Oracle® Hospitality BellaVita

General Manual

Release 2.7

March 2016

Contents

Preface

This document has been created to explain the daily use of BellaVita: log in/out, describing the options of the Welldesk, creating and cancelling bookings, and taking payments for bookings. This documentation has been prepared based on Windows 2003, 32bit server technology.

Audience

This guide 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/en/industries/hospitality/

Revision History

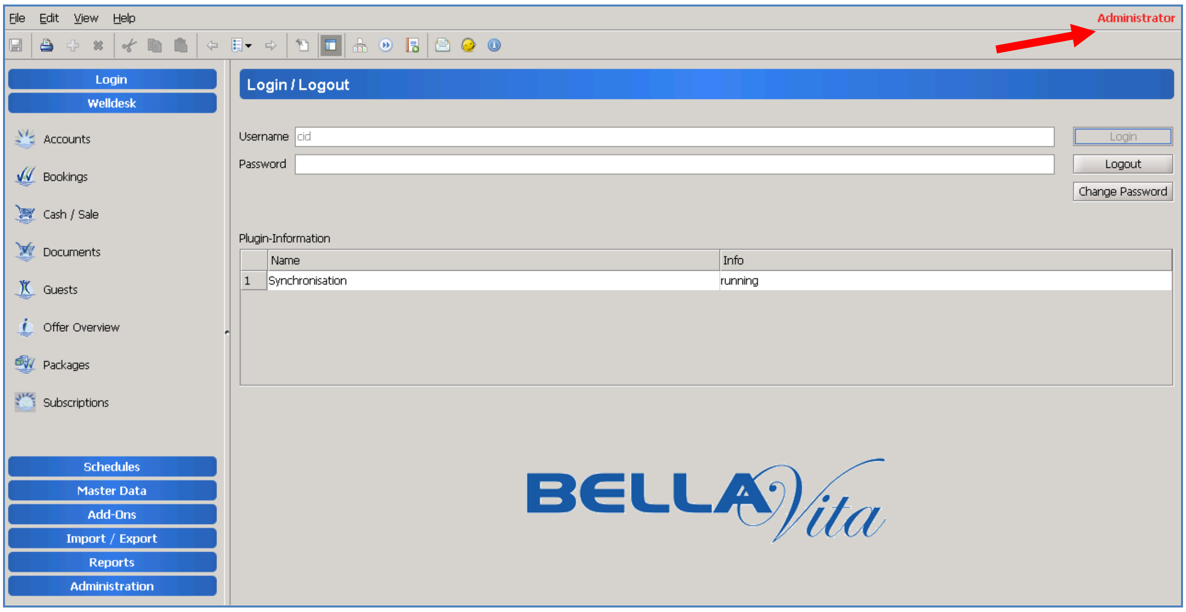
Date	Description of Change
June 16, 2013	• Initial publication. Document Version Number: 1.0

1 Everyday Tasks

This section explains your daily tasks in Bellavita: log in/out, describing the options of the Welldesk, Creating/Cancelling Bookings, taking payments for bookings. Each section explains the task in detail, and gives you tips at the end if there are other ways to reach the same option.

Log in

Use your username and password to log in to Bellavita.



