted in blue [   ] on the Floor Plan. All other available room types are highlighted in pale green [   ].

5. Click and drag the guest name to an empty room grid box, a confirmation message is displayed.

6. Click YES, if the room type assigned is the same as the room type on the reservation then the room is blocked for this guest.

7. If the room is not of the same type as the reservation a confirmation message is displayed. Select YES to block this room for this guest or NO to cancel the room choice.

> **Note:** Depending on the circumstances, you may also be informed that the reserved rate or other options are not available, and may or may not be given the option of an override. In such cases, the user must make the appropriate choice as dictated by management policy.

10   Goals

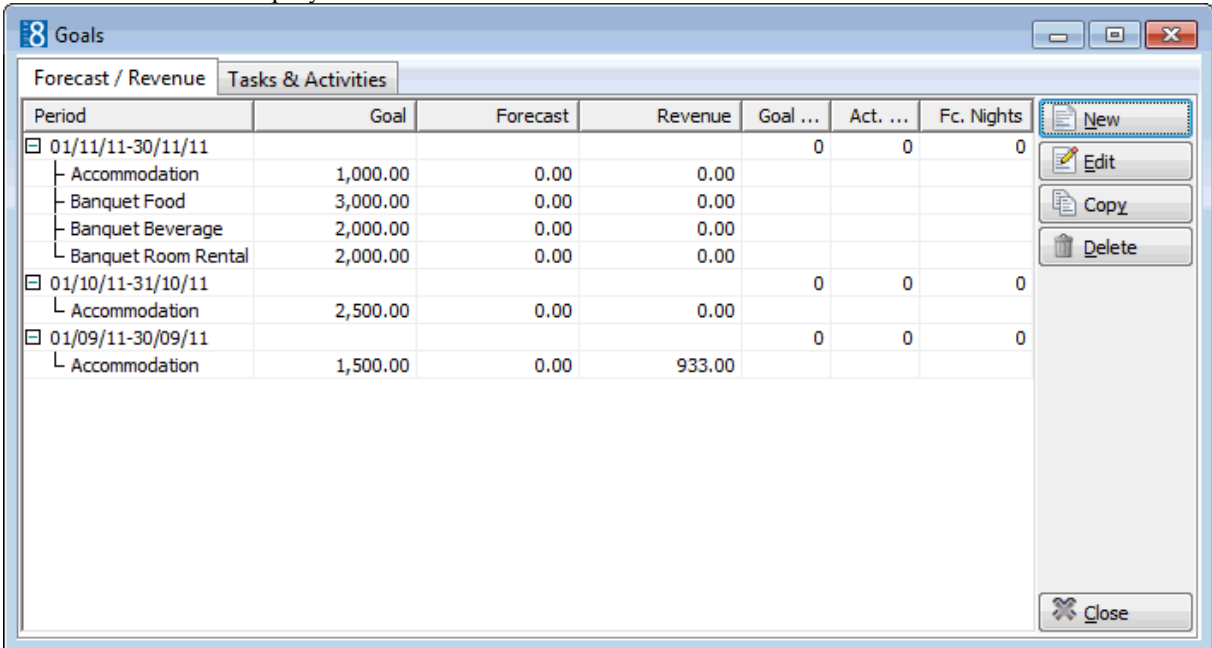The Goals quick key displays the goals for the logged in user, goals can be defined by:

- Number of nights
- Forecast/revenue per department code
- Tasks and activities.

Once a set of goals has been defined for a specific period this can be copied and the dates set for a new period.

To open the goals screen

Click the QUICK KEYS menu and select GOALS or press CTRL + SHIFT + G.

The Goals screen is displayed.

Period	Goal	Forecast	Revenue	Goal ...	Act. ...	Fc. Nights
⊟ 01/11/11-30/11/11				0	0	0
├ Accommodation	1,000.00	0.00	0.00			
├ Banquet Food	3,000.00	0.00	0.00			
├ Banquet Beverage	2,000.00	0.00	0.00			
└ Banquet Room Rental	2,000.00	0.00	0.00			
⊟ 01/10/11-31/10/11				0	0	0
└ Accommodation	2,500.00	0.00	0.00			
⊟ 01/09/11-30/09/11				0	0	0
└ Accommodation	1,500.00	0.00	933.00			

How to enter a Forecast/Revenue goal

1. Click the QUICK KEYS menu and select GOALS or press CTRL + SHIFT + G.

    The Goals dialog box is displayed divided into two tabs.
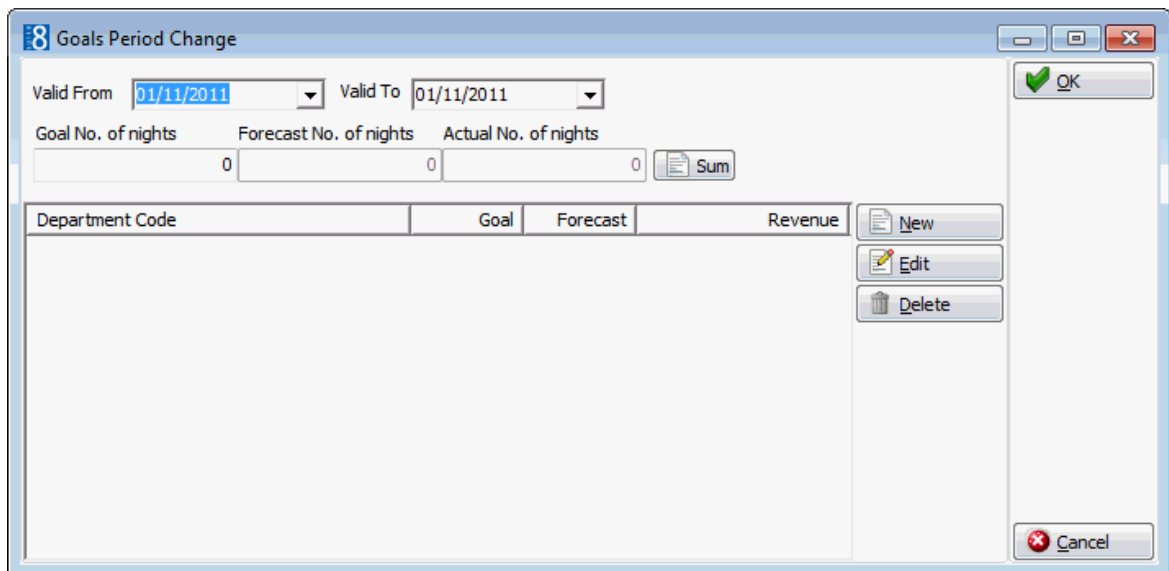
    - FORECAST/REVENUE - displayed by default, any existing forecast and revenue goals for the logged in user are listed.

    - TASKS & ACTIVITIES - lists the task and activity goals for the logged in user.
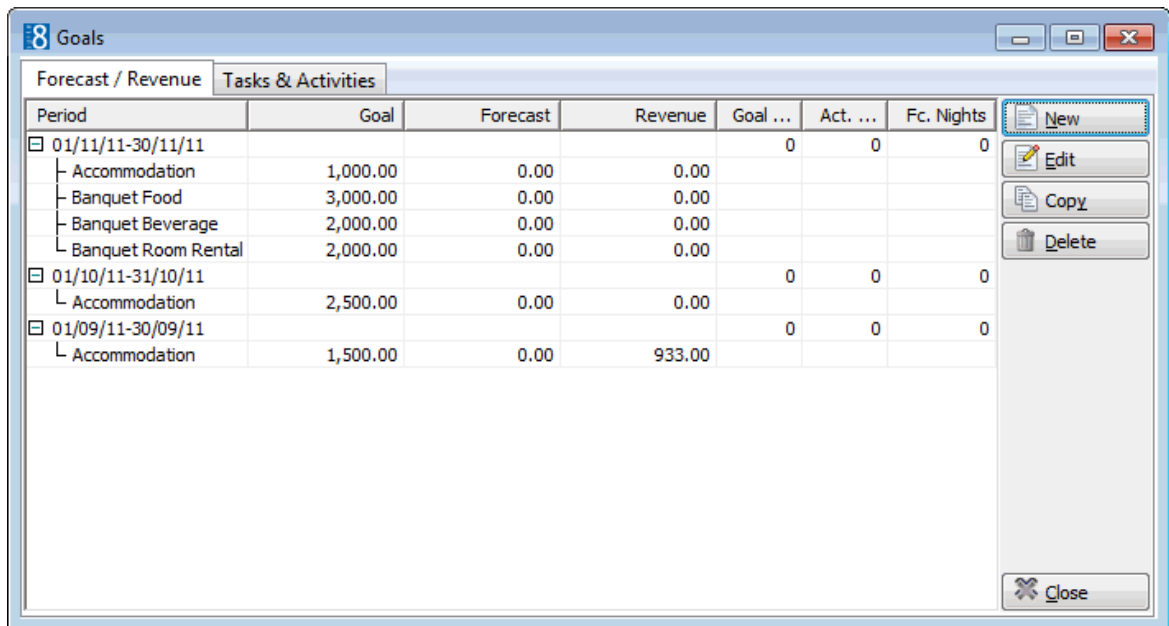
2. Click NEW to display the Goals Period Change dialog box.

3. Complete the VALID FROM and VALID TO fields with the required dates.

4. Enter the GOAL NO. OF NIGHTS; click the SUM button to update the FORECAST NO. OF NIGHTS and ACTUAL NO. OF NIGHTS according to the current reservations for the defined period.

5. Click NEW to define a forecast for a specific department code; the Edit Goal dialog box is displayed.

6. Select a DEPARTMENT CODE and enter the Goal for this department code.

7. Click the SUM button to update the FORECAST and REVENUE according to the current reservations for the defined period.

8. Click OK to save the goal.

   Repeat steps 6 - 8 for all the required department codes.

9. Click OK to close the Goal Period Change dialog box.

How to enter a Task and Activity goal

1. Click the QUICK KEYS menu and select GOALS or press CTRL + SHIFT + G.

2. Click the TASKS & ACTIVITIES tab; any existing tasks and activity goals are listed.

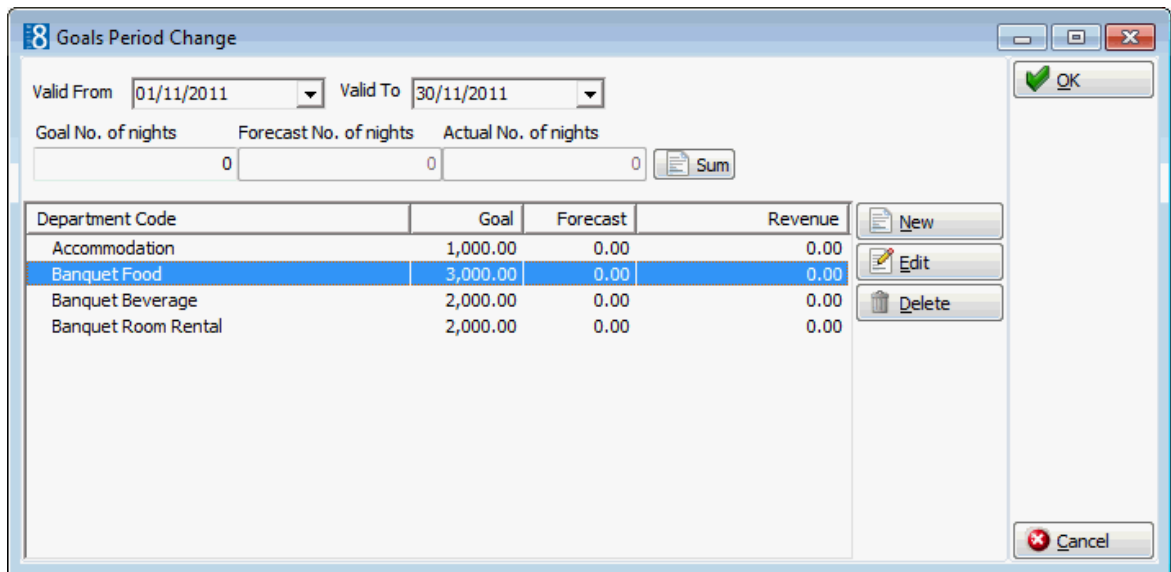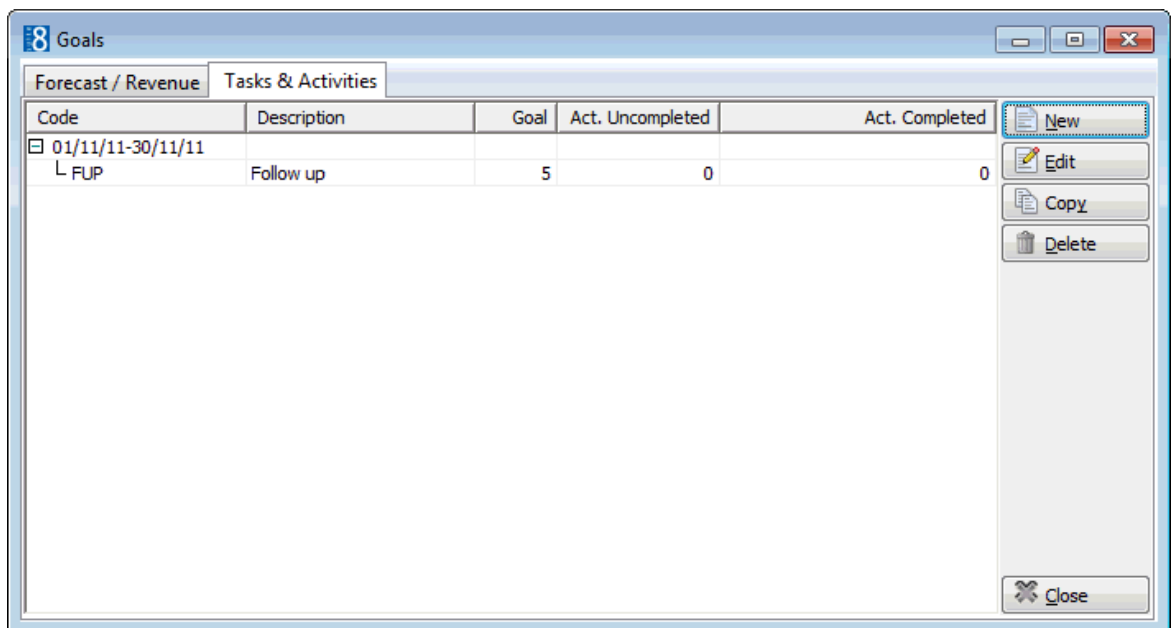3. Click NEW to display the Goals Period Change dialog box.
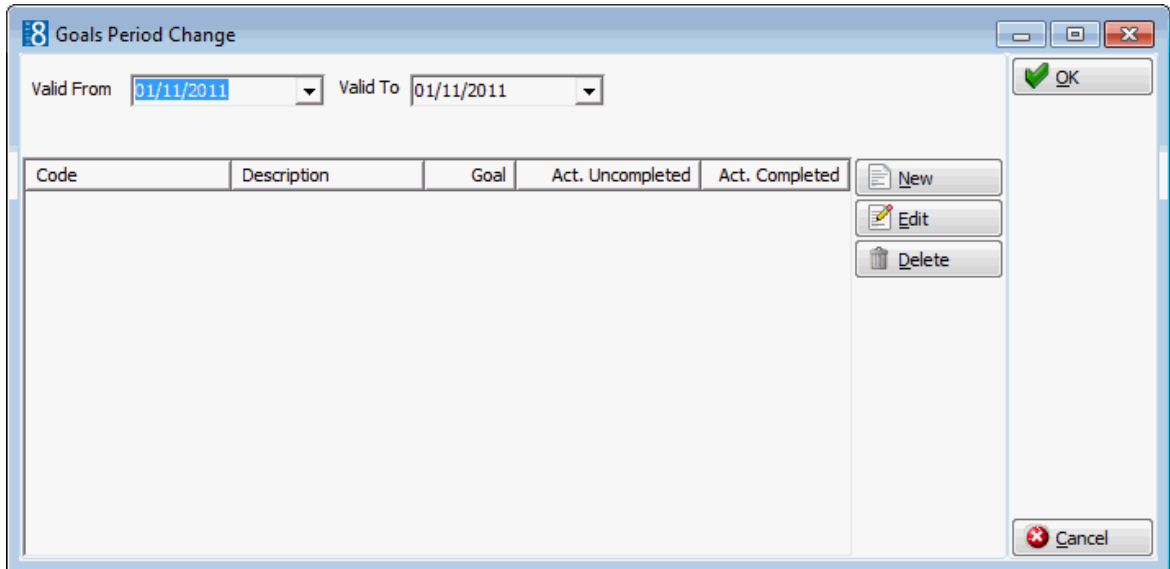
4. Complete the VALID FROM and VALID TO fields with the required dates.

5. Click NEW to display the Task & Activity Goal dialog box.

6. Select a TYPE and enter the Goal for this task or activity

7. Click the SUM button to update the ACTUAL COMPLETED and ACTUAL UNCOMPLETED according to the tasks & activities for the defined period.

8. Click OK to save the goal.

    Repeat steps 6 - 8 for all the required tasks and activities.
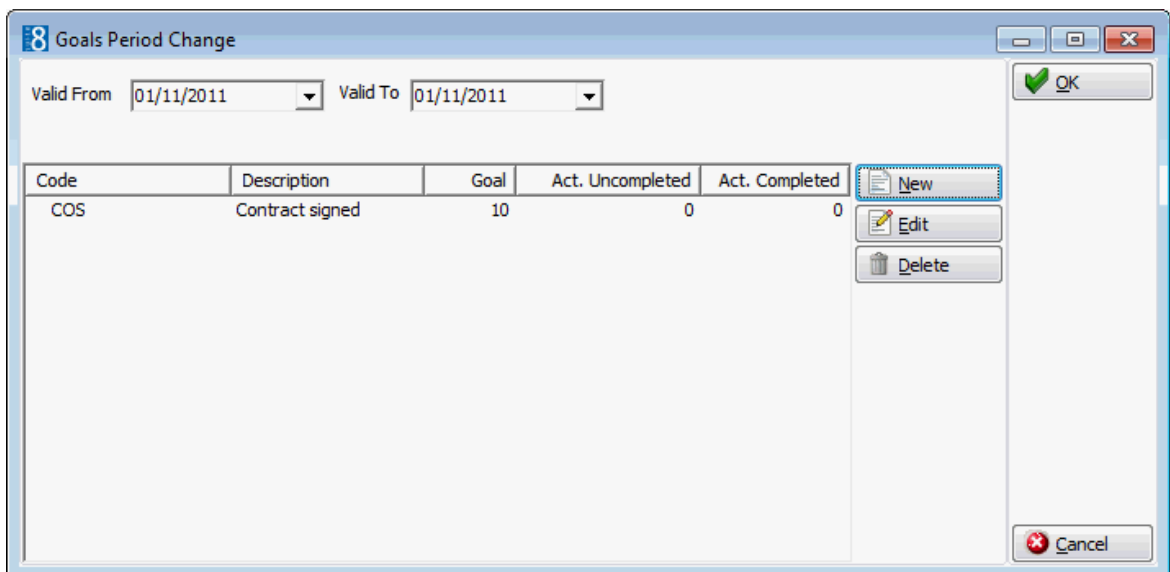
9. Click OK to close the Goal Period Change dialog box.

11 Hotel Segment Statistics

The hotel segment statistic display shows the number of expected reservations by guarantee code per day, per room type or per day, per segment.

The screen is divided into two sections:

- The upper section contains all the selection criteria that can be used to change the display of the hotel segment statistics screen. The segments selected are stored per user and will be automatically selected each time the screen is opened until changed by the user.

- The lower section displays the number of expected reservations by guarantee code per day, per room type or per day, per segment. By default the reservation guarantee codes are displayed on the vertical axis and the dates on the horizontal axis, the axes can be switched by selecting the REVERSE AXES check box.

How to view the hotel segment statistics screen

Click the QUICK KEYS menu and select HOTEL SEGMENT STATISTICS or press CTRL + SHIFT + S.

The Hotel segment statistics screen is displayed.

Note: If the statistics are not displayed immediately then click the REFRESH button. To display the statistic details automatically when the screen is opened select the check box CALCULATE ON POP.

How to change the hotel segment statistics view

1. Click the QUICK KEYS menu and select HOTEL SEGMENT STATISTICS or press CTRL + SHIFT + S.

   The Hotel segment statistics screen is displayed.

2. In the ROOM TYPE / SEGMENT FILTER dialog box, click the required option to display the statistics by all room types, only specific room types or by specific segment.

   > **Note:** The segment selection is stored per user and will be selected by default until changed by the user.

3. In the DATA TO DISPLAY dialog box select the type of data to display, currently only EXPECTED PER GUARANTEE CODE statistics can be displayed.

4. In the TIME INTERVAL dialog box type the start date in the FROM box or click the drop down arrow and select a date from the calendar.

5. Type the number of days in the NO. OF DAYS box or click the up or down arrow to select the number of days.

   Alternatively, type the end date in the TO box or click the drop down arrow and select a date from the calendar.

6. Click REFRESH to update the screen.

🛈 The screen refresh interval is defined via the option GENERIC SCREEN REFRESH INTERVAL IN SECONDS under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4 tab. The time to the next update is shown in the TIME INTERVAL dialog box; however the screen can be refreshed immediately by clicking the REFRESH button.

🛈 Viewing statistics by segment is controlled by the parameter HOTEL SEGMENTATION under Setup → Configuration → Global Settings → Reservations → Reservation 4 tab. In addition HOTEL SEGMENTS must be configured under Setup → Reservations → Room Management → Hotel Segments and Hotel Segment Link.

12   House Status

The House Status screen gives an overall picture of the hotel at that very moment.

