Oracle® Hospitality Suite8

Front Desk User Manual

Release 8.9

July 2015

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Preface 5
- Audience 5
- Customer Support 5
- Documentation 5
- Revision History 5

1 Introduction 7
- About Suite8 Front desk 7
- Front Desk Shortcut Bar 7
- Logging In 9
- Navigation Keys 10
- Using the blue drill down arrow 10
- HTML View 11
- The Quick Keys 14
- The Date Box 16
- Changing the date 16
- Customising Suite8 Grids 17
- Customising the HTML display 20
- Favourites 21
- Logging off, Exiting Suite8 and Locking the Station 22

2 Arrivals 23
- Check In 23
- Check In with Virtual Number Assignment 31
- Reservations 33

3 Inhouse Guests 35

4 Messages 37

5 New Financial Account 43
- Financial Accounts 43

6 Room Blocking 53

7 Queue Rooms 63

8 Lost & Found 65
- Lost & Found Actions 70
- Matching Lost & Found Items 71
- Number Cycles 74

9 Traces 77

10 Locator 81

11 Index 85

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

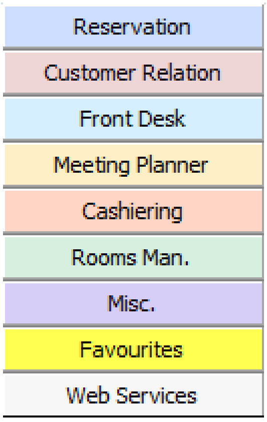
1 Introduction

About Suite8 Front desk

The Suite8 Front Desk Module is used for entering, searching and modifying reservations for arrivals and in house guests, performing room blocking, handling guest messages, accessing house accounts and checking house Status.
You have the same options as from the reservation navigator screen to search, edit, modify profiles, enter guest messages, guest comments, reservation notes and profile notes. You can make postings to add charges on the guest bill. All these functions are available for in house guests and arrivals. User definable search screens and Info templates in HTML format allow a flexible, property related handling of the reservation navigator.

Front Desk Shortcut Bar

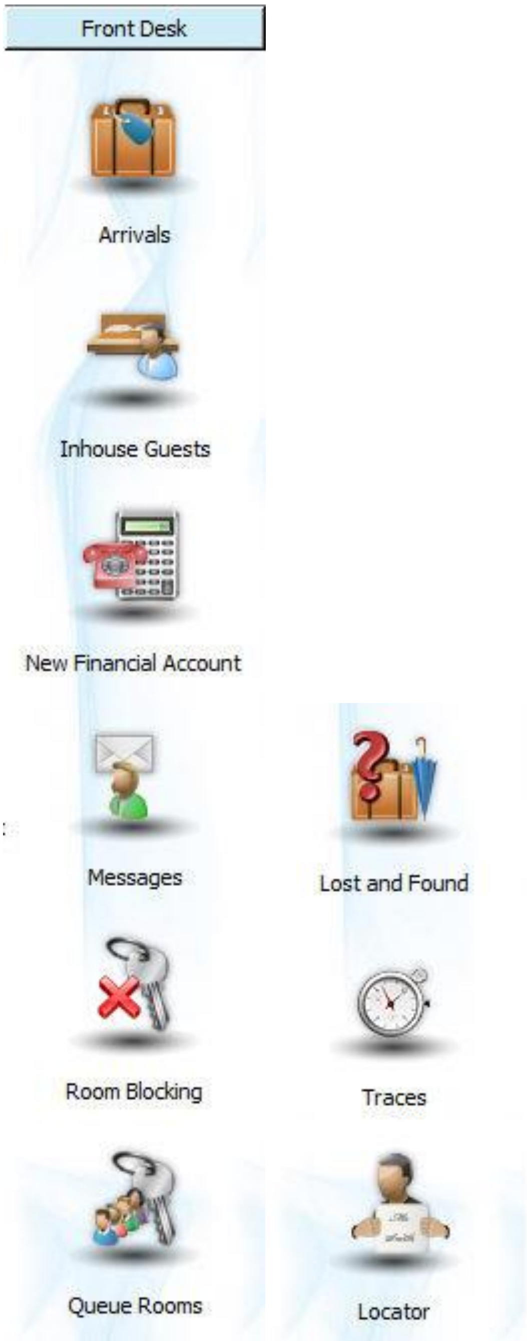
The Suite8 main menu screen has nine coloured tabs located on the left of the screen. Each coloured tab represents one of the main user modules.


Reservation
Customer Relation
Front Desk
Meeting Planner
Cashiering
Rooms Man.
Misc.
Favourites
Web Services

To open the Front Desk Shortcut Bar:

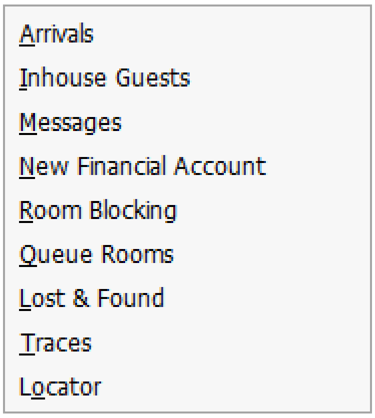
- Click FRONT DESK from the coloured shortcut bar.

  The Front Desk shortcut bar opens.


Front Desk
Arrivals
Inhouse Guests
New Financial Account
Messages
Lost and Found
Room Blocking
Traces
Queue Rooms
Locator

- Alternatively you can click FRONT DESK on the menu bar.

  The Front Desk menu screen appears.


Arrivals
Inhouse Guests
Messages
New Financial Account
Room Blocking
Queue Rooms
Lost & Found
Traces
Locator

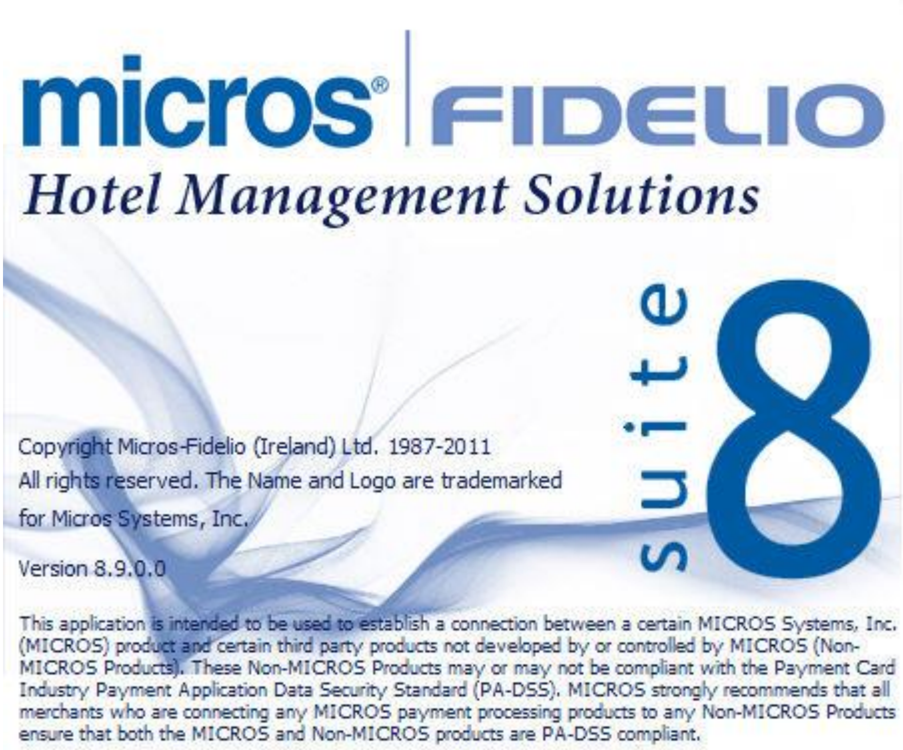
Logging In

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

Logging into Suite8

- 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



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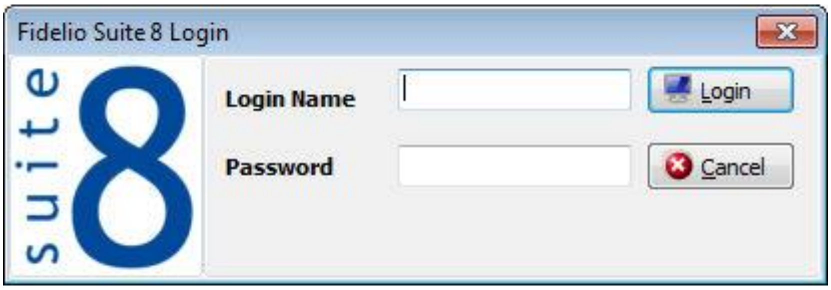
Version 8.9.0.0

This application is intended to be used to establish a connection between a certain MICROS Systems, Inc. (MICROS) product and certain third party products not developed by or controlled by MICROS (Non-MICROS Products). These Non-MICROS Products may or may not be compliant with the Payment Card Industry Payment Application Data Security Standard (PA-DSS). MICROS strongly recommends that all merchants who are connecting any MICROS payment processing products to any Non-MICROS Products ensure that both the MICROS and Non-MICROS products are PA-DSS compliant.

The Fidelio V8 Login screen is then displayed.



- Type your user identification (case sensitive) in the Login name box.
- **Tab** to the Password box.
- Type your secret password (case sensitive) in the Password box.
- Click LOGIN, 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

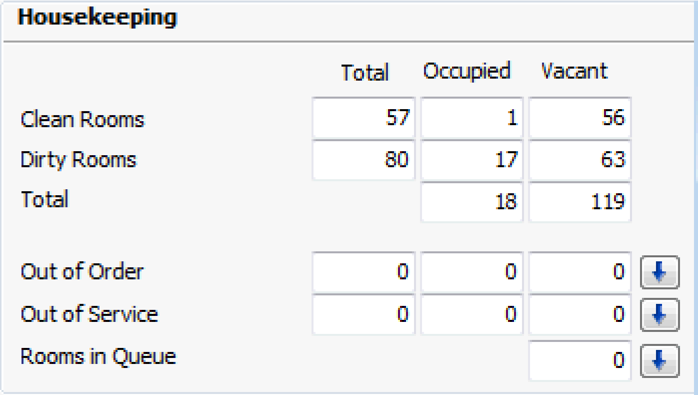
Suite8 has shortcut keys that allow you to perform actions directly from the keyboard without having to use the mouse. Using these keys saves you time.

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.

Using the blue drill down arrow

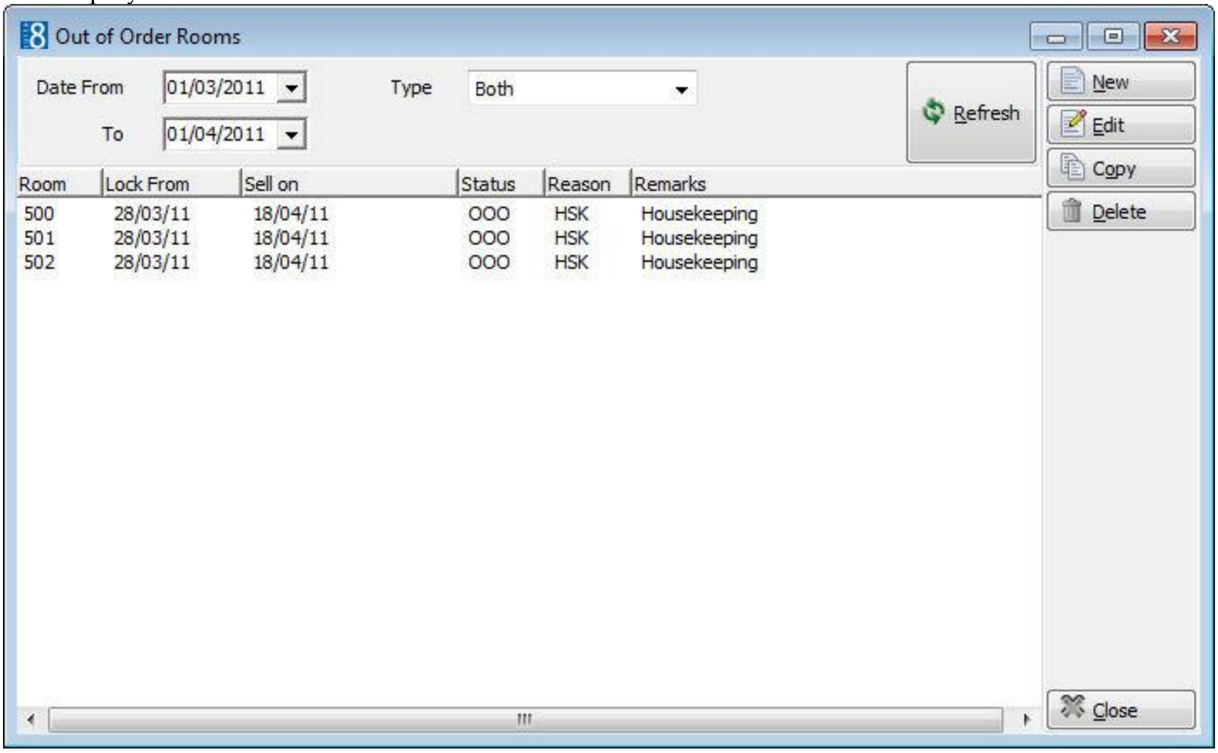
Many boxes have a blue drill down arrow ⬇ next them indicating that there is additional information that can be displayed.



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.



Date From: 01/03/2011
To: 01/04/2011
Type: Both

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

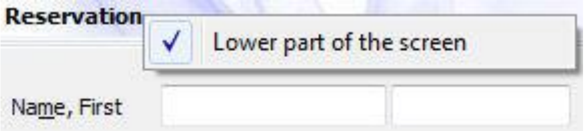
HTML View

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

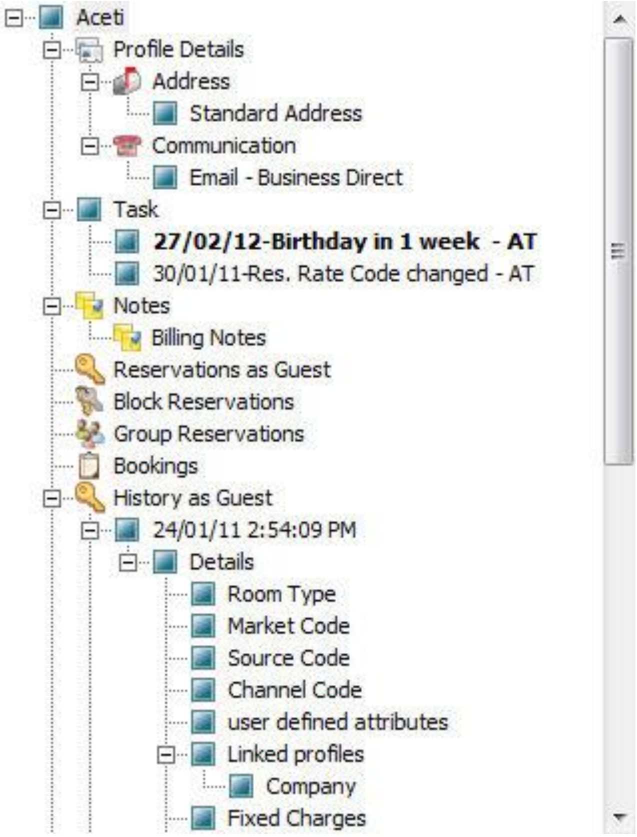
The HTML display on the reservation navigator can be hidden so that the reservation grid is expanded. Double-click in the blue reservation header bar or right-click and select/deselect

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.


Reservation
Lower part of the screen
Name, First

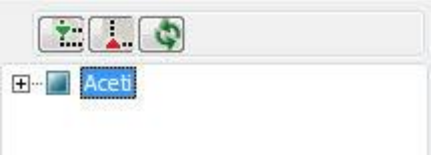
Expand the HTML tree

- Click the expand icon to show all available folders.


Aceti
Profile Details
Address
Standard Address
Communication
Email - Business Direct
Task
27/02/12-Birthday in 1 week - AT
30/01/11-Res. Rate Code changed - AT
Notes
Billing Notes
Reservations as Guest
Block Reservations
Group Reservations
Bookings
History as Guest
24/01/11 2:54:09 PM
Details
Room Type
Market Code
Source Code
Channel Code
user defined attributes
Linked profiles
Company
Fixed Charges

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.

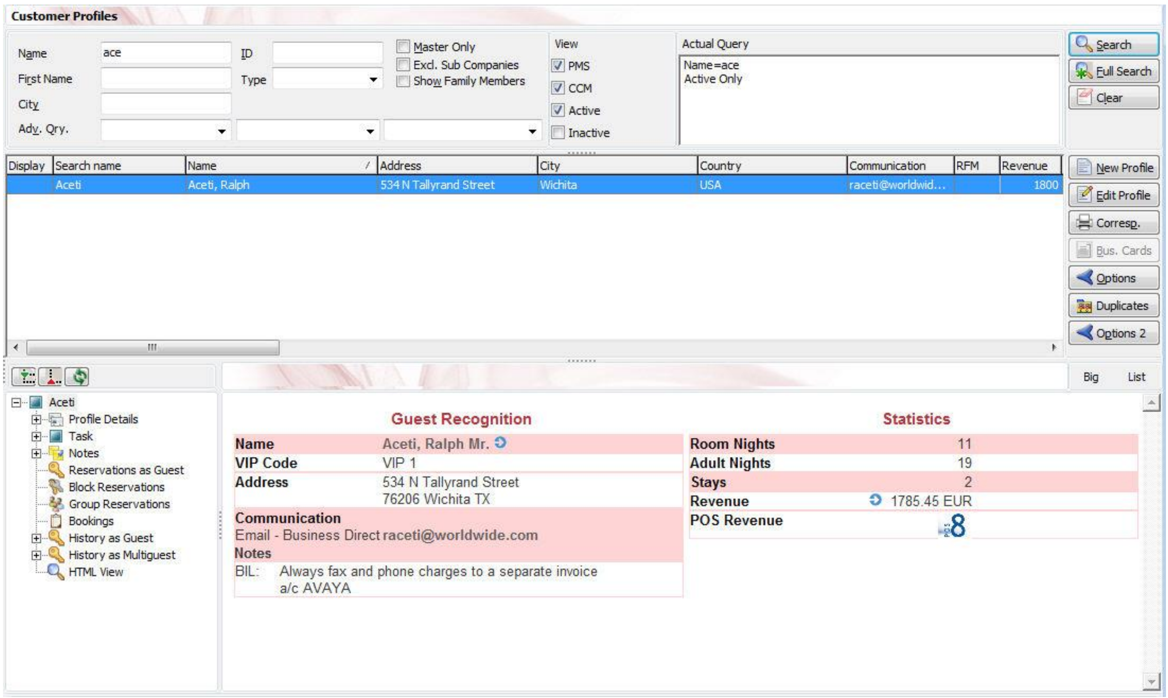
1. Click the CUSTOMER RELATION menu and select PROFILES to display the customer profile screen.

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

   1. Query - basic and advance profile search criteria

2. Query Results - the results of the query shown in a grid format
3. Tree Listing and HTML Page
    1. A tree listing of all the details associated with this profile including address, communications, links, reservations or history
    2. 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.

1. Enter the name to search for in the NAME box and click SEARCH.



Name: ace
ID:
First Name:
Type:
City:
Adv. Qry.:
☐ Master Only
☐ Excl. Sub Companies
☐ Show Family Members
View
☑ PMS
☑ CCM
☑ Active
☐ Inactive
Actual Query: Name=ace, Active Only

Display	Search name	Name	Address	City	Country	Communication	RFM	Revenue
	Aceti	Aceti, Ralph	534 N Tallyrand Street	Wichita	USA	raceti@worldwid...		1800

Aceti
- Profile Details
- Task
- Notes
- Reservations as Guest
- Block Reservations
- Group Reservations
- Bookings
- History as Guest
- History as Multiguest
- HTML View

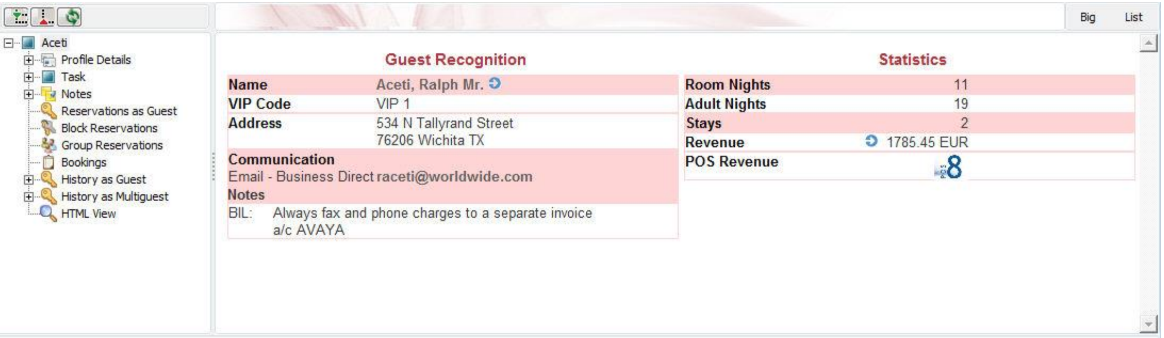
Guest Recognition

Name	Aceti, Ralph Mr.
VIP Code	VIP 1
Address	534 N Tallyrand Street 76206 Wichita TX
Communication	
Email - Business Direct	raceti@worldwide.com
Notes	
BIL:	Always fax and phone charges to a separate invoice a/c AVAYA

Statistics

Room Nights	11
Adult Nights	19
Stays	2
Revenue	1785.45 EUR
POS Revenue	

1. 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.



Aceti
- Profile Details
- Task
- Notes
- Reservations as Guest
- Block Reservations
- Group Reservations
- Bookings
- History as Guest
- History as Multiguest
- HTML View

Guest Recognition

Name	Aceti, Ralph Mr.
VIP Code	VIP 1
Address	534 N Tallyrand Street 76206 Wichita TX
Communication	
Email - Business Direct	raceti@worldwide.com
Notes	
BIL:	Always fax and phone charges to a separate invoice a/c AVAYA

Statistics

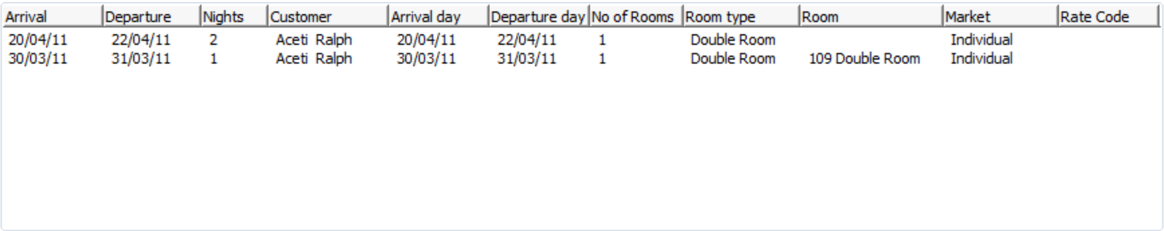
Room Nights	11
Adult Nights	19
Stays	2
Revenue	1785.45 EUR
POS Revenue	

- 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

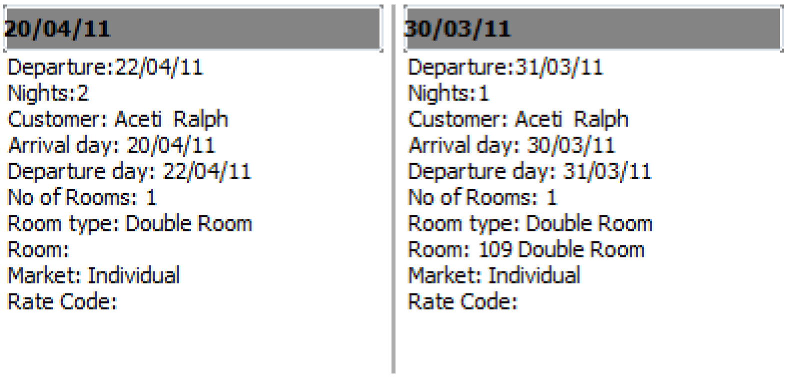
Two additional buttons on the html display allow you to change whether certain details are displayed in a non-grid style or in a list format. By default the 'big' view is displayed.

- 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	

- 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

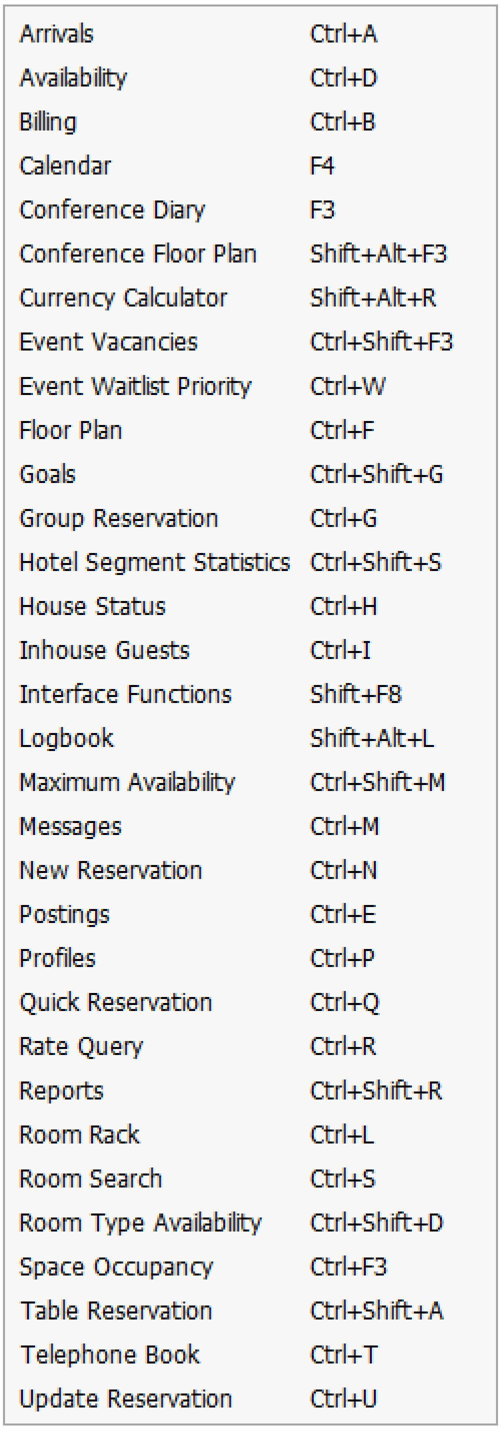
The Quick Keys

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.



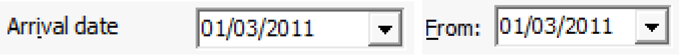
Arrivals	Ctrl+A
Availability	Ctrl+D
Billing	Ctrl+B
Calendar	F4
Conference Diary	F3
Conference Floor Plan	Shift+Alt+F3
Currency Calculator	Shift+Alt+R
Event Vacancies	Ctrl+Shift+F3
Event Waitlist Priority	Ctrl+W
Floor Plan	Ctrl+F
Goals	Ctrl+Shift+G
Group Reservation	Ctrl+G
Hotel Segment Statistics	Ctrl+Shift+S
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

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.