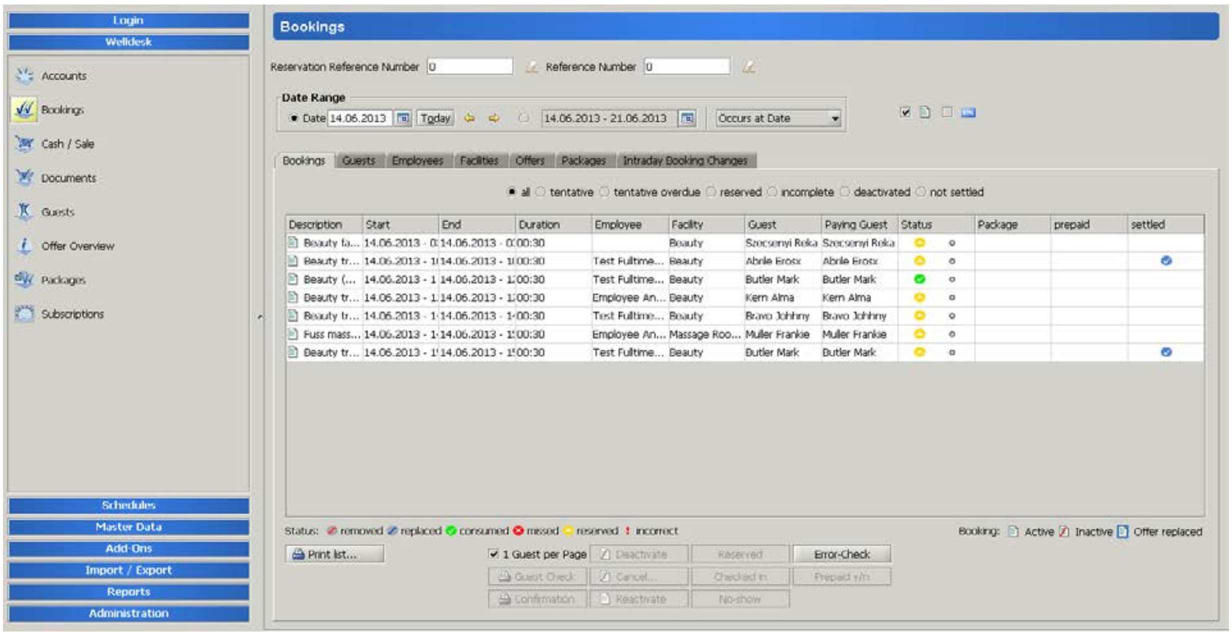
When you are not logged in, all the menus are hidden and inactive. To log out, simply press ‘Ctrl+F4’ or return to this menu by clicking on the blue login title, selecting log in/out and pressing the logout button.

After logging in, the logged in user will be visible on the top right corner of the screen.

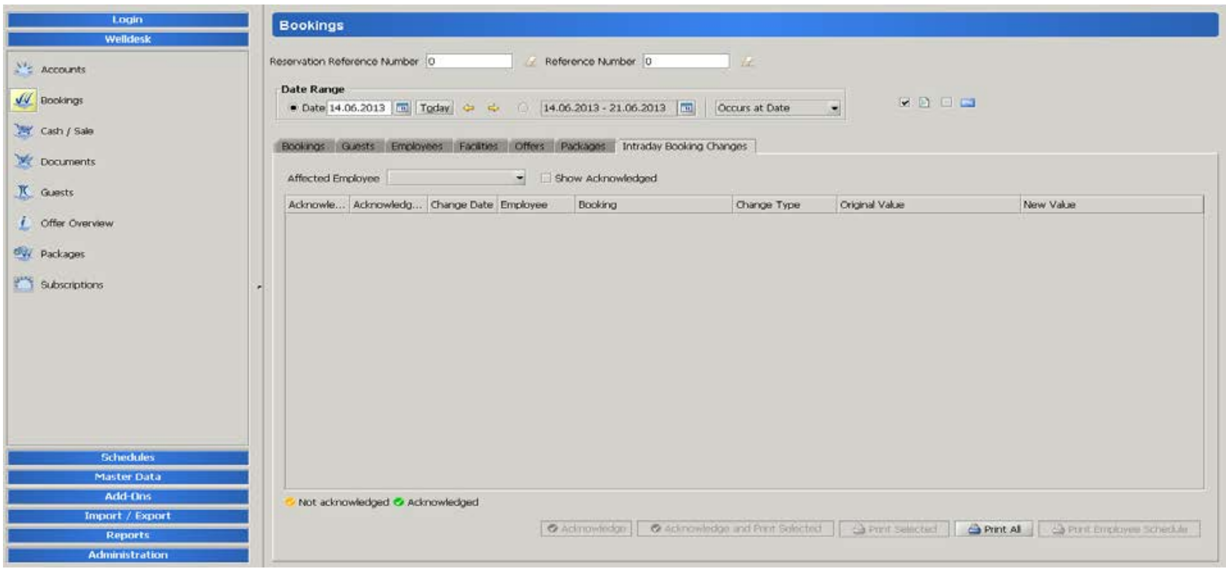
Welldesk

Bookings (Ctrl + 2)

This option shows you all the bookings listed for the day:



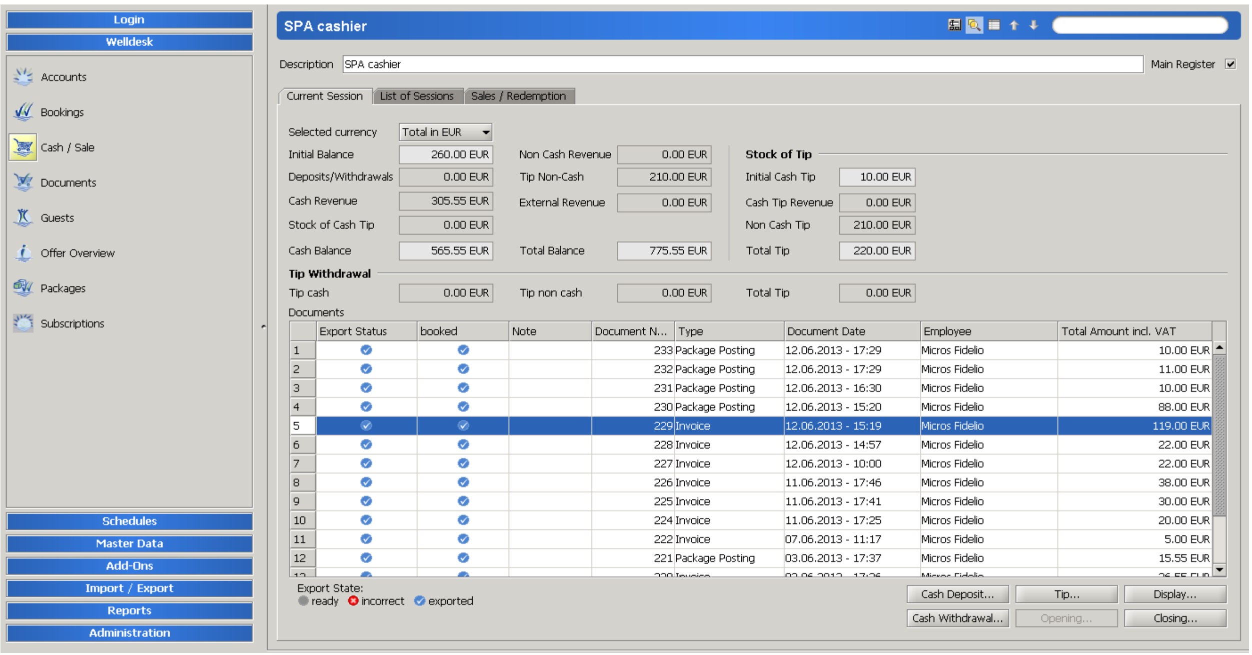
On the top you can select to have today's bookings or any other date's or time period's bookings listed. Using the **tabs** below, you can list these bookings by Guests, Employees, Facilities or Offers. The **Intraday Booking Changes** tab lists any changes that were made to today's bookings.