Opening the House Status screen

There are three ways to open the house status screen:

- From the Rooms Management toolbar click HOUSE STATUS.
- Press CTRL +H.
- Select HOUSE STATUS from the menu option Quick Keys.

Note: The blue arrow next to a field indicates a link to a corresponding screen. Click the arrow to display additional information.

To recalculate the House Status screen

From the House Status screen, click the REFRESH button.

The House Status screen figures are updated in all categories and fields.

House Status screen total terms

Term	Definition
Total Number of Rooms	The total number of rooms in the property. This is the number of rooms the license is provided for.
Total Rooms to Sell	The number of rooms available for sale. Total number of rooms less all rooms marked with the status 'Deduct from availability'. This usually includes out of order rooms but may include other statuses. For more details see the Version 8 Setup Manual.

House Status screen movement terms

Term	Definition
Expected Arrivals	The number of rooms/pax/children that are due to arrive that day.
Actual Arrivals	The number of rooms/pax/children that arrived that day.
Arrival Rooms Assigned	The number of rooms/pax/children that are due to arrive that day that have room numbers assigned to them.
Expected Departures	The number of rooms/pax/children that are due to depart that day.
Actual Departures	The number of rooms/pax/children that have departed that day.
Day Rooms	The number of rooms occupied and the number of pax and children that occupied rooms during the day that did not stay overnight.
Walk Ins	The number of rooms/pax/children that did not have prior reservations, walked into the hotel, and were checked in via the walk in button on the reservation navigator.
Same Day Reservations	The number of rooms/pax/children that checked in and made the reservation the same day.
Room moves to perform	The number of rooms/pax/children which are scheduled for a room move.
Early Departures	The number of rooms/pax/children that departed earlier than expected.
Current Occupancy	The number of rooms occupied and the number of pax and children occupying rooms at this moment. The % of rooms occupied at this moment.

Note: To display total persons (pax and children) click the option ADD CHILDREN TO PAX, the pax column then displays the total figure.

House Status screen housekeeping terms

Term	Definition
Clean Rooms	**Total:** Total number of occupied and vacant clean rooms. **Occupied:** The number of occupied rooms that are clean. **Vacant:** The number of vacant rooms that are clean.
Dirty Rooms	**Total:** Total number of occupied and vacant dirty rooms. **Occupied:** The number of occupied rooms that are dirty. **Vacant:** The number of vacant rooms that are dirty.
Total	**Occupied:** The total number of clean and dirty occupied rooms. **Vacant:** Total number of clean and dirty vacant rooms.
Out of Order	**Total:** Total number of out of order rooms. **Occupied:** This is always zero because an out of order room cannot be occupied. **Vacant:** The number of vacant rooms that are out of order and are not available for sale.
Out of Service	**Total:** Total number of out of service rooms **Occupied:** This is always zero because an out of service room cannot be occupied. **Vacant:** The number of vacant rooms that are taken out temporarily but are included in the availability and can be brought in at any time. For example: Closed Floor.
Rooms in Queue	The number of rooms on the check-in queue. These are room reservations for which the guests have checked-in but their rooms are not yet ready. Click the blue arrow to display a list of the queue rooms.

House Status screen end of day terms

Term	Definition
Average Room Rate gross	The forecasted gross average room rate. Total gross room revenue for in house and today's expected reservations divided by the expected number of rooms in house tonight.
Average Room Rate net	The forecasted net average room rate. Total net room revenue for in house and today's expected reservations divided by the expected number of rooms in house tonight.
Available Tonight	The number of rooms that will be available for sale that night.
Allotments	**Room:** The number of rooms that are occupied by individual reservations with a block code attached. **Pax:** The number of persons that are occupying rooms and have an individual reservation with a block code attached. **Note:** Block Reservation functionality requires an additional license code.
Groups	**Room:** The number of rooms that were entered using the group reservation option, but are not attached to a block. **Pax:** The number of persons that were entered using the group reservation option, but are not attached to a block.

Group and allotment	**Room:** The number of rooms that were entered using the group reservation option and are attached to a block.
	Pax: The number of persons that were entered using the group reservation option and are attached to a block.
	Note: Block Reservation functionality requires an additional license code.
Individuals	**Room:** The number of rooms that are occupied by individuals who are not part of a block or a group.
	Pax: The number of individual persons that are occupying rooms and do not belong to a block or a group.
In-house tonight	**Room:** The total number of rooms that will be occupied that night, including individuals, allotments, groups, and group and allotment.
	Pax: The number of persons that will be occupying the hotel that night, including individuals, allotments, groups, and group and allotment.

House Status screen end of day revenue

Term	Definition
Average Room Rev. gross	Calculates the gross average end of day room revenue from the Revenue Forecast table (YPOS). Forecasted package revenue is not taken into consideration.
Average Room Rev. net	Calculates the net average end of day room revenue from the Revenue Forecast table (YPOS). Forecasted package revenue is not taken into consideration.

> **Note:** Rooms and persons on blocks that have not been picked up will not be shown on the House Status regardless of the block status.

ⓘ The House Status can be set as the startup screen, so that each time this user logs on the House Status is displayed. To enable this functionality the required start up screen can be selected via the option STARTUP SCREEN under Miscellaneous → User Settings → Startup Tab.

ⓘ The storing of hotel segmentation preferences by user is controlled by the option STORE HOTEL SEGMENTATION PREFERENCES under Miscellaneous → User Settings → Appearance Tab. If the option STORE HOTEL SEGMENTATION PREFERENCES is selected then each time this user opens the House Status the selected hotel segment view is displayed.

13 Logbook

The Logbook allows users to transfer information between users or user groups, shifts and departments. Each user has an inbox where all incoming messages are stored and an outbox where all outgoing messages are stored.
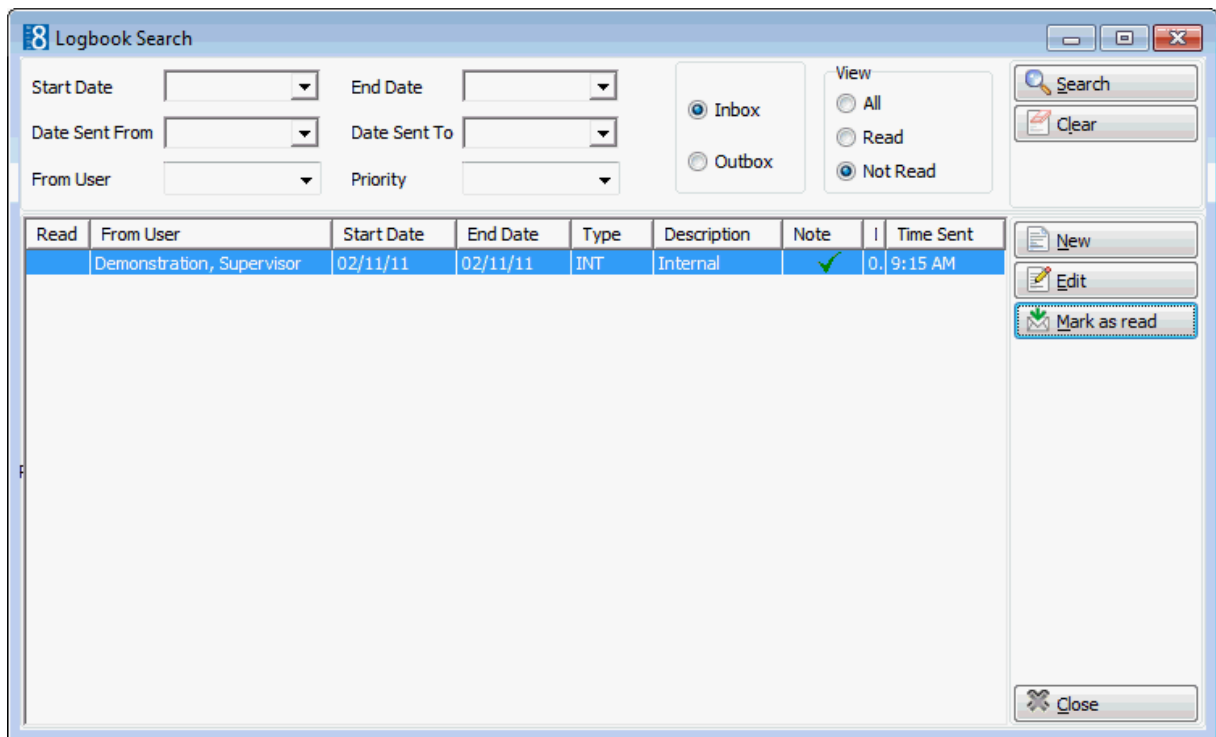
When a user with unread messages signs on to Suite8 then the logbook search screen is displayed automatically defaulted to show all incoming messages which have not yet been read. Incoming messages which have been marked as read are no longer displayed by default. To see a message which has been marked as read, select either the All or Read check box.

Whilst the user is signed on to Suite8 another user can send a message marked as POPUP which then appears immediately on the screen of the user receiving the message, breaking into whatever task they were currently performing. The logbook search screen is displayed and the message marked as Popup is listed in the grid bolded.

How to open the logbook

Click the QUICK KEYS menu and select LOGBOOK or press SHIFT + ALT + L.

The Logbook screen appears, defaulted to show all incoming messages which have not yet been read.

How to view and mark as read incoming messages

1. Click the QUICK KEYS menu and select LOGBOOK or press SHIFT + ALT + L.

2. The Logbook Search screen is displayed, defaulted to show all incoming messages which have not yet been read.

3. Select the message that you want to view and click EDIT.

   The Logbook dialog box is displayed with the incoming message.

4. Select the READ check box to mark the message as read.

> **Note:** Messages may be marked as read from the Logbook search
> screen by selecting the required messages and clicking MARK AS READ.

Logbook Search screen field names

Field Name	Explanation of the field
Read	Indicates if the message has been read. The box is empty when the message has not been viewed. A check mark appears when the message has been viewed.
From User	Name of the user that sent the message.
Start Date	Start date for the message.
End Date	Expiration date of the message.
Type	The type of logbook entry.
Description	The description of the logbook entry type.
Note	The message - a check mark indicates that this logbook entry includes a note.
Date Sent	Date that the message was sent.

Time Sent	Time that the message was sent.
Priority	The priority of the logbook entry.

Logbook Search screen search fields

Fill in this field	With this information
Start Date	The start date for which to search for logbook entries.
Date Sent From	The date the message was displayed from.
From User	The user who sent the message.
End Date	The end date for which to search for logbook entries.
Date Sent To	The date the message was displayed to.
Priority	The priority with which the message was sent.
Inbox/Outbox	Select the INBOX radio button to display incoming messages, select the OUTBOX radio button to display out
View	Select ALL to view all messages. Select READ to view all messages which have been marked as read. Select NOT READ to view all messages which have not yet been read.

How to enter a new logbook entry

1. Click the QUICK KEYS menu and select LOGBOOK or press SHIFT + ALT + L.

   The Logbook screen appears displaying any incoming messages that have not been read.

2. To send a new message, click NEW.

   The Logbook dialog box is displayed.

3. In the TO USER box, click the drop-down arrow and select the users or groups who should receive the message.

> **Note:** You can directly enter the user's initials separated by a comma.

4. In the LOGBOOK TYPE box the default logbook type is automatically selected, however, this can be changed by clicking the drop-down arrow and selecting the logbook type required.

5. The DESCRIPTION is completed automatically based on the logbook type selected, but can be changed as required.

6. Type the start date for the message in the START DATE box **or** click the drop down arrow and select a date from the calendar.

7. Type the expiration date for the message in the END DATE box **or** click the drop down arrow and select a date from the calendar.

8. In the PRIORITY box, click the drop-down arrow and select a priority level for the message.

9. If the message should pop up automatically on the screen of the user receiving the message select the POPUP check box, otherwise leave it blank. When a message has been sent with the pop up check box selected the message will be displayed in bold on the grid.

10. In the NOTES box type any additional information required, depending on the logbook type it might not be necessary to add notes.

11. The day, date, time and name of the logged in user can be added to the text of the note by pressing F7.

12. Click OK to send the message.

New Message dialog box

Fill in this field	With this information
To User	The name of the user who will receive the message.
Logbook Type	The type of logbook message.
Description	The description of the logbook message type.
Start Date	Start date for the message.
End Date	Expiration date of the message.
Priority	The priority of the logbook message.
Popup	Selecting the Popup check box opens the message inbox grid immediately on the user's screen. Otherwise the message goes directly to the user's Inbox.
Notes	The text of the logbook message. The day, date, time and name of the logged in user can be added to the text of the note by pressing F7.

> **Note:** Once a message has been sent only the POP UP box and the USER to whom the message has been sent can be changed. The recipient of the message can only mark the message as read.

How to view sent messages

1. Click the QUICK KEYS menu and select LOGBOOK or press SHIFT + ALT + L.

   The Logbook screen appears displaying any incoming messages that have not been read.

2. On the Logbook screen, click the OUTBOX radio button.

The Logbook Screen appears displaying the messages that are in the Outbox.
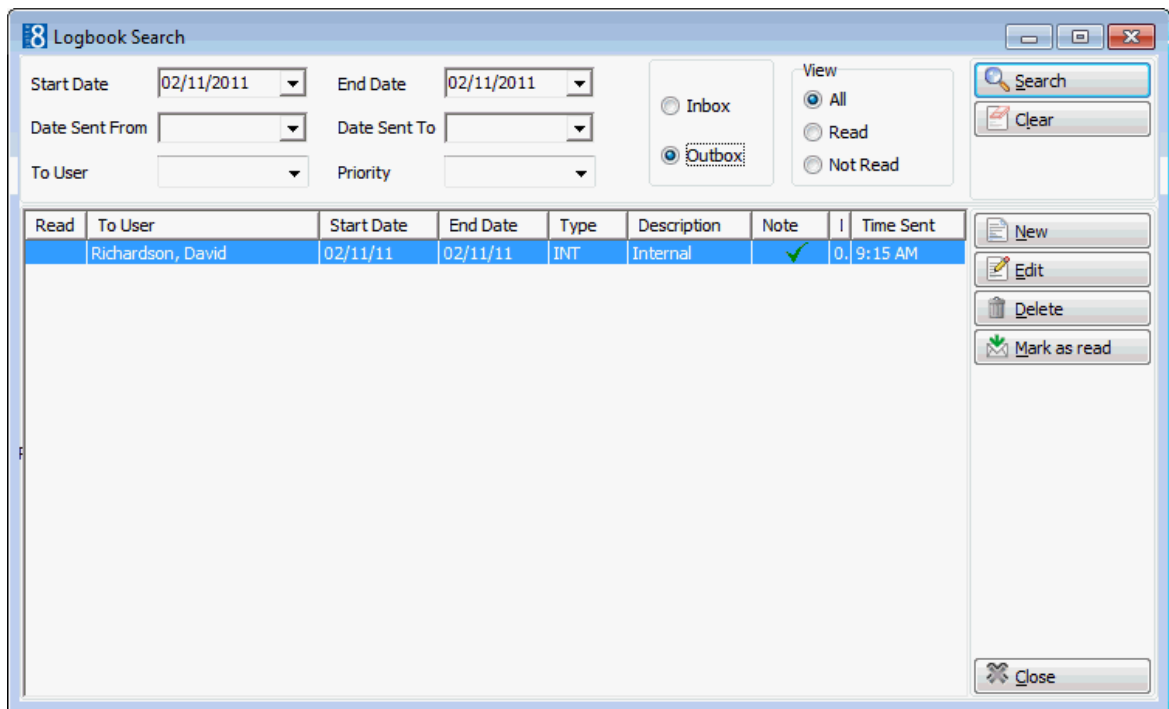
3. If a message has been read by the person to whom it was sent then a ✓ is displayed in the READ column.

How to delete a message sent

1. Click the QUICK KEYS menu and select LOGBOOK or press SHIFT + ALT + L.

    The Logbook screen appears displaying any incoming messages that have not been read.

2. On the Logbook screen, click the OUTBOX radio button.

    The Logbook screen appears displaying the messages that are in the Outbox.

3. Select the message that you want to delete and click DELETE.

    The Confirm Delete dialog box appears.
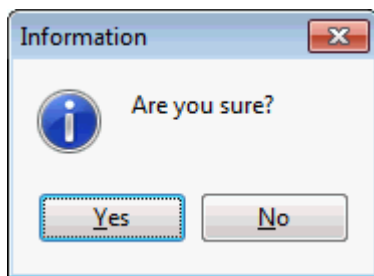
4. Click YES.

    The message is deleted.

ⓘ Logbook functionality is controlled by the parameter LOGBOOK under Setup → Configuration → Global Settings → Generic → Generic 3 tab. In addition a DEFAULT LOGBOOK TYPE has to be selected.

ⓘ The configuration of logbook types is controlled by the user rights under LOGBOOK TYPES under Setup → Configuration → Users → User Definition → Rights → Configuration → Miscellaneous.

ⓘ Logbook types, such as hand over and internal are defined via the option LOGBOOK TYPES under Setup → Configuration → Miscellaneous.

ⓘ An activity group with the type LOGBOOK needs to be defined via the option ACTIVITY & TRACE GROUPS under Setup → Configuration → CRM.

ⓘ Popup functionality requires that internal communication is activated. The option ONLINE under Setup → Configuration → Global Settings → Generic → Generic 2 tab requires that all machines have access to each other. The option OFFLINE requires that a default poll interval, e.g. 1000 (1 second) is defined.
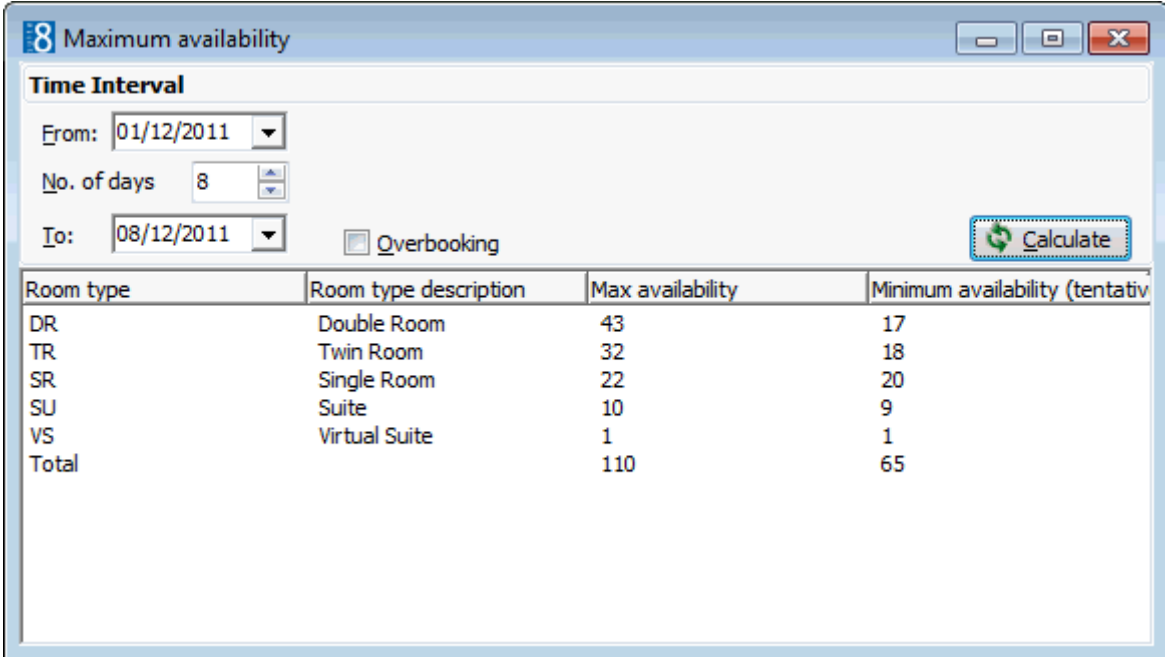
14   Maximum Availability

The Maximum Availability quick key displays the minimum and maximum amount of rooms available per room type over a specific time period.

How to open the maximum availability screen

Click the QUICK KEYS menu and select MAXIMUM AVAILABILITY or press CTRL + SHIFT + M.

The Maximum Availability screen is displayed.

How to change the Maximum Availability view

1. Click the QUICK KEYS menu and select MAXIMUM AVAILABILITY to display the Maximum Availability screen.

2. Type the start date in the FROM box or click the drop down arrow and select a date from the calendar.

3. Type the number of days in the NO. OF DAYS box or click the up or down arrow to select the number of days.

   Alternatively, type the end date in the TO box or click the drop down arrow and select a date from the calendar.

4. Select the OVERBOOKING check box to include overbooking figures in the calculation.

5. Click CALCULATE to display the maximum and minimum availability for the selected time period.

15   Quick Reservation

The Quick Reservation Wizard speeds up the creation of reservations. Instead of going through the process of searching for and/or creating a new profile and then entering all the reservation details, only the essential profile and reservation information needs to be entered on the quick reservation screen.

The profile search screen will only open if a name match applies, otherwise the profile will be created automatically. If a profile match is found, the profile screen will open and prompt users with profile matches, if none of the profiles are a match, then pressing the CONTINUE button indicated by a red arrow on the profile search screen will create a new profile and open the edit reservation screen complete with the details already entered on the quick reservation screen.

How to enter a quick reservation

1. Click the RESERVATIONS menu and select QUICK RESERVATION or press CTRL + Q.

    The Quick Reservation screen is displayed.

2. Complete the options as detailed in the table below.

3. Click OK.

    If the name entered on the quick reservation screen matches existing profiles then the profile search screen is displayed.

4. If the profile required exists, select it from the grid and click SELECT.

5. If the profile does not exist, click CONTINUE, the profile is then created automatically.

   The edit reservation screen is displayed.