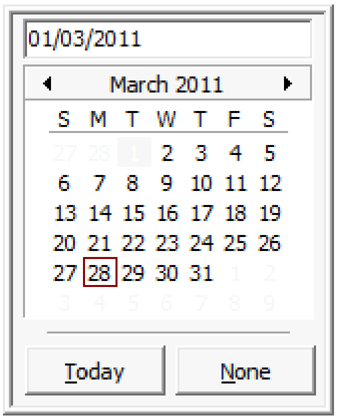
To type a new date

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

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

   The calendar appears.



01/03/2011

March 2011

S	M	T	W	T	F	S
27	28	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

1. 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.**
2. 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

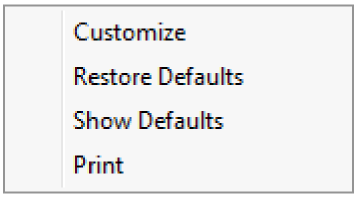
Many of the grids in Suite8 may be customised according to the needs of the property. The customization options available are:

- 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.

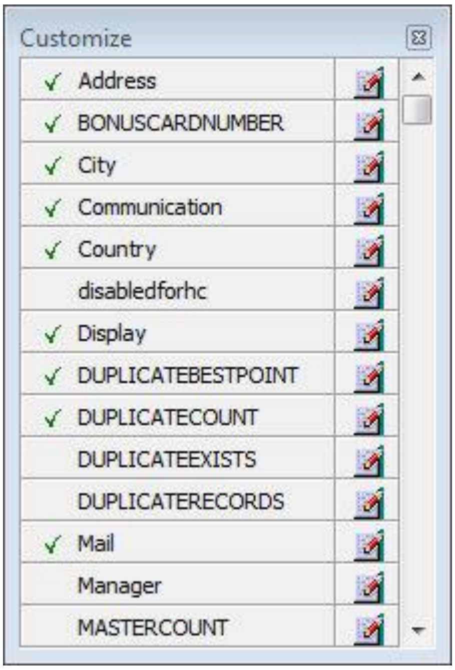
> **Note:** The print or export function should be used before changes to the grid will be saved.

How to customize a grid

2. Place the cursor in the grid and right-click to display the short-cut menu.



- Select CUSTOMIZE to open the customize screen.



✓ Address
✓ BONUSCARDNUMBER
✓ City
✓ Communication
✓ Country
disabledforhc
✓ Display
✓ DUPLICATEBESTPOINT
✓ DUPLICATECOUNT
DUPLICATEEXISTS
DUPLICATERECORDS
✓ Mail
Manager
MASTERCOUNT

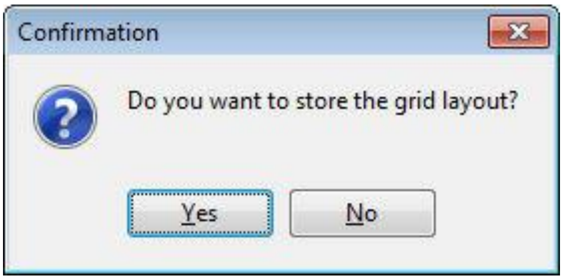
The fields already used are marked with a green check mark.

- Click the PENCIL button to view or change the column properties.

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.

- To move a field to the grid, select the field and drag it to the required position.
- Click the ☒ in the top right-hand corner to close the customize screen.
- A message is displayed asking if you want to store the grid layout.

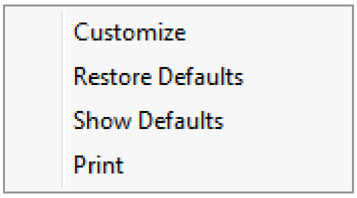

Confirmation

Do you want to store the grid layout?

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

How to remove a column from a customized grid

- Place the cursor in the grid and right-click to display the short-cut menu.



- Select CUSTOMIZE to open the customize screen.

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

1. 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.

- Click the ☒ in the top right-hand corner to close the customize screen.
- A message is displayed asking if you want to store the grid layout.
- Select YES to save the changes or NO not to save any changes.

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

2. Click one of the coloured shortcut toolbars on the left to list the options on that toolbar.
3. 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.
4. 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

5. Click the FAVOURITES shortcut toolbar on the left to list the options.
6. 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.
1. Repeat Steps 1 and 2 for each option that you want to remove.

How to reorganise the options on the Favourites shortcut bar

2. Click the FAVOURITES shortcut toolbar on the left to list the options.
3. 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.

- 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.

Logging off, Exiting Suite8 and Locking the Station

The windows menu consists of the following options:

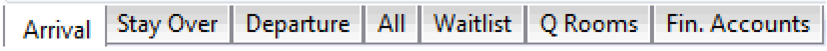
- Close All - closes all open screens and dialog boxes.
- Lock Station - locks the workstation.
- Logout - closes all open screens and logs off Suite8.
- Exit Application - closes all open screens and exits the application.

Options	**Description**
Close All	▪ Click the WINDOWS menu and the option CLOSE ALL. All open screens and dialog boxes are closed.
Logout	• 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. 1. 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 Arrivals

The ARRIVALS option on the FRONT DESK menu displays the reservation navigator defaulted to the Arrival tab. The reservation navigator consists of seven different pages of information which are accessible by clicking the appropriate tab.

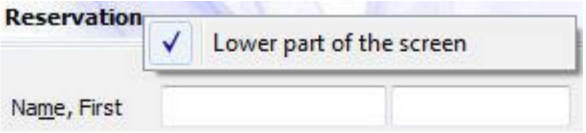


The ARRIVAL tab displays by default all reservations with the status EXPECTED ARRIVAL for today's date. The date filter allows you to display expected arrivals for a specific date and reservations with the statuses CHECKED IN and/or CANCELLED may be included in the display via the Selection filter.

The search criteria on the reservation navigator are identical regardless of which tab is selected with the exception of the Financial Accounts tab.

The available options are for the most part the same as in reservations, however several options may not be available for reservations with the status expected arrival, for example REINSTATE and UNDO CHECK IN.

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.



ⓘ The default reservation statuses to be displayed on the Arrival tab are defined via the option ARRIVAL PAGE under Setup → Configuration → Global Settings → Miscellaneous → Search Screens → Default Search Criteria on Reservation Navigator.

See: *Suite8 Reservations Manual for more details.*

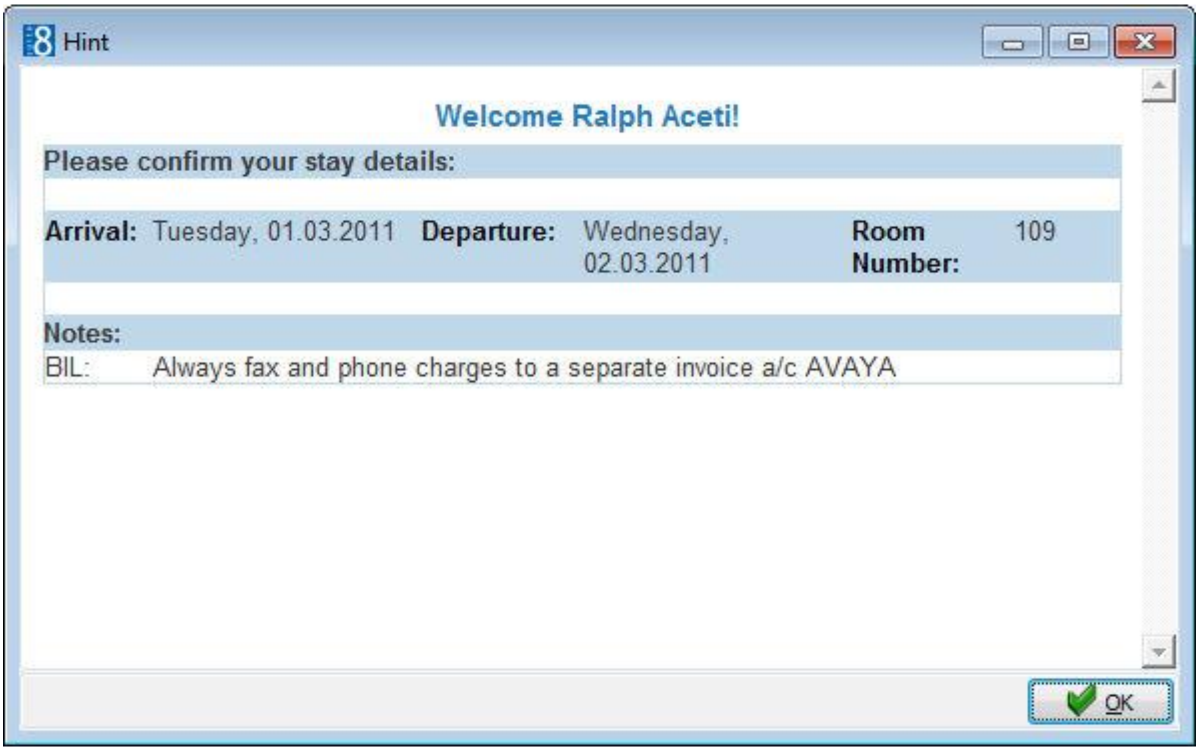
Check In

This option may be used to check-in a guest who has a reservation and is accessible via the CHECK IN button on the Reservation Navigator.

Depending on the parameter settings and interfaces installed, a variety of messages may be displayed upon check-in. For example, the display of the check-in successful message is parameter controlled and if a key card interface is installed then a message to print the key card is displayed at check-in.

If the parameter ALLOW CHECKIN WITHOUT ROOM FOR NEXT DAY is active then it is possible to check in a reservation for several days even if a room has not been assigned for all days of the stay. A room must be assigned for the first night, but upon check-in either a room number is assigned for the remaining days or the reservation is checked in and is marked as a scheduled room move from the day where no room is assigned.

A hint can be defined to display at check in under a specified condition, an example for a hint at check in could be a reminder to confirm the stay details.


Hint

Welcome Ralph Aceti!

Please confirm your stay details:

Arrival:	Tuesday, 01.03.2011	**Departure:**	Wednesday, 02.03.2011	**Room Number:**	109

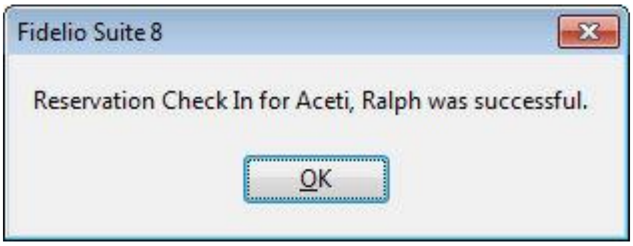
Notes:

BIL: Always fax and phone charges to a separate invoice a/c AVAYA

How to check-in a reservation with a room number assigned

1. From the Reservation Navigator select the reservation to be checked-in.
2. Click the CHECK IN button.

   A message is displayed indicating that the check-in was successful.

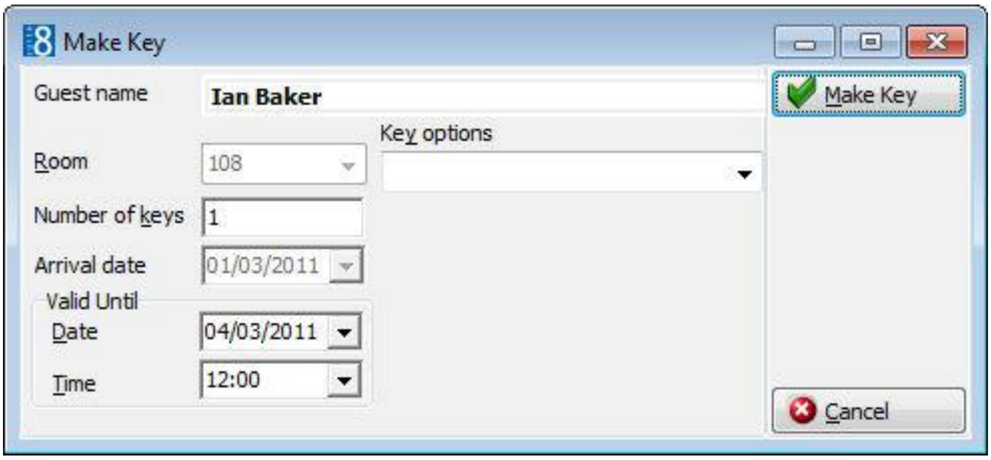

Fidelio Suite 8

Reservation Check In for Aceti, Ralph was successful.

2. 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.


Make Key

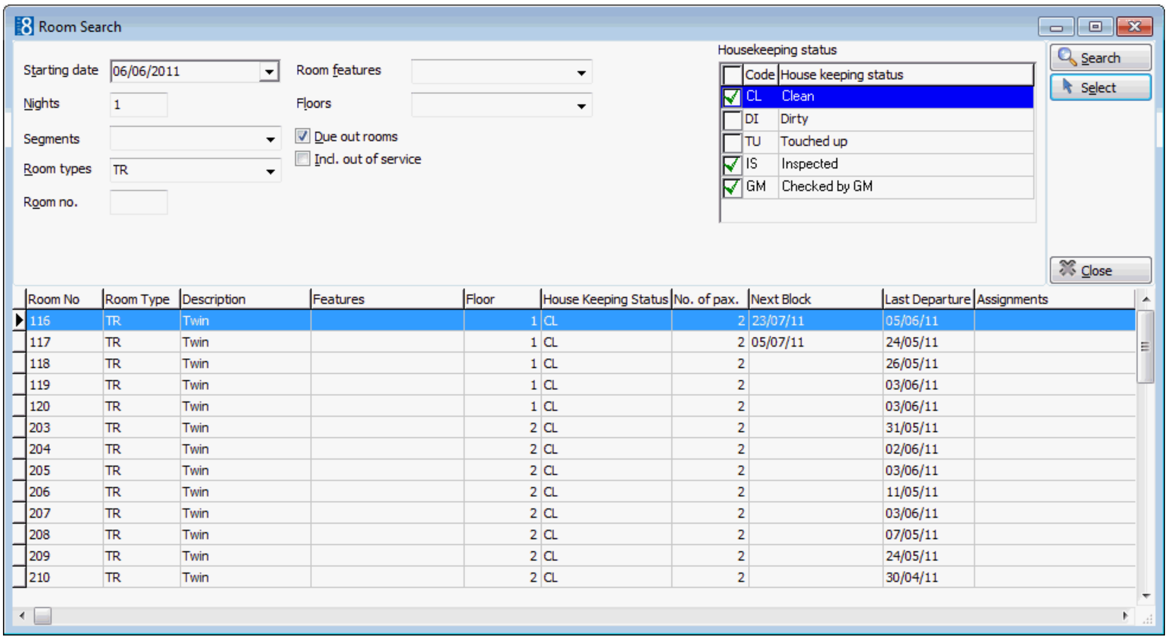
Guest name	Ian Baker
Room	108
Number of keys	1
Arrival date	01/03/2011
Valid Until Date	04/03/2011
Valid Until Time	12:00
Key options	

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

How to check-in a reservation with no room number assigned

1. From the Reservation Navigator select the reservation to be checked-in.
2. Click the CHECK IN button.

   If no room number has been assigned the Room Search Dialog screen is displayed.



Starting date: 06/06/2011
Nights: 1
Segments:
Room types: TR
Room no.:
Room features:
Floors:
☑ Due out rooms
☐ Incl. out of service

Housekeeping status

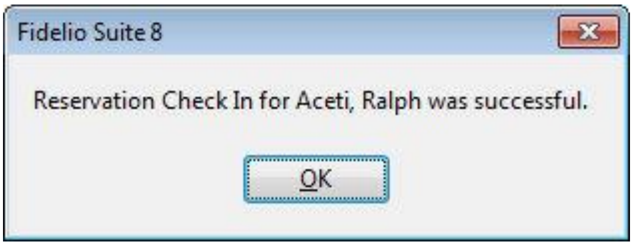
☐	Code	House keeping status
☑	CL	Clean
☐	DI	Dirty
☐	TU	Touched up
☑	IS	Inspected
☑	GM	Checked by GM

Room No	Room Type	Description	Features	Floor	House Keeping Status	No. of pax.	Next Block	Last Departure	Assignments
116	TR	Twin		1	CL	2	23/07/11	05/06/11	
117	TR	Twin		1	CL	2	05/07/11	24/05/11	
118	TR	Twin		1	CL	2		26/05/11	
119	TR	Twin		1	CL	2		03/06/11	
120	TR	Twin		1	CL	2		03/06/11	
203	TR	Twin		2	CL	2		31/05/11	
204	TR	Twin		2	CL	2		02/06/11	
205	TR	Twin		2	CL	2		03/06/11	
206	TR	Twin		2	CL	2		11/05/11	
207	TR	Twin		2	CL	2		03/06/11	
208	TR	Twin		2	CL	2		07/05/11	
209	TR	Twin		2	CL	2		24/05/11	
210	TR	Twin		2	CL	2		30/04/11	

   Several criteria including the STARTING DATE, number of NIGHTS and ROOM TYPE are completed with details from the reservation.

2. To search for a specific room number, enter the room number in the ROOM NO. field.
3. If ROOM FEATURES were entered on the guest profile or reservation then these are displayed.
4. In the FLOORS field select the required floors from the floor selection list and then click CLOSE.
5. Select DUE OUT ROOMS to include rooms which are due to depart.
6. Select INCL. OUT OF SERVICE to include rooms which have the status out of service.
7. Select the room statuses to include from the HOUSEKEEPING STATUS list; by default all room statuses which are defined as CLEAN are selected.
8. Click SEARCH to display the rooms available according to the entered criteria.
9. Select the required room from the grid and click the SELECT button.

   A message is displayed indicating that the check-in was successful.



Reservation Check In for Aceti, Ralph was successful.

3. Click OK to close the check-in successful message.

Depending on the interfaces installed additional messages may be 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.
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.

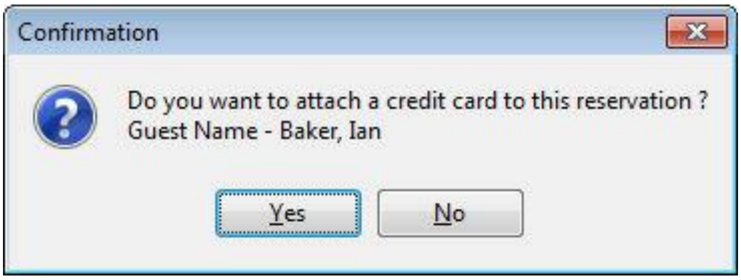
Room Search screen search fields

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.

How to check-in a reservation with a credit card active

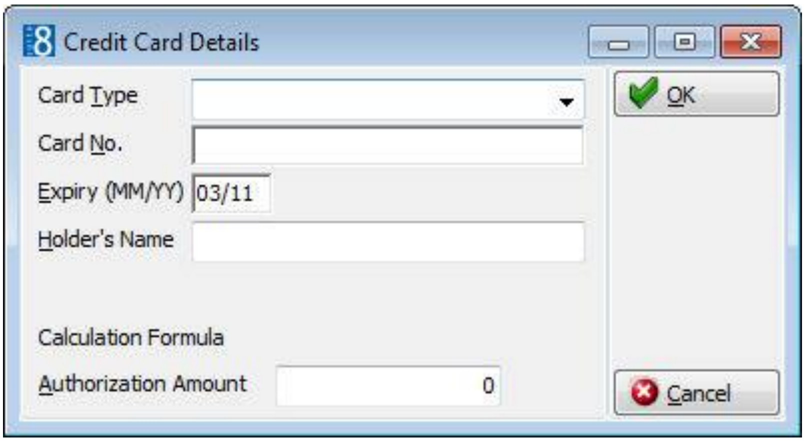
7. From the Reservation Navigator select the reservation to be checked-in.
8. Click the CHECK IN button.

   If a credit card interface is installed and the parameter ASK FOR CREDIT CARD AT CHECK-IN is active then a message is displayed asking if you want to attach a credit card to this reservation. If the parameter is not active then the Credit Card Detail dialog box is displayed directly.


Confirmation

Do you want to attach a credit card to this reservation ?
Guest Name - Baker, Ian

1. Click YES to display the Credit Card Details dialog box.


Credit Card Details

Card Type
Card No.
Expiry (MM/YY) 03/11
Holder's Name
Calculation Formula
Authorization Amount 0

The guest's credit card can be swiped or the credit card details entered manually.

2. Upon swiping the card or selecting the CARD TYPE manually; the AUTHORIZATION AMOUNT is calculated according to the rules setup at your property to calculate the approval amount.
3. Click OK to close the Credit Card Details dialog box and to request online authorization if a credit card interface is installed.

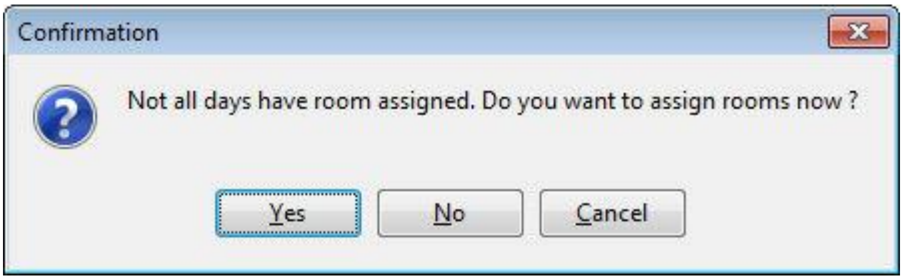
   A message is displayed indicating that the check-in was successful.
3. Click OK to close the check-in successful message.

Note: An entry is written to the interface log file if the credit card is not successfully authorized during check-in.

How to check-in a reservation with no room number assigned for all days of the reservation

4. From the Reservation Navigator select the reservation to be checked-in.
5. Click the CHECK IN button.

   A message is displayed indicating that not all days have a room number assigned.


Confirmation

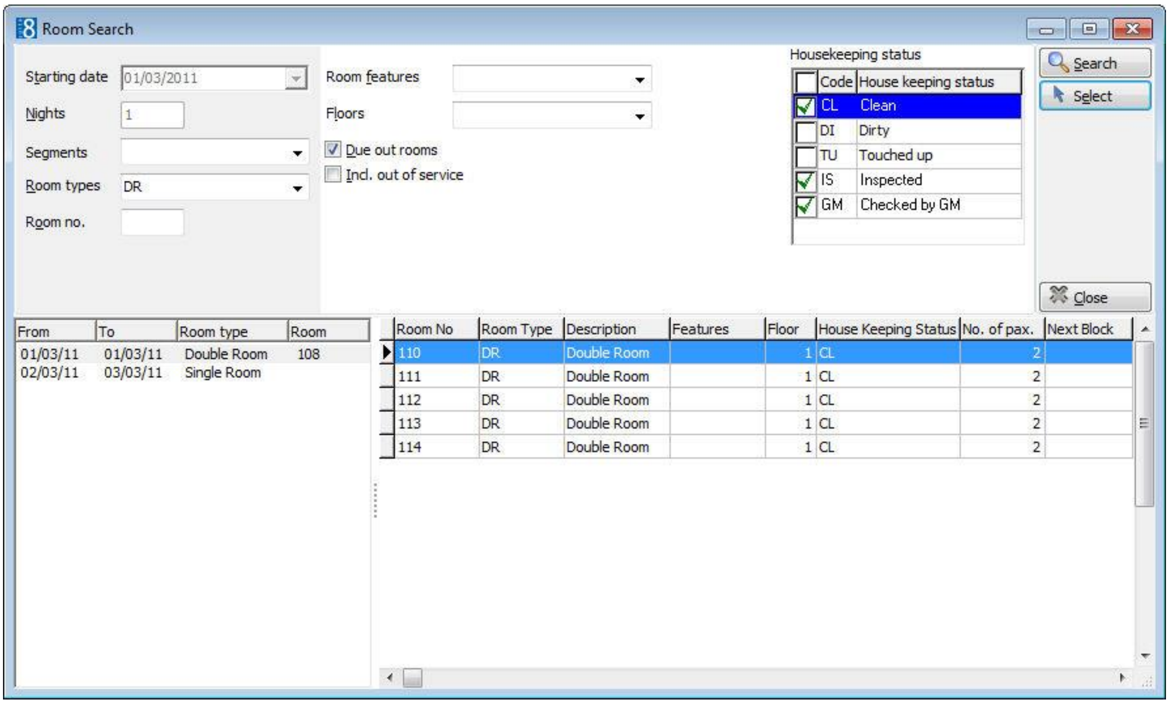
Not all days have room assigned. Do you want to assign rooms now ?

6. If a room should not be assigned for the remaining days at this point, click NO.

A message is displayed indicating that the check-in was successful. The reservation will be displayed on the list of scheduled room moves from the day where no room number is assigned.

- If a room should be assigned for the remaining days, click YES.

  The Room Search screen is displayed with all the room types required for this reservation listed.



Starting date 01/03/2011
Nights 1
Segments
Room types DR
Room no.
Room features
Floors
☑ Due out rooms
☐ Incl. out of service

Housekeeping status

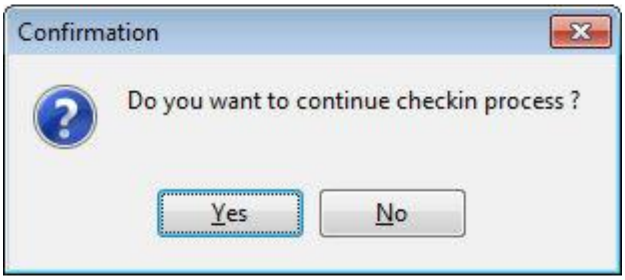
	Code	House keeping status
☑	CL	Clean
☐	DI	Dirty
☐	TU	Touched up
☑	IS	Inspected
☑	GM	Checked by GM

From	To	Room type	Room
01/03/11	01/03/11	Double Room	108
02/03/11	03/03/11	Single Room	

Room No	Room Type	Description	Features	Floor	House Keeping Status	No. of pax.	Next Block
110	DR	Double Room		1	CL	2	
111	DR	Double Room		1	CL	2	
112	DR	Double Room		1	CL	2	
113	DR	Double Room		1	CL	2	
114	DR	Double Room		1	CL	2	

- Select a room number for each room type required.
- Click CLOSE to close the room search dialog box.

  A message is displayed asking if you want to continue the check-in process.



Do you want to continue checkin process ?

1. Click YES to continue.

   A message is displayed indicating that the check-in was successful.

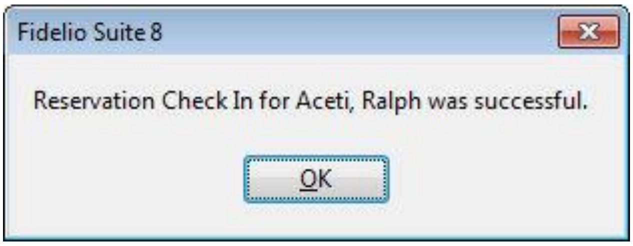
3. Click OK to close the check-in successful message.