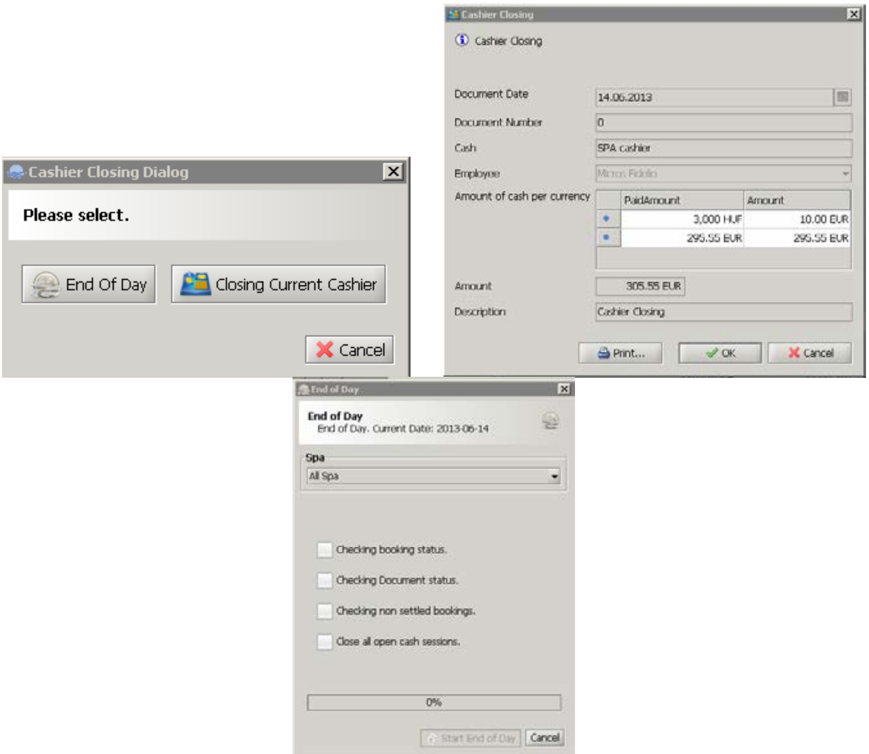


You can filter the records by affected employee: this comes handy once all employees have their schedule for the day but there are changes on them – you can just give them a list to see what affects their day.
To keep a track of the changes which were already communicated to the relevant people, you can acknowledge them as to make sure you see if there are any additional changes coming up later.

Cash / Sale (Ctrl + 3)

This is your cashier. The first tab you are presented with is the Sales/Redemption, however first you need to make sure that the cashier is open on the **Current Session tab.**





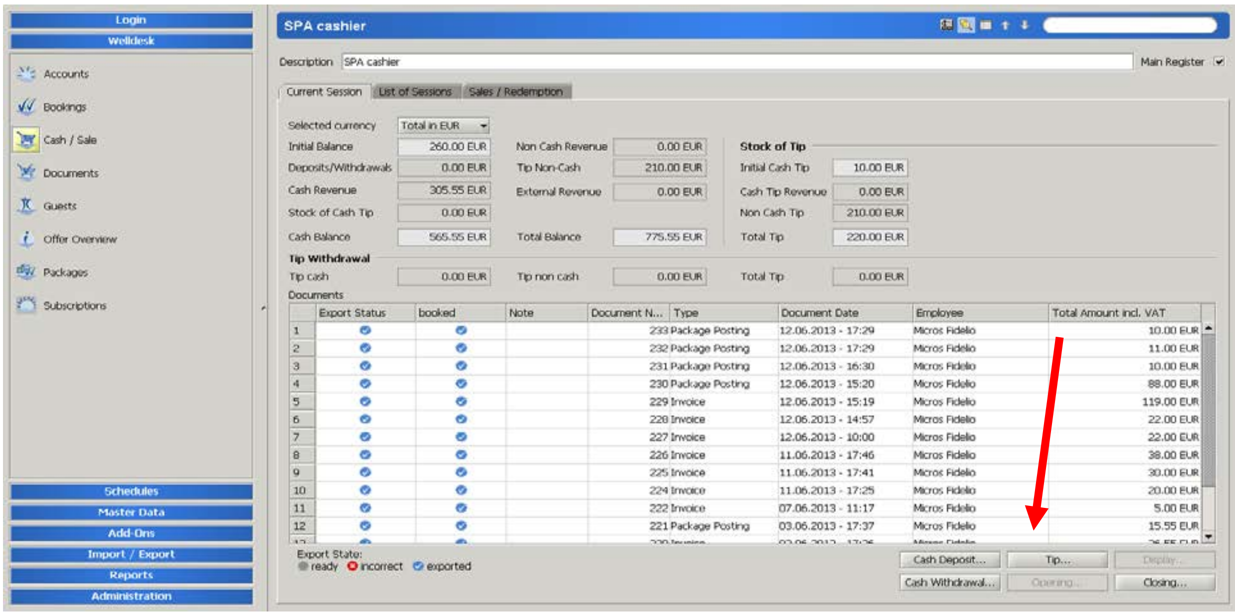
Select the *Opening* button at the **bottom to open you session**. The cashier opening window comes up showing the details of the cashier opening. Click OK to open the session.

To put in or remove any cash (like your float) use the Cash Deposit and Cash Withdrawal buttons.