6. Complete any additional information required then click OK to save the reservation.

Quick Reservation dialog box

Fill in this field	With this information
Last name	Enter the guest's last name with appropriate capitalization.
MI (Middle Initial/Name)	Enter the guest's middle initial or name.
First name	Enter here the guest's first name or initial.
Mail name	Enter here the name the guest prefers to use, e.g. if the name is David, but he prefers to be called Dave.
Country	Select the country from the drop-down list.
Zip	Enter here the zip code or postal code.
City	Enter the city.
State	Enter the state code here or select from a drop-down list of defined states. The state codes can be attached to zip codes so that as soon as the zip code is entered the state field will be filled automatically.
Street 1	Address line 1.
Street 2	Address line 2.
Language	Select a language from the drop-down list of defined languages.
Title	Enter the guest's title.
Address greeting	Select an address greeting from the drop-down list of defined greetings.
Letter greeting	Select the letter greeting from the drop-down list of defined letter greetings.
Phone	Enter the telephone details. The number entered will be saved on the guest profile on the first communication method found within the type PHONE.
Fax	Enter the fax details. The number entered will be saved on the guest profile on the first communication method found within the type FAX.
Arrival	Select the arrival date from the calendar, the default is today.
Nights	Enter the number of nights for the stay. Or enter the departure date in the next field and Suite8 will calculate the number of nights. Enter 0 for day-use rooms.
Departure	The departure date of the guest. If the number of nights was entered the departure date will be calculated. The day of the week will be displayed on top of the field. The departure date can also be entered manual or selected from the calendar. This is a mandatory field.

Adults	Enter the number of adults for the reservation.
Room type	Enter the room type or select from the list of defined room types. This is a mandatory field.
Rate	Enter a rate code, or select from the rate availability grid the open rate codes for each room type.

When selecting a profile or creating a new profile via quick reservation the default address type defined via the option DEFAULT ADDRESS TYPE under Setup → Configuration → Global Settings → Profile → Profile 1 tab is used.

16   Rate Query

Searching for room rates

The rate query allows you to look up rates in numerous ways and then do other tasks. For example, searching for a weekend rate and then making a reservation.

Searching for a rate requires the following steps:

- Access the rate query scope dialog box.
- Enter all mandatory rate query fields.
- Enter any optional fields you would like to use.
- Execute the search.

The Rate Query Scope dialog box consists of two main sections of search criteria - profile and rates. The display of these search criteria can be adjusted to suite the needs of the property. By default the profile search criteria are displayed first followed by the rate criteria, however activating the parameter SWAP PANELS ON RATE QUERY will display the rate criteria followed by the profile criteria.

Advertisements can be defined to be displayed on the rate query; the advertisement functionality is based on either advertisement dates or on dates valid for reservation requests.

- Advertisement Dates - the ticker is displayed in a separate box on the rate query during the defined period of time.
- Reservation Dates - the ticker is displayed only if the reservation request dates meet the configured reservation dates for the advertisement ticker.

To search for a rate using the rate query scope dialog box

1. From the Quick Keys main menu, click RATE QUERY or press CTRL + R.

   The Rate Query dialog box is displayed.

Optional profile fields:

2. Type the guest's last name in the Name box or click the selection icon to display the Profile Search dialog box.

   If only one profile name meets the entered name then the cursor moves to the next line. If there is more than one name then the Profile Search dialog box is opened. It is also possible to enter the last name and then the first name separated with a comma and a space Smith, John - an exact match will not open the profile search screen.

3. Type the company name in the Company box or click the selection icon to display the Profile Search dialog box for companies.

4. Type the travel agents name in the Agent box or click the selection icon to display the Profile Search dialog box for agents.

5. Type the source profile name in the Source box or click the selection icon to display the Profile Search dialog box for sources.

6. Select the type of Membership No. and then enter the membership number or click the selection icon ••• to display the Profile Search dialog box.

Mandatory rate query fields:

7. Type the arrival date in the Arrival Date box or click the drop down arrow and select a date from the calendar. The default is today's date.

8. Type the number of nights in the Nights box or click the up or down arrow to choose the number of nights. The default is one night.

9. Type the number of adults in the Adults box or click the up or down arrow to choose the number of adults. The default is one adult.

10. Type the number of children in the Children box or click the up or down arrow to choose the number of children. The default is zero children. This field is user-defined and may have a different label, for example Baby, Child or Teenager.

11. If your property has more than one child age category click the up or down arrow to select the required child box. Depending on the setup of the child age categories there may be several children's fields, for example Baby, Child and Teenager.

12. Type the number of rooms in the No. of Rooms box or click the up or down arrow to choose the number of rooms. The default is one room.

13. If you do not want to use any of the optional rate query criteria explained below, click OK.

    The Rate Selection screen appears showing all available rates.

    > **Note:** If offer functionality is active then clicking the button OFFER instead of OK will create a reservation with the status 'Offer'.

Optional rate query fields:

14. Type the rate category in the Rate Category box or select a rate category by clicking the drop down arrow and choosing one of the rate categories listed.

15. Type the rate code in the Rate Code box or select a rate code by clicking the drop down arrow and choosing one of the rate codes listed.

16. The Block field allows you to reserve a group room without having to go through the block module. This is ideal for convention groups where individuals may be reserving their own rooms, or for an allotment where the agent calls to book on a room by room basis and not by sending a rooming list

    ▪ Click the selection icon ••• to display the Block Selection dialog box.

    ▪ From the Block Selection dialog box, select a group name.

    ▪ The available rooms for the selected group are displayed in the grid.

    ▪ Click on the desired room type.

    The rate query dialog box is displayed with the block code selected.

17. Type the hotel segment in the Hotel segment box or select a hotel segment by clicking the drop down arrow and choosing one of the hotel segments listed.

Rate Query terms

Terms	Definition	Mandatory or Optional
Name	The guest's profile name.	Optional
Company	The company's profile name.	Optional
Agent	The profile name of the travel agent making the reservation.	Optional
Source	An additional profile name that allows the hotel to track reservations and collect statistics. For example: A central reservation service with locations in Paris and London. A reservation made through the Paris office would be booked with the Paris Office source profile name	Optional
Arrival Date	The date the guest is expected to check in.	Mandatory
Nights	The number of nights the guest will stay.	Mandatory
Adults	The number of adults.	Mandatory
Babies, Children, Teenagers	The number of babies, children or teenagers. Click the up and down arrows to view the defined children's fields.	Mandatory
No. of Rooms	The number of rooms needed.	Mandatory
Rate Category	The category of the rate code. Using this option will help to narrow the rate search.	Optional
Rate Code	The rate code required.	Optional
Block	Displays the Block Selection dialog box, with a listing of all existing blocks for the selected arrival date.	Optional
Packages	Opens the Package Configuration dialog box.	
Rate Availability	Opens the Rate Availability grid.	
Bar Availability	Opens the Bar Availability grid.	
Day Type Calculation	Opens the Day Type Calendar grid.	

Entering a name in any of the profile fields and pressing the tab key to exit the field, performs an immediate profile search if the parameter SEARCH PROFILES WHEN TAB OUT FROM NAME FIELD is selected under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.

The display order of the profile and rate options on the rate query screen is controlled by the parameter Swap panels on Rate Query under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4 tab.

The display of advertisement text on the rate query screen is controlled by the parameter Show Advertisement on the Rate Query Screen under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4 tab.

The advertisements to be displayed on the rate query are defined via the option Advertisement Ticker under Setup → Configuration → Reservations; the parameter Rate Query must be selected.

The display of the search field Membership No. is controlled by the option Allow Select on Rate Query under Setup → Configuration → CRM → Membership Types.

Hourly rates functionality is controlled by the parameter Hourly rates under Setup → Configuration → Global Settings → Reservation → Rates tab.

Hourly rates functionality is controlled by the user rights View and Edit under Setup → Configuration → Users → User Definition → Rights → Rates → Hourly Rates.

Calculate day type rates functionality is controlled by the parameter Calculate day type rates under Setup → Configuration → Global Settings → Reservation → Rates tab.

Offer functionality is controlled by the parameter Offers under Setup → Configuration → Global Settings → Reservation → Reservation 3 tab.

The default sort order of the rates on the rate query screen is controlled by the parameter Use global rate sort on Rate Selection and the option Default Sort Setting under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab. If this parameter is activated then a default sort setting such as Display Order or Valid Rates First can be selected. If activated then stored user settings are overwritten.

To view the rate availability grid

1. On the rate query dialog box, complete the mandatory rate query criteria: Arrival Date, Nights, Adults, Children, No. of Rooms.

2. Click OK.

   The Rate Selection screen is displayed showing all available rates.

The screen is divided into two sections:

- The top section displays available room types, number of available rooms per room type, rate codes and rates. Depending on the parameter setting in the configuration the availability is shown including or excluding tentative reservations. If a profile name was entered on the rate query dialog box and that profile has a rate linked, then an indicator shows to which type of profile the rate is linked. With the appropriate user rights the room type can be edited by right-clicking the room type code.

- The lower half of the screen displays the following information:

  - **General Information** - displays a description of the selected rate code, a description of the room type, the gross and net room rates and any policies linked to the rate code.

  - **Rate Restriction Information** - displays any restrictions on rates, such as closed to arrivals or minimum length of stays. Rate restrictions can be set manually or by an interface yield system. With equivalent user rights, the restricted rates can be displayed in different colours by pressing the customize button.

  - **Reservation Filter** - may be used to filter the rate codes. Placing the cursor on the ALL radio button displays a hint explaining each button. The filter can be changed by selecting one of the filter options.

  - On the lower part of the screen the date of the reservation is displayed for the first night by default. If the reservation is for multiple nights the NEXT button can be pressed to move forward by day until the last date of the stay of the selected reservation. The PREVIOUS button can be pressed to move back by day to the arrival date of the reservation.

  - On the right side of the screen are the available options.

The default reservation filter is defined via the option RATE SELECTION FILTER under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.

Turnaway functionality is controlled by the parameter USE TURNAWAY FUNCTIONALITY under Setup → Configuration → Global Settings → Reservation → Reservation 1 tab.

Displaying availability including or excluding tentative reservations on the rate query grid is defined via the option SHOW AVAILABILITY INCLUSIVE TENTATIVE ON RATE SELECTION under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab. If selected then the availability is shown inclusive of tentative reservations and if not selected then only definite reservations are calculated.

Rate code edit functionality is controlled by the user right RATES under Setup → Configuration → Users → User Definition → Rights → Configuration → Reservations → Rate Management and the user right EDIT under Setup → Configuration → Users → User Definition → Rights → Rates.

Room type edit functionality is controlled by the user right ROOM MANAGEMENT under Setup → Configuration → Users → User Definition → Rights → Configuration → Room Management.

Hourly rates functionality is controlled by the user rights VIEW and EDIT under Setup → Configuration → Users → User Definition → Rights → Rates → Hourly Rates.

Hourly rates functionality is controlled by the parameter HOURLY RATES under Setup → Configuration → Global Settings → Reservation → Rates tab.

Profile Indicators

Indicator	The rate is linked to
I	An individual profile
C	A company profile
T	A travel agent profile
S	A source profile
V	A vendor profile
M	A meeting planner profile

Rate Availability Reservation Filter Options

Button	Definition
All	To view all available rate codes.
Reservation	Displays only the rate codes linked to the specific reservation.
Private	Displays only rates linked to the profiles entered on the rate query dialog box. An indicator will show to which profile type the rate is linked.
Private and Public	Displays only rates which are linked to a profile and rates which have been marked as public on the rate code setup.
Rate Sort	▪ Display Order - rates are displayed according to the display order.

	• Valid Rates First - valid rates are displayed first followed by the restricted rates. • Valid Rates Only - only valid (no restricted) rates are displayed. • Bar Only - only rates classified as Bar Enabled are displayed.
Rates in Base Currency	This selection will only display rates in Base Currency.
Always show rooms	This option will always show the room numbers on the rate availability grid if rates are defined for specific room numbers.
Stay view	This selection will display the amount for the whole stay. For example if the rate is 100.- and the reservation is made for 4 nights, stay view will display 400.-
Price with packages	If this field is selected, the rate will display including print separate and add to rate packages defined on the rate detail or rate header.
Promoted price	This selection is only available if the parameter CALCULATE RATE PROMOTIONS is activated under Global Settings → Reservation 2 tab. It will display the rate amount minus the calculated promotional discount.
Inclusive Overbooking	If this option is selected then overbooking levels are included in the amount of available rooms.
Open for Web Booking	Displays only the rate codes which are configured as 'Open for web booking'. **Note:** This option is displayed if the Suite8 Homepage or Mobile Reports licence is active.

Rate Selection Screen Options

Click this button	**To do this:**
Select	Select the rate and create a new reservation.
Up Down	Changes the display order of the rate codes.
Scope	Re-displays the rate query scope which allows you to look up different rate queries. This option is only available when the rate selection screen is accessed via the quick key RATE QUERY.
Turnaway	Record a turnaway. This option is controlled by the parameter USE TURNAWAY FUNCTIONALITY.
Customize	Customize the rate grid.
Close	Close the rate query screen.

Viewing rates

You can make queries to show rates including or excluding private rates. For example, you can view private rates, private and public rates and all rates.

Rate Query rate definitions

Show Rates	Definition
All	Every rate that is available in the system excluding closed rates.
Reservation	The rate attached to the reservation. Only accessible from the reservation.
Private	A rate that is particular to a specific guest name, company, agent or source.
Private and Public	Rates that are particular to a specific guest name, company, agent or source in addition to all the public rates that are available to everybody.

View all rates

1. On the rate query dialog box, complete the mandatory rate query criteria: Arrival Date, Nights, Adults, Children, No. of Rooms.

2. Click OK.

   The Rate Selection screen appears showing all rates.

View a private rate of a guest, company, agent or source

1. From the rate query scope dialog box, type one of the following options, Name, Company, Agent or Source **or** search for a name by clicking the selection icon
   ⠿ next to the option.

2. Press TAB, the Profile Search screen is displayed.

3. From the Profile Search screen, highlight the required name and click SELECT, the rate query dialog box reappears with the name filled in.

4. From the rate query scope dialog box, click OK; the rate selection screen appears showing all rates.

5. Click the PRIVATE radio button.

   The rate query selection screen appears showing only the private rates.

   > **Note:** Private Rates may be attached to a profile through the More Fields tab on the profile screen.

View private and public rates

1. From the Rate query scope dialog box, type one of the following options: Name, Company, Agent or Source **or** search for a name by clicking the selection icon
   ⠿ next to the option.

2. Press TAB, the Profile Search screen is displayed.

3. From the Profile Search screen, highlight the required name and click SELECT, the rate query dialog box reappears with the name filled in.

4. From the rate query scope dialog box, click OK; the rate selection screen appears showing all rates.

5. Click the PRIVATE AND PUBLIC radio button.

The rate query selection screen appears showing the private and public rates.

Displaying corresponding dialog boxes

From the Rate Selection screen you can display corresponding dialog boxes.

- SELECT - displays the new reservation screen allowing you to create a new reservation without having to close the rate selection screen.
- SCOPE - displays the rate query scope, which allows you to look up different rate queries without having to close the rate selection screen.

> **Note:** The SCOPE option is not available if the rate selection screen is accessed from within a reservation.

Make a new reservation from the Rate Selection screen

1. From the rate selection screen, select a rate code.
2. Click SELECT, the New Reservation screen appears with the information typed in the rate query scope dialog box and the selected rate code.
3. Type in the remaining reservation information.
4. Click OK, the reservation is saved and the rate query scope screen is displayed.

To look up different rates from the Rate Selection screen

1. From the rate selection screen, click SCOPE; the rate query dialog box is displayed.
2. Enter all mandatory rate query fields.
3. Click OK, the rate selection screen appears with the new rates.

Turning away a reservation

A reservation is turned away for different reasons. For example, the hotel could not take the reservation due to being fully booked or the guest called to inquire about a rate and did not make a reservation. The hotel can keep the market code, reason for the turnaway and name for statistical purposes. In addition, marketing attribute categories can be linked to the turnaway screen in order to collect additional property specific information.

To turn away a reservation

1. Click TURNAWAY, the Turnaway dialog box is displayed.

2. Type the arrival date in the Arrival Date field box or click the drop down arrow and select a date from the calendar. The default is today's date.

3. Type the number of nights in the Nights field or click the up or down arrow to choose the number of nights. The default is one night.

4. Type the number of rooms in the NO OF ROOMS field or click the up or down arrow to choose the number of rooms. The default is one room.

5. Type the number of persons in the NO OF PERSONS field or click the up or down arrow to choose the number of persons. The default is one person.

6. Click the drop down arrow and select a marketing code from the MARKET CODE list.

7. Click the drop down arrow and select a reason from the TURNAWAY REASONS list.

8. Leave the Guest box blank, type the name in the GUEST box or click the selection icon ![...] and choose a name from the Profile Search screen.

9. Complete any marketing attribute categories that have been added to the turnaway screen in order to collect additional property specific information.

10. Click OK.

ⓘ Turnaway functionality is controlled by the parameter Use turnaway functionality under Setup → Configuration → Global Settings → Reservation 1 tab.

ⓘ Marketing attributes can be added to the turnaway screen via the option ATTRIBUTE CATEGORIES under Setup → Configuration → CRM.

ⓘ For each attribute category defined a marketing info category is created. The elements for each new list box are defined via the option MARKETING INFO under Setup → Configuration → CRM.

Customising the rate grid

The colour for the font and the background on all restriction statuses can be customized; additionally it is possible to define if the value should display or if a user defined indicator should be displayed, such as NOT AV. for rates that are closed.
Click CUSTOMIZE, the Rate Grid Customization screen is displayed.

Rate Grid Customization dialog box

Field	Description
Available	Defines the colour for all available rates.
Selected Item	Defines the colour for a selected item.

Not configured or Rate Header	Defines the colour for rates which are not available.
Rate Availability	Defines the colour for rates when there is a rate restriction. The rate field if the rate is not available.
Rate Change Indicator Colour	Defines the colour for the indicator button that is displayed if the rate will change during the stay.
Promoted Rate Indicator Colour	Defines the colour for the indicator button that is displayed if the rate includes a promotional discount.
Day Type Indicator Colour	Defines the colour for the indicator button that is displayed if the rate is configured for day type rates.
Yield Management Closed	Defines the colour for rates that have been closed by the yield management system. Only available if a yield system is installed.
Hurdle	Defines the colour to display as available the rate codes defined in Suite8 that are higher than the calculated HURDLE AMOUNT from the yield system. Only available if a yield system is installed.
BAR Rate	Defines the colour for BAR rates.
BAR Restrictions	Defines the colour for restricted BAR rates.

Rate grid customization functionality is controlled by the user right CUSTOMIZE under Setup → Configuration → Users → User Definition → Rights → Rates → Rate Selection.

Viewing Package Configuration

The term package is used to refer to an arrangement where the guest in the hotel gets services included in the rate other than just a room. For example, bed and breakfast is a package.

Each package is made up of package elements. Each package element is defined individually and then assigned to a rate code.

To open the Package Configuration screen

1. From the Quick Keys main menu, click RATE QUERY or press (CTRL + R).

    The Rate Query Scope dialog box appears.

2. Click PACKAGES, the Package Configuration screen appears displaying the package elements.
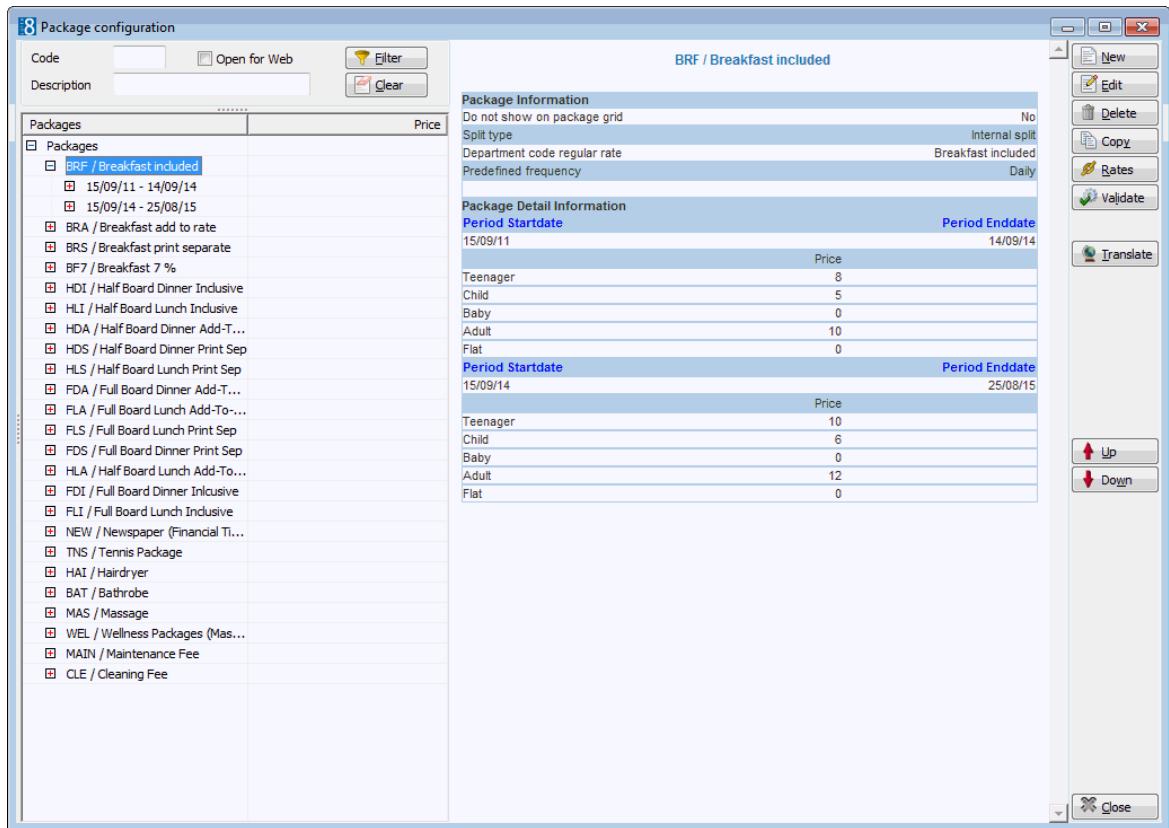
The options for how the charges will be included are set during the configuration of the system.