> **Note:** On the reservation Advanced Query filter a query called 'No room for today or tomorrow' can be used to search for the reservations that have no room assigned.

How to check-in a reservation with luggage list/entry active

1. From the Reservation Navigator select the reservation to be checked-in.
2. Click the CHECK IN button.

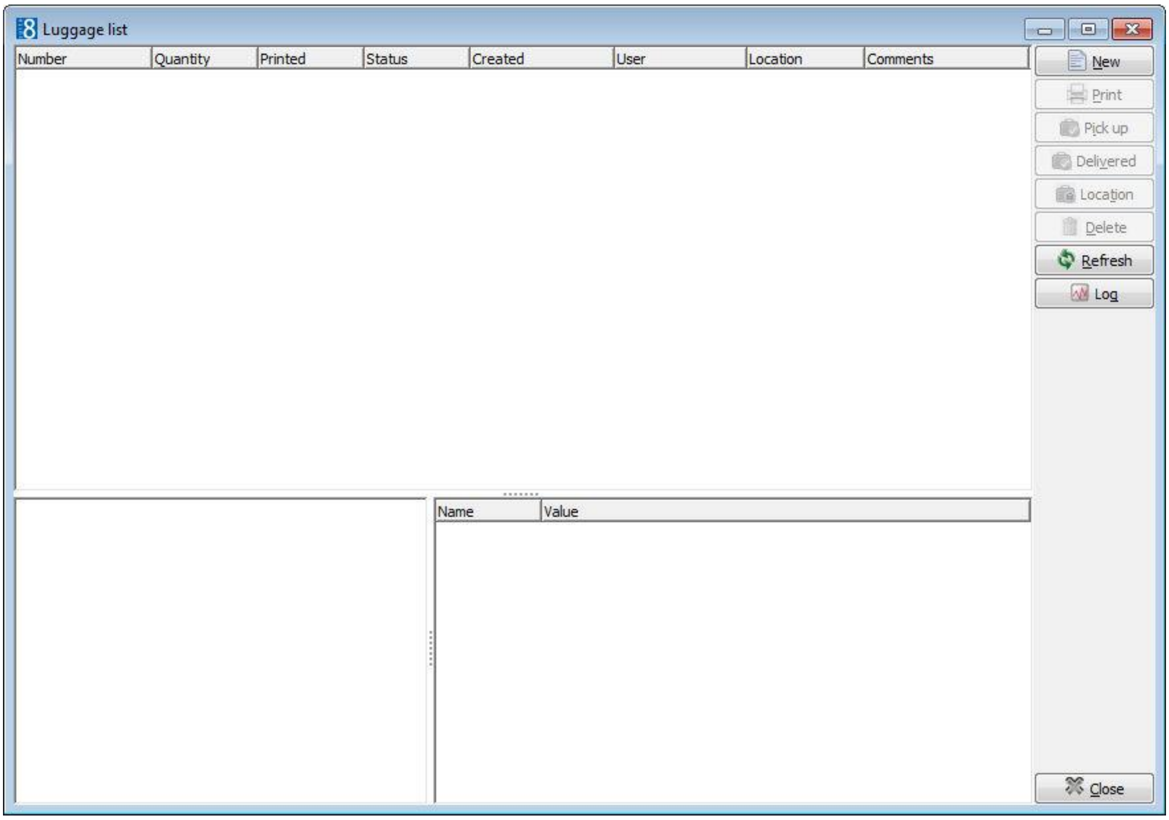
   A message is displayed indicating that the check-in was successful.


Fidelio Suite 8
OK

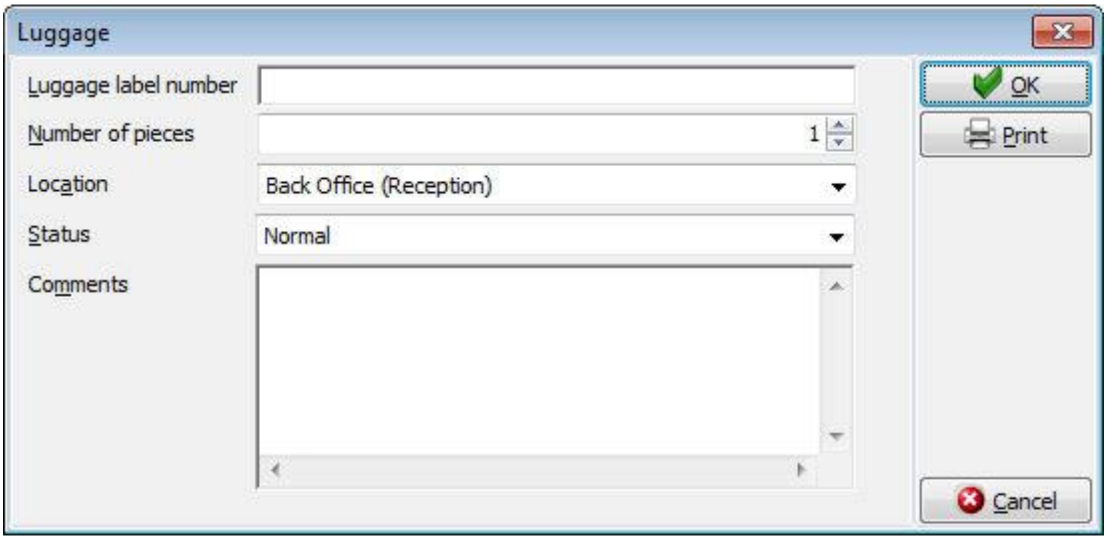
Reservation Check In for Aceti, Ralph was successful.

3. Click OK to close the check-in successful message.

   If the option Pop up Luggage list is selected in the configuration then the Luggage list screen is displayed. If the option Pop up Luggage Entry is selected then the Luggage dialog box is displayed directly.

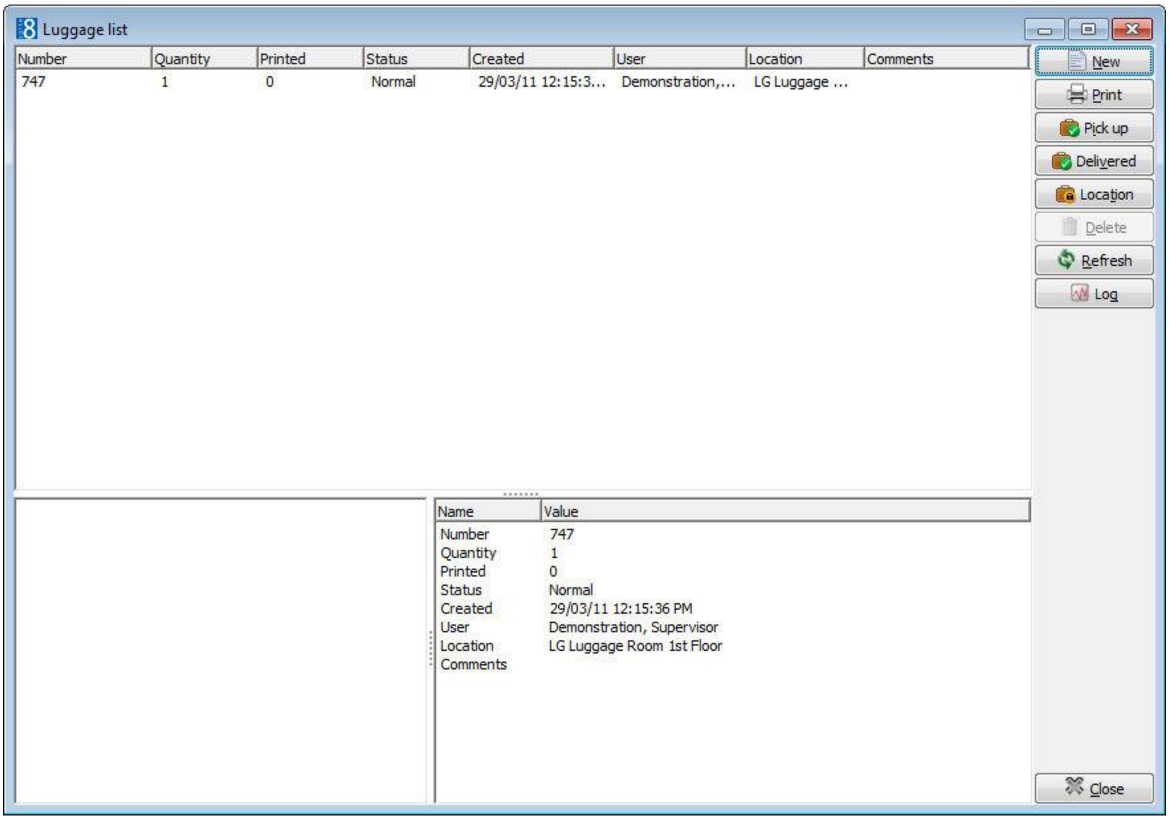

Luggage list
Number
Quantity
Printed
Status
Created
User
Location
Comments
New
Print
Pick up
Delivered
Location
Delete
Refresh
Log
Name
Value
Close

1. Click New to display the Luggage dialog box.


Luggage
OK
Print
Cancel

Luggage label number	
Number of pieces	1
Location	Back Office (Reception)
Status	Normal
Comments	

3. If auto-numbering is not active then enter the LUGGAGE LABEL NUMBER; depending on the configuration only a numeric entry may be allowed.
4. Enter the NUMBER OF PIECES of luggage.
5. Select the current LOCATION of the luggage from the drop-down list; depending on the configuration a location may be mandatory.
6. Select a STATUS from the drop-down list, such as normal, picked up by guest or delivered to room.
7. Enter any additional information in the COMMENTS box.
8. If the luggage label is to be printed click the PRINT button.
9. Click OK to add the luggage label details to the luggage list.



Number	Quantity	Printed	Status	Created	User	Location	Comments
747	1	0	Normal	29/03/11 12:15:3...	Demonstration,...	LG Luggage ...	

Name	Value
Number	747
Quantity	1
Printed	0
Status	Normal
Created	29/03/11 12:15:36 PM
User	Demonstration, Supervisor
Location	LG Luggage Room 1st Floor
Comments	

- Click CLOSE to close the Luggage List.

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.

If the parameter ALLOW CHECKIN WITHOUT ROOM FOR NEXT DAY is active under Setup → Configuration → Global Settings → Reservation → Reservation 3 tab then a reservation can be checked in even if a room has not been assigned for all days of the reservation.

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.

The housekeeping statuses are defined under Setup → Configuration → Reservations → Room Management → Housekeeping

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.

Luggage label functionality is controlled by the parameter LUGGAGE LABEL FUNCTIONALITY under Setup → Configuration → Global Settings → Reservation → Luggage 5 tab. All the luggage label configuration options are displayed when the option is activated.

Luggage locations are defined via the option LUGGAGE LOCATION under Setup → Configuration → Reservations.

Hints are defined via the option HINTS under Setup → Configuration → Reservation.

Check In with Virtual Number Assignment

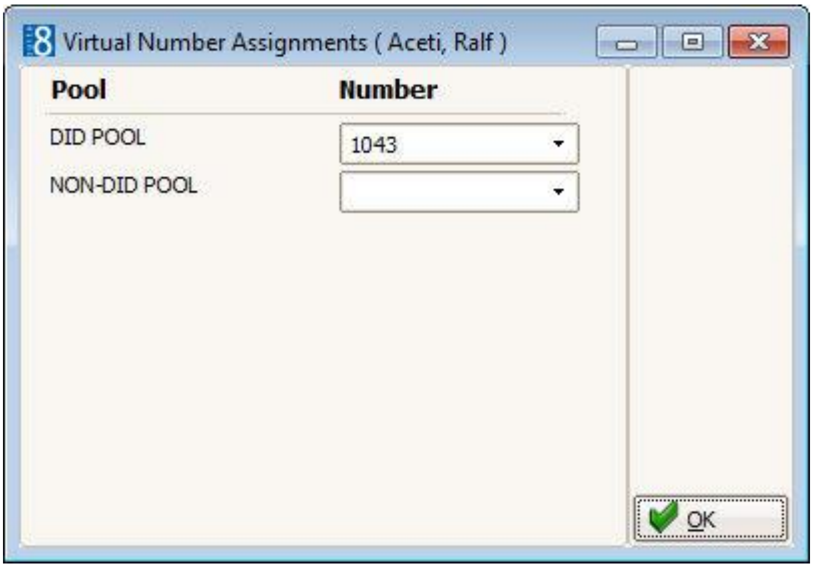
Virtual numbers serve the guest as the guest's private line once they check in until they check out. Virtual numbers can be assigned to guests on an as required basis, automatically, upon request or for the duration of the guest's stay. Virtual numbers can also be assigned permanently to an individual guest profile.

At check-in, the respective number will be displayed in the configured pool of numbers (assigned VN number dialog box), and will be available for selection.

How to check-in a reservation with a virtual number assigned

- From the Reservation Navigator select the reservation to be checked-in.
- Click the CHECK IN button.

  If Virtual Numbers is active then the Virtual Numbers Assignments screen is displayed.

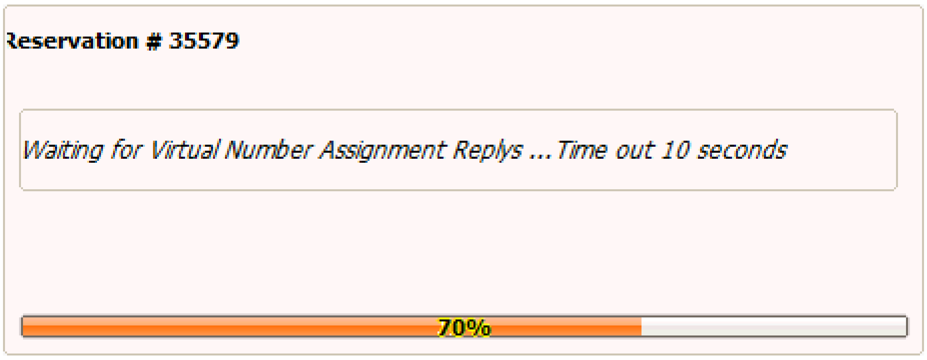

Virtual Number Assignments (Aceti, Ralf)
Pool
Number
DID POOL
1043
NON-DID POOL
OK

All pools which are installed and marked as “Active” are shown here.

The system will offer numbers based on the pool configuration here (DID Pool) or may not offer a number but would leave the choice to the user. (Non-DID Pool).

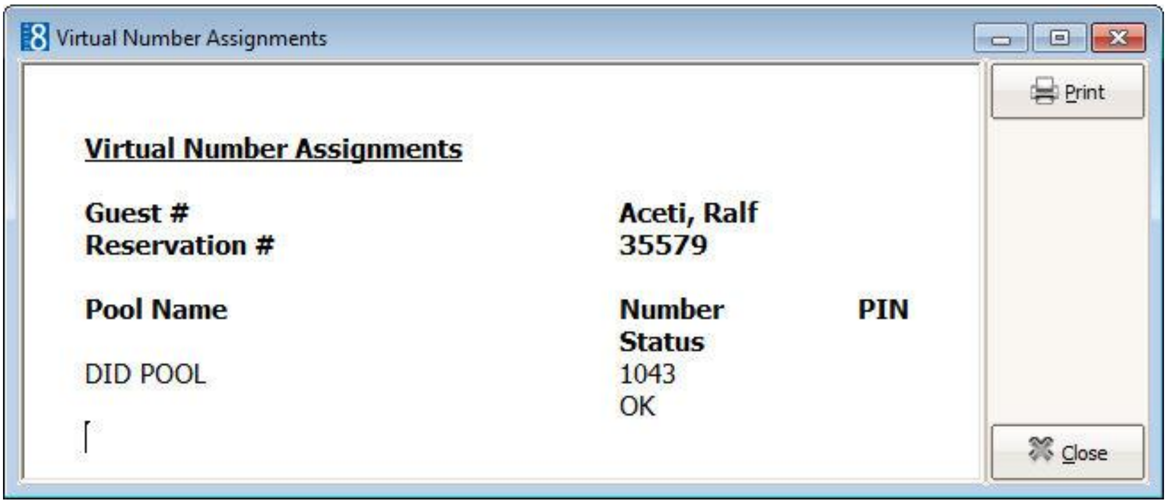
1. Select a number from the DID POOL.
2. Click OK to close the dialog box and save the assigned number.

   A progress screen is displayed.


Reservation # 35579
70%

Waiting for Virtual Number Assignment Replys ... Time out 10 seconds

A confirmation screen is displayed with the virtual numbers assigned.


Virtual Number Assignments
Print
Close

Virtual Number Assignments

Guest # **Aceti, Ralf**
Reservation # **35579**

Pool Name	**Number** **Status**	**PIN**
DID POOL	1043 OK	

2. Click PRINT to print the screen.
3. Click CLOSE to exit the virtual number assignment.

Note: A virtual number can be changed via the option VIRTUAL NUMBERS on the Options menu.

Deleting an assigned virtual number is not possible if the parameter ASSIGNMENT REQUIRED is active under Setup → Configuration>Virtual Number Setup → Virtual Number Pool Setup. A different virtual number can be assigned by unassigning the current virtual number and assigning a new number.

Note: The use of Virtual numbers and the available functionality depends entirely on the capabilities and the feature set of the external system and the interface used in the hotel.

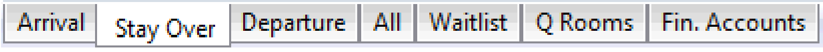
Reservations

Many of the options available in the Front Desk module are also available in the Reservations module.
The following options are detailed in the *Suite8 Reservations Manual*:

- Reservation Navigator
- Reservation Search
- New/Edit Reservation
- Walk In
- Cancel Reservation
- Reinstate
- All the options available via the OPTIONS menu of the both the Reservation Navigator and the Edit Reservation screen.

3 Inhouse Guests

The Inhouse Guests option on the Front Desk menu displays the reservation navigator defaulted to the Stay Over tab. The reservation navigator consists of seven different pages of information which are accessible by clicking the appropriate tab.

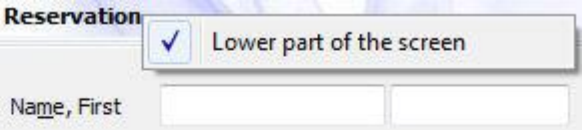


The Stay Over tab displays all reservations with the status Checked In, and depending on the setup, the Selection filter may also include the statuses Expected Arrival, Checked Out and/or Due Out.

The search criteria on the reservation navigator are identical regardless of which tab is selected with the exception of the Financial Accounts tab.

The available options are for the most part the same, however several options may not be available for reservations with the status in house, for example Deposit requested and Waitlist.

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.



The default reservation statuses to be displayed on the Stay Over tab are defined via the option In House Page under Setup → Configuration → Global Settings → Miscellaneous → Search Screens → Default Search Criteria on Reservation Navigator.

The possibility to change the profile of a checked in reservation is controlled by the user right Change guest after check in under Setup → Configuration → Users → User Definition → Rights → Reservations.

See: *Suite8 Reservations Manual for more details.*

4 Messages

This option may be used to leave a message for a guest and is accessible via the Front Desk menu and via the Options menu of the both the Reservation Navigator and the Edit Reservation screen. Messages can be printed in a user definable format and with an appropriate interface messages can be sent via:

- The video system, so the guest can view the message on the television screen.
- The telephone system, which triggers the message lamp in the room.

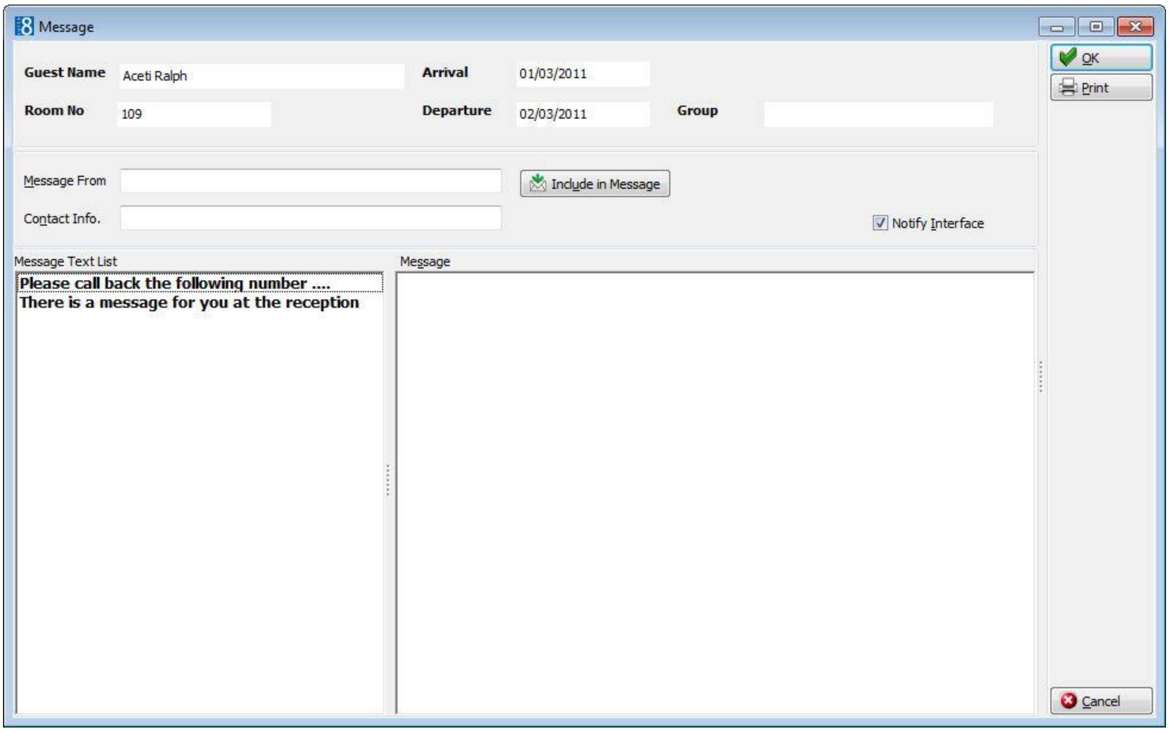
If an interface is connected the Notify Interface box is selected by default.

How to enter a new guest message

- Click the Front Desk menu and select Messages.

  The Messages screen is displayed.
- Click New, the reservation navigator is displayed.
- Use the search criteria to locate the required reservation and then click Select.

  The Message dialog box is displayed.



Guest Name: Aceti Ralph

Room No: 109

Arrival: 01/03/2011

Departure: 02/03/2011

Group:

Message From:

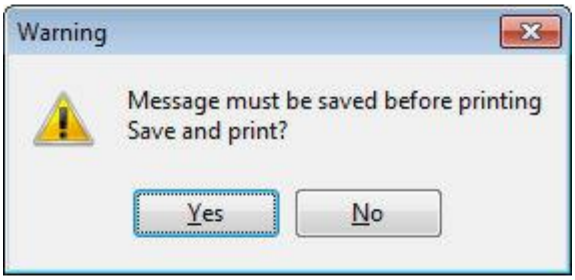
Contact Info.:

☑ Notify Interface

Message Text List:
Please call back the following number ....
There is a message for you at the reception

1. In the Message From box enter the name of the person who is leaving the message.
2. Enter the Contact Info. such as a telephone number.
3. Click the Include in Message button if the contact Message From and Contact Info. should be included automatically in the main message text.
4. The Notify Interface option is selected by default if an appropriate interface is active.
5. Enter the guests Message or select a standard message text from the Message Text List and double click.
6. Add any additional details if required.

7. Click OK to save the message without printing or click PRINT to save and print the message. A warning message is displayed that the message must be saved before printing.


Warning
Yes
No

Message must be saved before printing
Save and print?

3. Click YES to save and print the message.

   The Printing records dialog box is displayed briefly.

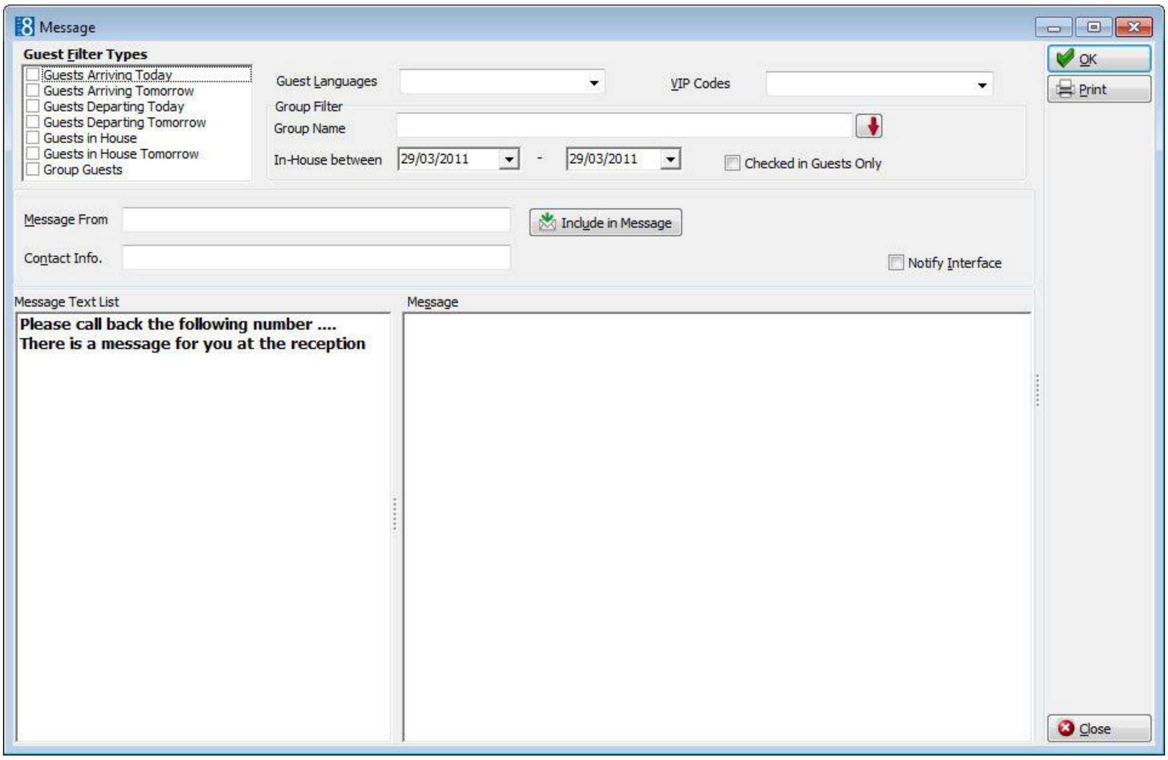
4. Click OK to close the message dialog box.

How to enter a new batch guest message

1. Click the FRONT DESK menu and select MESSAGES.

   The Messages screen is displayed.