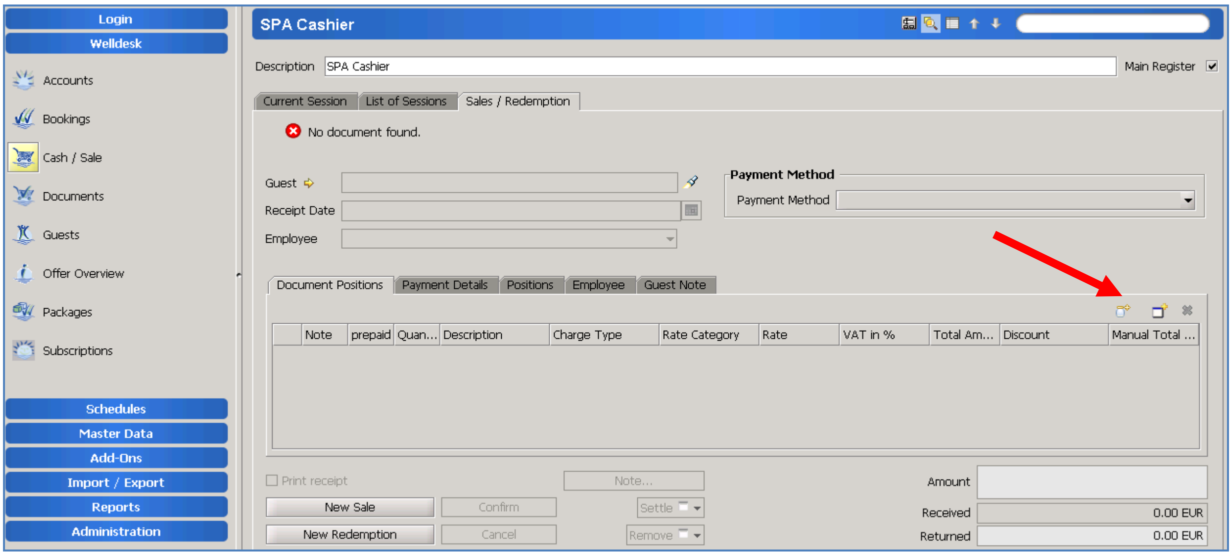
To close you cashier at the end of day, return to this window and press the *Closing* button.

First, select print to view/print your cashier closure report. Then click OK and your session is closed.

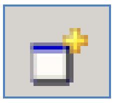
The **List of Sessions tab** shows all the closed and currently opened session. The buttons Opening and Closing are also available from here.

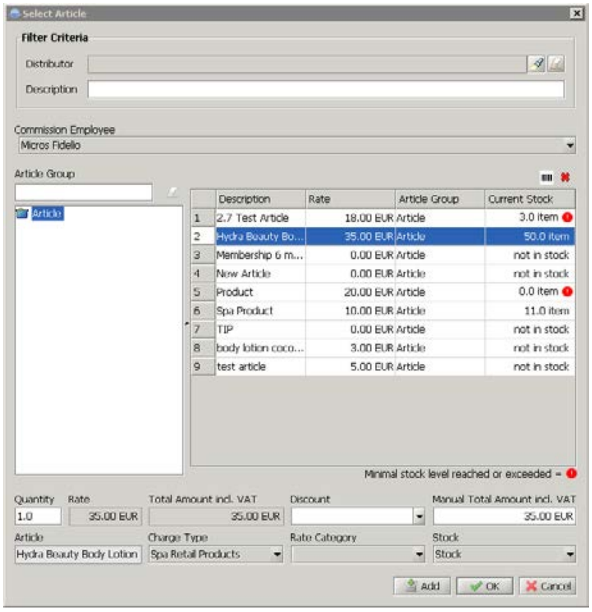


The **Sales/Redemption tab** accessed through the Welldesk is used when you are selling products or subscriptions only, but not treatments.