Viewing the Day Type Calendar

This option may be used to view the day type calendar and with the appropriate user rights, assign day types to certain days or periods.
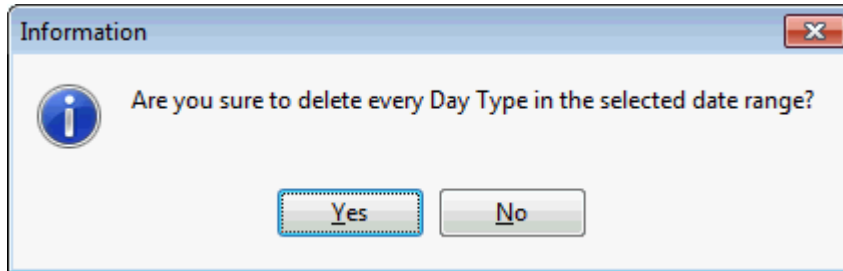
How to view the day type calendar

1. From the Quick Keys main menu, click RATE QUERY or press (CTRL + R).

   The Rate Query Scope dialog box appears.

2. Click DAY TYPE CAL., the Day Type Calendar is displayed.

3. Click CLOSE to close the Day Type Calendar.

How to set day types on the day type calendar

1. From the Quick Keys main menu, click RATE QUERY or press (CTRL + R).

   The Rate Query Scope dialog box appears.

2. Click DAY TYPE CAL. to display the Day Type Calendar.

3. The required dates can be selected on the calendar using the left mouse button or completed after clicking the SET button.

4. Click the SET button to display the Day Type Selection dialog box.

5. Complete the FROM and UNTIL dates or select a date from the drop-down calendar.

6. Select the required DAY TYPE from the list of defined day types and click OK.

   The selected dates are updated on the Day Type Calendar in the colour defined for the selected day type.

7. Click CLOSE to close the Day Type Calendar.

How to clear day types from the calendar

1. From the Quick Keys main menu, click RATE QUERY or press (CTRL + R).

   The Rate Query Scope dialog box appears.

2. Click DAY TYPE CAL. to display the Day Type Calendar.

3. Select the dates from which the day type is to be cleared.

4. Click the CLEAR button to display the Day Type Selection dialog box.

   A message is displayed asking if you are sure you want to delete every day type in the selected range.

5. Click YES; the selected dates are cleared on the Day Type Calendar.

6. Click CLOSE to close the Day Type Calendar.

Day type dialog box

Field	Definition	Legal Values
Code	The code for the day type.	Up to 3 alphanumeric characters.
Description	Description of the day type.	Up to 30 characters of text.
Colour	The colour assigned to the day type. This is displayed on the control panel (Ctrl + D) when adding day types to the grid.	Select a colour from list box
Inactive	Defines if the day type is active or not.	Check: Inactive Blank: Active

ⓘ The viewing, inserting and deleting of day types on the calendar is controlled by the user rights VIEW, INSERT and DELETE under Setup → Configuration → Users → User Definition → Rights → Rates → Day Types Calendar.

Rate Availability (Supervisory Function)

Using the Rate Availability Grid

The Rate Availability Grid displays the rate code availability controls in a graphical format. The screen is divided into four sections:

- Grid section - displays the availability of selected rates over a selected time period in graph form. The rates and the time period are controlled by the Scope section and the Filter option.
- Scope section - determines the date range of rates displayed on the grid.
- Rate options - used to set rate restrictions such as opening or closing dates.
- Set Options section - presents several related functions.

To open the Rate Availability Grid

1. On the QUICK KEYS menu, click RATE QUERY or press CTRL + R.

   The Rate Query Scope dialog box appears.

2. Click RATE AVAILABILITY.

   The Rate Availability Grid is displayed.
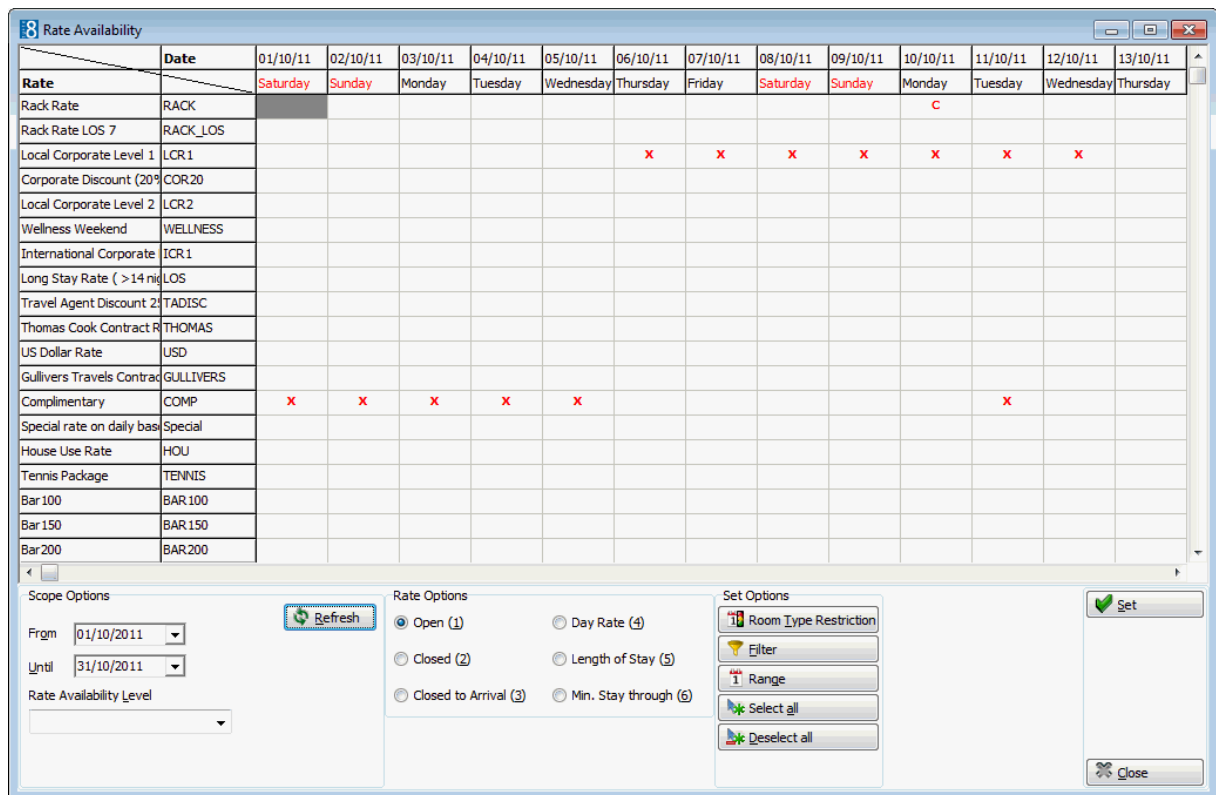
Rate Availability Grid Rate Options

Set Option	Symbol	Definition
Open		The rate code is available for sale for that day. It is the default set option.
Closed	**x**	All room types are not available on that day for that rate code. For example: Close summer rate codes in the winter.
Closed to arrival	**c**	Rate is not available to guests arriving on that day.

		For example: The Weekend rate is open Friday, Saturday and Sunday. A guest can arrive on Friday and stay through Sunday. A guest can arrive on Saturday and stay through Sunday. The guest cannot arrive on Sunday.
Day rate	D	Rates that are sold for day use without staying over night.
Length of stay	3 - 5	Defines a rate by setting a minimum amount of consecutive days to stay, starting with the arrival date. Enter the number of days in the DAYS field. For example: A minimum stay of 3 days set on Monday. The guest must arrive on Monday and stay Monday night, Tuesday night and Wednesday night.
Min stay through	3	Defines a minimum number of consecutive days' stay required for that rate. The guest may arrive before the indicated date, as long as it is included in the stay Enter the number of days in the DAYS field. For example: 09/05/03 minimum stay through is set at 3 days. The guest can stay from May 7 – 9, May 8 - 10, or May 9 - 11.
Days	Integer between 1 and 999	Used to define the number of days for Length of Stay and Min. Stay Through.

Rate Availability Grid Set Options

Commands	Definition
Set	The rate restriction option symbol is placed in the grid box
Range	A range of consecutive dates with the same rate restriction option symbol. There is also the option to limit the rate restriction to certain days of the week with the date range specified.
Room Type Availability	An indicator that not all room types are available. ■ Indicates that not all room types are available for that rate code for that day. ■ X Indicates that the rate code is closed to certain room types but the hotel is still selling some of the rooms.
Filter	Allows you to specify by rate restriction which rate codes to display in the grid.
Info	Displays information for the selected rate.
Close	Closes the rate availability grid.
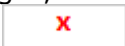
Setting rate restrictions

To set rate restrictions

1. On the QUICK KEYS menu, click RATE QUERY or press CTRL + R.

2. Click the RATE AVAILABILITY button, the Rate Availability grid is displayed.
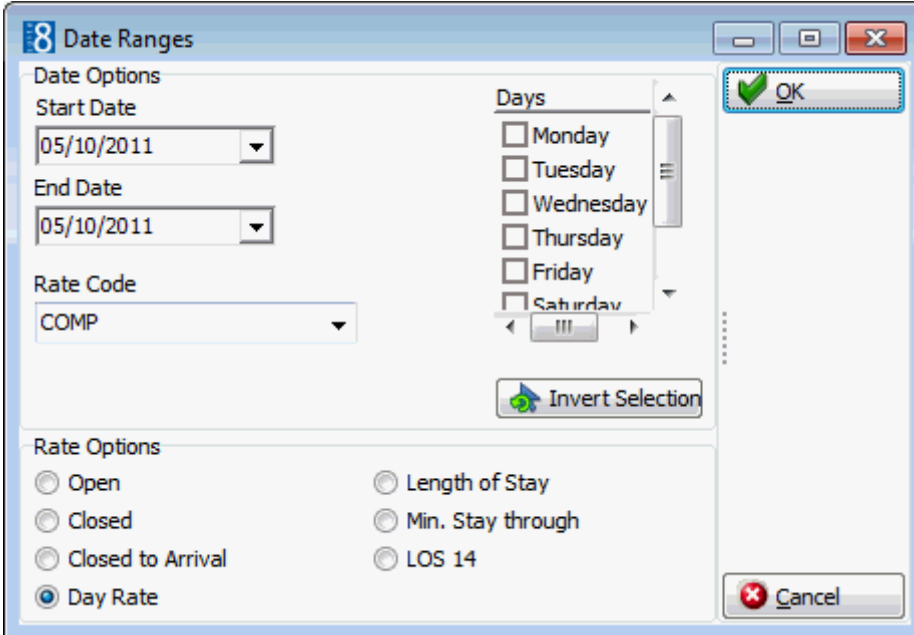
3. Place the cursor on the grid box for the rate code and date on which the restriction is to be set.

4. Click the required rate restriction from RATE OPTIONS, for example CLOSED.

5. Click SET.

   The Rate Availability grid reflects the changes, in this example; the selected squares are now marked with a red cross.

To set rate restrictions using the range option

1. On the QUICK KEYS menu, click RATE QUERY or press CTRL + R.

2. Click the RATE AVAILABILITY button, the Rate Availability grid is displayed.

3. Click RANGE, the Range dialog box is displayed.

4. Set the start of the date range for the restriction by typing the start date in the START DATE box.

5. Set the end of the date range for the restriction by typing the end date in the END DATE box.

6. Type the rate code in the RATE CODE box **or** select a rate code by clicking the drop down arrow and choosing one of the rate codes.

7. If the restriction is only applicable for certain days then select the check-boxes next to the required days. For example a weekend rate is not normally available on weekdays so the rate could be marked as closed Monday through Thursday and available Friday through Sunday.

8. Select the type of rate restriction required from the Rate options section.

9. Click OK.

   The Set Range Availability dialog box closes and the Rate Availability Grid is updated with the rate restrictions.

To view specified rate restrictions for all rate codes

1. On the QUICK KEYS menu, click RATE QUERY or press CTRL + R.

2. Click the RATE AVAILABILITY button, the Rate Availability grid is displayed.

3. Click FILTER, the Filter dialog box appears.
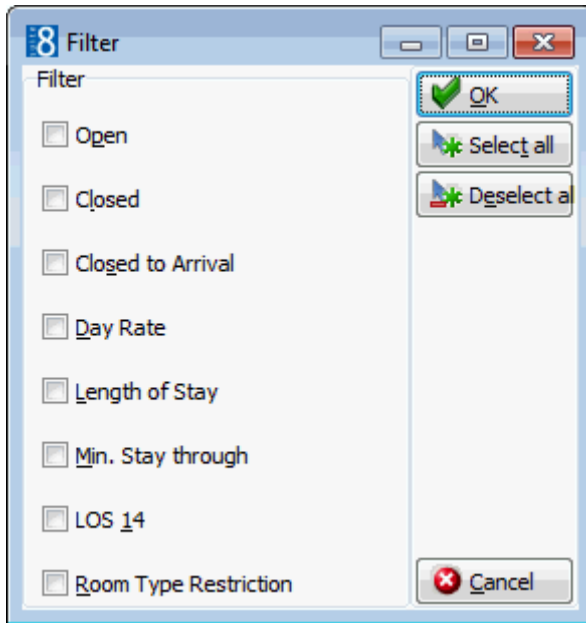
4. Select the desired rate restrictions by clicking in the appropriate check-boxes.

5. To select all options: click SELECT ALL.

6. To select only one or two options: Click UNCHECK ALL, and then select the desired options.

7. Click OK.

   The Set Filter Availability dialog box closes and only the selected options appear in the Rate Availability Grid.

To set room type availability

1. On the QUICK KEYS menu, click RATE QUERY or press CTRL + R.

2. Click the RATE AVAILABILITY button, the Rate Availability grid is displayed.

3. Place the cursor on the grid box for the rate code and date on which the restriction is to be set.

4. Click ROOM TYPE RESTRICTION, the Room Type Restriction dialog box is displayed.
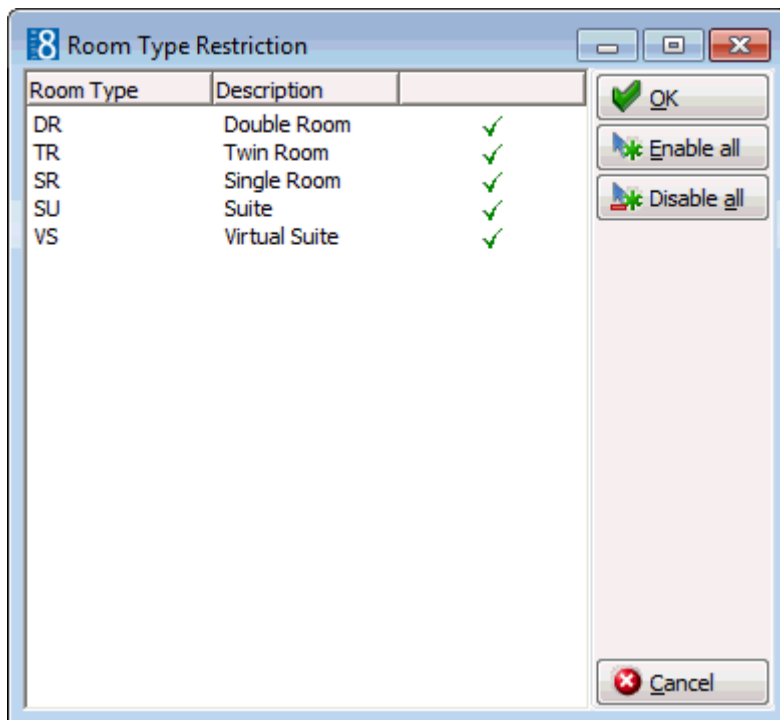
A ✘ next to a room type indicates that the room type is closed.

A ✔ indicates that the room type is available.

5. Select the required room type restrictions by clicking the room type:
   - To restrict all room types: click DISABLE ALL.

   - To restrict only one or two room types: Click ENABLE ALL and then select the desired room types.

6. Click OK.

   The Room Type Restriction dialog box closes, the Rate Availability Grid now reflects the changes:

   - If all room types were previously available, and you have now excluded some, the selected squares are now marked with a small red square. ■

   - If some room types were previously excluded and now all are available, the square is now clear.

Bar Availability

This option may be used to view all rate codes assigned to rate availability levels.

How to view bar availability

1. From the Quick Keys main menu, click RATE QUERY or press (CTRL + R).

   The Rate Query Scope dialog box appears.

2. Click BAR AVAILABILITY, the Bar Availability screen is displayed.
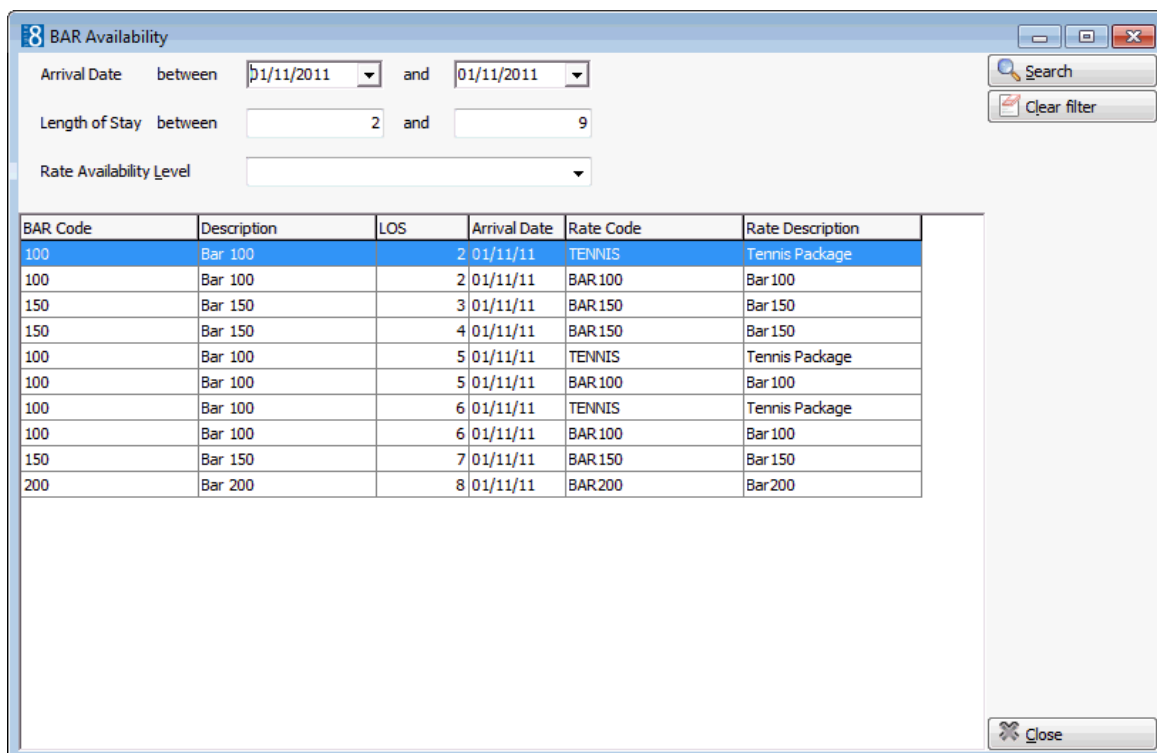
3. Click CLOSE to close the Bar Availability Screen.

Bar Availability dialog box

Terms	Definition
Arrival Date between and	The date the guest is expected to check in.
Length of stay between and	The number of nights the guest will stay.
Rate Availability level	The rate availability level.

Rate availability levels functionality is controlled by the option ENABLE RATE AVAILABILITY LEVELS under Setup → Configuration → Global Settings → Reservation → Rates tab → Rate Availability Levels.

The best available rates interface is controlled by the option USE BAR INTERFACE under Setup → Configuration → Global Settings → Interfaces → Misc. Interface 3 tab → Best Available Rates Interface (BAR).

If the IDeaS System is used then the license HURDLE RATES XML INTERFACE must be activated under Setup → Miscellaneous → License → V8 Sublicenses → Software Interfaces.

The viewing, inserting, editing and deleting of rate availability levels is controlled by the user rights VIEW, INSERT, EDIT and DELETE under Setup → Configuration → Users → User Definition → Rights → Rates → Rate Availability Level.

Hurdles

How to display the hurdles overview

This option may be used to display an overview of the hurdles set by the yield system.

How to view hurdles overview

1. From the Quick Keys main menu, click RATE QUERY or press (CTRL + R).

   The Rate Query Scope dialog box appears.