3. Click BATCH MESSAGES, the Message dialog box is displayed.


Message
Guest Filter Types
☐ Guests Arriving Today
☐ Guests Arriving Tomorrow
☐ Guests Departing Today
☐ Guests Departing Tomorrow
☐ Guests in House
☐ Guests in House Tomorrow
☐ Group Guests
Guest Languages
VIP Codes
Group Filter
Group Name
In-House between
☐ Checked in Guests Only
Message From
Include in Message
Contact Info.
☐ Notify Interface
Message Text List
Message
OK
Print
Close

In-House between 29/03/2011 - 29/03/2011

Please call back the following number ....
There is a message for you at the reception

11. In the section GUEST FILTER TYPES select the guest categories to which the message should be sent.

12. Select the GUEST LANGUAGE if the message is to be sent only to guests with a specific language.

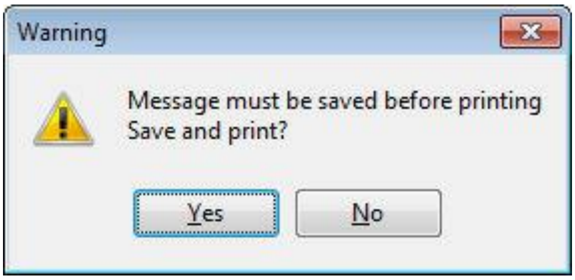
13. Select the required VIP CODES if the message is to be sent only to guests with a specific VIP code.

    If the guest filter type Group Guests is selected then additional filter criteria are available:

    - Group Name

- In-house group guests between a certain date range
- Checked-in group guests only

1. In the MESSAGE FROM box enter the name of the person who is leaving the message.
2. Enter the CONTACT INFO. such as a telephone number.
3. The NOTIFY INTERFACE option is selected by default if an appropriate interface is active.
4. Enter the guests MESSAGE or select a standard message text from the MESSAGE TEXT LIST and double click.
5. Add any additional details if required.
6. Click OK to save the message without printing or click PRINT to save and print the message. A warning message is displayed that the message must be saved before printing.



Message must be saved before printing
Save and print?

3. Click YES to save and print the message.

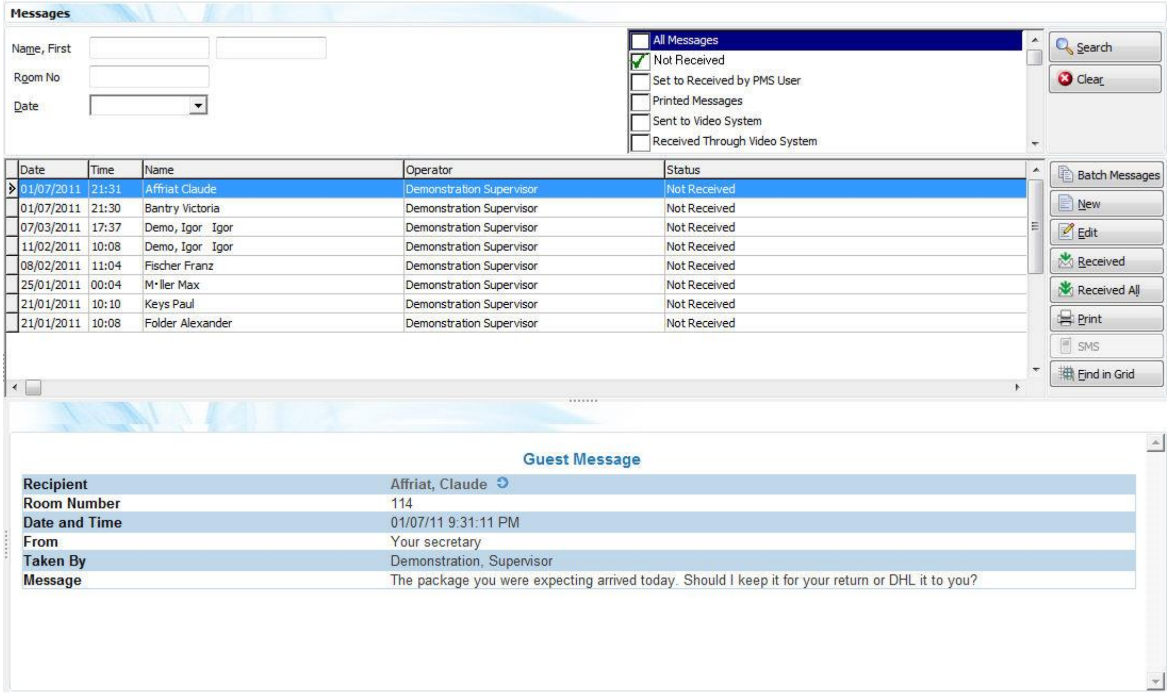
   The Printing records dialog box is displayed briefly.

4. Click OK to close the message dialog box.

How to view or edit a guest message

6. Click the FRONT DESK menu and select MESSAGES.

   The Messages screen is displayed.



☐ All Messages
☑ Not Received
☐ Set to Received by PMS User
☐ Printed Messages
☐ Sent to Video System
☐ Received Through Video System

Date	Time	Name	Operator	Status
01/07/2011	21:31	Affriat Claude	Demonstration Supervisor	Not Received
01/07/2011	21:30	Bantry Victoria	Demonstration Supervisor	Not Received
07/03/2011	17:37	Demo, Igor Igor	Demonstration Supervisor	Not Received
11/02/2011	10:08	Demo, Igor Igor	Demonstration Supervisor	Not Received
08/02/2011	11:04	Fischer Franz	Demonstration Supervisor	Not Received
25/01/2011	00:04	M•ller Max	Demonstration Supervisor	Not Received
21/01/2011	10:10	Keys Paul	Demonstration Supervisor	Not Received
21/01/2011	10:08	Folder Alexander	Demonstration Supervisor	Not Received

Recipient	Affriat, Claude
Room Number	114
Date and Time	01/07/11 9:31:11 PM
From	Your secretary
Taken By	Demonstration, Supervisor
Message	The package you were expecting arrived today. Should I keep it for your return or DHL it to you?

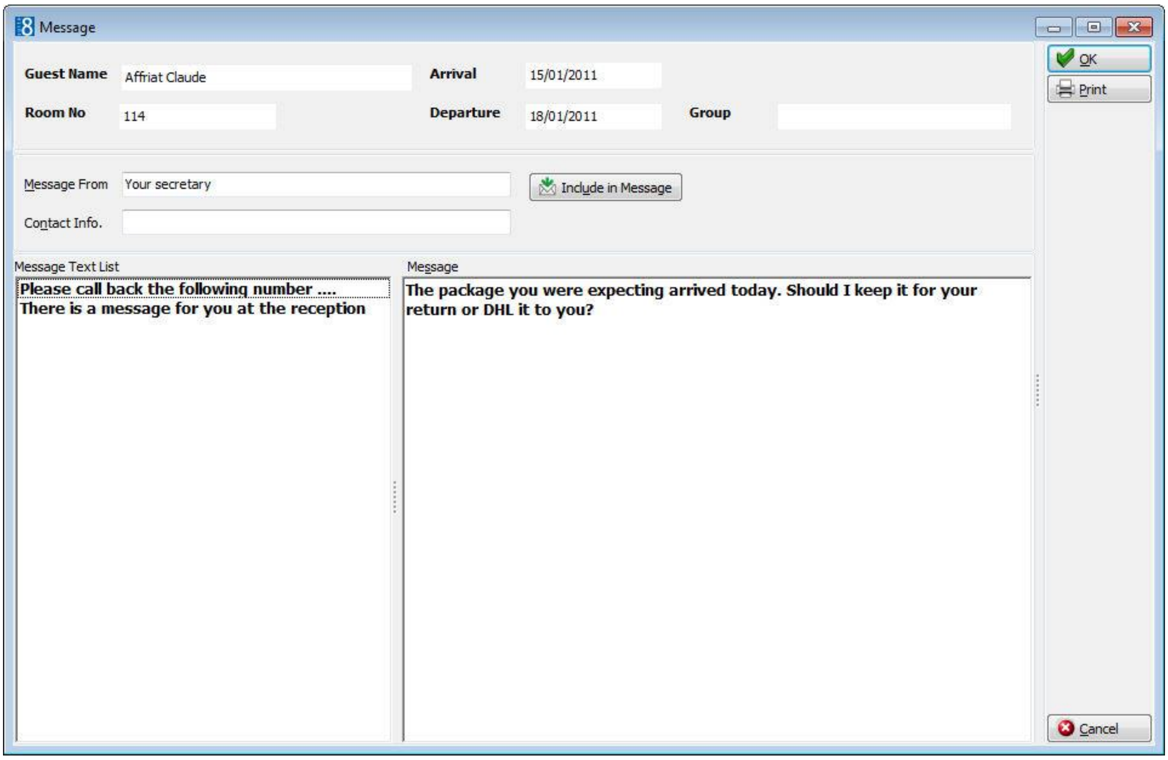
The screen is split into 4 sections:

- The upper left-hand side of the screen is the search area. You can search for messages by entering a guest NAME, a ROOM NO or a DATE.
- The upper right-hand side of the screen allows the search to be narrowed by message status:
  - **All Messages** - not received, printed and received messages.
  - **Not Received** - for all messages which have not been received yet.
  - **Set to Received by PMS User** - all messages which have been marked as received.
  - **Printed Messages** - all messages which have been printed.
  - **Sent to Video System** - all messages that have been sent via the video interface. (Interface Dependant)
  - **Received through Video System** - all messages that have been received by the guest via the video interface. (Interface Dependant)
- A list of the current messages with details about the date and time, the guest name, the user who took the message and the message status is displayed in the grid in the middle of the screen.
- The text of the currently selected message is displayed in the lower part of the screen.

1. To activate the search, click SEARCH; to clear the search criteria, click CLEAR.
2. Select the message to be viewed and click EDIT.

The message screen is split into two sections:

- The upper part displays guest details, who the message was from and contact details.
- The lower part displays the message text.



Guest Name: Affriat Claude
Room No: 114
Arrival: 15/01/2011
Departure: 18/01/2011
Group:
Message From: Your secretary
Contact Info.:

Message Text List
Please call back the following number ....
There is a message for you at the reception

Message
The package you were expecting arrived today. Should I keep it for your return or DHL it to you?

3. Make any changes if required to the message and click OK to close the message without printing or click PRINT to print the message.
4. Click CANCEL to exit the message dialog box without saving any changes.

How to print a guest message

4. Click the FRONT DESK menu and select MESSAGES.

   The Messages screen is displayed.
5. Select the message to be printed and click PRINT.

   The Printing Records dialog box is displayed briefly and the message is printed.

How to mark a guest message as received

7. Click the FRONT DESK menu and select MESSAGES.

   The Messages screen is displayed.
8. Select the message to be marked as received and click RECEIVED.

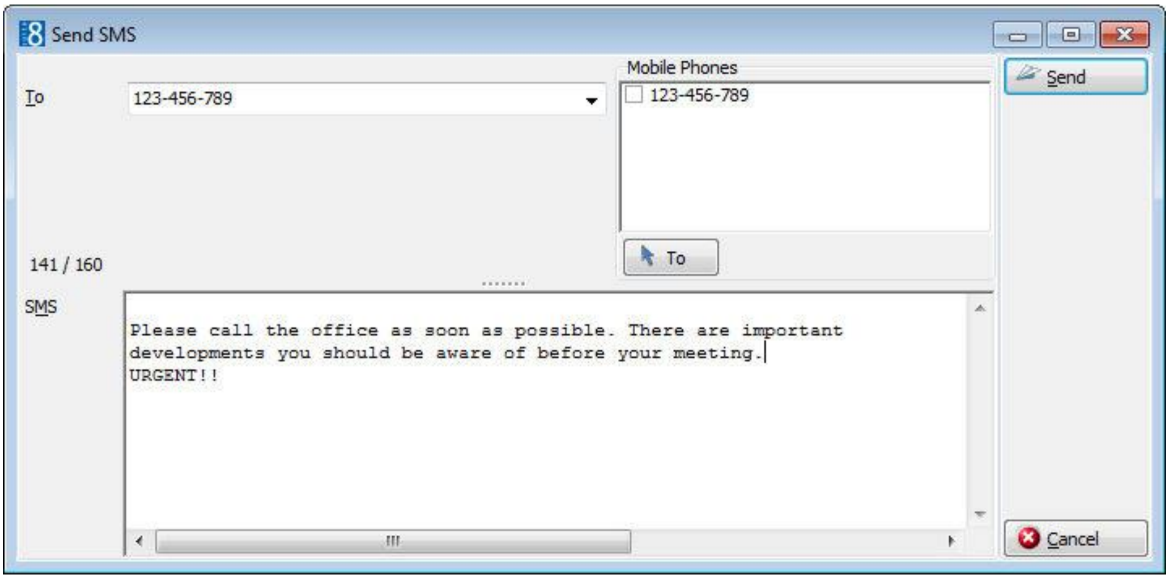
   In the STATUS column the time and user who marked the message as received is listed.

How to send a message as an SMS

1. Click the FRONT DESK menu and select MESSAGES.

   The Messages screen is displayed.
3. Select the message to be sent as an SMS and click SMS.

   The Send SMS dialog box is displayed.



To: 123-456-789

☐ 123-456-789

141 / 160

SMS:

```
Please call the office as soon as possible. There are important
developments you should be aware of before your meeting.
URGENT!!
```

4. Click SEND.

   The message is sent as an SMS to the selected mobile phone number.

Note: The SMS button is only available if the guest profile has a communication type which is marked as a mobile phone.

Options available on the messages screen

- **New** - to enter a new message.
- **Edit** - to edit an existing message.
- **Received** - to mark the selected message as received.
- **Received All** - to mark all messages as received.
- **Print** - to print the selected message.
- **Find in Grid** - to further narrow the search.

Standard message texts can be defined via the option MESSAGES under Setup → Configuration → Reservations.

The template used for SMS sending is defined under Miscellaneous → Reports using the Internal Editor and is then defined as the Message SMS Template under Setup → Configuration → Global Settings → Reservation → Reservation 1 tab.

5 New Financial Account

Financial Accounts

Financial Accounts are accounts that do not affect the properties availability and are used to post charges to non-guest accounts. For example, permanent accounts such as staff accounts, POS Accounts or other internal accounts used to post no-show and cancellation fees, corrections or charges for non staying guests. Financial Accounts are also used for conference bookings and conference telephone charges and internal lost postings such as interface late charges.

> **Note:** In the Meeting Planner module the financial accounts option and postings functionality are available if the PMS license and/or the CCM Billing Component license are activated.

Financial accounts may be accessed via several options in Suite8:

- Reservations
- Front Desk
- Meeting Planner
- Cashiering

How to access via Reservations

The financial account option in reservations may be used to open, edit or create a financial account.

5. Click the RESERVATIONS menu and select FINANCIAL ACCOUNTS.

   The Reservation Navigator screen is displayed defaulted to the Financial Accounts tab.

12. Click NEW to display the New Financial Account dialog box.

How to access via Front Desk

The financial account menu option in front desk may be used to open a new financial account.

1. Click the FRONT DESK drop down menu and select NEW FINANCIAL ACCOUNT.

   The financial account dialog box is displayed.

An existing account may be edited by selecting the financial account page on the reservation navigator via the Arrivals or Inhouse Guests menu options.

How to access via Meeting Planner

There are several ways to access Financial Accounts from with the Meeting Planner module:

3. On the Conference Diary, right-click on a booking, select BOOKING OPTIONS to display the short-cut menu.

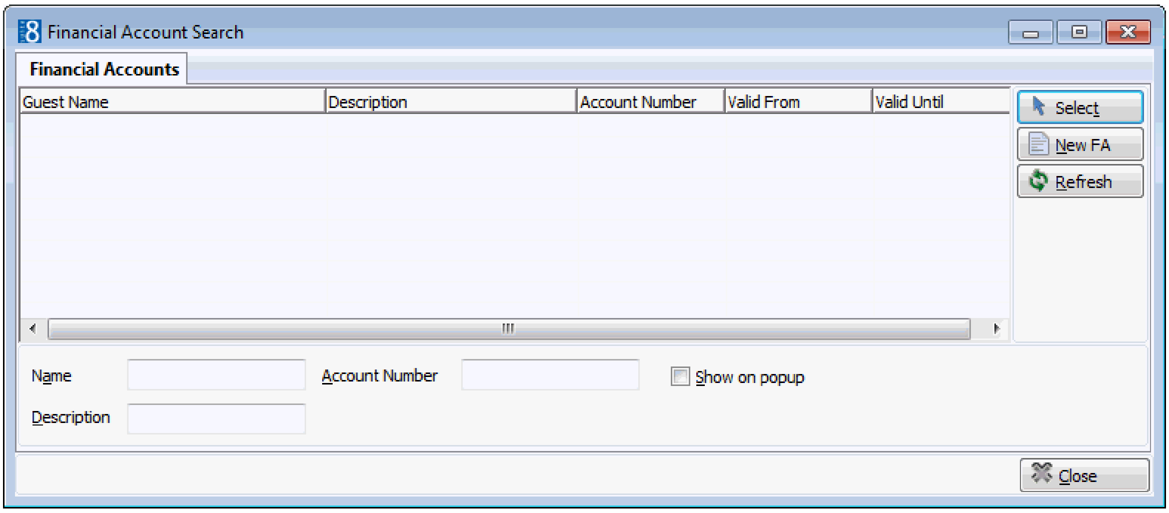
   or

   From Event Management, locate the booking and select OPTIONS or EDIT the booking and select OPTIONS to display the short-cut menu.

   or

   From Event Management, click EVENTS and select OPTIONS to display the short-cut menu.

5. Click FINANCIAL ACCOUNTS on the short-cut menu to display the Financial Accounts Search screen.


Financial Account Search
Financial Accounts
Guest Name
Description
Account Number
Valid From
Valid Until
Select
New FA
Refresh
Name
Account Number
☐ Show on popup
Description
Close

- Click NEW FA to create a new financial account.

  The financial account dialog box is displayed.

The search criteria, financial account Name, Description and Account Number allow the user to locate the required financial account easily. In addition selecting the option Show on pop-up will display all available financial accounts. This setting is saved for future use until changed by the user.

> **Note:** The financial account can also be displayed via Event Management when selecting Postings. However, as this option allows postings you must enter a cashier number.

How to access via Cashiering

- Click the CASHIER menu and select BILLING.

  The Cashier Login screen is displayed.

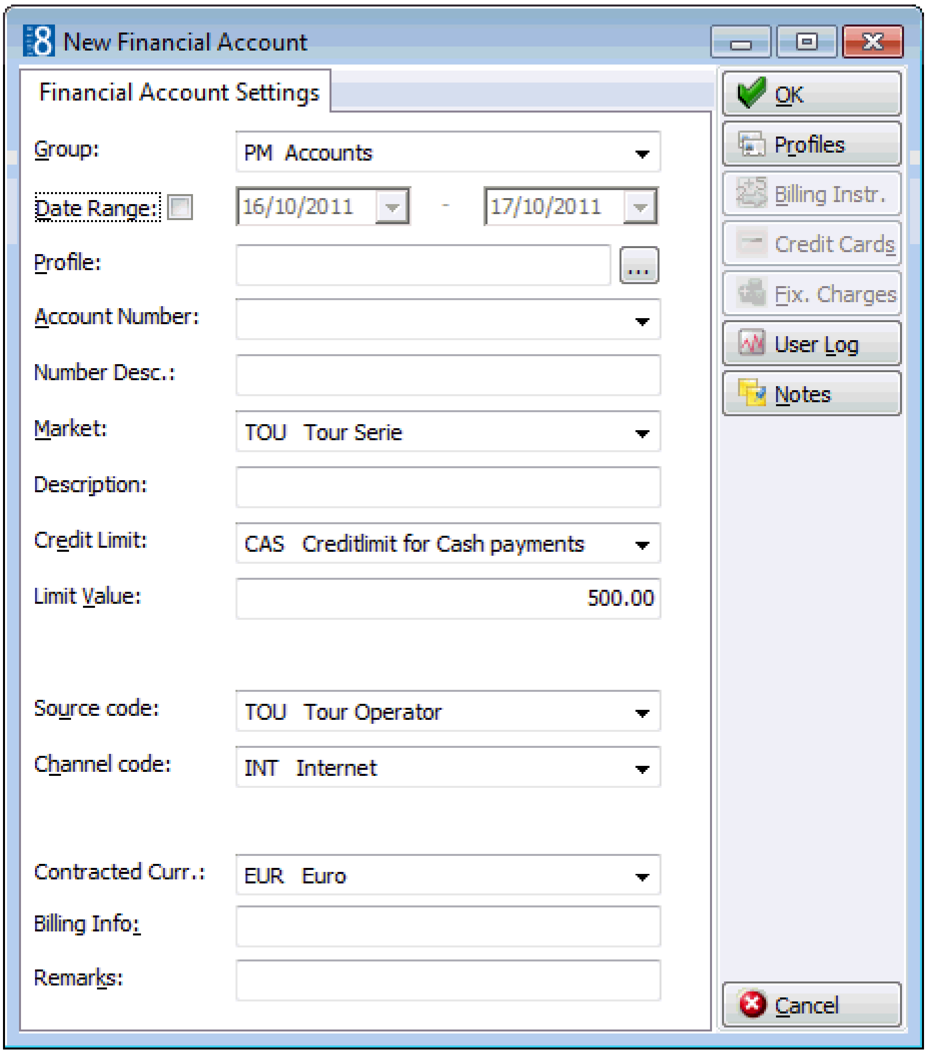
1. Enter your CASHIER NUMBER and PASSWORD, click LOGIN.

   The Billing Search screen is displayed.

2. Click NEW FA to display the New Financial Account dialog box.

How to create a new financial account

4. Access the New Financial Account dialog box via one of the access methods described above.



Group: PM Accounts
Date Range: ☐ 16/10/2011 - 17/10/2011
Profile:
Account Number:
Number Desc.:
Market: TOU Tour Serie
Description:
Credit Limit: CAS Creditlimit for Cash payments
Limit Value: 500.00
Source code: TOU Tour Operator
Channel code: INT Internet
Contracted Curr.: EUR Euro
Billing Info:
Remarks:

11. Complete the financial account details by typing information or selecting information from the drop-down lists.

    For an explanation of the fields on the financial account screen, see the New Financial Account table below.

12. Click OK.

    If the new financial account was created via cashiering then the posting screen is displayed.

New Financial Account dialog box

Fill in this field	With this information
Group	Select the type of financial account required from the list of predefined groups.
Date Range	If required select the date range check box and enter the date range (from/to) you would like to keep the Financial Account in your system. Usually it is not necessary to enter a date range on a financial account.
Profile	Each financial account must be linked to a profile; click the button next to the profile box to open the profile search screen and select an existing profile or create a new one.

Account Number	Each financial account must have an account number before it can be checked into the system. Click the drop-down arrow and select an account number; if the account number was defined with a description then this is updated in the NUMBER DESC. box.
Number Desc.	The description defined for this account number is displayed.
Market	If no default market code has been defined, click the drop-down arrow and select a market code. If this field is defined as mandatory then a market code has to be attached. When setting up a financial account in meeting planner the market is filled by default with the market segment from the booking master.
Description	Displays the financial account group and financial account number.
Credit Limit	Select a credit limit from the list box.
Limit Value	The credit value associated with the selected credit limit is displayed. This may be changed as required.
Transponder	The transponder card number is displayed if the financial account was created upon swiping or entering a transponder card. **Note:** This option only displayed if TRANSPONDER functionality is active.
Source Code	Select from a list of predefined source codes.
Channel Code	Select from a list of predefined channel codes.
Tax Exemption	Defines if the financial account is tax exempt.
Contracted Curr	Select the contracted currency for the financial account.
Billing Info	Enter any billing information, such as 'Room and Tax to Company'. The billing information is displayed in the billing screen on the standard HTML file.
Remarks	Enter any additional information. Remarks are displayed in the billing screen on the standard HTML file.

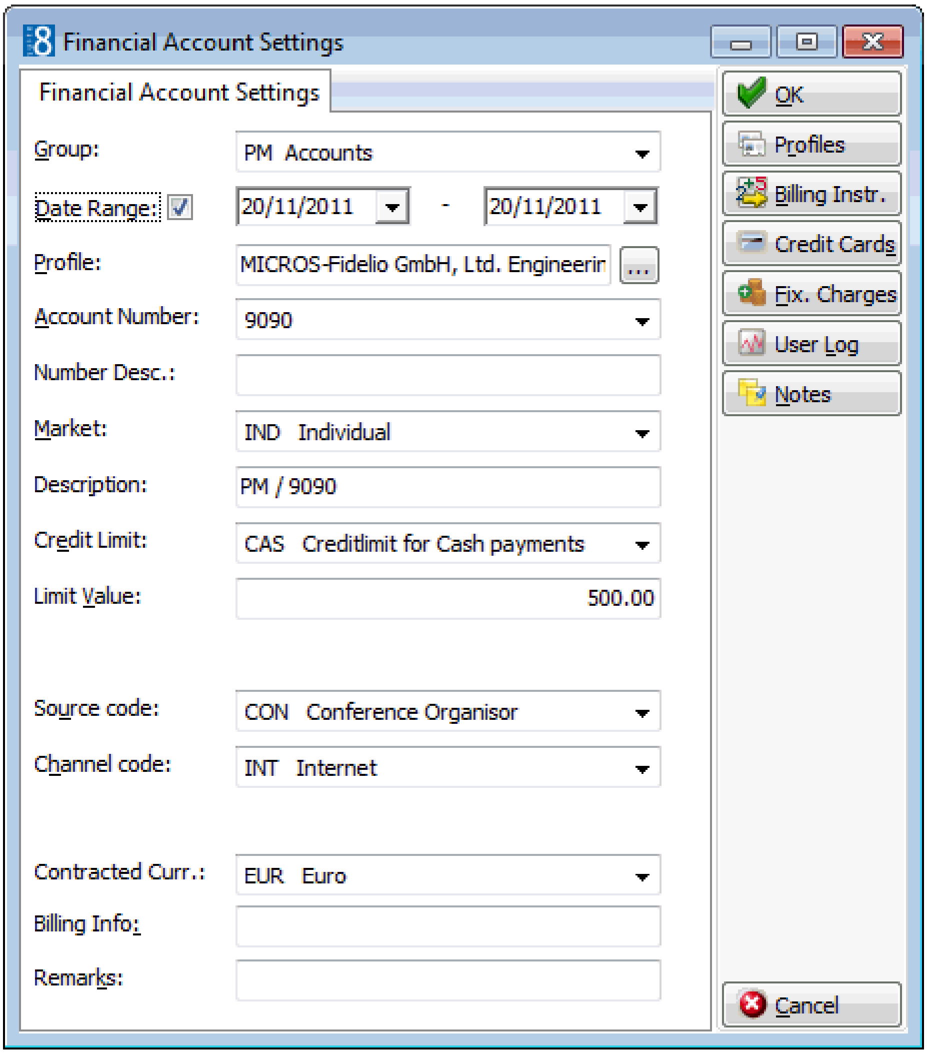
Note: If the start date selected equals the system date and the OK button is clicked, the financial account will be checked in. If the start date does not match the system date the financial account status will be ‘Expected’.

How to edit financial account settings

1. Select the required financial account and click EDIT to display the Financial Account Settings dialog box.

   In cashiering display the billing screen of the required financial account and click the FA SETTINGS button to display the Financial Account Settings dialog box.

   In Meeting Planner display the Financial Accounts Search screen via one of the access methods described above, select the required financial account and click SELECT to display the Financial Account Settings dialog box.



Group: PM Accounts
Date Range: ☑ 20/11/2011 - 20/11/2011
Profile: MICROS-Fidelio GmbH, Ltd. Engineerir
Account Number: 9090
Number Desc.:
Market: IND Individual
Description: PM / 9090
Credit Limit: CAS Creditlimit for Cash payments
Limit Value: 500.00
Source code: CON Conference Organisor
Channel code: INT Internet
Contracted Curr.: EUR Euro
Billing Info:
Remarks:

2. Make any changes necessary and click OK to close the financial account settings.

How to link profiles to financial accounts

This option is used to link Company, Agent, Source, Meeting Planner or Vendor profiles to the financial account.

3. Access the Financial Account Settings dialog box via one of the access methods described above.
4. Click PROFILES to display the Profile Select dialog box.
5. On the profile type required click the drop-down arrow.

   The Profile Search dialog is displayed.

- Search for the required profile, click SELECT.

The Profile Select dialog box is displayed with the profile selected.

6. Click OK to return to the Financial Account Settings dialog box.

How to unlink profiles to financial accounts

This option is used to unlink Company, Agent, Source, Meeting Planner or Vendor profiles to the financial account.

13. Access the Financial Account Settings dialog box via one of the access methods described above.
14. Click PROFILES to display the Profile Select dialog box.
15. Select the profile to be unlinked.
14. Click DELETE LINK.
1. Click OK to return to the Financial Account Settings dialog box.

How to enter notes for financial accounts

This option is used to add, edit, delete and view notes related to the selected financial account.

- Access the Financial Account dialog box via one of the access methods described above.
- Click NOTES to display the Notes dialog box.

  See: *Suite 8 Reservations manual for more details.*

How to link billing instructions to financial accounts

This option is used to link billing instructions to the Financial Account.

2. Access the Financial Account Settings dialog box via one of the access methods described above.
3. Click BILLING INSTR. to display the Billing Instructions dialog box.

   See: *Suite 8 Reservations manual for more details.*

How to link credit cards to financial accounts

This option is used to add, edit, delete, guarantee or get approval for credit cards. For example the charges of conference bookings or group members might be routed to a financial account and paid by a company credit card.

- Access the Financial Account Settings dialog box via one of the access methods described above.
- Click CREDIT CARDS to display the financial account credit cards dialog box.

  See: *Suite 8 Reservations manual for more details.*

This option is only available if the status of the financial account is expected, checked in or closed.

How to enter fixed charges for financial accounts

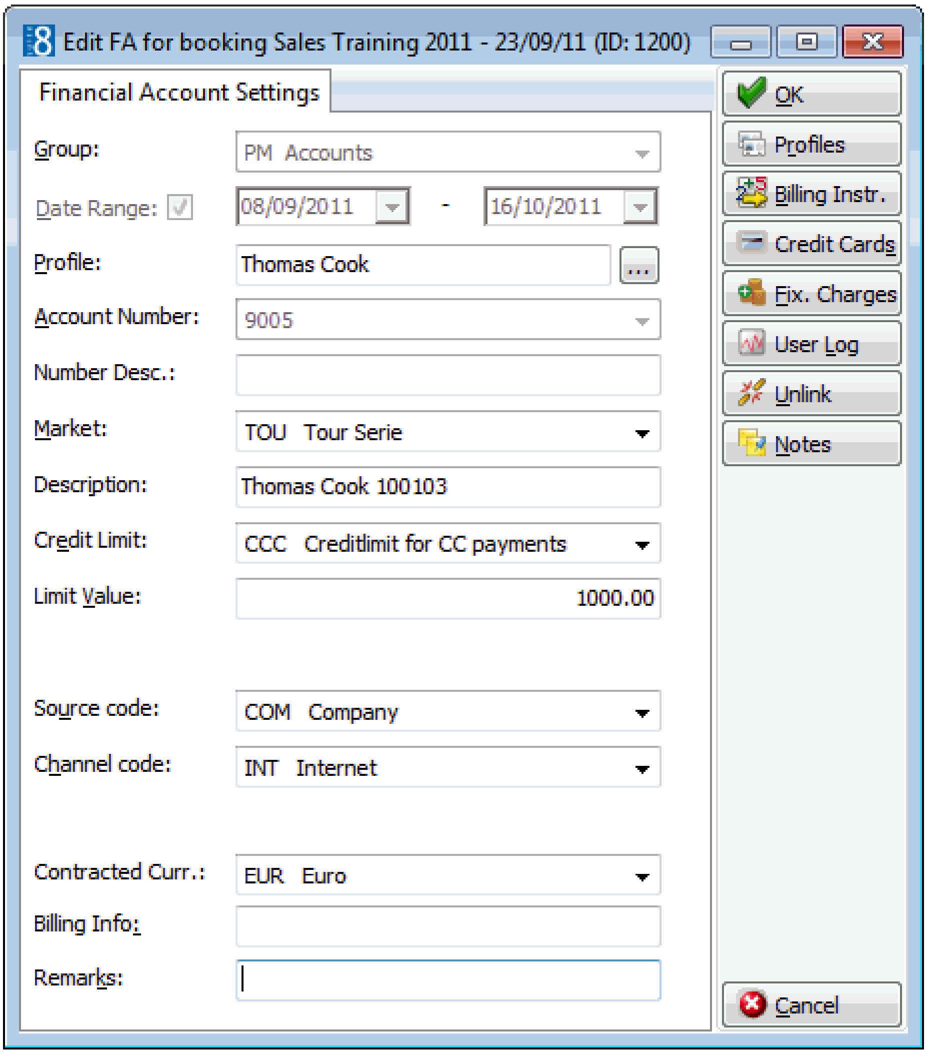
This option is used to enter fixed charges on the Financial Account. Fixed charges are used to post daily charges other than room, tax or packages, for example conference equipment rental from external locations. Suite 8 posts fixed charges automatically during night audit or when choosing the option post daily charges in the cashiering module.

4. Access the Financial Account Settings dialog box via one of the access methods described above.
5. Click FIXED CHARGES to display the Fixed Charges dialog box.

See: *Suite 8 Reservations manual for more details.*

How to unlink a CCM financial account

1. Locate the required booking.
2. Click the Options button to display the short-cut menu.
3. Click Financial Accounts on the short-cut menu to display the Financial Accounts Settings dialog box.



Edit FA for booking Sales Training 2011 - 23/09/11 (ID: 1200)

Financial Account Settings

Group: PM Accounts
Date Range: ☑ 08/09/2011 - 16/10/2011
Profile: Thomas Cook
Account Number: 9005
Number Desc.:
Market: TOU Tour Serie
Description: Thomas Cook 100103
Credit Limit: CCC Creditlimit for CC payments
Limit Value: 1000.00
Source code: COM Company
Channel code: INT Internet
Contracted Curr.: EUR Euro
Billing Info:
Remarks:

2. Click Unlink, the message "Unlink CCM Booking?" is displayed to confirm the unlinking, select Yes.
3. If no postings have been made the Financial Account will be unlinked. If postings have been made then a message is displayed to "Transfer postings of the selected booking?" select Yes.
4. The cashier folio is displayed; click the Transfers button to display the Transfer Posting dialog box.
5. In the To Room field select the account to transfer the postings to **or** create and then select a new financial account.
6. The charges may be transferred in the normal manner **or** transferred by checking the Transfer postings of selected CCM booking check box. This option transfers all postings that have been made via the Manual Post option under the Events menu.
7. Click OK to transfer the charges.

8. Click the Close button to close the cashier screen.
9. Click OK on the Financial Account Settings dialog box to complete the transaction.

> **Note:** Financial Accounts will be unlinked only when the OK button on the FA edit screen is pressed. If Cancel is pressed then the FA is still linked even if postings have been transferred.
>
> **Note:** Postings that have been made via the option Postings on the Options menu are not linked to the CCM booking and posted directly to the Financial Account. These postings have to be transferred individually.

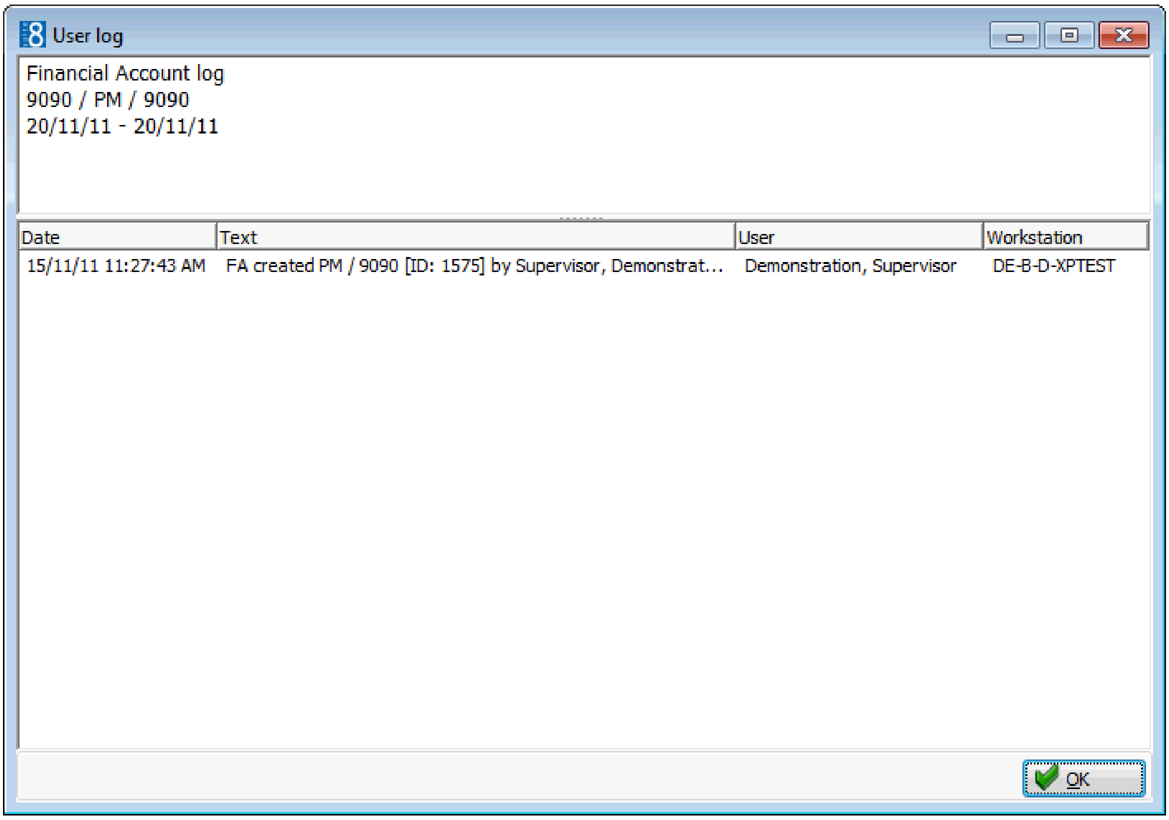
How to display the user log

This option is used to view the changes related to the selected financial account.

1. Access the Financial Account dialog box via one of the access methods described above.
2. Click User Log to display the User Log dialog box.

   The User Log is displayed split into 2 sections:

   2. The upper section displays the name of the financial account and the arrival and departure dates.
   3. The lower section displayed information about the changes to this financial account.



Financial Account log
9090 / PM / 9090
20/11/11 - 20/11/11

Date	Text	User	Workstation
15/11/11 11:27:43 AM	FA created PM / 9090 [ID: 1575] by Supervisor, Demonstrat...	Demonstration, Supervisor	DE-B-D-XPTEST

1. Once all changes have been viewed, click OK to close the user log.

User Log Display Options

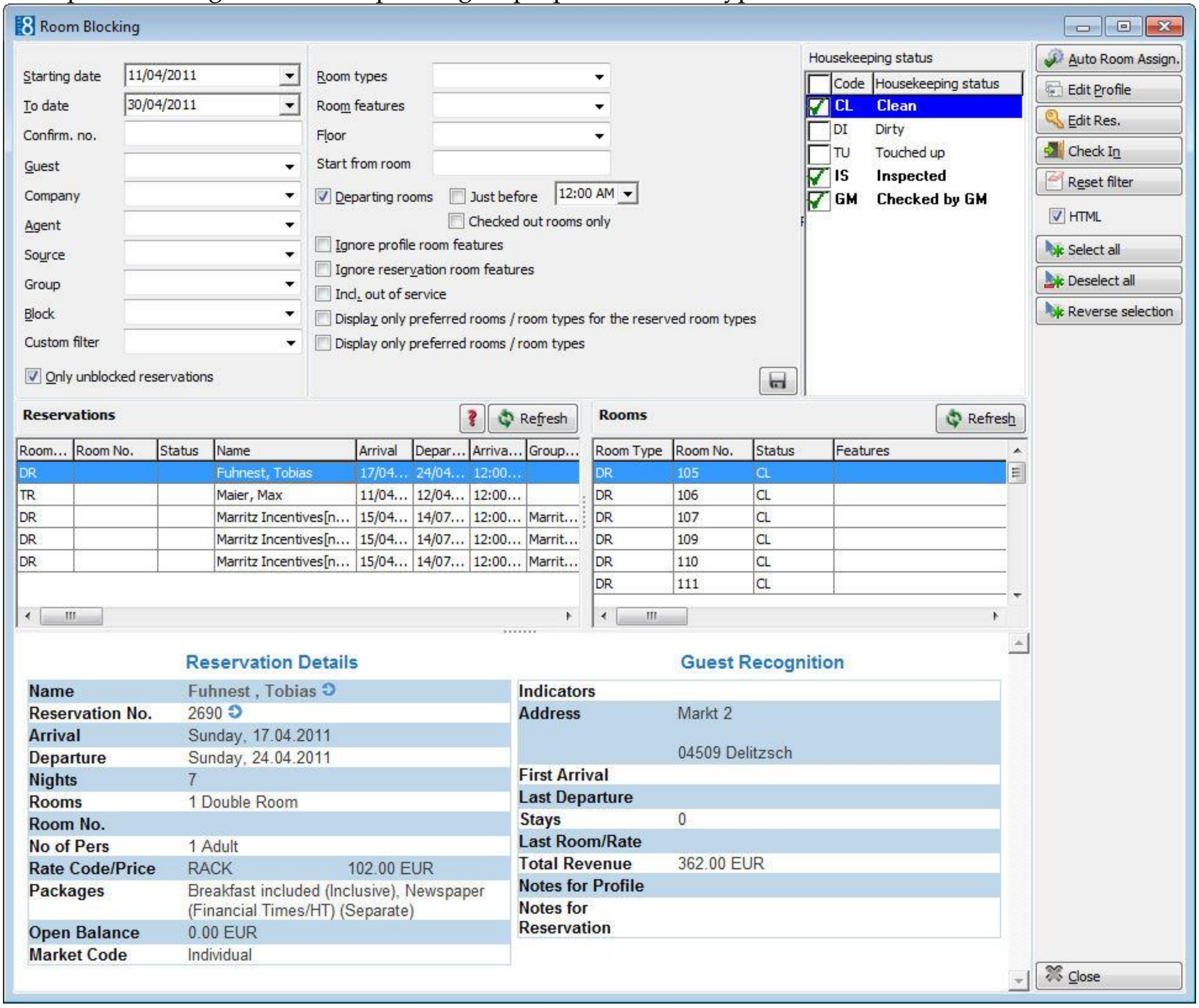
Field Heading	**Gives this information**
Date	The date and time the change was made. This is the system date of the computer on which the change was made.
Text	A short description about the changes that were made.
User	The name of the user who made the change.
Workstation	The computer name on which the change was made.

The financial account groups and numbers are defined via the options FINANCIAL ACCOUNT GROUPS and FINANCIAL ACCOUNT NUMBERS under Setup → Configuration → Cashiering.

Financial account functionality is controlled by the user rights VIEW, EDIT, INSERT and DELETE under Setup → Configuration → Users → User Definition → Rights → Cashiering → Financial Accounts.

6 Room Blocking

A room blocking is the assignment of a room to a reservation. The room blocking option is accessible via the FRONT DESK menu and may be used to search for and assign rooms for reservations arriving today, for a specific date in the future or that meet certain criteria.
Some properties like to assign all the room numbers prior to arrival and some properties may use this option to assign rooms for specific groups, parties, room types or VIP levels.



Starting date 11/04/2011
To date 30/04/2011
Confirm. no.
Guest
Company
Agent
Source
Group
Block
Custom filter
☑ Only unblocked reservations

Room types
Room features
Floor
Start from room
☑ Departing rooms ☐ Just before 12:00 AM
☐ Checked out rooms only
☐ Ignore profile room features
☐ Ignore reservation room features
☐ Incl. out of service
☐ Display only preferred rooms / room types for the reserved room types
☐ Display only preferred rooms / room types

Housekeeping status

☐	Code	Housekeeping status
☑	CL	Clean
☐	DI	Dirty
☐	TU	Touched up
☑	IS	Inspected
☑	GM	Checked by GM

☑ HTML

Reservations

Room...	Room No.	Status	Name	Arrival	Depar...	Arriva...	Group...
DR			Fuhnest, Tobias	17/04...	24/04...	12:00...	
TR			Maier, Max	11/04...	12/04...	12:00...	
DR			Marritz Incentives[n...	15/04...	14/07...	12:00...	Marrit...
DR			Marritz Incentives[n...	15/04...	14/07...	12:00...	Marrit...
DR			Marritz Incentives[n...	15/04...	14/07...	12:00...	Marrit...

Rooms

Room Type	Room No.	Status	Features
DR	105	CL	
DR	106	CL	
DR	107	CL	
DR	109	CL	
DR	110	CL	
DR	111	CL	

Reservation Details

Name	Fuhnest , Tobias
Reservation No.	2690
Arrival	Sunday, 17.04.2011
Departure	Sunday, 24.04.2011
Nights	7
Rooms	1 Double Room
Room No.	
No of Pers	1 Adult
Rate Code/Price	RACK 102.00 EUR
Packages	Breakfast included (Inclusive), Newspaper (Financial Times/HT) (Separate)
Open Balance	0.00 EUR
Market Code	Individual

Guest Recognition

Indicators	
Address	Markt 2 04509 Delitzsch
First Arrival	
Last Departure	
Stays	0
Last Room/Rate	
Total Revenue	362.00 EUR
Notes for Profile	
Notes for Reservation	

The room blocking screen is split into two or three sections depending on whether the HTML option is selected:

- The upper section contains all the selection criteria. The reservation selection criteria are listed on the left, the rooms selection criteria in the middle and on the right are the available housekeeping statuses; by default all room statuses which are defined as CLEAN are selected. Selection criteria can be selected, saved and set as the default for all users.
- The middle section of the screen displays the results of the selection:
  - The RESERVATIONS grid displays the reservations in alphabetical order according to the selected rooms criteria. The display order may be changed by clicking the column heading by which the display should be sorted. Clicking the REFRESH button updates the reservations listing.
  - The ROOMS grid displays the available rooms for the reservation selected in the reservations grid and according to the selected criteria. The room features are listed and also the number of days the room has not been occupied. Clicking the REFRESH button updates the available rooms.

- If the HTML option is selected then the freely-definable html display is shown in the lower section of the screen.

Note: Reservations with a room type change during the stay are displayed over more than one row. The first row of a reservation is displayed in a black font; subsequent rows of the reservation are displayed in a blue font. A grey background indicates that the row is part of a reservation with at least one room type change during the stay.

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.

How to block a room

2. Click the FRONT DESK menu and select ROOM BLOCKING.

   The Room Blocking screen is displayed.

3. The STARTING DATE and the TO DATE default to today's date, but may be changed as required.

4. Complete the search criteria by typing information or selecting information from the drop-down lists.

   For an explanation of the search criteria on the room blocking screen, see the Room Blocking Search Criteria table below:

- Select the room statuses to include from the HOUSEKEEPING STATUS list; by default all room statuses which are defined as CLEAN are selected.
- In the RESERVATIONS section click the REFRESH button to display the reservations according to the entered criteria.
- In the ROOMS section all available rooms meeting the search criteria and the first reservation listed are displayed.
- Select the reservation to be blocked; a list of suitable rooms is displayed on the ROOMS grid.
- Point to the required room on the ROOMS grid and hold down the left-mouse button.
- Drag the room from the ROOMS grid to the RESERVATION grid and then release the left-mouse button.

  The room is assigned to the selected reservation.

  If the check box ONLY UNBLOCKED RESERVATIONS is selected then the reservation is no longer listed.
- Repeat the steps above until all the required rooms have been blocked.
- Click CLOSE to exit the room blocking screen.

Note: The housekeeping statuses available are dependant upon the statuses that have been configured by your property.

How to automatically assign rooms

1. Click the FRONT DESK menu and select ROOM BLOCKING.

   The Room Blocking screen is displayed.

2. The STARTING DATE and the TO DATE default to today's date, but may be changed as required.

3. Complete the search criteria by typing information or selecting information from the drop-down lists.

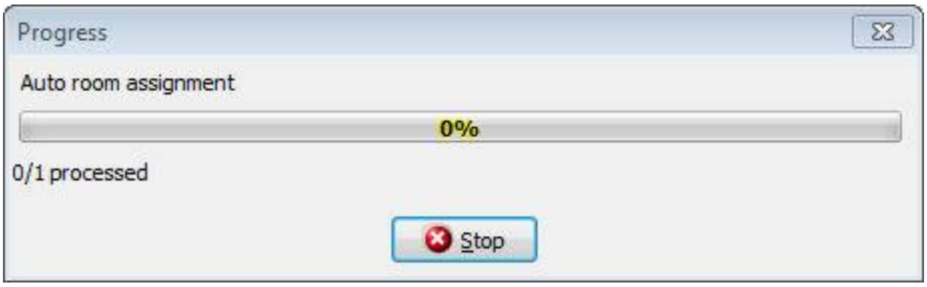
   For an explanation of the search criteria on the room blocking screen, see the Room Blocking Search Criteria table below:

1. Select the room statuses to include from the Housekeeping status list; by default all room statuses which are defined as clean are selected.
2. In the Reservations section click the Refresh button to display the reservations according to the entered criteria.
3. Select the reservations to which rooms are to be assigned by holding the Ctrl key and clicking the required reservations.

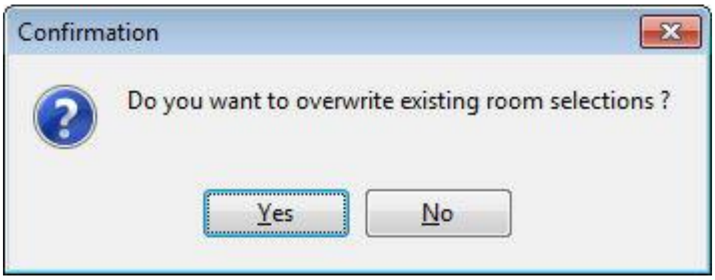
   To assign rooms to all the reservations listed click the Select All button. Click the Unselect All button to unselect all the reservations.

1. Once the reservations to be assigned are selected, click the Auto Room Assign. button.

   A progress bar is displayed.



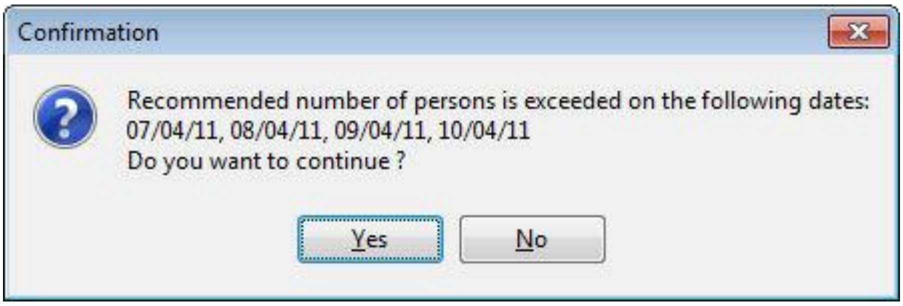
   If reservations with rooms assigned are included in the automatic room assignment then when the first reservation with a room assigned is found a question is displayed asking if you want to overwrite existing room selections.



Do you want to overwrite existing room selections ?

2. Click Yes to overwrite existing room selections or No to ignore all reservations with a room already assigned.

   If any of the reservations exceed the recommended number of persons then an error message is displayed.

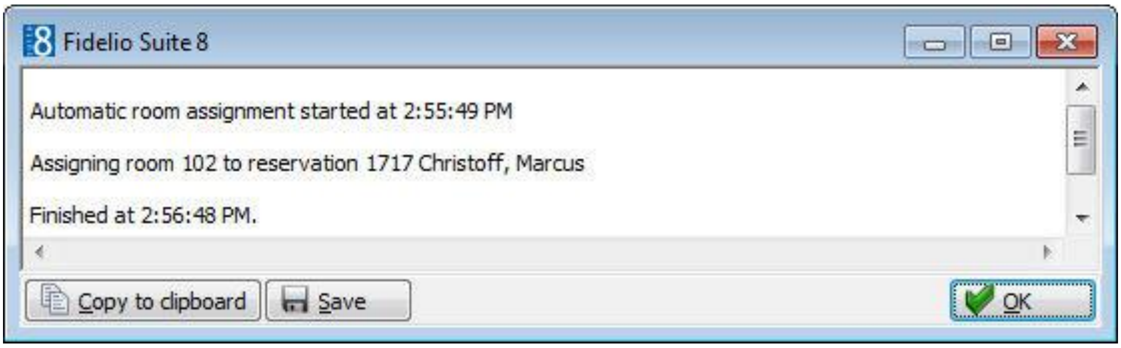


Recommended number of persons is exceeded on the following dates:
07/04/11, 08/04/11, 09/04/11, 10/04/11
Do you want to continue ?

3. Click Yes to continue or No to not assign a room to this reservation.

Once the room assignment has been completed an information box is displayed with the following information:

1. Start and finish time of the automatic room assignment.
2. Rooms assigned and the reservation numbers and names to which they were assigned.
3. Any error messages, such as when no room is available.
4. If a reservation has more than one room assigned then an entry is listed that the room assignment should be done manually.
5. The number of rooms which were assigned out of the total selected.