2. Click HURDLES, the Hurdles Overview screen is displayed.
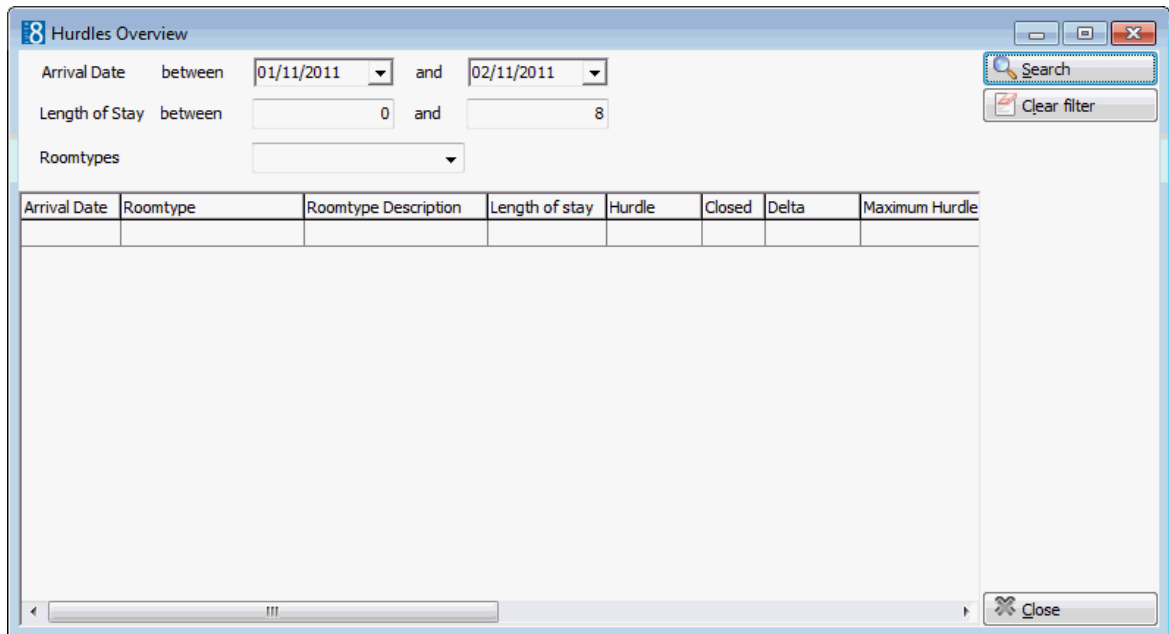
3. Click CLOSE to close the Hurdles Overview Screen.

Hurdles Overview dialog box

Terms	Definition
Arrival Date between and	The dates for which to display the hurdles.
Length of stay between and	The number of nights for which to display the hurdles.
Room Types	The room types for which to display the hurdles.

ⓘ Hurdles Overview functionality required that the HURDLE RATES XML INTERFACE or the TLP YIELD INTERFACE licence must be active under Setup → Miscellaneous → License → V8 Sublicenses → Software Interfaces.

17   Room Rack

Using the Room Rack

The Room Rack allows you to search for a room, edit a reservation, edit the room status, open other screens, display other dialog boxes and display the details column with reservation or out of order information. You may also view the room status, room type details, guest status and guest information. Reservations may be displayed in different colours according to several criteria including definite/tentative status, VIP code and guarantee code.

If hotel segmentation functionality is active then the room rack can be displayed by hotel segment. If the option STORE HOTEL SEGMENTATION PREFERENCES is active then the hotel segment selected is stored per user and will be automatically selected each time the room rack is opened.

How to view the room rack

Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

The Room Rack is displayed.

The user can scroll up and down within the room rack by rotating the wheel of the mouse.
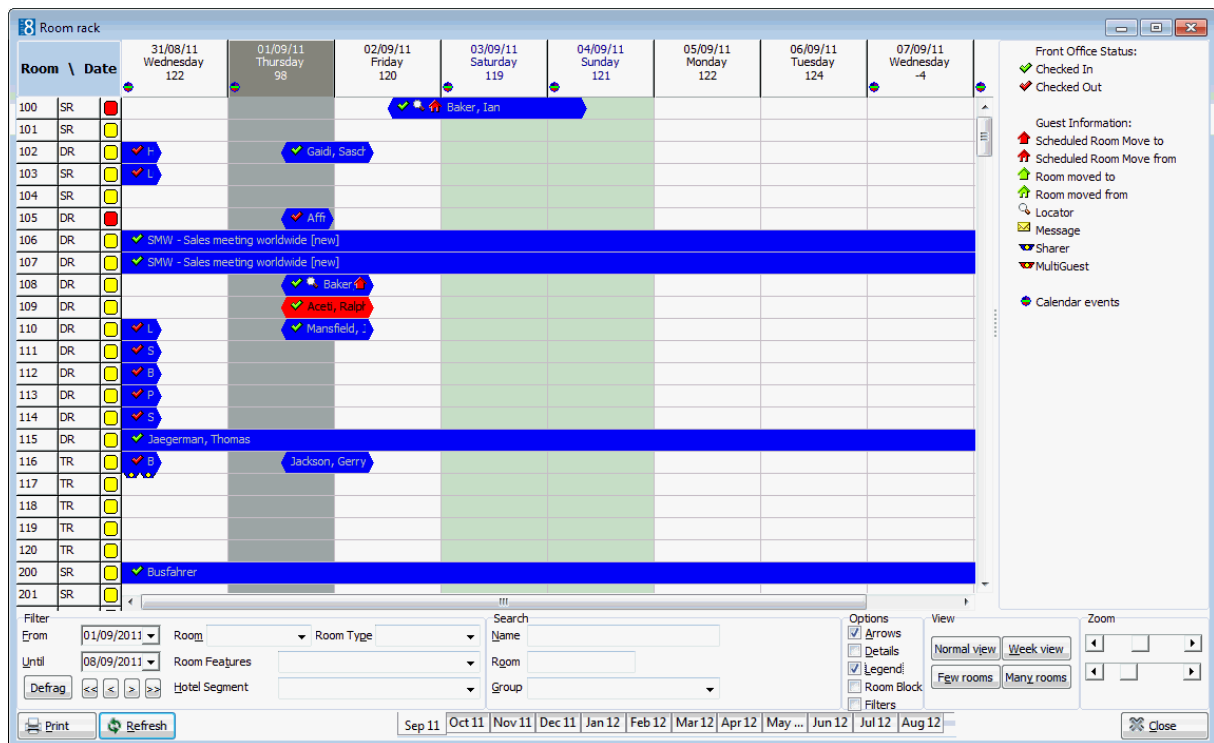
Understanding the Room Rack

Room Rack screen headings
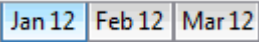
Heading Name	Example	Explanation
Room	024 SB	The room number. The room type. Executive Single
Date	10-01-03 Friday 129	The calendar date and day of the week. The current date column is shown in dark grey. Weekend days are shown in a different colour. The figure under the day of the week is either: Maximum Availability Minimum Availability Def. Occupied Def. + Tent. Occupied

Room Rack screen filters

Field Name	Explanation of the field
Filter	
From	Displays the Room Rack screen starting from that date. If the selected from date is the system date then the display start date will be one day earlier. For all other dates the display will start on the selected from date. The start date is stored so the next time the room rack is opened the last entered start date will be displayed.
Until	Displays the Room Rack screen up until that date. The until date is stored so the next time the room rack is opened the last entered until date will be displayed.
Defrag	Used to administer the room rack and provide optimal average room utilization.
<<	Scrolls back by one date range period, for example 10 days, a week or a month.
<	Scrolls back by one day.
>	Scrolls forward by one day.
>>	Scrolls forward by one date range period from the selected date range, for example 10 days, a week or a month.
Room	Displays only the rooms selected.
Room Type	Displays only the room types selected.
Room Features	Displays only the rooms with the specified room features.
Hotel Segment	If HOTEL SEGMENTATION functionality is activate then the room rack can be displayed by hotel segment. The hotel segments selected are stored per user and will be automatically selected each time the screen is opened until changed by the user.
Search	

Name	Search for the guest's last name on the Room Rack screen.
Room	Search for the room number on the Room Rack screen.
Group	Search by group name. When selecting a group from the list of available groups and pressing refresh, all members of the group who have a room number assigned are listed. **Note:** Only groups which have attached reservations with assigned rooms are listed in the group filter.
Options	
Arrows	Toggles the shape of the reservation bar from an arrow to a straight edge.
Details	Displays a details column on the right-hand side of screen. When selecting a reservation or financial account on the room rack, the information is displayed in html format.
Legend	Displays the legend of the icons used on the room rack.
Room Block	Displays the room blocking dialog box which lists the names of the guests who are due to arrive for the selected time period and have not yet been assigned a room. The list can be filtered by room type, room feature.
Room Type Filter	This option is displayed at the top of the room blocking dialog box when the option ROOM BLOCK is selected. If a filter is selected then only the rooms which have the same room type as the selected reservation are displayed on the room rack.
Room Feature Filter	This option is displayed at the top of the room blocking dialog box when the option ROOM BLOCK is selected. If a filter is selected then only the rooms which have the same room features as the selected reservation are displayed on the room rack.
days after starting date	This option is displayed at the top of the room blocking dialog box when the option ROOM BLOCK is selected. This option defines the number of days to show arrivals with no room assigned; the number of entered days can not exceed the displayed time range of the room rack, for example if the room rack is opened for a 7 day view, the selected days can not exceed 7.
Filters	Displays additional filter criteria.
View	
Normal View	Displays nine days in expanded mode. Weekend days are shown in a different colour.
Week View	The view of the screen is expanded horizontally to display the rooms up to a month.
Few Rooms	Displays approximately 23 room number rows on the screen
Many Rooms	The room number rows are compressed to show more rooms.
Zoom	The upper zoom bar increases/decreases the number of days and the lower zoom bar increases/decreases the number of rooms.

Details Column	Displays details about the reservation/financial account/in-house guest that is currently highlighted. Details include the guest name, reservation number, arrival and departure dates, room type, number of persons, room number and room rate.
	If the room is out-of order/out of service then the details displayed are the out of order/out of service reason, from and to dates, the room number, the status and the return status.
Jan 12 Feb 12 Mar 12	The tabs at the bottom of the display enable the user to easily select a month to view. The display starts at the beginning of the selected month and displays the number of days selected in the date range period.

Room Rack screen icons

Icon	Legend Term	What it represents
▢ ▣ ▢ ▣	Clean Dirty Touched Up Inspected	The room is clean. The room is dirty. The room has the status touched up. The room has the status inspected.
●	Calendar Events	Calendar events.
✉	Message	The guest has a message.
⏧	Sharer	Two or more guests share the room.
⏧	Multi-Guest	Indicates a multiple guest reservation.
🔍	Locator	Indicates that the guest can be found at a specific location at a specific time.
✔	Checked-In	The guest has checked into the hotel.
✔	Checked-out	The guest has checked out of the hotel.
⬆	Scheduled Room Move to	The guest is scheduled to move to this room.
⌂	Scheduled Room Move from	The guest is scheduled to move from this room.
⬆	Room moved to	The guest has moved to this room.
⌂	Room moved from	The guest has moved from this room.

ⓘ The type of availability displayed in the Date column is defined via the option DISPLAY AVAILABILITY IN ROOM RACK under Miscellaneous → User Settings → Appearance Tab.

ⓘ The width of the room type column can be defined via the option ROOM TYPE COLUMN WIDTH under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4 tab

ⓘ The width of the room type column can be defined via the option ROOM NO COLUMN WIDTH under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4 tab.

The display of the room status description in addition to the coloured icon is controlled by the option DISPLAY ROOM STATUS DESCRIPTION under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4 tab.

Hotel Segmentation functionality is controlled by the parameter HOTEL SEGMENTATION under Setup → Configuration → Miscellaneous → Global Settings → Reservations → Reservation 4 tab. In addition HOTEL SEGMENTS must be configured under Setup → Reservations → Room Management → Hotel Segments and Hotel Segment Link.

The storing of hotel segmentation preferences by user is controlled by the option STORE HOTEL SEGMENTATION PREFERENCES under Miscellaneous → User Settings → Appearance Tab. If the option STORE HOTEL SEGMENTATION PREFERENCES is selected then each time this user opens the room rack the selected hotel segment view is displayed.

The screen refresh interval is defined via the option GENERIC SCREEN REFRESH INTERVAL IN SECONDS under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4 tab. The screen is not refreshed automatically if no time is defined; however the screen can be refreshed immediately by clicking the REFRESH button.

To display financial account groups on the room rack the option SHOW IN ROOM RACK under Setup → Configuration → Cashiering → Financial Account Groups must be selected.

Opening corresponding screens from the Room Rack

From the Room Rack screen you can open the following screens:

- New Reservation opens the profile search screen.
- Set OOO/OOS opens the out of order screen.
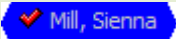
To open corresponding screens

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to an empty grid box, drag the cursor to the right until the required date, the short-cut menu is displayed.

3. Select NEW RESERVATION or BLOCK ROOM, the corresponding dialog box is displayed.

To display corresponding dialog boxes

From the Room Rack screen you can display the dialog boxes listed below:

Corresponding dialog boxes

Field Name	To display the dialog box	Dialog Box
Room	Place the cursor on a room number field and click. Ex. 024	The Room Information dialog box appears displaying details about the room. For financial accounts the account number and description are displayed.
Room Type	Place the cursor on a room type and click. Ex. SB	The Room Type Info dialog box appears displaying details of the room type. For financial accounts the setup of the account group is displayed.

Traffic Light	Place the cursor on a traffic light and click. Ex. ▣	The Edit Housekeeping Status dialog box appears displaying the housekeeping status of the room. The status can be changed from this screen.
Dates	Place the cursor on a date and click. Ex. 11/09/99	The Calendar Events Search dialog box appears displaying events that are going on in the hotel or the city.
Reservation grid box	Place the cursor on the Reservation grid box and double click. Ex. ✔ Mill, Sienna	The Edit Reservation screen appears displaying the reservation information for that guest.

Viewing the information box

When you place the cursor on a grid box, an information box appears for approximately five seconds.

To view the information box

From the Room Rack screen, place the cursor on a grid box.

The information box appears. If the grid box is a reservation then the information box displays a guest's last name and the date of arrival and departure. If the grid box is an out of order block then the information box displays the dates and the reason that the room is out of order.

Changing the view of the Room Rack screen

You can change the view of the room rack screen by:

- Changing the date - You can change the view of the room rack screen by changing the start and end dates of the Room Rack screen.

- Selecting the zoom option- You can change the view of the Room Rack screen by selecting the zoom option. The two zoom bars allow you to expand/contract the view of the Room Rack screen with more/less rooms and more/less days.

- Selecting the week view you can change the view of the room rack screen by selecting the week view option. The week view option allows you to view the room rack screen up to a month with clearly defined dates for every week from Sunday to Saturday.

Change the start and end dates

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Type the start date in the FROM DATE box or click the drop down arrow and select a date from the calendar.

3. Type the end date in the UNTIL DATE box or click the drop down arrow and select a date from the calendar.

    The Room Rack screen reappears displaying different dates and information.

Select the Week View option

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

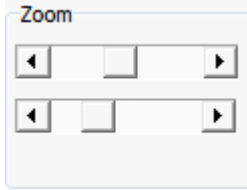2. Click the button WEEK VIEW.

    The Room Rack screen reappears displaying a month's view of rooms and room information.

3. Click the NORMAL VIEW button to return the screen to the default nine day view.

Select the Zoom option

On the Room Rack screen, the upper zoom bar increases/decreases the number of days and the lower zoom bar increases/decreases the number of rooms.

The Room Rack screen reappears displaying more/less rooms and more/less days depending on your selection.

Defragmenting the Room Rack

Defragmentation is usually used for administering computer systems, a process that reduces the amount of fragmentation in file systems. With Fidelio Suite8 this is used to administer the room rack and provide optimal average room utilization.

The defragmentation can be run according to the following criteria:

- TIME INTERVAL - the dates for which the defragmentation should be calculated.
- TARGET - Less unused intervals, Longer unused intervals from first day and Completely empty rooms.
- OPTIONS - Same room type, Same floor only, Move even if guest has more than one reservation or Allow move to dirty room.

How to run defragmentation on the room rack

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

   The Room Rack is displayed.

2. Click the DEFRAG button to display the Defragmentation options dialog box.

3. The time interval for the defragmentation is determined by the dates selected on the main room rack screen. The dates cannot be changed on the Defragmentation options screen.

   Select the required targets:

   - Less unused intervals

   - Longer unused interval from first day

   - Completely empty rooms

   Select the required options:

   - Same room type only

   - Same floor only

   - Move even if guest has more than one reservation

   - Allow move to dirty room

   - Maximum number of steps

4. After selecting the required options click OK.

   A preview of the suggested moves is displayed on the room rack and a list of the suggested moves on the right-hand side of the room rack.
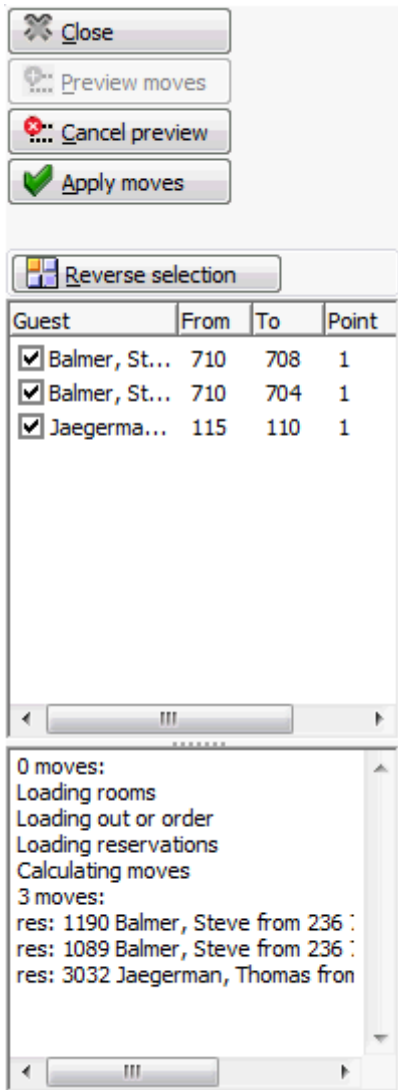
7. Click the Apply moves button to perform the suggested moves or click Close to discard the suggestion and close the screen.

   A progress bar is displayed.
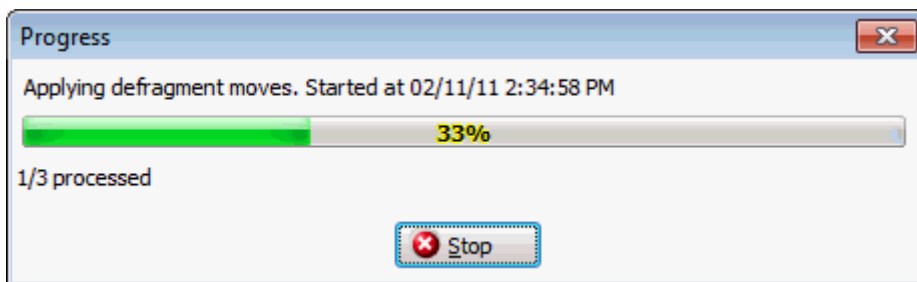
8. Once the process has completed then a list of the defragmentation moves is displayed.
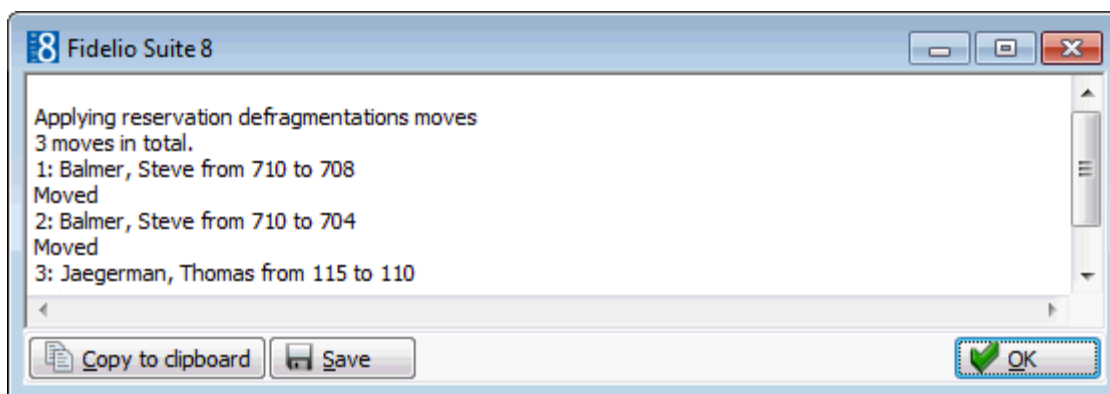
9. Click OK to close the defragmentation.

ⓘ Defragmentation functionality is controlled by the user right DEFRAGMENTATION under Setup → Configuration → Users → User Definition → Rights → Reservations.

Printing the Room Rack

You can print the room rack for the selected date range in a two week or monthly format. The print settings defined are saved per user.

To print the room rack

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Complete the FROM and UNTIL dates and any other required filter criteria.

3. Click PRINT; the Room rack print dialog box is displayed.

4. Select the print settings, for details on the print settings see the Room Rack Print Options table below.

5. Click PRINT to print the room rack.

   The room rack can also be exported to Excel by pressing the EXCEL button.

Room Rack Print Options

Field	Definition
Display horizontal lines	If selected, horizontal lines will be shown in the printout of the room rack.
Horizontal lines type	Select the type of horizontal lines that should be displayed.
Display vertical line	If selected, vertical lines will be shown in the printout of the room rack.
Vertical lines type	Select the type of vertical lines that should be displayed.
Font	Select the font that should be used for the print out.
Display status colour	If selected the room rack will be displayed and printed in the original colours.
Default colour	Select the default colour in which the room rack should be printed.
Default Colour	If selected, the room rack will be displayed and printed in the default colour defined.
Row Height	Select the height for each row on the printout.

Print 2 weeks layout	Select this option to print the room rack with two weeks on one page. If not selected then all days will be printed on one page.

Searching for a room

You can search for a room by typing a room number in the Room box or by typing in the whole name or the first letter of the guest's last name in the Name field box. The Room Rack filter fields allow you to change the from and until dates, select room types and room features. If virtual suites are configured then they can be displayed by searching for the room type VS.

Search for a room

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Type the room number in the ROOM box and press the TAB key.

   The Room Rack screen is displayed with the room number in the first grid box.

Search for a room using a specific name

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Type the name in the NAME box and press the TAB key.

   If only one name that matches the entry in the NAME box, the Room Rack screen is displayed with the name in the first grid box. If more than one name matches the entry, the Reservation Search dialog box is displayed.

Search for a room using the filter options

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Type the room number in the ROOM box and press the TAB key.

   The Room Rack screen is displayed with the room number in the first grid box.

3. Click the drop down arrow and select the required room numbers from the ROOM list.

4. Click the drop down arrow and select the required room types from the ROOM TYPE list.

5. Click the drop down arrow and select the required room features from the ROOM FEATURES list.

   The Room Rack screen is displayed with only rooms which match the entered criteria.

New reservation on the room rack

To create a new reservation

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Place the cursor on the grid box for the arrival date and room number required for the reservation.

3. Left-click and hold down the left-mouse button.

4. Drag the mouse to the right until the required dates are selected, release the left-mouse button, the short-cut menu is displayed.

New reservation
Set OOO/OOS

Cancel
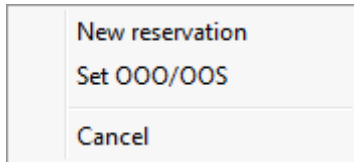
5. Select NEW RESERVATION, the Profile Search screen appears.

6. Select an existing profile or create a new profile, the Edit Reservation screen is then displayed.

7. Once the reservation is complete, click OK to close the reservation screen and re-display the room rack.

Editing a reservation on the room rack

From the Room Rack screen you can edit a reservation. You may also change a guest's arrival date if the guest has not checked in.

Edit a reservation

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the reservation to be edited and right-click to display the short-cut menu.

Edit

Cancel Res.
Add on

Move to Another Room
Lock room (superblock)

Balmer, Steve
Jung, Frank-Michael
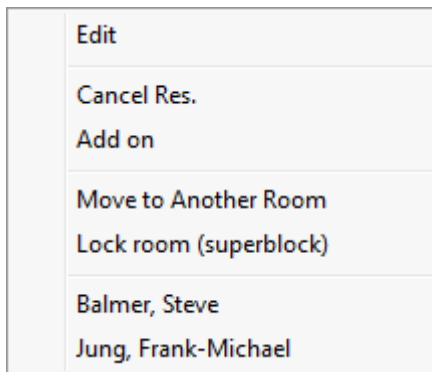
If the reservation is a share reservation then the names of the sharing guests are also listed.

3. Select EDIT to display the Edit Reservation screen of the reservation that was pointed to.

4. Select a specific GUEST NAME to display the edit reservation screen for that reservation.

5. Make the required changes.

6. Click OK.

> **Note:** Double-clicking the reservation also displays the reservation edit screen.

Change the arrival/departure date by moving the reservation on the grid

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Click the reservation to be changed, a yellow arrow appears on the first and last day of the reservation.

3. Left-click on the arrow on either the first or last day and drag the mouse to the left or right.

4. A confirmation message is displayed.

5. Click YES to change the date.

Change the arrival or departure date via the reservation screen

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the reservation to be changed and double-click to display the Edit Reservation screen.

3. In the ARRIVAL and or DEPARTURE box type the new date or click the drop-down arrow and select a date from the calendar.

4. Click OK to change the date.

Editing a financial account

To edit a financial account

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the financial account to be edited and right-click to display the short-cut menu.

3. Select EDIT, the financial account settings dialog box is displayed.

4. Make any changes necessary and click OK to save the changes.

Only financial account groups which have been marked Show in room rack under Setup → Configuration → Cashiering → Financial Account Groups are displayed on the room rack.

Checking in a reservation

To check in a reservation

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the reservation to be checked in and right-click to display the short-cut menu.

3. Select CHECK IN, a message is displayed indicating that the check-in was successful.

4. Click OK, to close the check-in successful message

   Depending on the interfaces installed additional messages may be displayed.

   For example, if an interface for key cards is installed, the Make Key dialog box is displayed.

5. Click the MAKE KEY button to print a key card.

A green check mark appears in front of the guest name on the room rack indicating that the reservation has been checked in.

ⓘ The check in successful message is controlled by the parameter DISPLAY MESSAGE WHEN CHECK IN WAS SUCCESSFUL under Miscellaneous → User Settings → Reservation.

ⓘ Prompting for a credit card at check-in is controlled by the parameter ASK FOR CREDIT CARD AT CHECK-IN under Setup → Configuration → Global Settings → Reservation → Reservation 1 tab.

ⓘ Daily charges can be posted automatically after check-in by selecting the parameter POST DAILY CHARGES AFTER CHECK-IN under Setup → Configuration → Global Settings → Reservation → Reservation 3 tab. The charges are posted using the night audit cashier ID and there is no user notification that the daily charges have been posted.

ⓘ The cashier login and then the guest folio for the checked-in guest can be displayed right after check in by selecting the parameter SHOW BILLING AFTER CHECK-IN under Setup → Configuration → Global Settings → Reservation → Reservation 3 tab. If sharers were checked-in then the guest folio is displayed for all sharing guests.

Checking in a financial account

To check in a financial account

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the financial account to be checked in and right-click to display the short-cut menu.

3. Select CHECK IN, a check in message is displayed.

4. Click OK, a green check mark appears in front of the financial account name indicating that the account has been checked in.

ⓘ Only financial account groups which have been marked Show in room rack under Setup → Configuration → Cashiering → Financial Account Groups are displayed on the room rack.

Undoing a check in

To undo a check in

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the reservation to be unchecked in and right-click to display the short-cut menu.

3. Select UNDO CHECK IN, the select room status dialog box is displayed.

4. Select a room status from the list.

5. Click OK, the green check mark indicating that the reservation has checked in is removed.

Checking out a reservation

To check out a guest

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the reservation to be checked out and right-click to display the short-cut menu.

3. Select CHECK OUT, the Cashier Password dialog box to access the check out options is displayed.

4. Login and check out the guest.

5. Click CLOSE on the Check Out screen, the check out screen is closed.

6. The Room Rack reappears with a red check mark in front of the guest name indicating that the reservation has been checked out.

Creating an add on reservation on the room rack

The add on option may be used to create a duplicate reservation of the one you are currently positioned on. All reservation details are copied except for the credit card and the guest and reservation notes information.
If the parameter ADD ON RESERVATION PROFILE SELECT FIRST is activate then the profile search screen is opened when selecting ADD ON from the room rack. If the parameter is not active then a reservation copy is displayed in edit reservation mode and can be changed as required. This option is useful if the guest asks for an identical reservation on a different period or if the guest needs more than one room.

To create an add on reservation

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to a reservation and right-click to display the short-cut menu.

3. Select ADD ON.

   If the parameter ADD ON RESERVATION PROFILE SELECT FIRST is active then Profile Search screen appears. Once a profile is selected then a reservation copy is displayed in edit reservation mode and can be changed as required.

   If the parameter is not active then a reservation copy is displayed in edit reservation mode directly and can be changed as required.

4. Once the reservation is complete click OK to close the reservation screen and re-display the room rack screen.

   Only if a room number was selected for the reservation is the guest name is displayed in the room rack.

ⓘ The profile search screen is opened when selecting Add On from the room rack if the parameter ADD ON RESERVATION PROFILE SELECT FIRST is selected under Setup → Configuration → Global Settings → Reservation → Reservation 1 tab. This allows for a different profile to be selected before a duplicate reservation of the one you are currently positioned on is created.

Accessing financial account billing

To open the billing screen for a financial account

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the required financial account and right-click to display the short-cut menu.

3. Select BILLING, the Cashier Password dialog box to access the billing options is displayed.

4. Login, the billing screen is displayed.

5. Once the required billing transactions have been performed, click CLOSE on the billing screen.

6. The Room Rack reappears, if the financial account was checked out then a red check mark is shown in front of the financial account indicating that the account was checked out.

ⓘ Only financial account groups which have been marked Show in room rack under Setup → Configuration → Cashiering → Financial Account Groups are displayed on the room rack.

Undoing a check out

To undo a check out

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the reservation whose check out is to be undone and right-click to display the short-cut menu.

3. Select UNDO CHECK OUT, the reinstate message is displayed.

4. Click YES, the undo check out message is displayed.

5. Click OK.

6. The Room Rack screen reappears with a green check mark in front if the guest name indicating that the reservation has been checked back in.

ⓘ Reinstate/Undo checkout functionality is controlled by the user right REINSTATE/UNDO under Setup → Configuration → Users → User Definition → Rights → Cashiering.

Assigning a room to a reservation

From the Room Rack screen you can assign a room number to a reservation.

To assign a room number

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the grid box for the required arrival date and room number, right-click to display the short-cut menu.

3. Select ASSIGN RESERVATION, the Reservation Navigator screen appears displaying all reservations suitable for the room type and arrival date selected.

4. Point to the required reservation and click SELECT.

5. The Room Rack screen is displayed with the reservation assigned to the selected room.

Superblocking a room on the room rack

Superblock functionality enables authorized users to block a room for a guest, while unauthorized users will not be able to change that room or make a room move. From the Room Rack screen you can assign a superblock to a reservation. A superblock means that the room number assigned to the reservation is locked and can only be changed by a user with the appropriate user rights. This feature enables supervisors to gain more control over room assignments where a specific room type and number is essential.

How to superblock a room

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the reservation to be superblocked and right-click to display the short-cut menu.
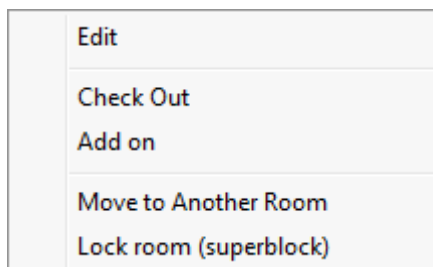
3. Select LOCK ROOM (SUPERBLOCK), the superblock is applied and the colour of the reservation changes to the colour defined in the configuration for superblocked reservations.

How to clear a superblock

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the reservation whose superblock is to be removed and right-click to display the short-cut menu.
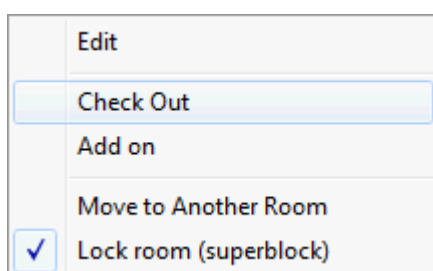
3. A tick mark in front of the lock room option indicates that the reservation has a superblock. To remove the superblock select LOCK ROOM (SUPERBLOCK). The reservation is then displayed on the room rack in its original colour and not in the colour which indicates superblocked reservations.

ⓘ Superblock functionality is controlled by the user rights LOCK ROOM (SUPERBLOCK) and UNLOCK ROOM (CLEAR SUPERBLOCK) under Setup → Configuration → Users → User Definition → Rights → Reservation.

ⓘ The colour for superblocked reservations is defined via the option COLOUR FOR DONT MOVE RESERVATION under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4 tab.

Cancelling a reservation

A reservation can be cancelled if the guest has not checked in.

To cancel a reservation

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the reservation to be cancelled and right-click to display the short-cut menu.

3. Select CANCEL RES, the cancel reservation dialog box is displayed.

4. In the REASON box click the drop-down arrow, and select a reason from the reasons list.

5. Click YES, a confirmation message is displayed.

   The reservation is cancelled and no longer shown on the Room Rack screen.

Moving a reservation/FA to a different room

There are several different ways to move a guest reservation or financial account (FA) to a different room.

Move the reservation/FA on the grid via drag-and-drop

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Click the reservation/FA to be moved, a yellow arrow appears on the first and last day of the reservation.

3. Drag the reservation/FA to the desired room, a confirmation message is displayed.

4. Click YES to move the reservation/FA to the new room.

> **Note:** If the room type is different, a confirmation message to change the room type is displayed.

Move the reservation/FA on the grid via the short-cut menu

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the reservation/FA to be moved and right-click to display the short-cut menu.

3. Select MOVE TO ANOTHER ROOM, the Select Room dialog box is displayed.

4. In the ROOM box, type the new room number or click the drop-down arrow and select a room number from list.

5. Click OK to move the reservation to the new room.

Move the reservation/FA via the edit reservation screen

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the reservation/FA to be moved and double-click to display the edit reservation screen or financial account settings dialog box.

3. In the ROOM or ACCOUNT NUMBER box type the new room number or click the drop-down arrow and select a room number from list.

4. Click OK to move the reservation/FA to the new room.

Perform a scheduled room move

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the reservation with the scheduled room move, indicated by 🏠 and right-click to display the short-cut menu.

3. Select PERFORM ROOM MOVE, the Room Move dialog box is displayed.

4. Select the reservation and click the MOVE button, a confirmation message is displayed.

5. Click OK to move the reservation to the new room.

6. Click CLOSE.

Out of Order and Out of Service rooms

From the Room Rack screen you can change the status of a room to Out of Order or Out of Service and edit all relevant information.

Edit the out of order/out of service information

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the out of order/out of service room and right-click to display the short-cut menu.

3. Select EDIT, the Out of Order dialog box is displayed.

4. Make the required changes.

5. Click SAVE.

Place a room out of order or out of service

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the grid box for the required date and room number you want taken out of order/out of service.

3. Drag the cursor to select the required number of days, the short-cut menu is displayed.

4. Select SET OOO/OOS, the Out of Order dialog box is displayed.

5. The room number and date fields are already completed, make any changes necessary.

6. Click the drop down arrow and select a room status from the status list.

7. Click the drop down arrow and select a reason from the reason list.

8. Add any special remarks in the remarks field.

9. Click the drop down arrow and select a return status from the status list.

10. Click SAVE to place the room out of order/out of service, the reason is displayed on the Room Rack screen.

Deleting the out of order/out of service information

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the out of order/out of service room and right-click to display the short-cut menu.

3. Select DELETE, the Delete Out of Order Rooms dialog box is displayed.
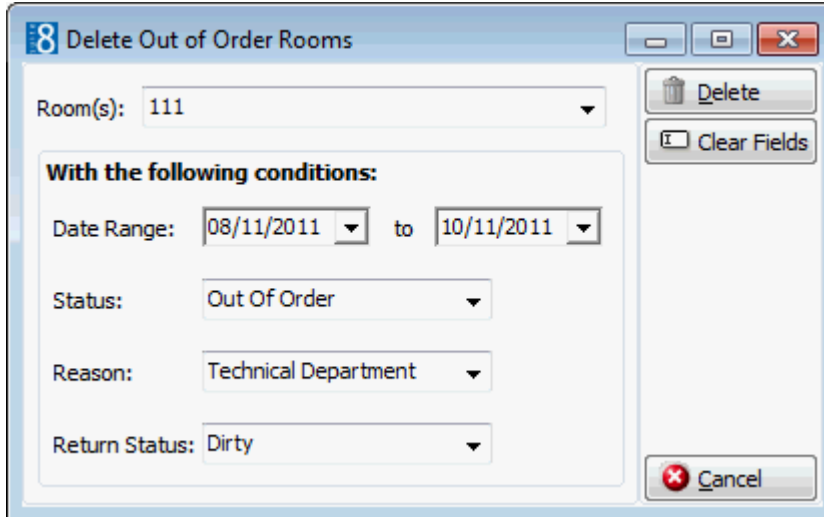
4. Click DELETE, the dialog box is closed and the out of order/out of service status is no longer displayed on the Room Rack screen.

Change the dates of the out of order/out of service block via drag-and-drop

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Click the out or order/out of service block to be changed, a yellow arrow appears on the first and last day of the block.

3. Click on the arrow at the start or end of the block and drag the block to the required date, a confirmation message is displayed.

4. Click YES to change the out of order/out of service dates, the block is moved on the Room Rack screen.

> **Note:** The start date cannot be changed to before the system date.

Change the dates of the out of order/out of service block via the edit dialog box

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Point to the out of order/out of service block to be moved and double-click to display the out of order dialog box.

3. Type a new date in the appropriate field box or click the drop down arrow and select a date from the calendar.

4. Click SAVE to The date is changed and the out of order/out of service room is moved on the Room Rack screen.

5. Click YES to change the out of order/out of service dates, the block is moved on the Room Rack screen.

> **Note:** The start date cannot be changed to before the system date.

Out of Order functionality is controlled by the user rights VIEW, EDIT, INSERT and DELETE under Setup → Configuration → Users → User Definition → Rights → Housekeeping → Out of Order.

Out of Service functionality is controlled by the user rights VIEW, EDIT, INSERT and DELETE under Setup → Configuration → Users → User Definition → Rights → Housekeeping → Out of Service.

Blocking a room

You can block a room by opening the Room Blocking dialog box and selecting a room. The room blocking dialog box lists the names of the guests who are due to arrive and have not yet been assigned a room.

To block a room

1. Click the QUICK KEYS menu and select ROOM RACK or press CTRL + L.

2. Select the check-box next to ROOM BLOCKING; the Room Blocking dialog box is displayed with a list of reservation that have not yet been assigned a room.

3. The list can be filtered by ROOM TYPE and ROOM FEATURE; if a filter is selected then only the rooms which meet the room type and/or room feature for the selected reservation are displayed on the room rack.

   If no rooms are found with the corresponding feature or room type then the message: 'No Rooms found' is displayed.

4. To limit the number of days to show arrivals with no room assigned the required number of days can be entered in the option DAYS AFTER STARTING DATE. The number of entered days can not exceed the displayed time range of the room rack, for example if the room rack is opened for a 7 day view, the selected days can not exceed 7.

5. Click and drag the selected reservation to the required room number row; the room is blocked for the reserved dates.

6. If the room is not of the same type as the reservation a confirmation message is displayed. Select YES to block this room for this guest or NO to cancel the room choice.
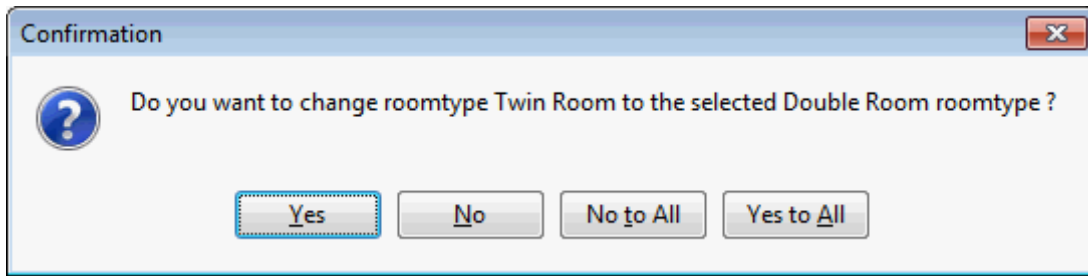
7. If the room is already occupied then a message is displayed asking if you want to share. Select YES to share the room or NO to cancel the room choice.

8. If NO was selected then a confirmation message is displayed confirming that the room blocking request is cancelled.
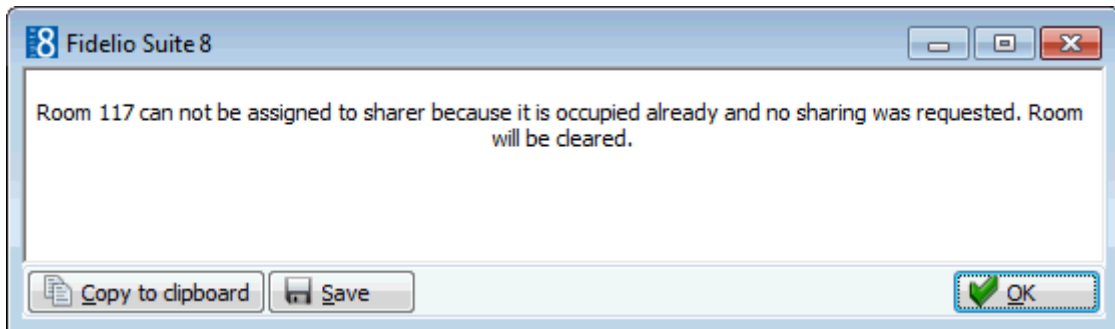
9. Click OK.

> **Note:** If the option ROOM BLOCK is selected to assign reservations to rooms, it is not possible to use drag and drop to move already blocked reservations on the room rack.

18   Room Search

Viewing the Room Search screen

The Room Search quick key is used to search for available rooms.

How to open the room search screen

Click the QUICK KEYS menu and select ROOM SEARCH or press CTRL +S.

The Room Search screen is displayed.

Rooms Search screen field names

Field Name	Explanation of the field
Room No	The room number.
Room Type	The room type.
Description	The room type description.
Features	The room features. For example, CN – Connecting Door.
Floor	The floor number.
Housekeeping Status	The housekeeping status of the room. For example, CL – Clean, DI – Dirty or INS – Inspected
No. of pax	The maximum number of people that under normal occupancy conditions could sleep in the room (excluding cots and/or cribs).
Next Block	The next arrival date for which the room is blocked.
Last Departure	Displays the reservation departure date for the last time this room was occupied.
Assignments	Displays information about rooms that have special housekeeping or general assignments. For example, TWN or TRI, this may indicate to housekeeping that the room needs to be prepared in a special way.

Room Search screen search fields

Fill in this field	With this information
Starting Date	The date for which to search for available rooms.
Nights	The number of night's to search for available rooms.
Room Types	Select specific room types if required.
Room Number	Enter a specific room number if required.
Room Features	Select specific room features.
Floors	Select specific floors if required.
Due out rooms	Select this check box to include rooms currently in-house, but that are due to check-out. The search can include due out rooms by default by selecting the parameter DUE OUT ROOMS ON ROOM SEARCH (DEFAULT) in configuration.
Include out of service	Select this check box to include rooms that are marked as out of service.
Housekeeping Status	Select the required housekeeping statuses.