Automatic room assignment started at 2:55:49 PM

Assigning room 102 to reservation 1717 Christoff, Marcus

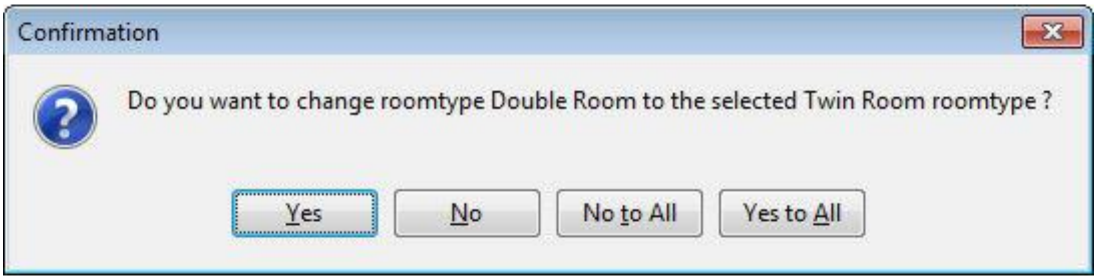
Finished at 2:56:48 PM.

2. Click OK to close the summary screen.
3. Click CLOSE to exit the room blocking screen.

How to change the room type when automatically assigning rooms

3. Click the FRONT DESK menu and select ROOM BLOCKING.
1. Complete the search criteria by typing information or selecting information from the drop-down lists.
2. In the RESERVATIONS section click the REFRESH button to display the reservations according to the entered criteria.
3. Select the reservations to which rooms are to be assigned by holding the CTRL key and clicking the required reservations.
4. To change the room type of the selected reservations; select the required room type from the ROOM TYPES box.
5. Click the AUTO ROOM ASSIGN. button.

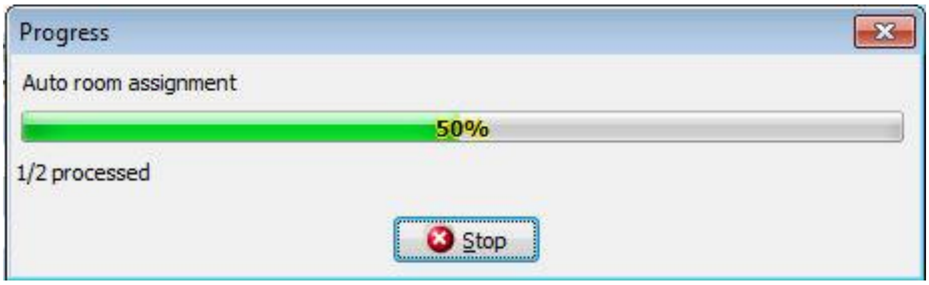
   A message is displayed asking you to confirm that you want to change the room type.



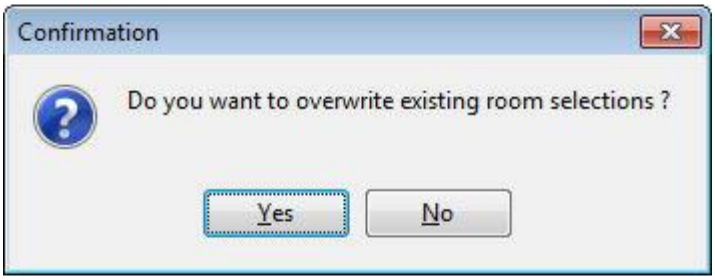
Do you want to change roomtype Double Room to the selected Twin Room roomtype ?

2. Click YES or YES TO ALL to confirm the room type change.

   A progress bar is displayed.



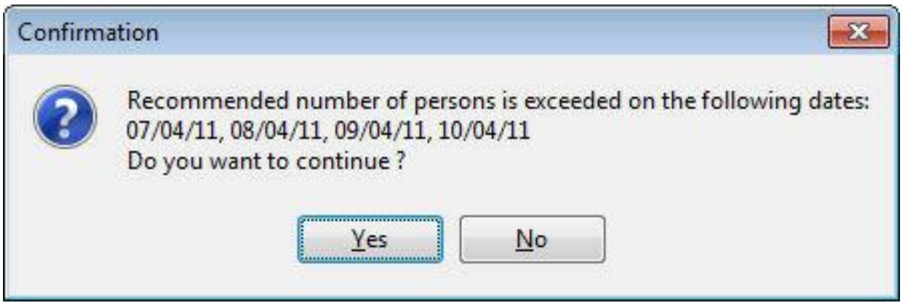
If reservations with rooms assigned are included in the automatic room assignment then when the first reservation with a room assigned is found a question is displayed asking if you want to overwrite existing room selections.



Do you want to overwrite existing room selections ?

3. Click YES to overwrite existing room selections or NO to ignore all reservations with a room already assigned.

   If any of the reservations exceed the recommended number of persons then an error message is displayed.

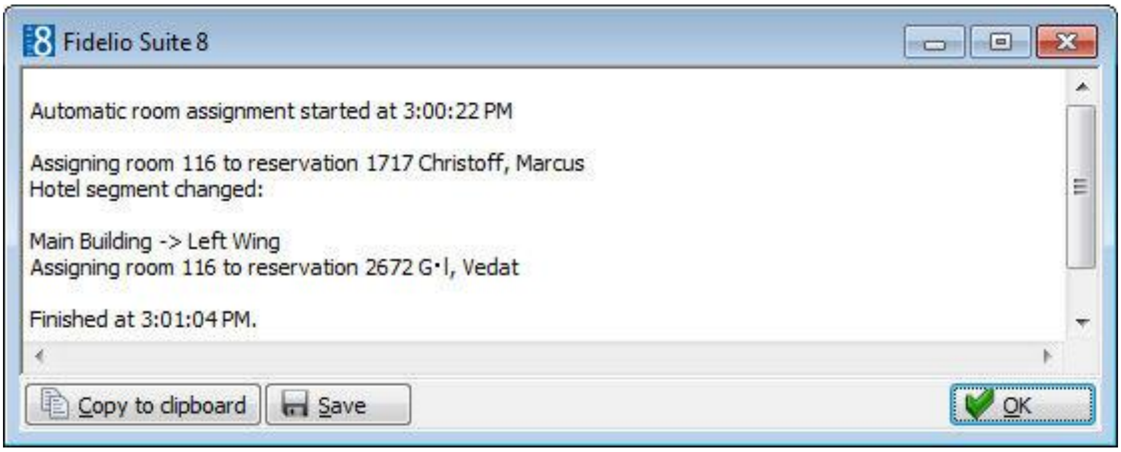


Recommended number of persons is exceeded on the following dates:
07/04/11, 08/04/11, 09/04/11, 10/04/11
Do you want to continue ?

1. Click YES to continue or NO to not assign a room to this reservation.

   Once the room assignment has been completed an information box is displayed with the following information:

   - Start and finish time of the automatic room assignment.
   - Rooms assigned and the reservation numbers and names to which they were assigned.
   - Any error messages, such as when no room is available.
   - If a reservation has more than one room assigned then an entry is listed that the room assignment should be done manually.
   - The number of rooms which were assigned out of the total selected.



```
Automatic room assignment started at 3:00:22 PM

Assigning room 116 to reservation 1717 Christoff, Marcus
Hotel segment changed:

Main Building -> Left Wing
Assigning room 116 to reservation 2672 G·l, Vedat

Finished at 3:01:04 PM.
```

2. Click OK to close the summary screen.
3. Click CLOSE to exit the room blocking screen.

Room Blocking Search Criteria

Fill in this field	With this information
Starting date	Enter the date for which you would like to block rooms or select a date from the calendar. The default is today's date.
To date	The default to date is the same as the starting date, however a date range can be selected by entering a different date or selecting a date from the calendar.
Confirm. no.	Enter the confirmation number of the reservation for which you would like to block a room. Multiple confirmation numbers can be entered separated by a comma. If a confirmation number is entered then the other reservation filters are deactivated and only reservations with the entered confirmation number are displayed.
Guest	Enter a guest name if you would like to block a room for a specific guest. Click the drop-down arrow to open the profile search screen.
Company	Enter the company name if you would like to assign rooms only for a specific company. Click the drop-down arrow to open the profile search screen.
Agent	Enter the agent name if you would like to assign rooms only for a specific agent. Click the drop-down arrow to open the profile search screen.
Source	Enter the source name if you would like to assign rooms only for a specific source. Click the drop-down arrow to open the profile search screen.
Group	Enter the group name here if you would like to assign rooms only for a specific group. Click the drop-down arrow to open the group reservations search screen.
Block	Enter the block name here if you would like to assign rooms only for a specific group block. Click the drop-down arrow to open the block search screen.
Only unblocked reservations	Select this check box to view only reservations with no room number assigned.

Room types	Select specific room types from the list of available room types.
Room features	Select specific room features from the list of available features.
Floor	Enter a floor number or select the required floors from the drop-down list to assign rooms on a specific floor.
Start from room	Enter the room number the search or automatic room assignment should start from.
Departing rooms	Select this option to display rooms that are currently occupied but that are due to check-out today. If not selected then only rooms which were vacant last night will be displayed.
Just Before	Select this option and enter a time to display rooms that are currently occupied, but that are due to check-out before the entered time.
Checked out rooms only	Select this option to display rooms that have already checked out and are vacant.
Ignore profile room features	Select this option to ignore the room features entered on the guest profile.
Ignore reservation room features	Select this option to ignore the room features entered on the reservation.
Incl. out of service	Select this option to include rooms which have been placed out of service.
Display only preferred rooms / room types for the reserved room type	Select a reservation and select this check box to display only the preferred rooms and/or room types entered on the guest profile that match the room type of the reservation. For example, if the guest prefers suites and double rooms but the reservation is for a double room, then only double rooms will be displayed. This option can be selected by default via User Settings on the Miscellaneous menu.
Display only preferred rooms / room types	Select a reservation and select this check box to display only preferred rooms and/or rooms types entered on the profile of the selected reservation. For example, if the guest prefers suites and double rooms but the reservation is for a double room, then both suites and double rooms will be displayed. This option can be selected by default via User Settings on the Miscellaneous menu.
?	Displays an explanation of how a reservation with a room type change during the stay is displayed on the reservations grid: "Each time interval of a reservation is represented by a new row. The first row of a reservation is displayed in a black font. Subsequent rows of the reservation are displayed in a blue font.

	A gray background indicates that the row is part of a reservation with more than one time interval and is displayed in more than one line."
Housekeeping Status	Select the required housekeeping statuses; by default all room statuses which are defined as CLEAN are selected.

Options available on the room blocking screen

- AUTO ROOM ASSIGN. - to automatically assign rooms to the selected reservations.
- EDIT PROFILE - to view or edit profile details.
- EDIT RES. - to view or edit reservation details.
- CHECK IN - to check-in a reservation that is arriving today.
- RESET FILTER - to clear the query criteria with the exception of the dates which are not reset.
- NOTES - to display profile or reservation notes. This option is displayed only if there are profile or reservation notes attached.
- HTML - to display reservation information in Html format.
- SELECT ALL - to select all reservations listed in the Reservations grid.
- DESELECT ALL - to de-select all reservations listed in the Reservations grid.
- REVERSE SELECTION - to reverse the selection in the Reservations grid.
- 💾- displays a pop-up menu with the following two options:
- SAVE AS DEFAULT - saves the current room filter settings as the default settings when opening room blocking. The settings are applied to all users.
- SAVE FOR AUTOMATIC ROOM SPLITTING - saves the current room filter settings as the default settings for automatic split room assignment. The settings are applied to all users.

How to save default settings

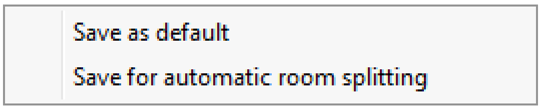
1. Click the FRONT DESK menu and select ROOM BLOCKING.

   The Room Blocking screen is displayed.

4. The STARTING DATE and the TO DATE default to today's date, but may be changed as required.

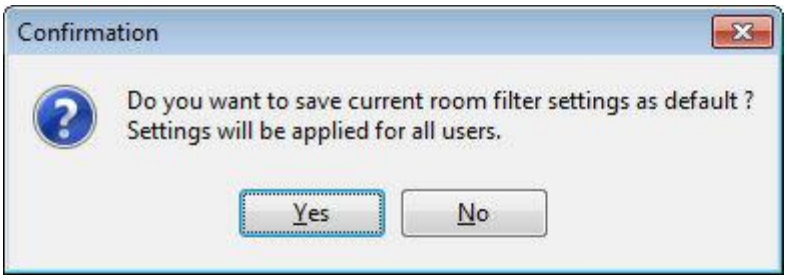
5. Complete the search criteria by typing information or selecting information from the drop-down lists.

5. Click 💾 to display a pop-up menu.



1. Select SAVE AS DEFAULT.

   A confirmation message is displayed.



Do you want to save current room filter settings as default ?
Settings will be applied for all users.

4. Select Yes to save current room filter settings as the default for all users.
5. Click Close to exit the room blocking screen.

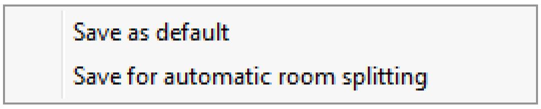
How to save default settings for automatic split rooms assignment

5. Click the Front Desk menu and select Room Blocking.

   The Room Blocking screen is displayed.

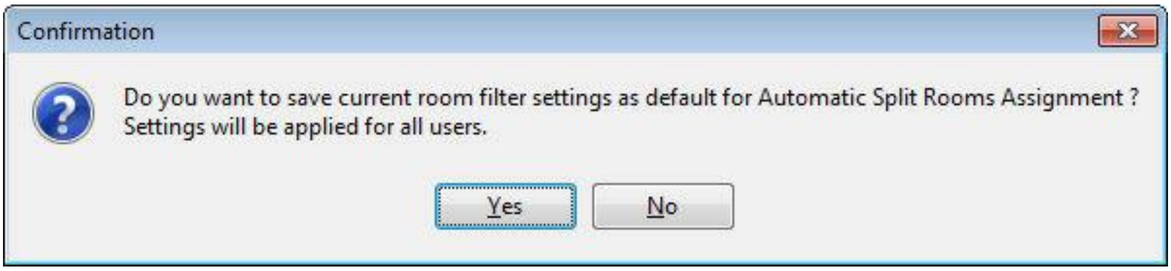
1. The Starting date and the To date default to today's date, but may be changed as required.
2. Complete the search criteria by typing information or selecting information from the drop-down lists.

1. Click 💾 to display a pop-up menu.



1. Select Save for automatic room splitting.

   A confirmation message is displayed.



Do you want to save current room filter settings as default for Automatic Split Rooms Assignment ?
Settings will be applied for all users.

1. Select Yes to save current room filter settings as the default for Automatic Split Rooms Assignment for all users.
2. Click Close to exit the room blocking screen.

ⓘ The housekeeping statuses are defined via the option Housekeeping under Setup → Configuration → Reservations → Room Management.

ⓘ On the room blocking screen the option Display only preferred rooms / room types for the reserved room type can be selected by default under Miscellaneous → User Settings → Search Screens.

ⓘ On the room blocking screen the option Display only preferred rooms / room types can be selected by default under Miscellaneous → User Settings → Search Screens.

ⓘ The html refreshes immediately when using the mouse, however, when using a key stroke the refresh is performed according to the milliseconds defined via the option Tree Delay under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab. When clicking for the first time in the grid in the first row and then pressing the down arrow the html is refreshed immediately instead of using the defined key stroke delay.

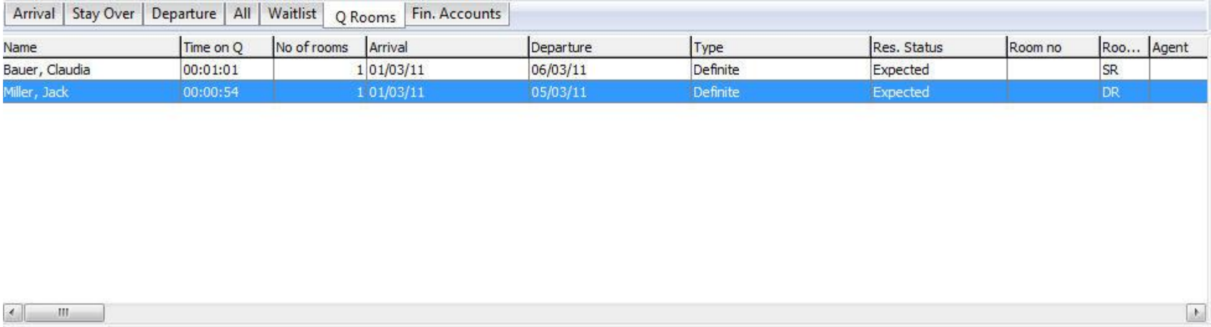
ⓘ The save default settings functionality is controlled by the user right Save default filter for automatic room assignment under Setup → Configuration → Users → User Log → Reservation.

7 Queue Rooms

This option displays all reservations which are currently on the check-in queue and is accessible via the FRONT DESK menu and via the Q ROOMS tab on the Reservation Navigator. This option and the display of the Q Rooms tab are parameter controlled.

Reservations can be placed on the check in queue when there are no rooms available at the time of arrival. The length of time that a reservation has been on the check in queue is listed in the column TIME ON Q. As rooms become available they can be allocated according to the length of time a reservation has been on the queue.

Reservations are removed from the queue, either by being checked-in or via the option DELETE FROM QUEUE on the Options menu of the reservation navigator.

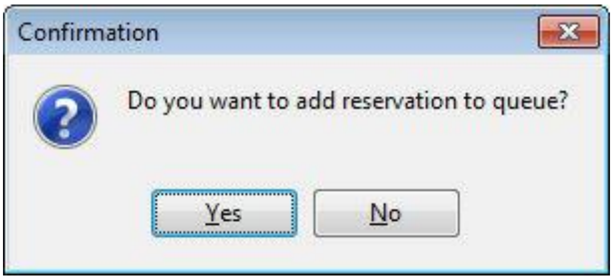


Name	Time on Q	No of rooms	Arrival	Departure	Type	Res. Status	Room no	Roo...	Agent
Bauer, Claudia	00:01:01	1	01/03/11	06/03/11	Definite	Expected		SR	
Miller, Jack	00:00:54	1	01/03/11	05/03/11	Definite	Expected		DR	

How to add rooms to the queue

1. From the Reservation Navigator select the reservation to be added to the queue.
2. Select ADD TO QUEUE from the OPTIONS menu.

   A confirmation message is displayed.



Do you want to add reservation to queue?

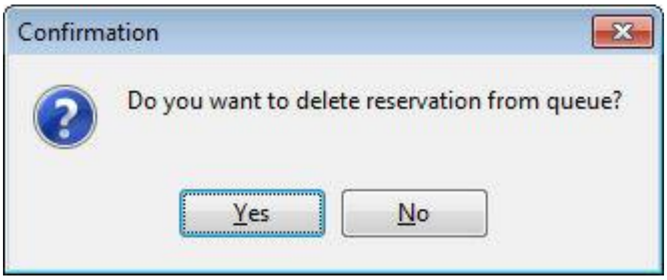
4. Click YES to add the reservation to the queue.

   The reservation is now listed under both the Arrival tab listing and the Q Rooms tab. The time the reservation has been in the check in queue is listed in the column TIME ON Q.

How to delete rooms from the queue

1. From the Reservation Navigator select the reservation to be removed from the queue.
2. Select DELETE FROM QUEUE from the OPTIONS menu.

   A confirmation message is displayed.



Do you want to delete reservation from queue?

- Click YES to delete the reservation from the check in queue.

  The reservation is removed from the Q Rooms listing and is now listed under the Arrival tab.

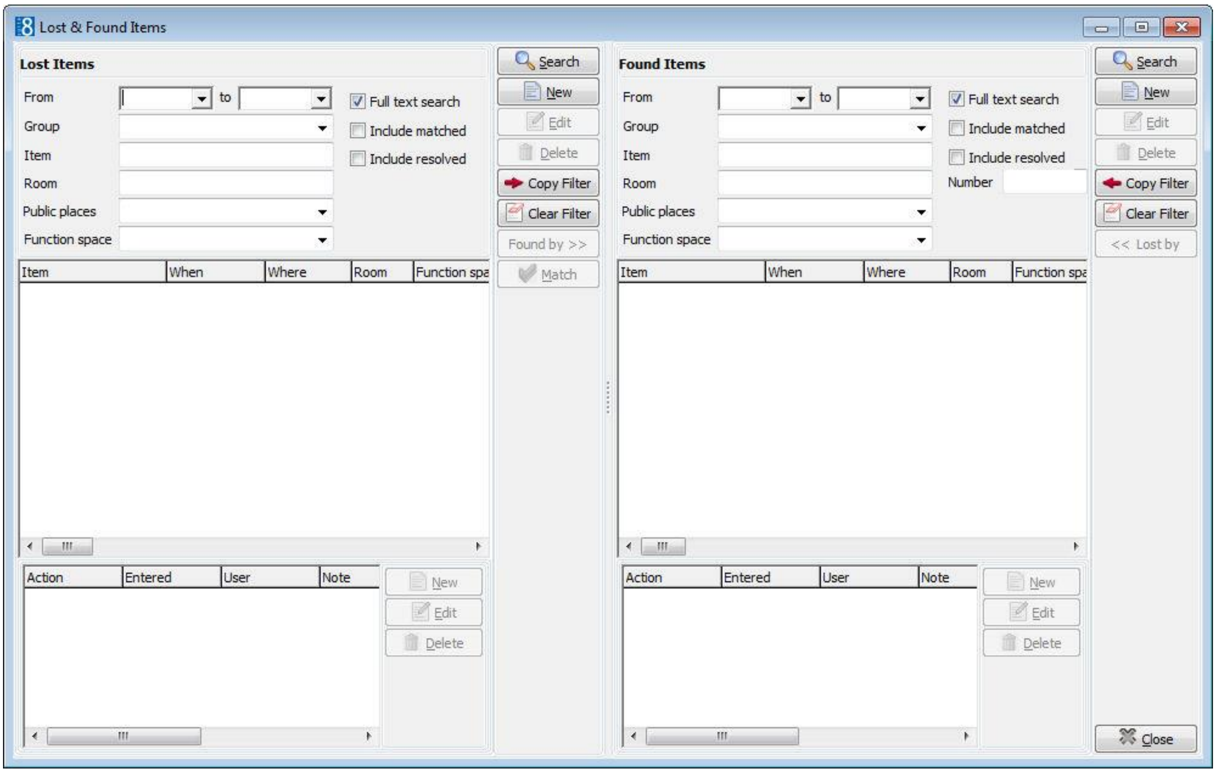
Queue rooms functionality is controlled by the parameter QUEUE ROOMS HANDLING under Setup → Configuration → Global Settings → Reservation → Reservation 1 tab.

8 Lost & Found

This option may be used to record, track and match lost & found items and is accessible via the FRONT DESK menu. Users are also able to enter any actions which are taken on the lost & found items. This option is parameter controlled.

The Lost & Found Items screen is divided into two sections:

- Lost items - used to enter or track items for guests who are missing an item.
- Found items - used to enter or track items found by guests or employees.


Lost & Found Items
Lost Items
From
to
Group
Item
Room
Public places
Function space
☑ Full text search
☐ Include matched
☐ Include resolved
Search
New
Edit
Delete
Copy Filter
Clear Filter
Found by >>
Match
Item
When
Where
Room
Function spa
Action
Entered
User
Note
New
Edit
Delete
Found Items
From
to
Group
Item
Room
Public places
Function space
☑ Full text search
☐ Include matched
☐ Include resolved
Number
Search
New
Edit
Delete
Copy Filter
Clear Filter
<< Lost by
Item
When
Where
Room
Function spa
Action
Entered
User
Note
New
Edit
Delete
Close

How to track lost items

3. Click the FRONT DESK menu and select LOST & FOUND.
4. On the left-hand side in the LOST ITEMS section, enter any known search criteria in the search options, see Lost Items Search dialog box.
5. Click SEARCH, all items for the entered search criteria where FOUND BY has not been completed are displayed.

Lost Items Search dialog box

Field	Definition
From	The date from which the search should be started.
To	The date until which the search should be limited.
Group	Select a lost item group from the list of defined groups, e.g. personal, jewellery, miscellaneous.
Item	Description of the item.
Room	Enter the room number if the item was lost in a specific guest room.

Public places	Select a public place if the item was lost in a specific public place.
Function space	Select a function space if the item was lost in a specific function space.
Full Text Search	Selected by default, the search will display all lost item records which contain any part of the Item text. If not selected then the entry in the Item field must be an exact match.
Include matched	Select this option if the search should also include items which have been matched with a found item or with the field Found by completed.
Include resolved	Select this option if the search should include resolved records.

How to track found items

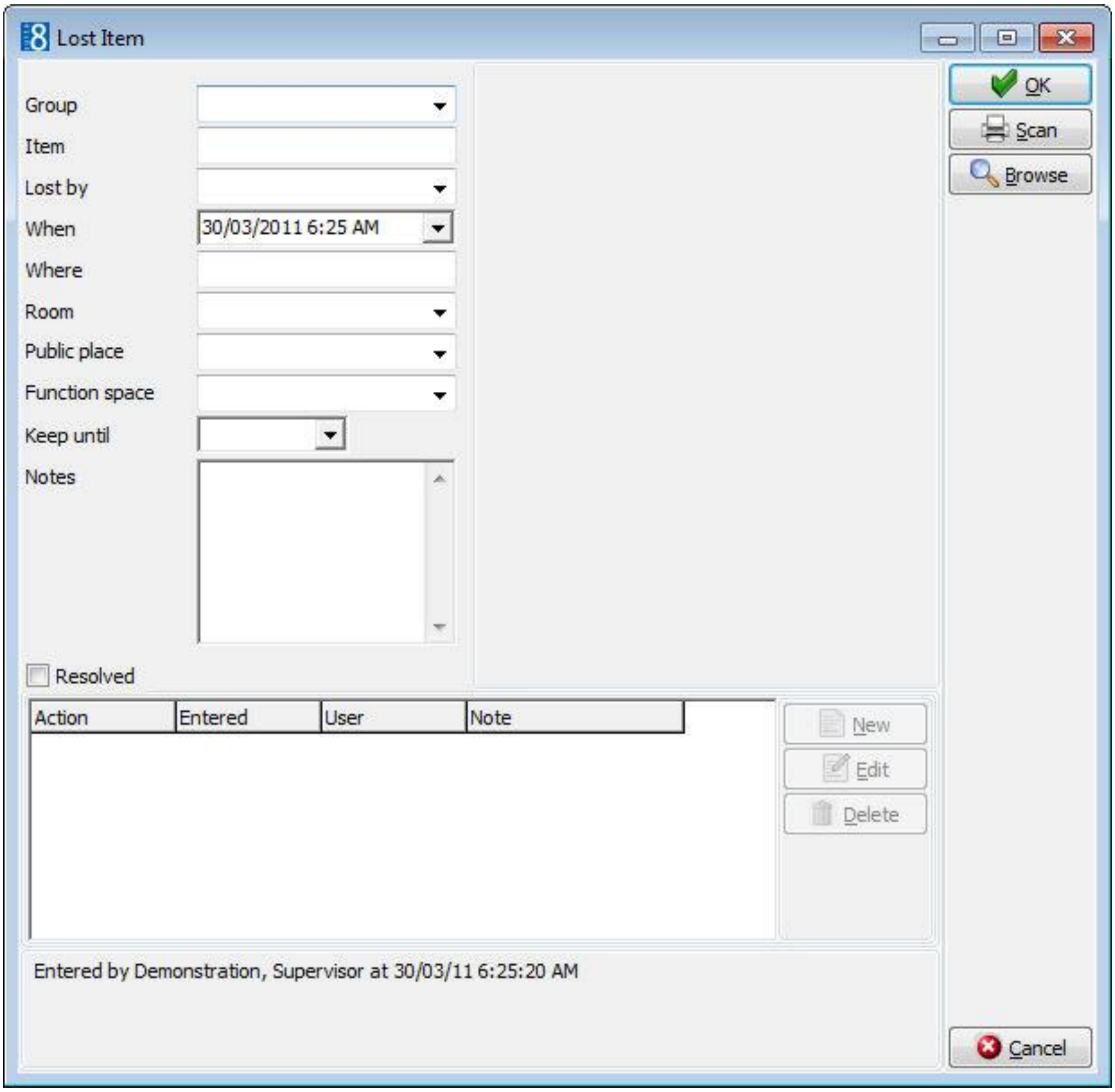
- Click the Front Desk menu and select Lost & Found.
- On the right-hand side in the Found items section, enter any known search criteria in the search options, see Found Items dialog box.
- Click Search, all items for the entered search criteria where Lost By has not been completed are displayed.