NOTE: Rooms with the status 'Out of Order' are not displayed in the rooms selection grid and rooms which have been placed out of service are only included if the option INCL. OUT OF SERVICE is selected.

ⓘ Due out rooms can be included by default in the room search by selecting the parameter DUE OUT ROOMS ON ROOM SEARCH (DEFAULT) under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.

Search for available rooms

You can change the query of the room search screen by changing the starting date and/or the number of nights selected.

How to search for available rooms

1. Click the QUICK KEYS menu and select ROOM SEARCH to display the Room Search screen.

2. Type the required date in the STARTING DATE field box or click the drop down arrow and select a date from the calendar.

3. In the NIGHTS field type the number of nights required.

4. Complete any of the following optional fields: Room Types, Room No., Room Features and Floor.

5. Choose to include or exclude Due out rooms, Out of Service rooms and rooms according to housekeeping status, e.g. Clean rooms, Dirty rooms or Inspected Rooms.

6. Click SEARCH, to display the available rooms according to the entered criteria.

Note: The SELECT button is not available when calling the Room Search from the Quick Keys main menu.

ⓘ The housekeeping statuses are defined under Setup → Configuration → Reservations → Room Management → Housekeeping

Narrowing the room search

You can narrow the search of rooms by changing the search criteria. You may search by room type, room feature, floor number and the housekeeping status.

- Rooms are categorised by room types and room codes. For example, there may be an Executive Single with the code ES and an Executive Twin with the code ETW. Room codes are defined during system setup.

- Each room may have different features, for example, there may be non-smoking and smoking rooms or rooms with connecting doors.

- A hotel that has multiple floors may assign a floor number to each room. For example, room 101 is on the first floor and room 512 is on the fifth floor.

- Each room has a housekeeping status. For example, a room is clean or dirty. You may narrow your search by including and/or excluding due out rooms, out of service rooms, clean rooms and dirty rooms.

> **Note:** To select or clear all of the selections in a selection list, select/clear the check box at the top of the list.

How to search by room type

1. Click the QUICK KEYS menu and select ROOM SEARCH to display the Room Search screen.

2. Type the required date in the STARTING DATE field box or click the drop down arrow and select a date from the calendar.

3. In the NIGHTS field type the number of nights required.

4. In the ROOM TYPES field click the drop down arrow, the room type selection list appears.

	Code	Room Type
	DR	Double Room
	TR	Twin Room
	SR	Single Room
	SU	Suite

5. Select then required room types by selecting the check box next to each room type. A check mark ☑ appears in the check box.

6. Click CLOSE to remove the room types selection list.

7. Click SEARCH, to display the available rooms according to the room types selected.

> **Note:** To search for a specific room number, enter the room number in the ROOM NO. field and click SEARCH.

How to search by room feature

1. Click the QUICK KEYS menu and select ROOM SEARCH to display the Room Search screen.

2. Type the required date in the STARTING DATE field box or click the drop down arrow and select a date from the calendar.

3. In the NIGHTS field type the number of nights required.

4. In the ROOM FEATURES field click the drop down arrow, the room features selection list appears.

5. Select the required room features by selecting the check box next to each feature. A check mark ☑ appears in the check box.

6. Click CLOSE to remove the features selection list.

7. Click SEARCH, to display the available rooms according to the features selected.

How to search by floor

1. Click the QUICK KEYS menu and select ROOM SEARCH to display the Room Search screen.

2. Type the required date in the STARTING DATE field box or click the drop down arrow and select a date from the calendar.

3. In the NIGHTS field type the number of nights required.

4. In the FLOORS field click the drop down arrow, the floor selection list appears.

5. Select the required floors by selecting the check box next to each floor. A check mark ☑ appears in the check box.

6. Click CLOSE to remove the floors selection list.

7. Click SEARCH, to display the available rooms on the floors selected.

How to search by housekeeping status

All housekeeping room statuses may be selected, cleared, or a combination of some selected and others cleared. For example, you may want to search for rooms which are due out and clean.

To include Due out rooms, Out of Service and Housekeeping Status options:

1. Click the QUICK KEYS menu and select ROOM SEARCH to display the Room Search screen.

2. Type the required date in the STARTING DATE field box or click the drop down arrow and select a date from the calendar.

3. In the NIGHTS field type the number of nights required.

4. To include due out rooms select the DUE OUT ROOMS check box.

   ☑ Due out rooms

5. To include out of service rooms select the INCL. OUT OF SERVICE check box.

   ☐ Incl. out of service

6. In the HOUSEKEEPING STATUS selection list select the check box next to each housekeeping status required. A check mark ☑ appears in the check boxes.

	Code	House keeping status
☑	CL	Clean
☐	DI	Dirty
☐	TU	Touched up
☑	IS	Inspected
☑	GM	Checked by GM

7. Click SEARCH, to display the available rooms with the combination of the housekeeping statuses selected.

19   Room Type Availability

The Room Type Availability screen displays in a per room type per day format, single or multiple criteria, selected by the user from the VALUES list.

The time period and the number of days to be displayed are user-definable, by default, seven days from the current hotel date. The room types to be displayed can be defined; however by default all room types are selected.

The room type availability grid displays the dates on the horizontal axis and the room types on the vertical axis, but this may be reversed by selecting the option REVERSE AXES.

The screen is divided into three sections:

- The upper section contains the basic selection criteria, including the time interval, the number of days and the room types or segments to display. The segments selected are stored per user and will be automatically selected each time the screen is opened until changed by the user.

- The left-hand side consists of a list of VALUES which can be selected to be displayed in the room type availability grid, for example, the number of rooms that are available for sale or the number of rooms that are occupied. Additional criteria allow you to view figures for only definite reservations, only tentative reservations or both definite and tentative, and to include or exclude overbooking levels.

- The room type availability grid displays in a per room type per day format, the criteria selected from the VALUES list, for example, the availability %, occupancy % or number of rooms available to rent.

The CROSS REF button provides a quick link to displaying the Availability Screen.

View availability

Click the QUICK KEYS menu and select ROOM TYPE AVAILABILITY or press CTRL + SHIFT + D.

The Room Type Availability screen is displayed.

> **Note:** If the availability details are not displayed immediately then click the REFRESH button. To display the availability details automatically when the screen is opened mark the check box CALCULATE ON POP.

ⓘ The screen refresh interval is defined via the option GENERIC SCREEN REFRESH INTERVAL IN SECONDS under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4 tab. The time to the next update is shown in the TIME INTERVAL dialog box; however the screen can be refreshed immediately by clicking the REFRESH button.

ⓘ Booking Position functionality is controlled by the parameter BOOKING POSITION under Setup → Configuration → Global Settings → Reservation 1 tab. Booking Position functionality defines if tentative block rooms can be displayed as definite on the availability screen, for more details see Entering Block Details → Block Grid Selection.

ⓘ Hotel Segmentation functionality is controlled by the parameter HOTEL SEGMENTATION under Setup → Configuration → Global Settings → Reservations → Reservation 4 tab. In addition HOTEL SEGMENTS must be configured under Setup → Reservations → Room Management → Hotel Segments and Hotel Segment Link.

Changing the Availability View

You can change the view of the room type availability screen using the selection dialog boxes on the left-hand side of the screen.

In the VALUES dialog box you can select which criteria should be shown per room type per day. The selection is by default a single selection, but multiple selections can be made by selecting the MULTI SELECT option. Additional options ALL, NONE and REVERSE allow you to select all criteria, no criteria and to reverse the current criteria selection respectively.

The DEFINITE/TENTATIVE options allow you to select to view figures for only definite reservations, only tentative reservations or both definite and tentative, and to include or exclude overbooking levels.

Changing the time interval

1. On the room type availability screen, type the start date in the FROM box or click the drop down arrow and select a date from the calendar.

2. Type the number of days in the NO. OF DAYS box or click the up or down arrow to select the number of days.

   Alternatively, type the end date in the TO box or click the drop down arrow and select a date from the calendar.

3. Click REFRESH to update the screen.

   > **Note:** The display refreshes automatically every 5 minutes, the time to the next update is shown in the TIME INTERVAL dialog box. The screen can be refreshed immediately by clicking the REFRESH button.

Setting the room type availability view

1. In the VALUES listing, select the required criteria.

2. To select multiple criteria, select the option MULTI SELECT.

3. Click the ALL button to select all the available criteria, click the NONE button to clear all selections and click the REVERSE button to reverse the current criteria selection.

4. In the DEFINITE/TENTATIVE dialog box, select the required option.

5. The Room Type Availability screen reappears with the options that you selected.

Definite/Tentative Options

Button	Displays
Definite	Only definite reservations.
Definite and Tentative	Both definite and tentative reservations.
Tentative Only	Only tentative reservations.
All	Three figures; definite, definite and tentative and only tentative.
Add Overbooking	Overbooking levels are included in the figures.
Booking Position	If selected then the number of rooms in a block which are marked as BOOKING POSITION will be shown as definite reservations instead of tentative reservations.

20   Space Occupancy

The Space Occupancy quick key allows the user to quickly check the function space occupancy for a particular day.

All the events for the selected day can be shown sorted by function space and time or the search can be by selected function space.

In addition, the total number of events and attendees of the selected function spaces are displayed. The booking, event, function space, company or contact details may be edited or changed. The option ONLY UNALLOCATED TABLE RES. can be selected so that only events which have no table reservations attached are listed.

Users can check the availability of function spaces via the conference diary of course, but there, they will see all function spaces whether they have been booked or not. Some users may prefer using this quick key as only function spaces which have been booked are displayed and therefore they then know which function spaces are still available.

How to view booked function spaces

1. Click the QUICK KEYS menu and select SPACE OCCUPANCY or press CTRL + F3 to display the Space Occupancy screen.

2. Type the required date in the EVENT DATE field box or click the drop down arrow and select a date from the calendar, by default today's date is filled.

3. In the STATUS field click the drop down arrow and select the booking statuses required.

4. In the FUNCTION SPACE box select the required function spaces; leave blank to show all booked function spaces.

5. In the TIME box select the time from which to search; the entered time also considers any defined setup and set down times.

6. Click SEARCH to display the function spaces booked for the date selected.

21 Telephone Book

The Telephone Book is set up by categories and within each category are the names and telephone numbers of people and places that the hotel staff may need. The Telephone Book may also be used as a Concierge guide with information that can be helpful to guests. For example, the hotel can scan in a map of the area, airport, or transportation system and then print it for the guest.
For example, choosing the category restaurants, displays a list of restaurants and their telephone numbers. Information relating to the restaurant name and telephone number is displayed by highlighting the entry; the restaurant details are displayed in the description box under the name and telephone number.

How to open the telephone book

On the QUICK KEYS menu, click TELEPHONE BOOK or press CTRL + T.

The Telephone Book screen is displayed.
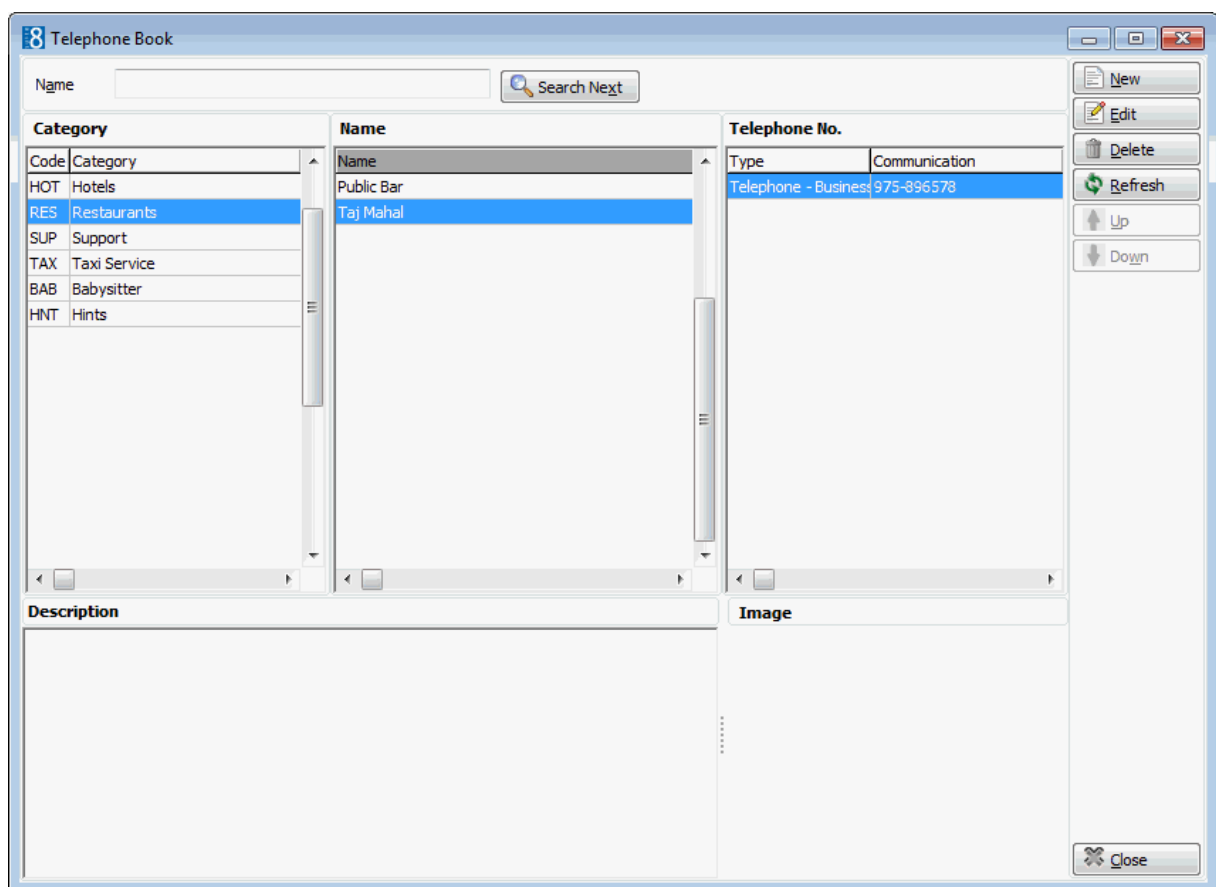
Searching for a telephone number

You can search for a name and telephone number by using the Name Search.

To search by name

1. On the QUICK KEYS menu, click TELEPHONE BOOK.

2. In the NAME SEARCH box type the text to search for, e.g. **Cafe**.

3. Click SEARCH NEXT, the first entry which has the text cafe appearing at the start of the name is displayed.

4. Click SEARCH NEXT again to find the next entry.

Telephone Book Categories

To add a new category

1. On the QUICK KEYS menu, click TELEPHONE BOOK.

2. Point to the CATEGORY section and click NEW, the Telephone Book Category dialog box appears.
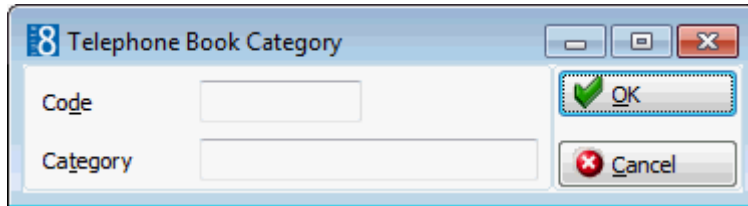
3. In the CODE box type the category code (up to 3 alphanumeric characters).

4. In the CATEGORY box type the category name.

5. Click OK to add the new category.

> **Note:** The order in which the category appears on the category list is determined by using the up and down arrows.

To delete a category

When deleting a category, you must first delete all the entries under the category.

1. On the QUICK KEYS menu, click TELEPHONE BOOK.

2. Select the category to be deleted.

3. Delete all the entries under that category.

4. Once all the entries are deleted, point to the category to be deleted and click DELETE, a confirmation message is displayed.
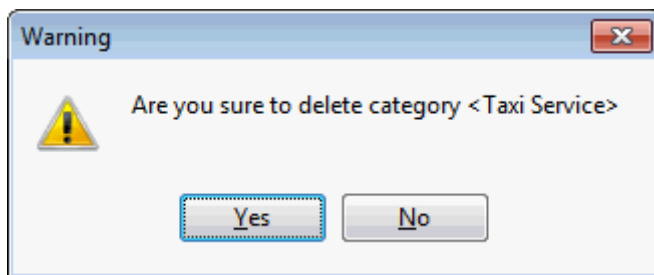
5. Click YES to delete the category.

Telephone Book Entries

To add a new entry

1. On the QUICK KEYS menu, click TELEPHONE BOOK.

2. Point to the NAME section and click NEW, the Edit Entry dialog box appears.
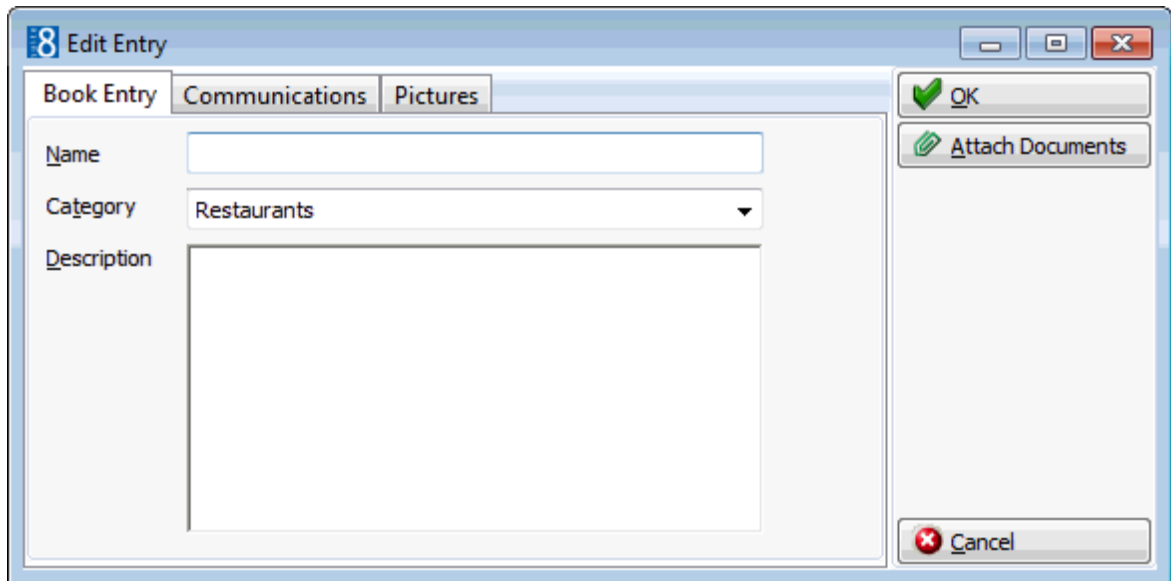
4. In the NAME box type the name of the new entry.

5. Type the category name in the CATEGORY box or click the drop down arrow and select a category from the list.

6. In the DESCRIPTION box type any additional information.

7. Click the COMMUNICATIONS tab.

8. Click NEW, the Communications dialog box appears.

9. In the TYPE box click the drop down arrow and select a communications type from the list.

10. In the VALUE box type the communication value/telephone number.

11. Click OK to add the communication entry.

12. Click OK to add the new entry to the telephone book.

To change an entry

1. On the QUICK KEYS menu, click TELEPHONE BOOK.

2. Point to the entry to be changed and click EDIT, the Edit Entry dialog box appears.

3. Tab to the fields to be updated and type the changes.

4. To change the category, type the new category name in the CATEGORY box or click the drop down arrow and select a category from the list.

5. To change the communication details, click the COMMUNICATIONS tab, select the entry to be changed and click EDIT.

6. Click OK to save changes to the communication details.

7. Click OK to save changes to the telephone book entry.

To delete an entry

1. On the QUICK KEYS menu, click TELEPHONE BOOK.

2. Point to the entry to be deleted and click DELETE, a confirmation message is displayed.
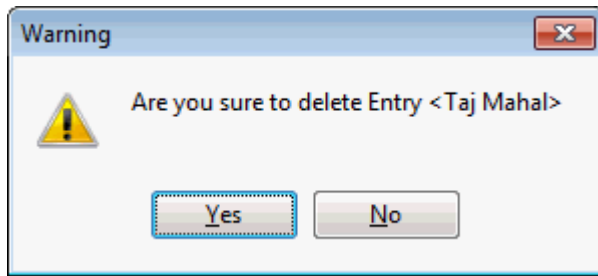
3. Click YES to delete the entry.

Attaching documents

You can attach documents to a telephone book entry or scan a document and attach it. For example, the hotel can scan in a map of the area, airport, or transportation system and then print it for the guest.