Found Item Search dialog box:

Field	**Definition**
From	The date from which the search should be started.
To	The date until which the search should be limited.
Group	Select a found item group from the list of defined groups, e.g. personal, jewellery, miscellaneous.
Item	Description of the item.
Room	Enter the room number if the item was found in a specific guest room.
Public places	Select a public place if the item was found in a specific public place.
Function space	Select a function space if the item was found in a specific function space.
Full Text Search	Selected by default, the search will display all found item records which contain any part of the Item text. If not selected then the entry in the Item field must be an exact match.
Include matched	Select this option if the search should also include items which have been matched with a found item, or the field Lost by completed.
Include resolved	Select this option if the search should include resolved records.
Number	If number cycles have been activated, then enter the record number which was assigned when the item was recorded as found.

How to record a lost item

1. Click the Front Desk menu and select Lost & Found.
2. On the lost items section click New, the lost item dialog box is displayed.


Lost Item
Group
Item
Lost by
Where
Room
Public place
Function space
Keep until
Notes
Action
Entered
User
Note
New
Edit
Delete
OK
Scan
Browse
Cancel

When: 30/03/2011 6:25 AM

☐ Resolved

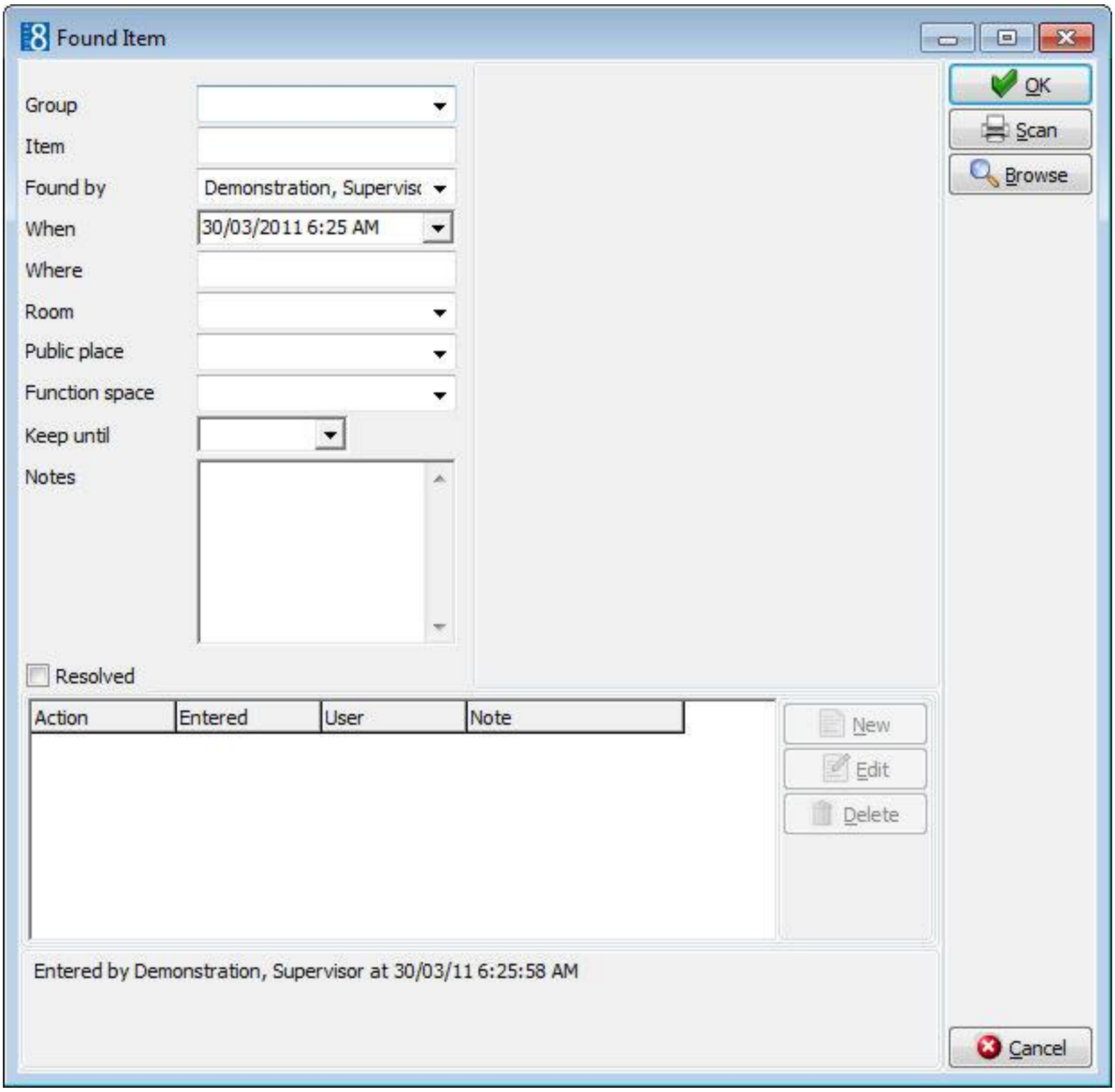
Entered by Demonstration, Supervisor at 30/03/11 6:25:20 AM

2. In the Group box, click the drop-down arrow and select the lost item group from the list of pre-defined groups.
3. In the Item box, enter a description of the lost item.
4. In the Lost By box, click the drop-down arrow to open the profile search dialog box, enter the name of the guest who lost the item and select their guest profile.
5. The When box is automatically filled with the current date and time, click the drop-down arrow to open the calendar/clock, select the time and date the item was lost.
6. In the Where box, enter the location where the item was lost.
7. In the Room box, enter a room number if the item was lost in a guest room.
8. If the item was lost in a public place, select the Public place from the list of defined public places.
9. If the item was lost in a function space or the guest was joining an event in a function space, select the Function Space from the list of defined function spaces.

10. In the KEEP UNTIL box the date until which the item should be kept will be completed automatically if a default number of days has been defined, otherwise enter the date until which the lost record should be kept for tracking.
11. In the NOTES box, enter any additional information.
12. The RESOLVED option should only be selected if the lost item record should be marked as "case closed".
13. If a picture of the item exists, this can be stored with the lost record using the SCAN button.
14. Click OK to save the lost item record.

How to record a found item

4. Click the FRONT DESK menu and select LOST & FOUND.
5. On the right-hand side in the Found items section click NEW, the found item dialog box is displayed.


Found Item
Group
Item
Where
Room
Public place
Function space
Keep until
Notes
☐ Resolved
Action
Entered
User
Note
New
Edit
Delete
OK
Scan
Browse
Cancel

Found by: Demonstration, Supervis

When: 30/03/2011 6:25 AM

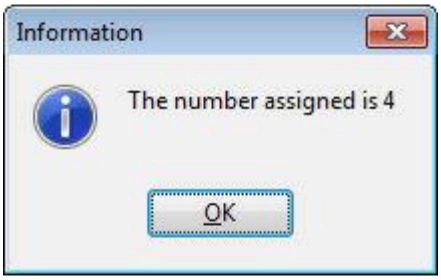
Entered by Demonstration, Supervisor at 30/03/11 6:25:58 AM

10. In the GROUP box, click the drop-down arrow and select the item group from the list of pre-defined groups.
11. In the ITEM box, enter a description of the found item.

12. The FOUND BY box is automatically completed with the logged in user; a different name can be entered by opening the profile search dialog box and selecting the profile of the person who found the item.

> **Note:** All employees (users) are also available on the profile search.

1. The WHEN box is automatically filled with the current date and time, click the drop-down arrow to open the calendar/clock, select the time and date the item was found.
2. In the WHERE Box, enter the location where the item was found.
3. In the ROOM box, enter a room number if the item was found in a guest room.
4. If the item was found in a public place, select the PUBLIC PLACE from the list of defined public places.
5. If the item was found in a function space, select the FUNCTION SPACE from the list of defined function spaces.
6. In the KEEP UNTIL box the date until which the item should be kept will be completed automatically if a default number of days has been defined, otherwise enter the date until which the found record should be kept for tracking.
7. In the NOTES box, enter any additional information.
8. The RESOLVED option should only be selected if the found item record should be marked as "case closed".
9. The SCAN button can be used to scan the item or a picture of the item, this is then stored with the found record.
10. Click OK to save the found item record.
11. If number cycles are activated, then a message is displayed showing the number assigned to the found item.



The number assigned is 4

2. Click OK.

Options available on the lost and found screen

- **Search** - to search for an existing lost or found item
- **New** - to enter a new lost or found item.
- **Edit** - to edit an existing lost or found item
- **Delete** - to delete a lost or found item.
- **Copy Filter** - to copy the current search criteria from lost items to found items and vice versa.
- **Clear Filter** - to clear the current search criteria.
- **Found By** - to mark a lost item as found by.
- **Lost By** - to mark a found item as lost by.
- **Match** - to match a lost item with a found item.

Lost and found functionality is controlled by the parameter Lost & Found under Configuration → Setup → Global Settings → Generic → Generic 3 tab.

Lost and found functionality is controlled by the user right Lost & Found under Configuration → Setup → Users → User Definition → Rights.

Lost and found groups and actions are defined via the option Action Categories and Groups under Configuration → Setup → Lost & Found.

Lost & Found Actions

Users can record the different actions taken with regard to the lost or found item. Actions can be assigned, edited or deleted from a lost or found item.
Typical actions would be:

- Item claimed as lost
- Item found by housekeeping
- Item found by another guest
- Guest informed by email
- Guest informed by telephone
- Item sent to guest

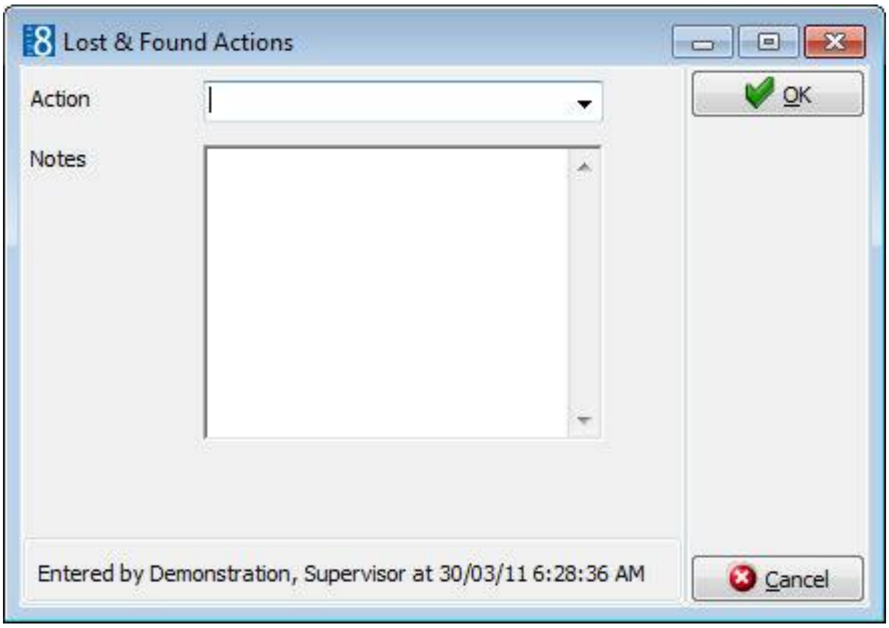
How to add a new lost or found action

4. Click the Front Desk menu and select Lost & Found.

7. Enter any search criteria and click Search, all lost & found records for the entered search criteria are displayed.

8. Select the required item from the Lost & Found grid; all actions taken for this item are displayed in the lower grid.

9. Click New to enter a new action; the Lost & Found Actions dialog box is displayed.



Entered by Demonstration, Supervisor at 30/03/11 6:28:36 AM

8. In the Action box, click the drop-down arrow and select the required action.

9. In the Notes box, enter any additional information about the action.

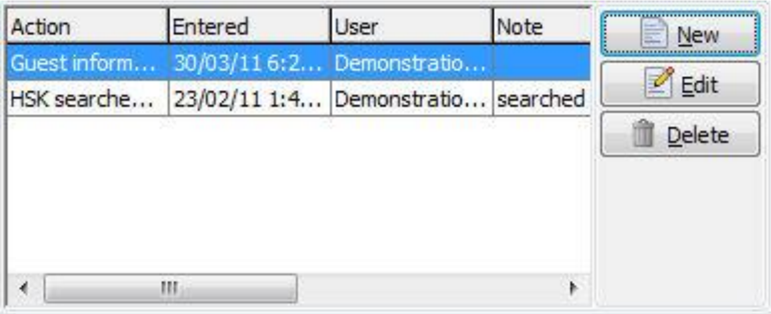
10. Select the option Resolved if the case is now closed.

11. Click OK, the action is added to the lost/found record.

Note: Selecting RESOLVED closes the case and removes the items from the Lost & Found screens. The case can be re-opened by selecting to display resolved cases in the search query and clearing the RESOLVED option on the required record.

How to edit a lost or found action

9. Click the FRONT DESK menu and select LOST & FOUND.
10. Enter any search criteria and click SEARCH, all lost & found records for the entered search criteria are displayed.
11. Select the required item from the Lost & Found grid; all actions taken for this item are displayed in the lower grid.



Action	Entered	User	Note
Guest inform...	30/03/11 6:2...	Demonstratio...	
HSK searche...	23/02/11 1:4...	Demonstratio...	searched

- Select the action to be edited and click EDIT, the Lost & Found Actions dialog box is displayed.
- Make any changes necessary and click OK, the action is updated.

How to delete a lost or found action

10. Click the FRONT DESK menu and select LOST & FOUND.
11. Enter any search criteria and click SEARCH, all lost & found records for the entered search criteria are displayed.
12. Select the required item from the Lost & Found grid; all actions taken for this item are displayed in the lower grid.
13. Select the action to be deleted and click DELETE, the action is removed from the item.

Matching Lost & Found Items

Items recorded as LOST or FOUND can be matched; one of the most common scenarios would be the case of a lost item which is found by housekeeping and later claimed by the guest.

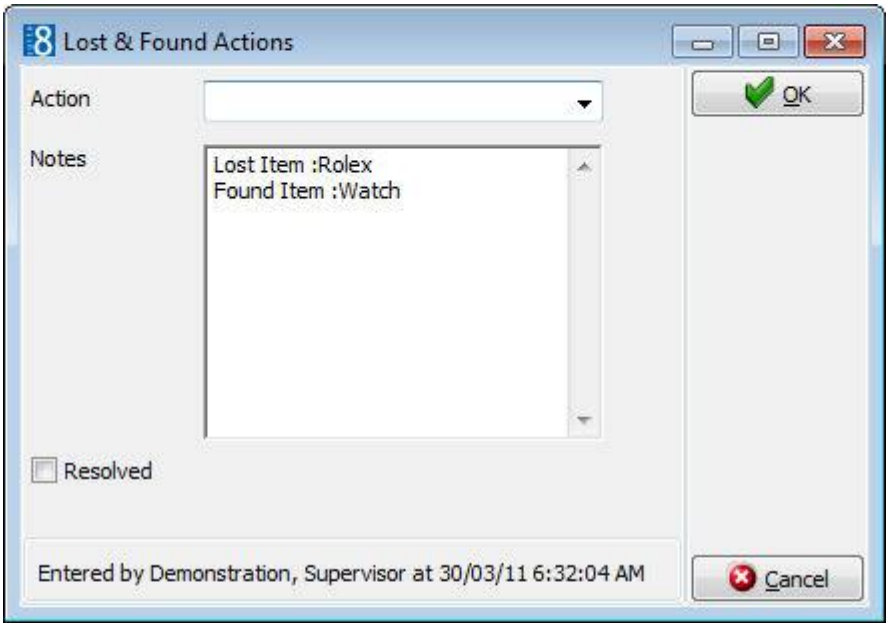
For example: Housekeeping finds a mobile phone and enters a new FOUND item record. The guest calls and says that they lost a mobile phone; a new LOST item record is entered. These two records are matched and a new action such as "Returned to Guest" is selected, this is applied to both the LOST and FOUND item records. The case is closed by selecting the option RESOLVED.

A record can be 'matched' without having to enter a corresponding lost or found record. If the guest calls to say that an item has been lost and that item has already been recorded as found then the found record can be completed with the action and the name of the person who lost the item and vice versa.

How to match items

1. Click the FRONT DESK menu and select LOST & FOUND.
2. On the left-hand side in the LOST ITEMS section, enter any known search criteria, click SEARCH.

3. On the right-hand side in the Found items section, enter any known search criteria, click Search.
4. Select the item on each side which is to be matched and click the Match button, the Lost and Found Actions dialog box is displayed.



Action

Notes
Lost Item :Rolex
Found Item :Watch

☐ Resolved

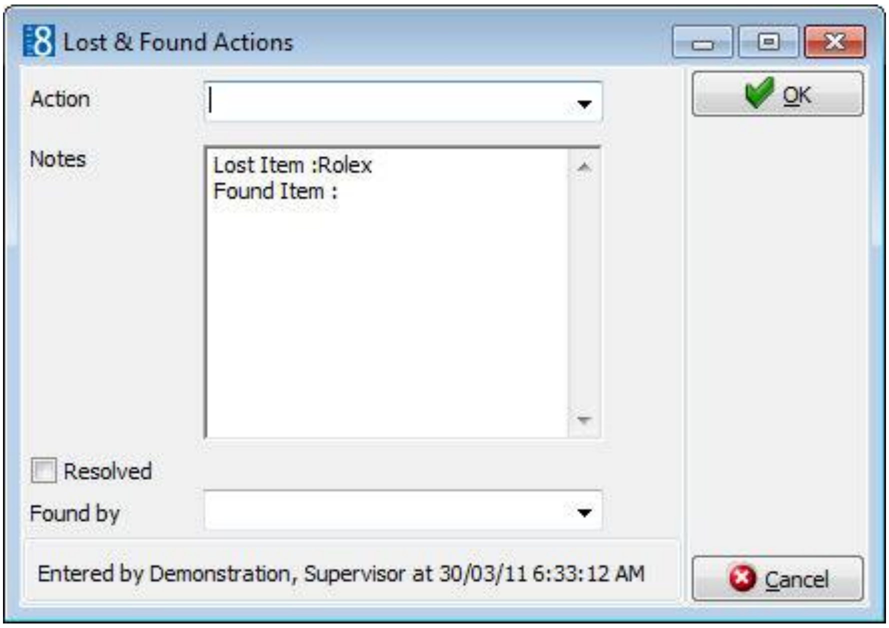
Entered by Demonstration, Supervisor at 30/03/11 6:32:04 AM

2. In the Action box, click the drop-down arrow and select the required action.
3. In the Notes box, enter any additional information about the action.
4. Select the option Resolved if the case is now closed.
5. Click OK, the action is added to both the Lost & Found records.

Note: Selecting Resolved closes the case and removes the items from the Lost & Found screens. The case can be re-opened by selecting to display resolved cases in the search query and clearing the Resolved option on the required record.

Use the Found by option to close a lost item record

7. Click the Front Desk menu and select Lost & Found.
8. On the left-hand side in the Lost items section, enter any known search criteria in the search options.
9. Click Search, all items for the entered search criteria where Found by has not been completed are displayed.
10. Select the item from the list.
11. Click the Found by button; the Lost & Found Actions dialog box is displayed.



Lost Item :Rolex
Found Item :

☐ Resolved

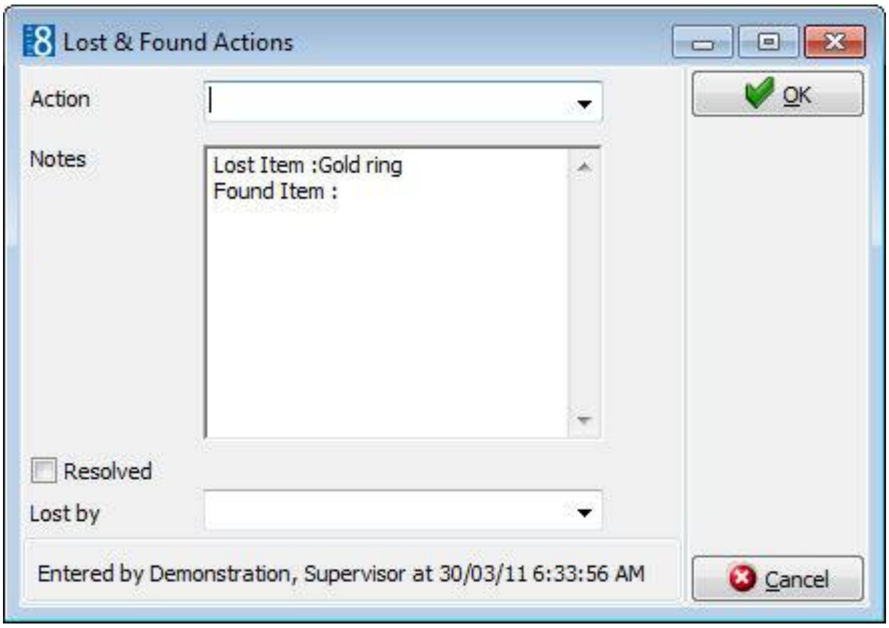
Entered by Demonstration, Supervisor at 30/03/11 6:33:12 AM

8. In the ACTION box, click the drop-down arrow and select the required action.
9. In the NOTES box, enter any additional information about the action.
10. Select the option RESOLVED if the case is now closed.
11. In the FOUND BY box, click the drop-down arrow to open the profile search dialog box, enter the name of the employee who found the item and select their profile.
12. Click OK, the action is added to the Found record.

> **Note:** Selecting FOUND BY closes the case and removes the items from the Lost & Found screens. The case can be re-opened by selecting to display resolved or matched cases in the search query and deleting the action.

Use the Lost by option to close a found item record

9. Click the FRONT DESK menu and select LOST & FOUND.
10. On the right-hand side in the FOUND ITEMS section, enter any known search criteria in the search options.
11. Click SEARCH, all items for the entered search criteria where LOST BY has not been completed are displayed.
12. Select the item from the list.
13. Click the LOST BY button; the Lost & Found Actions dialog box is displayed.



Lost Item :Gold ring
Found Item :

☐ Resolved

Entered by Demonstration, Supervisor at 30/03/11 6:33:56 AM

- In the ACTION box, click the drop-down arrow and select the required action.
- In the NOTES box, enter any additional information about the action.
- Select the option RESOLVED if the case is now closed.
- In the LOST BY box, click the drop-down arrow to open the profile search dialog box, enter the name of the guest who lost the item and select their guest profile.
- Click OK, the action is added to the lost record.

> **Note:** Selecting LOST BY closes the case and removes the items from the Lost & Found screens. The case can be re-opened by selecting to display resolved or matched cases in the search query and deleting the action.

Number Cycles

Number cycles can be used to automatically assign a number for each found object. If number cycles are activated, then a message is displayed showing the number assigned to the found item. In the search criteria the number can be used to search for a found record.

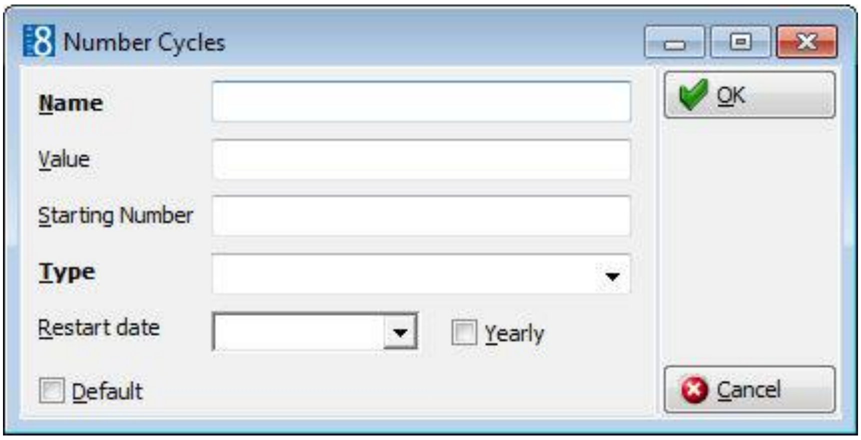
How to configure number cycles for found objects

10. Click the SETUP menu and select CONFIGURATION.

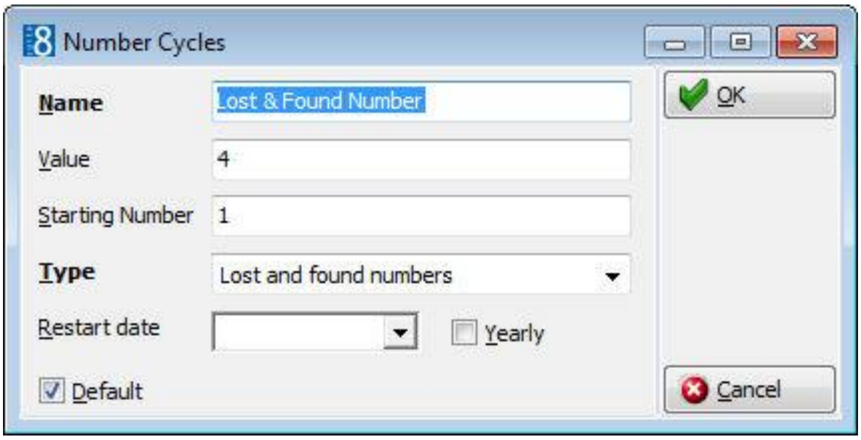
    The main configuration options are displayed.

- Click the CASHIERING menu and select NUMBER CYCLES.