How to attach a document

1. On the Telephone Book screen, select the entry that you want to add an attachment to.

2. Click EDIT, the Edit Entry dialog box appears.

3. Click ATTACH DOCUMENTS, the Attached documents dialog box is displayed.
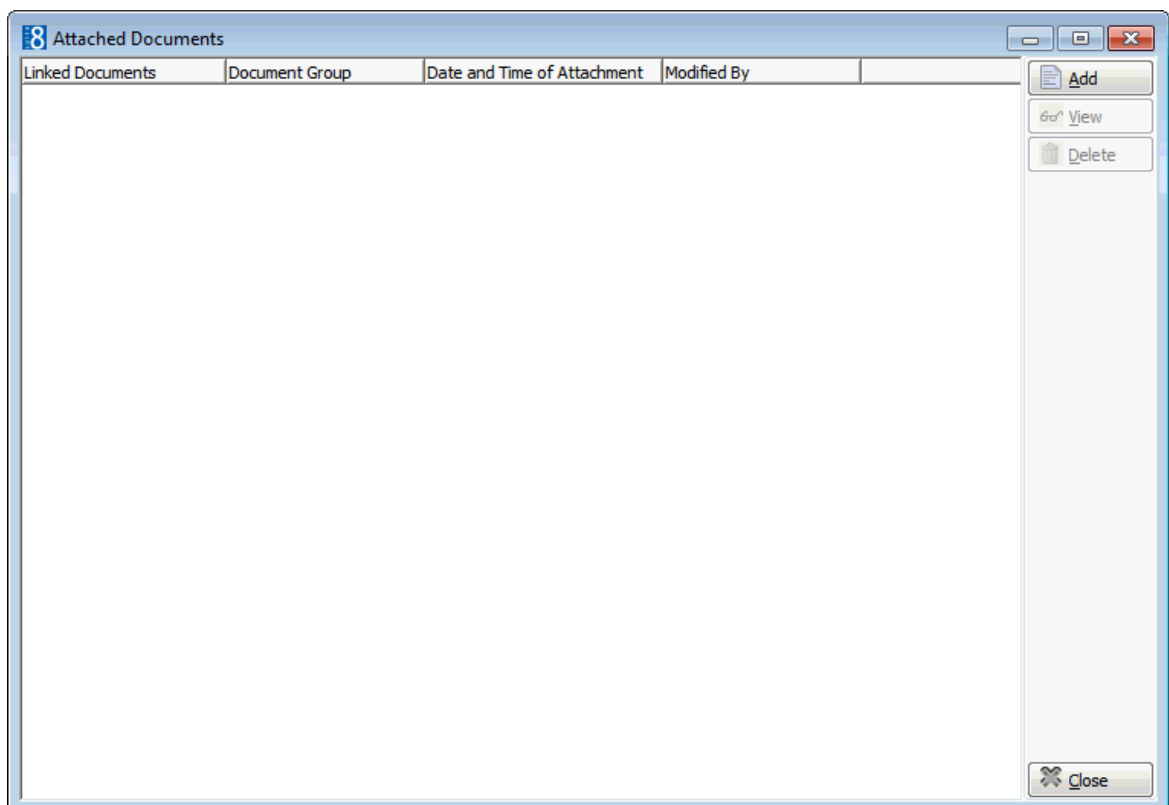
4. Click ADD, the Attach documents dialog box is displayed.
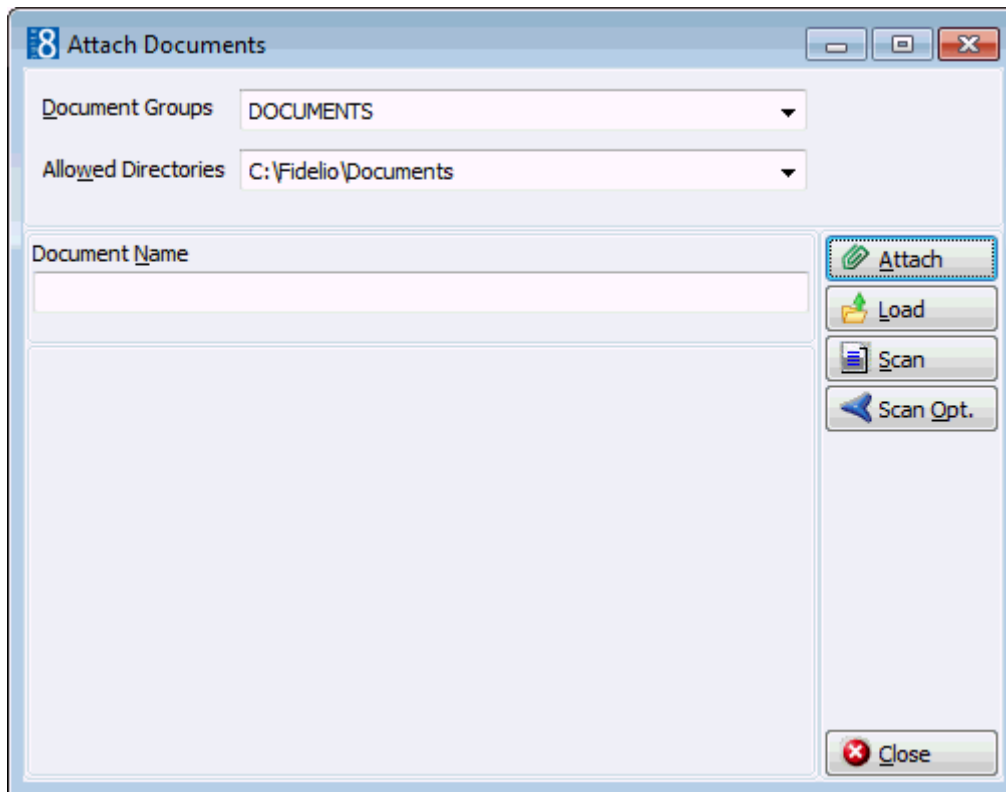
5. In the DOCUMENT GROUPS list, select the document group required.

6. In the ALLOWED DIRECTORIES list, select the allowed directory required.

7. Click BROWSE, to display the list of documents.

8. Select the required document and click OPEN, the Document Name field is filled.
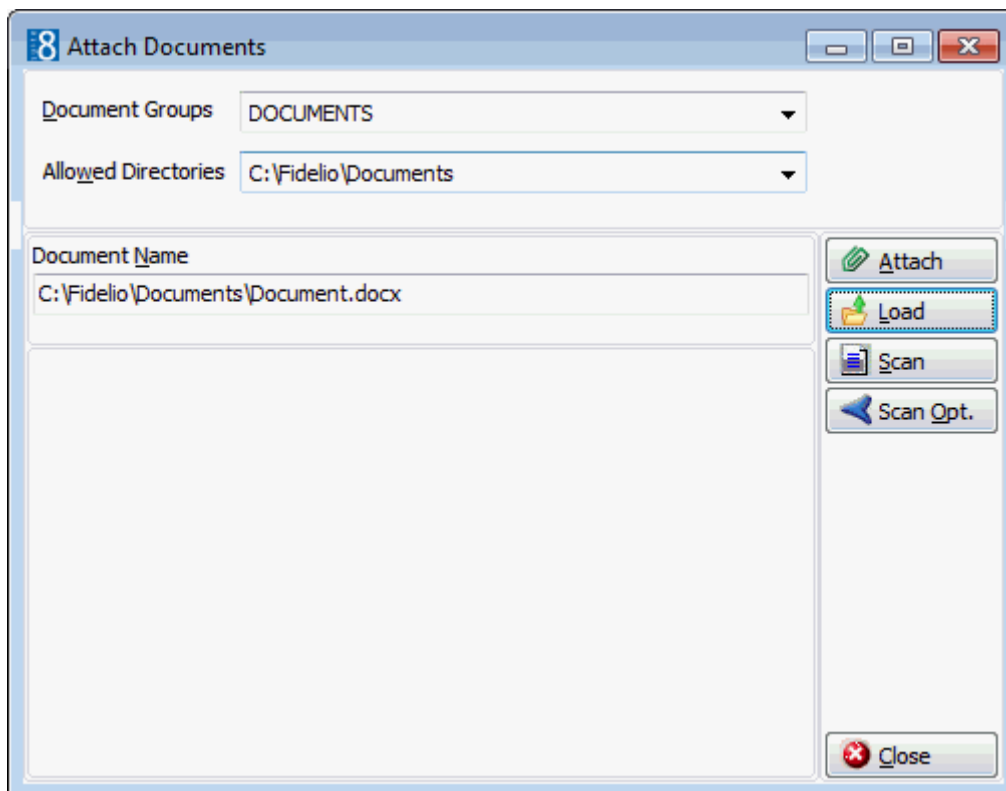
9. To attach the document, click ATTACH, the document is shown as linked on the attached documents screen.
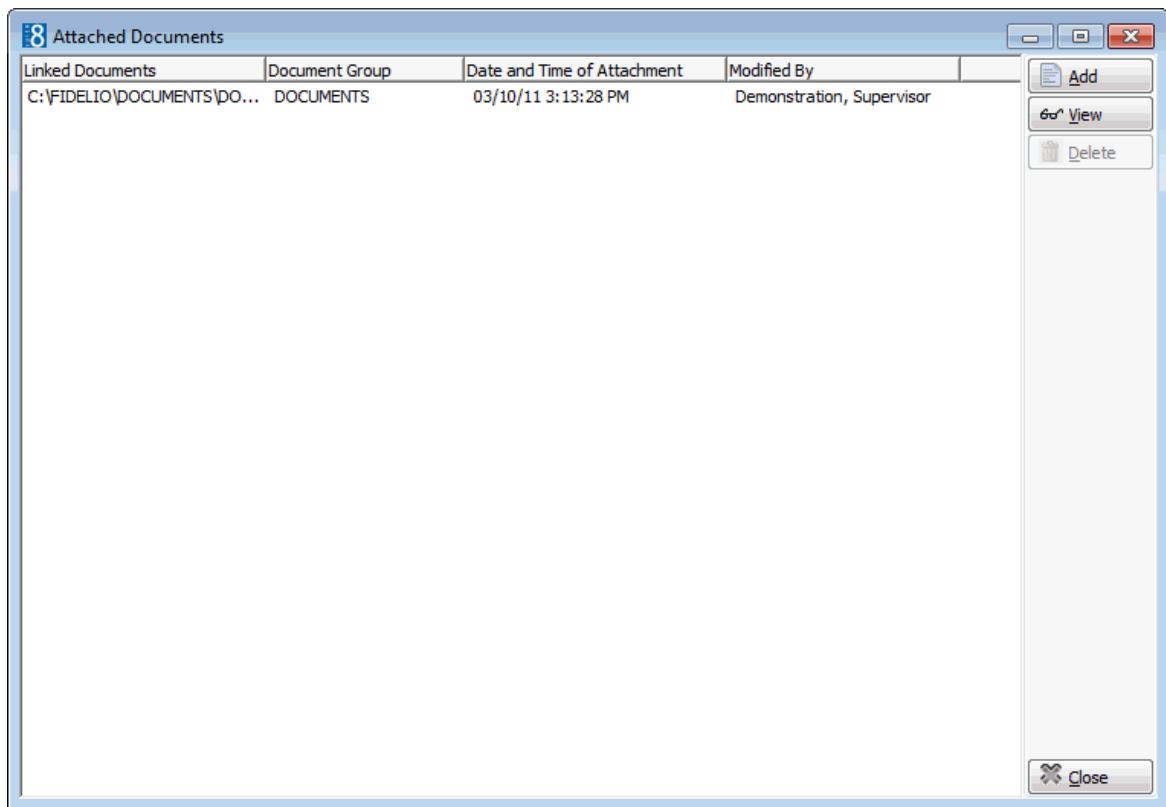
> **Note:** Pictures or images may be attached in JPG or BMP format. The default setting is JPG, but this may be changed via the OPTIONS button. The selected settings will be saved for that user.

How to view/edit an attached document

1. On the Telephone Book screen select the entry that you want to view the attachment.

2. Click EDIT, the Edit Entry dialog box appears.

3. Click ATTACH DOCUMENTS, the Attached documents dialog box is displayed.

4. Select the document and click VIEW.

   Suite8 opens the relevant application, for example, Word if the document is a Word document or Crystal Reports if the document is a Crystal Report.

   > **Note:** The document may be edited directly from within the opened application.

How to scan and attach a document

1. On the Telephone Book screen select the entry that you want to scan and attach a document to.

2. Click EDIT, the Edit Entry dialog box appears.

3. Click ATTACH DOCUMENTS, the Attached documents dialog box is displayed.

4. Click ADD, the attach documents dialog box is displayed.

5. In the DOCUMENT GROUPS list, select the document group required.

6. In the ALLOWED DIRECTORIES list, select the allowed directory required.

7. Click SCAN, the select source dialog box is displayed.
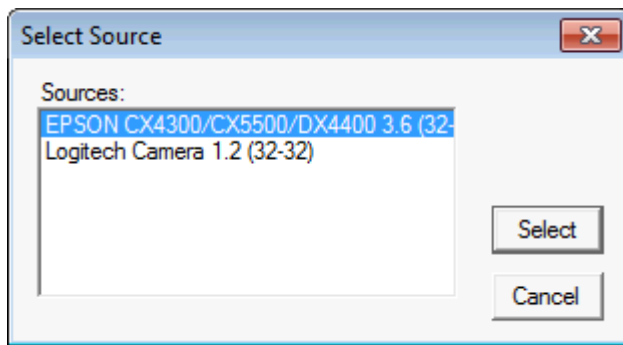
8. Select the source and click SELECT to open the scanner application.

9. Scan the document.

10. Click ATTACH to link the scanned document.

> **Note:** The scanner needs to be 'Twain' compatible.

22   Transponder Scan

Transponder Handling is used in resort properties operating without cash. The guests receive a card upon check in which can be used for all purposes and services the property provides.

How to open the Transponder Scan screen

Click the QUICK KEYS menu and select TRANSPONDER SCAN or press CTRL + SHIFT + T.

The Transponder scan screen is displayed.
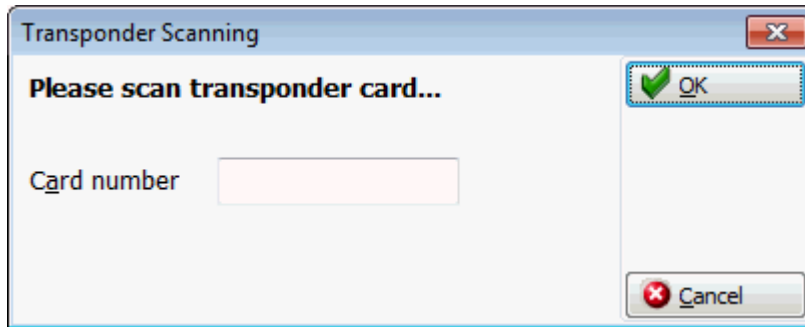
Transponder Scanning Options

Option	Explanation of the field/button
Card number	Scan the card or enter the card number manually.
OK	Press this button to confirm.
Last scan	Press this button to insert the last scanned or entered transponder card number.
Cancel	Closes the screen.

How to scan a new transponder card

1. Click the QUICK KEYS menu and select TRANSPONDER SCAN to display the Transponder Scanning dialog box.

2. Scan the card, enter the card number manually or press the LAST SCAN button to enter the last scanned card number.

3. Click OK, a message is displayed informing you that this is the first time you have swiped the card.
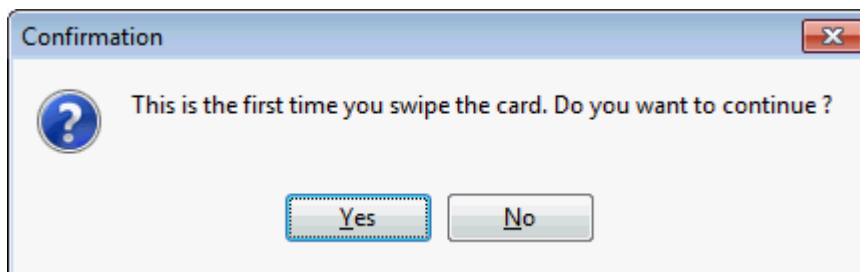
4. Select YES to continue, the Card type dialog box is displayed.
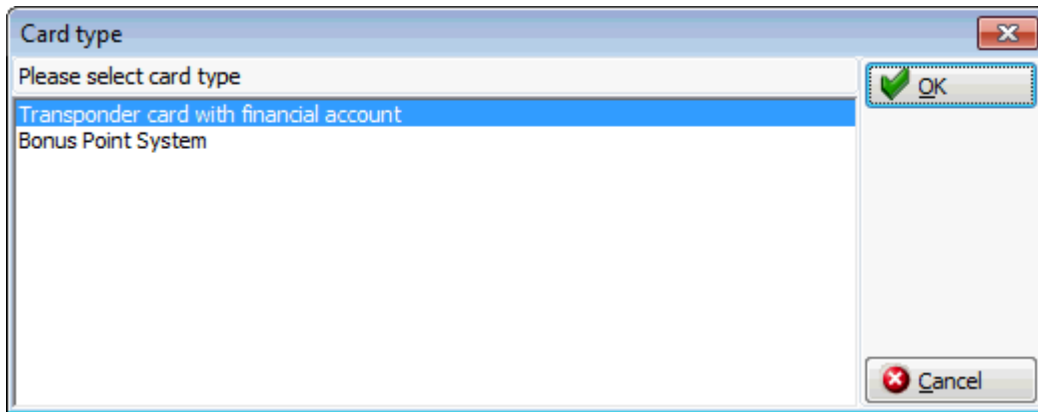
5. Choose TRANSPONDER CARD WITH FINANCIAL ACCOUNT and click OK; the Transponder Financial Account Creation dialog box and profile selection screen are displayed.

6. Select the required profile; the financial account GUEST name is completed with the selected profile.
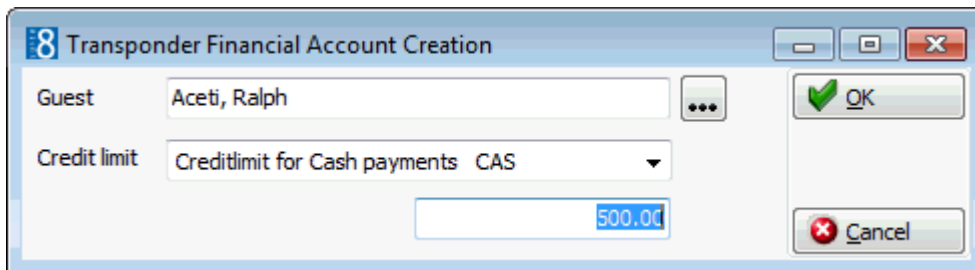
7. The CREDIT LIMIT is completed with a default credit limit which may be changed if required; click OK.

   The Transponder Handling dialog box is opened with the TRANSPONDER READ tab displayed.

How to scan an active transponder card

1. Click the QUICK KEYS menu and select TRANSPONDER SCAN to display the Transponder Scanning dialog box.

2. Scan the card, enter the card number manually or press the LAST SCAN button to enter the last scanned card number.

3. Click OK, the Card Information dialog box is displayed.
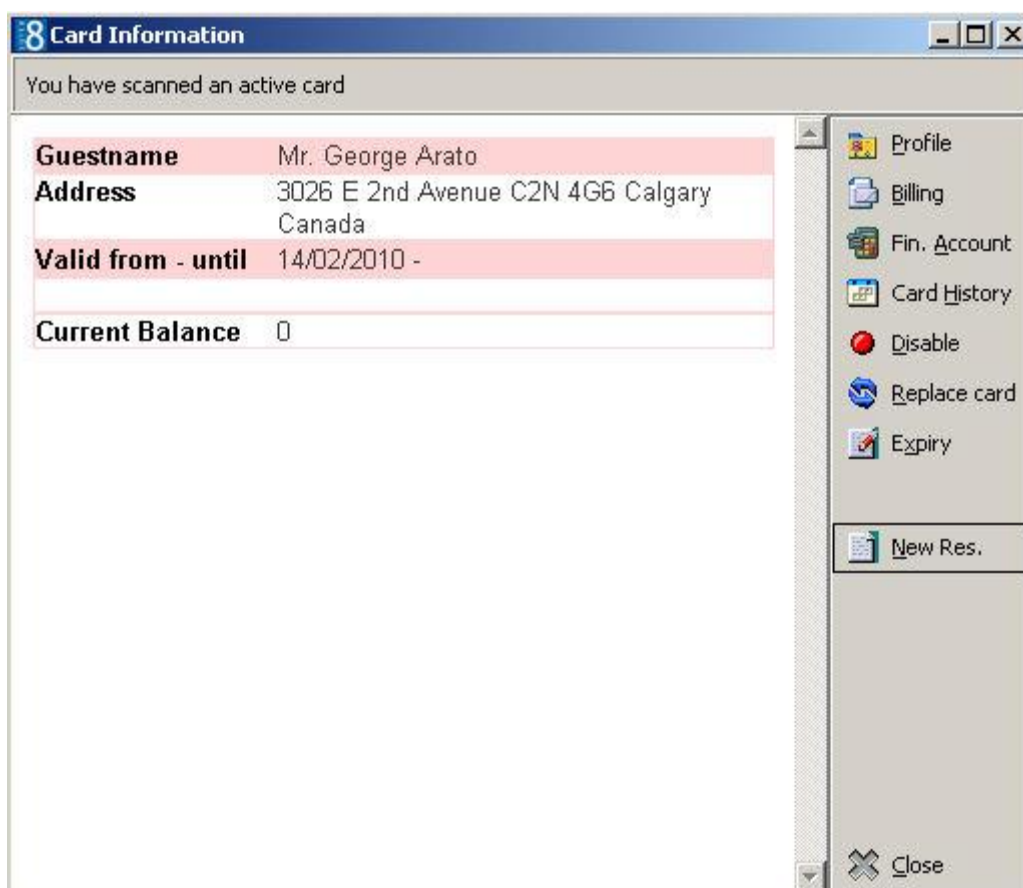
4. Take the required action by selecting one of the available options:

Transponder scan active card options

Button	Explanation
Profile	Displays the linked profile in edit mode.
Billing	Displays the Cashier Login and after a valid login opens the invoice.
Fin. Account	Displays the financial accounts settings.
Free Nights	If the card is configured for free nights, the free night's information dialog box is displayed.
Card History	Displays the card history for the account and reservations linked to the card.
Disable	Disables the card.
Replace card	Used to scan a new transponder card and replace the old number with the newly scanned card.
New Res.	Displays the new reservation screen so that a new reservation can be entered for this card.
Close	Closes the dialog box.

🛈 The Transponder Scan option is controlled by the parameter TRANSPONDER HANDLING under Setup → Configuration → Global Settings → Generic → Generic 2 tab.