  The number Cycles dialog box is displayed.



1. Enter the NAME of the number cycle, for example Lost & Found.
2. The VALUE box shows the last used or printed number of the number cycle.
3. Enter the STARTING NUMBER for the cycle.
4. In the TYPE box select LOST AND FOUND NUMBERS from the drop-down list.
5. In the RESTART DATE box enter the date the number cycle will be reset to the starting number.
6. Select the YEARLY check box to reset the number cycle each year on the restart date defined.
7. Leave the DEFAULT check box blank.



Name: Lost & Found Number
Value: 4
Starting Number: 1
Type: Lost and found numbers
Restart date:
☐ Yearly
☑ Default

2. Click OK to save the number cycle setup.
3. Click CLOSE to close the configuration screen.

How to link the number cycle

4. Click the SETUP menu and select CONFIGURATION.

   The main configuration options are displayed.
5. Click the MISCELLANEOUS menu and select GLOBAL SETTINGS.
6. Select GENERIC and then click the GENERIC 3 tab.
7. In the LOST & FOUND NUMBER CYCLE box select the number cycle defined for lost & found.
8. Click SAVE and then click CLOSE to exit the configuration screen.

Number Cycles Setup dialog box

Field	**Definition**	**Legal Values**
Name (Required)	The name of the number cycle.	Up to 30 alphanumeric characters
Value	Shows the last used or printed number of the number cycle. For new installations, this field should be empty.	Up to 60 digits
Starting Number	The number the cycle should start with.	Up to 60 digits
Type (Required)	The type of folio or receipt this number cycle applies to. Predefined types are: ▪ Invoices ▪ User Defined ▪ Currency Exchange ▪ Booth Telephone ▪ AR Postings ▪ AR Payments ▪ Registration Cards. ▪ Void Invoices ▪ Credit Note ▪ Fattura ▪ Fattura & Nota di Credito ▪ Proforma Invoices ▪ Automatic FA Numbers ▪ Lost and found numbers ▪ Police Export ▪ Tourist Export	Select from a list box.
Restart date	The date the number cycle will be reset to the starting number.	Select from list box
Yearly	Indicates that the number cycle will be reset each year on the restart date defined.	Check: YES Blank: NO
Default	Indicates that the number cycle marked as default will be used for all invoices or receipts with no number cycle attached.	Check: YES Blank: NO

9 Traces

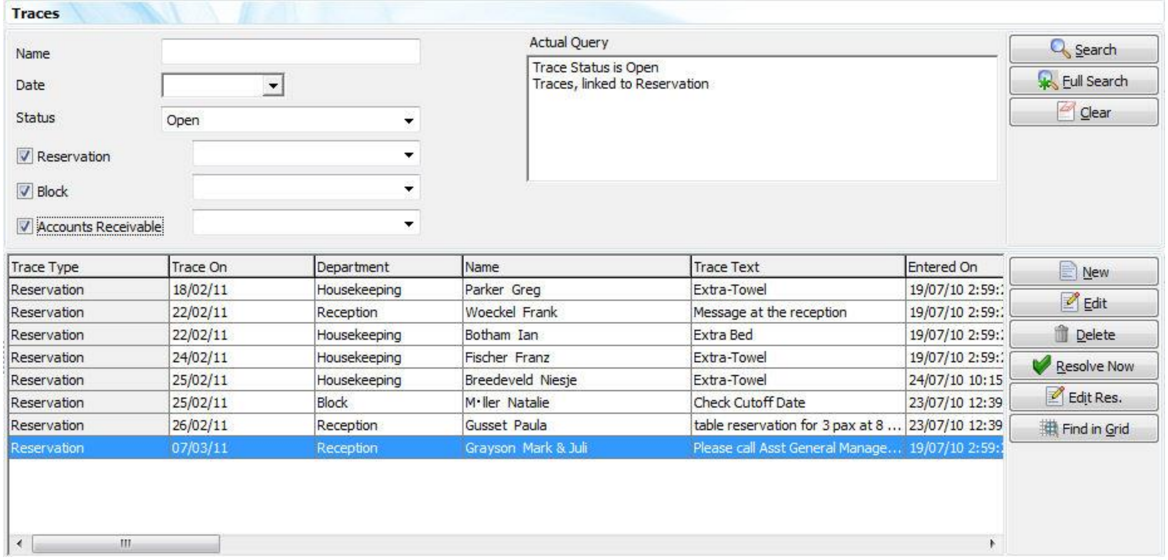
This option may be used to view all traces, create and resolve traces and is accessible via the FRONT DESK menu.

Traces are internal messages attached to a reservation, group block or A/R account noting that a specific action is required on a specific date. They are used to remind other departments or co-workers of actions to take or information about the reservation. A trace could be set, for example to the housekeeping department to ask them to put an extra bed into the guest room during the stay. Traces require an instruction (trace text) and an instruction date.

How to view or edit a trace

1. Click the FRONT DESK menu and select TRACES.

   The Traces screen is displayed.



Name:
Date:
Status: Open
☑ Reservation
☑ Block
☑ Accounts Receivable

Actual Query
Trace Status is Open
Traces, linked to Reservation

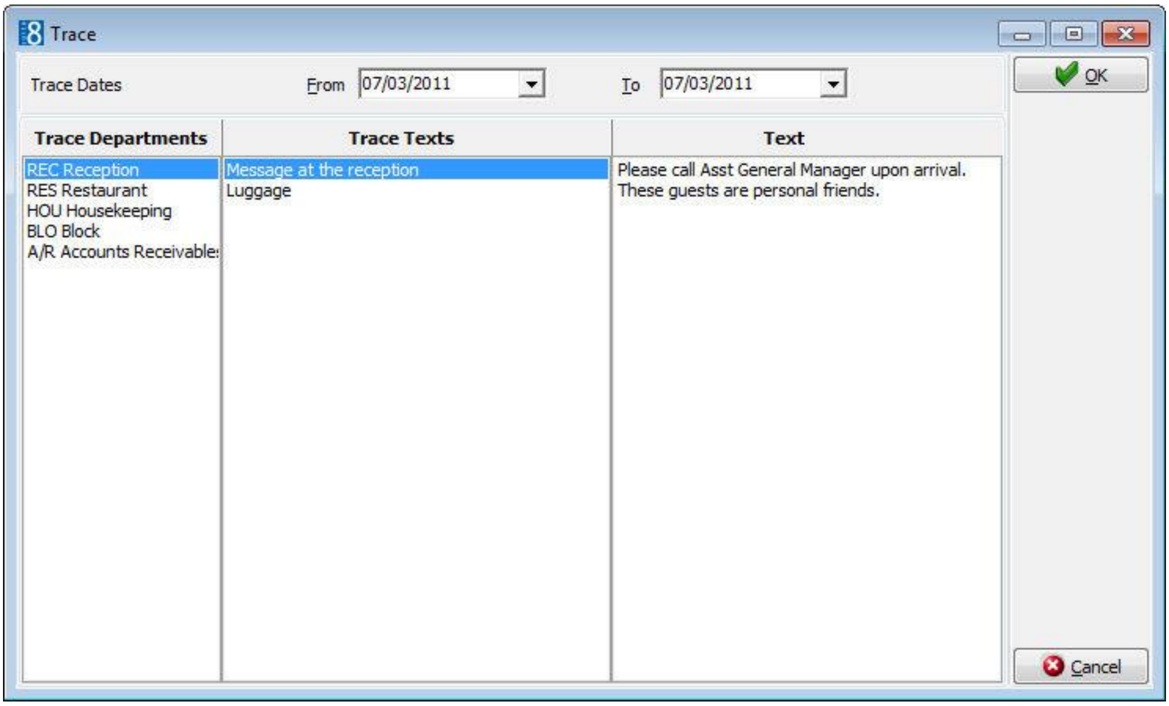
Trace Type	Trace On	Department	Name	Trace Text	Entered On
Reservation	18/02/11	Housekeeping	Parker Greg	Extra-Towel	19/07/10 2:59:
Reservation	22/02/11	Reception	Woeckel Frank	Message at the reception	19/07/10 2:59:
Reservation	22/02/11	Housekeeping	Botham Ian	Extra Bed	19/07/10 2:59:
Reservation	24/02/11	Housekeeping	Fischer Franz	Extra-Towel	19/07/10 2:59:
Reservation	25/02/11	Housekeeping	Breedeveld Niesje	Extra-Towel	24/07/10 10:15
Reservation	25/02/11	Block	M•ller Natalie	Check Cutoff Date	23/07/10 12:39
Reservation	26/02/11	Reception	Gusset Paula	table reservation for 3 pax at 8 …	23/07/10 12:39
Reservation	07/03/11	Reception	Grayson Mark & Juli	Please call Asst General Manage…	19/07/10 2:59:

The screen is split into 3 sections:

- The upper part of the screen is the search area.
  - You can search for traces by entering a guest Name, a Date or a trace Status.
  - You can limit the trace types displayed by trace group; Reservation, Block or Accounts Receivable and within each group by trace department.
- By default all open traces for all dates are listed in the grid in the middle of the screen. Details include the trace date and department, the date and time the traces was entered, the name of the user who entered the trace and whether the trace has been resolved and if so when and by whom. The grid can be sorted by double clicking on the relevant column heading.
- Details of the currently selected trace are displayed in HTML format in the lower part of the screen.

1. To activate the search, click SEARCH or FULL SEARCH; to clear the search criteria, click CLEAR.
2. Select the trace to be viewed and double-click or click EDIT.

   The trace screen is displayed.



Trace Dates From 07/03/2011 To 07/03/2011

Trace Departments	Trace Texts	Text
REC Reception	Message at the reception	Please call Asst General Manager upon arrival. These guests are personal friends.
RES Restaurant	Luggage	
HOU Housekeeping		
BLO Block		
A/R Accounts Receivable:		

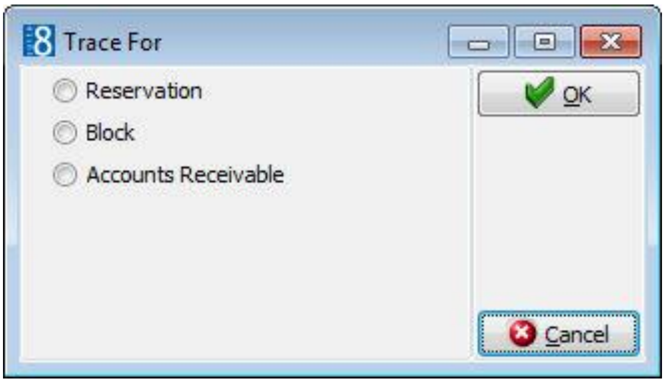
2. Make any changes if required to the trace and click OK to close the trace.
3. Click CANCEL to exit the trace dialog box without saving any changes.

How to enter a trace

4. Click the FRONT DESK menu and select TRACES.

   The Traces screen is displayed with a list of all the open traces.

5. Click NEW, the Trace For selection dialog box is displayed.

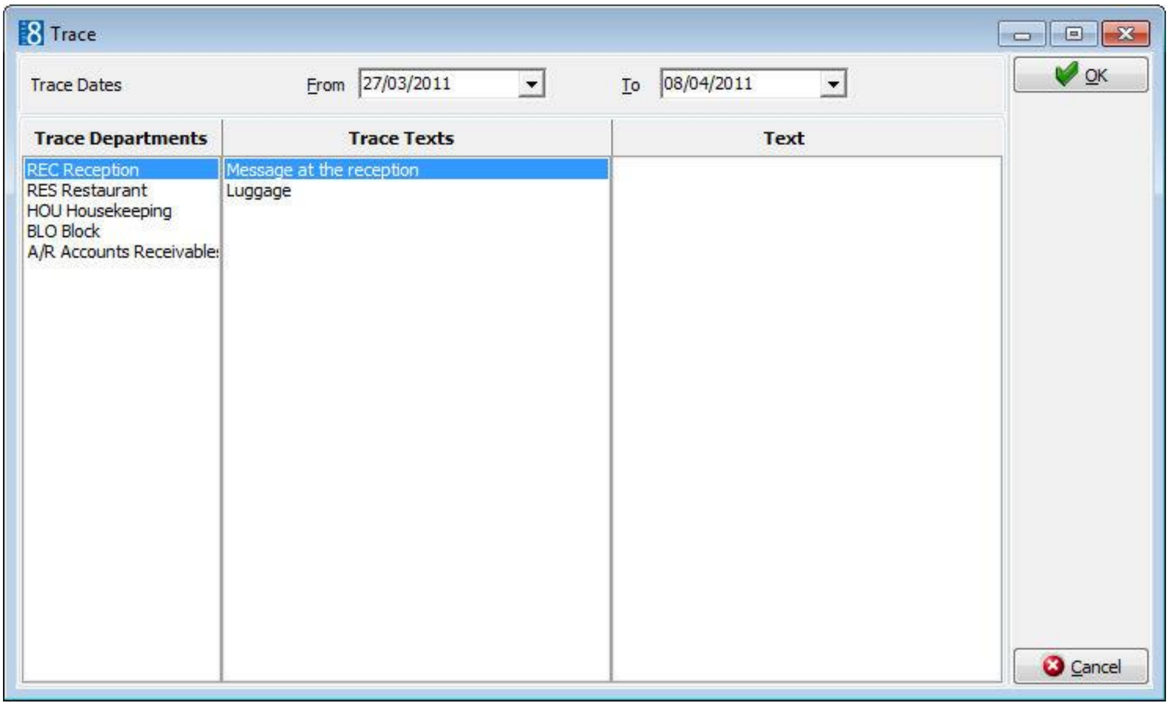


6. Select RESERVATION, BLOCK or ACCOUNTS RECEIVABLE and click OK.

   Depending on the trace type selected then the Reservation Navigator, Block Search or A/R Accounts Navigator is displayed.

1. Use the search criteria to locate the required reservation, block or A/R account and then click SELECT.

   The Traces dialog box is displayed.


Trace
Trace Dates
From
27/03/2011
To
08/04/2011
OK
Trace Departments
Trace Texts
Text
REC Reception
RES Restaurant
HOU Housekeeping
BLO Block
A/R Accounts Receivable:
Message at the reception
Luggage
Cancel

3. In the TRACE DATES FROM and TO boxes select the date for the trace.
4. In the TRACE DEPARTMENTS box select the department the trace is for.

   A list of texts that you may select from appears under TRACE TEXTS.

1. Type the trace message in the TEXT box or select one of the pre-defined trace texts by double-clicking the text.
2. Click OK to save the trace.

Trace dialog box

Field	Definition
Trace Date From - To	The date the trace is for.
Trace Departments	Defines the department the trace is for.
Trace Texts	The pre-defined traces texts belonging to the selected trace department.
Text	Free-format trace text can be entered in addition to or in place of one of the pre-defined texts.

How to resolve a trace

3. Click the FRONT DESK menu and select TRACES.

   The Traces screen is displayed with a list of all the open traces.

- Locate the trace to be resolved.
- Click RESOLVE NOW, the trace is now marked as resolved.

  In the RESOLVED ON and RESOLVED BY columns the time and user who marked the trace as resolved is listed.

Note: The resolved trace may not be displayed as by default only open traces are listed. Selecting the STATUS 'Resolved' or 'Both' will display resolved traces.

How to mark a resolved trace as unresolved

1. Click the Front Desk menu and select Traces.

   The Traces screen is displayed with a list of all the open traces.

1. In the Status box select 'Resolved' or 'Both' to display resolved traces and then click Search.
2. Select the trace to be unresolved.
3. Click Clear Resolve, the trace is now marked as not resolved.

   In the Resolved On and Resolved By columns the time and user who marked the trace as resolved are removed.

How to delete a trace

1. Click the Front Desk menu and select Traces.

   The Traces screen is displayed with a list of all the open traces.

3. Locate the trace to be deleted.
4. Click Delete, the trace is deleted.

Options available on the traces screen

- New - to enter a new trace.
- Edit - to edit an existing trace.
- Delete - to delete an existing trace.
- Resolve Now - to mark the selected trace as resolved.
- Clear Resolve - to mark the selected trace as not resolved.
- Edit Res. - to edit the reservation linked to the selected trace.
- Edit Block - to edit the block header linked to the selected trace.
- Edit A/R - to edit the A/R account linked to the selected trace.
- Find in Grid - to further narrow the search.

Trace group's control where the traces appear in Fidelio and are defined via the option Activity and Trace Groups under Setup → Configuration → CRM. Traces can be linked to Blocks, Accounts Receivable Accounts or Reservations.

Trace types are linked to the trace groups and are defined via the option Trace Types under Setup → Configuration → Reservations.

Trace changes are displayed in the user log if the options Reservation Trace is added, Reservation Trace is edited, Reservation Trace is deleted, Reservation Trace is resolved, Reservation Trace is unresolved are selected in Setup → Configuration → Users → User Log → Reservation.

Trace functionality is controlled by the user rights View, Edit, New and Delete under Setup → Configuration → Users → User Definition → Rights → Traces → Reservation traces.

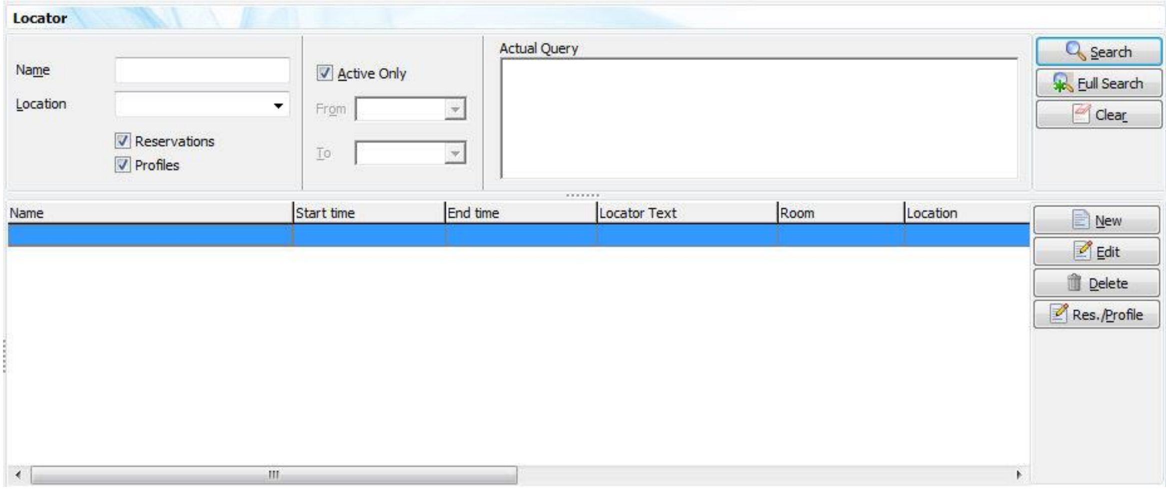
10 Locator

This option may be used to enter the guest's location and is accessible via the FRONT DESK menu. For example, if the guest is not in going to be in his room and is expecting a call then a locator can be entered so that when the call is received it can be transferred to the location given by the guest. A guest locator can be attached to a reservation or for a non-resident guest to a guest profile. Guest locators are displayed on the HTML details of the room rack and the reservation navigator.

How to view or edit a locator

1. Click the FRONT DESK menu and select LOCATOR.

   The Locator screen is displayed split into three sections:

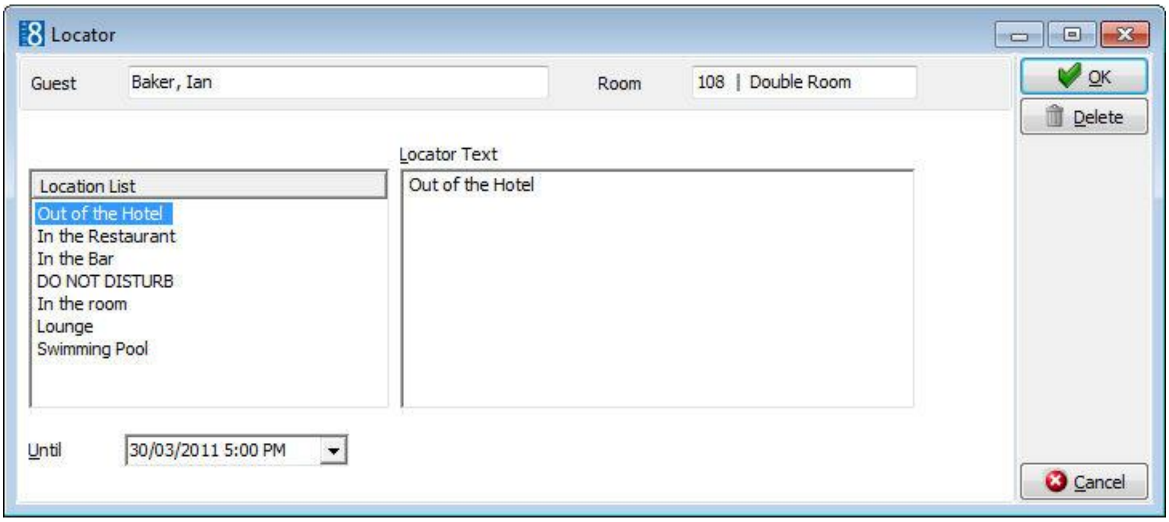

Locator
Name
Location
☑ Reservations
☑ Profiles
☑ Active Only
From
To
Actual Query
Search
Full Search
Clear
Name
Start time
End time
Locator Text
Room
Location
New
Edit
Delete
Res./Profile

   - The upper part of the screen is the search area; you can search for locators by entering a guest NAME or a LOCATION, by default both reservations and profiles are selected.
   - The locators meeting the entered search criteria are listed in the grid in the middle of the screen. Details include the guest name, start and end time and the location of the guest. The grid can be sorted by double clicking on the relevant column heading.
   - Details of the currently selected locator are displayed in HTML format in the lower part of the screen.

3. To activate the search, click SEARCH or FULL SEARCH; to clear the search criteria, click CLEAR.

4. Select the locator to be viewed and double-click or click EDIT.

   The Locator screen is displayed.



Guest: Baker, Ian

Room: 108 | Double Room

Location List:
- Out of the Hotel
- In the Restaurant
- In the Bar
- DO NOT DISTURB
- In the room
- Lounge
- Swimming Pool

Locator Text: Out of the Hotel

Until: 30/03/2011 5:00 PM

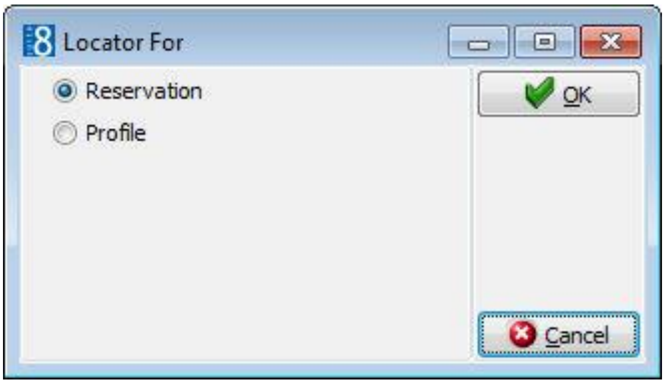
6. Make any changes if required and click OK to close the locator.
7. Click CANCEL to exit the locator dialog box without saving any changes.

How to enter a guest locator

17. Click the FRONT DESK menu and select LOCATOR.

    The Locator screen is displayed.

- Click NEW, the Locator For selection dialog box is displayed.



● Reservation

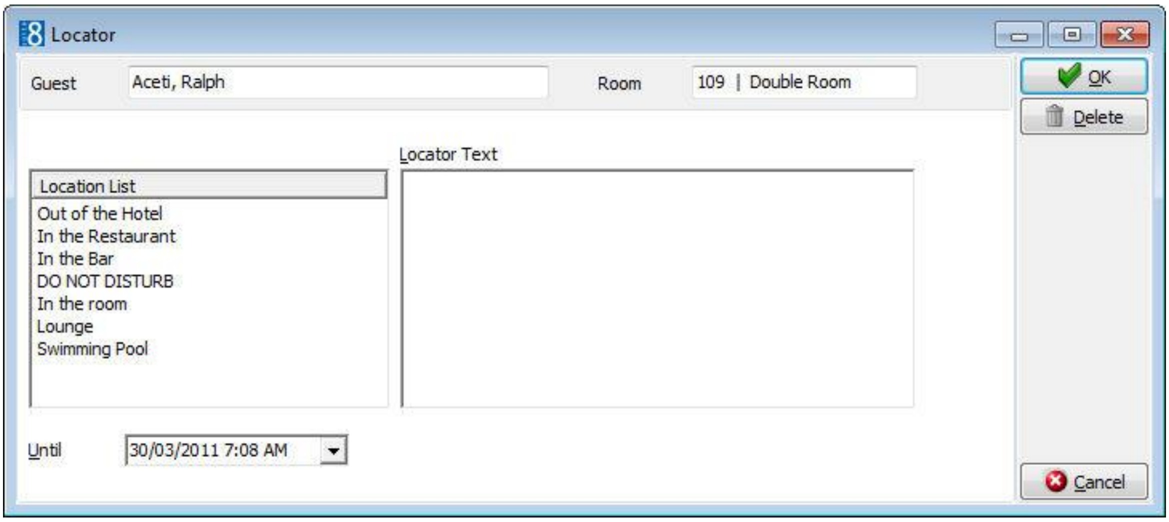
○ Profile

- Select RESERVATION or PROFILE and click OK.

  Depending on the locator type selected then the Reservation Navigator or Profile Navigator is displayed.

1. Use the search criteria to locate the required reservation or profile and then click SELECT.

   The Locator dialog box is displayed.



Guest: Aceti, Ralph

Room: 109 | Double Room

Location List

- Out of the Hotel
- In the Restaurant
- In the Bar
- DO NOT DISTURB
- In the room
- Lounge
- Swimming Pool

Locator Text

Until: 30/03/2011 7:08 AM

2. The GUEST name and ROOM number are completed automatically.
3. Enter the guest LOCATION or select where the guest will be located from the LOCATION LIST and double click.
4. Add any additional details if required.
5. In the UNTIL box click the drop-down arrow and select the Date and Time the locator is valid until.
6. Click OK to save the locator.

The guest locations are defined via the option LOCATIONS under Setup → Configuration → Reservations.

Locator functionality is controlled by the user rights VIEW, INSERT, EDIT and DELETE under Setup → Configuration → Users → User Definition → Rights → Locators.

11 Index

A

Automatic Room Assignment 53

F

Financial Accounts 43
  Arrivals 23
  Financial Accounts 43

H

HTML
  Checkin in a guest 23
  Checking in a guest 23

I

In house guests... 35
  About Suite8 Front Desk.......................... 7

L

Lost & Found
  Actions 70
  Matching Items 71
  Number Cycles 74
  Recording a found item.......................... 65
  Recording a lost item 65
  Tracking lost & found items.................... 65

M

Messages
  Entering a message............................... 37
  Receiving a message 37

Q

Q Rooms 63

Queue Rooms... 63