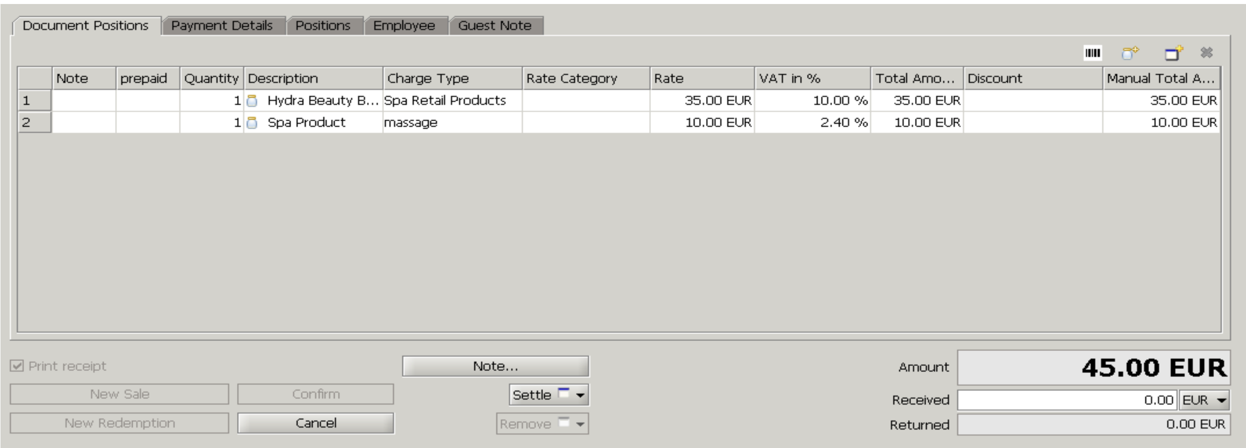


First select the guest – otherwise the invoice will be registered with the guest **Passer By**. Using the icons on the top right corner of the Document Positions tab, add articles (first icon) or subscriptions (second icon).

 Add Article  Add Subscription

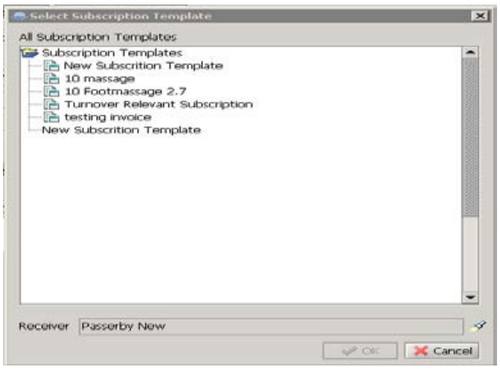


When you add the articles, you can select them from the above list, enter the quantity sold and either click OK to add this to your sale or click Add to continue selecting additional articles.

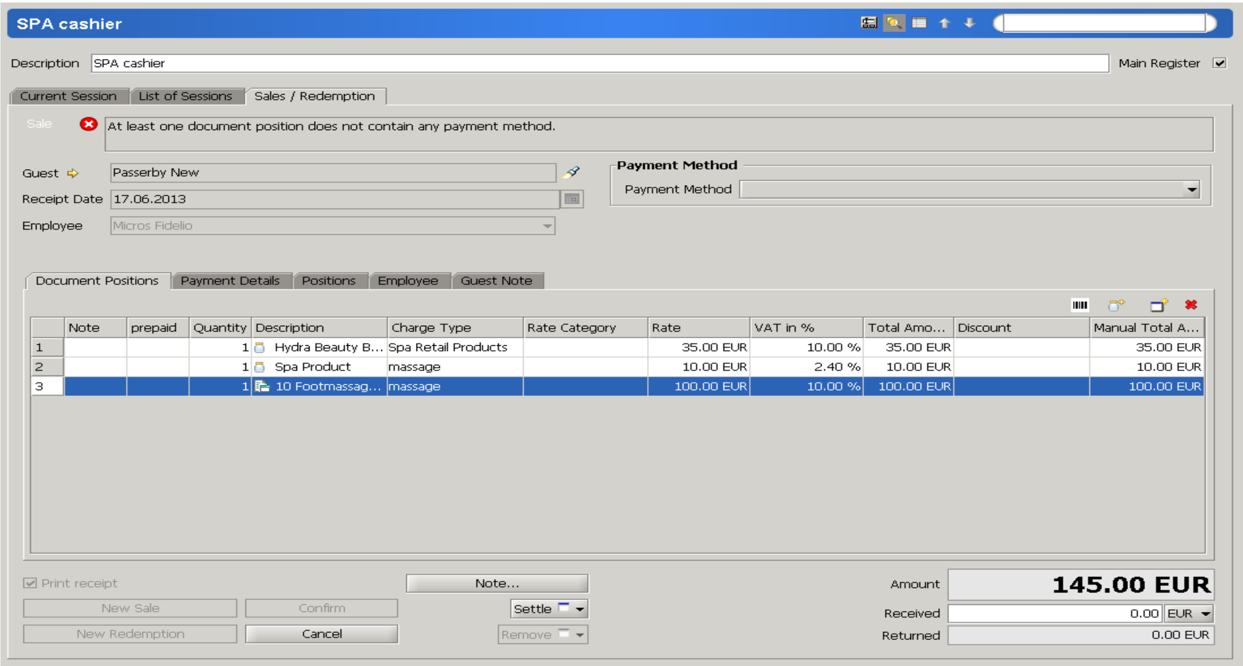


Once they are listed on your sale, you can change the quantity by double clicking on the number. Click on the Discount field to choose from the discount categories if required.

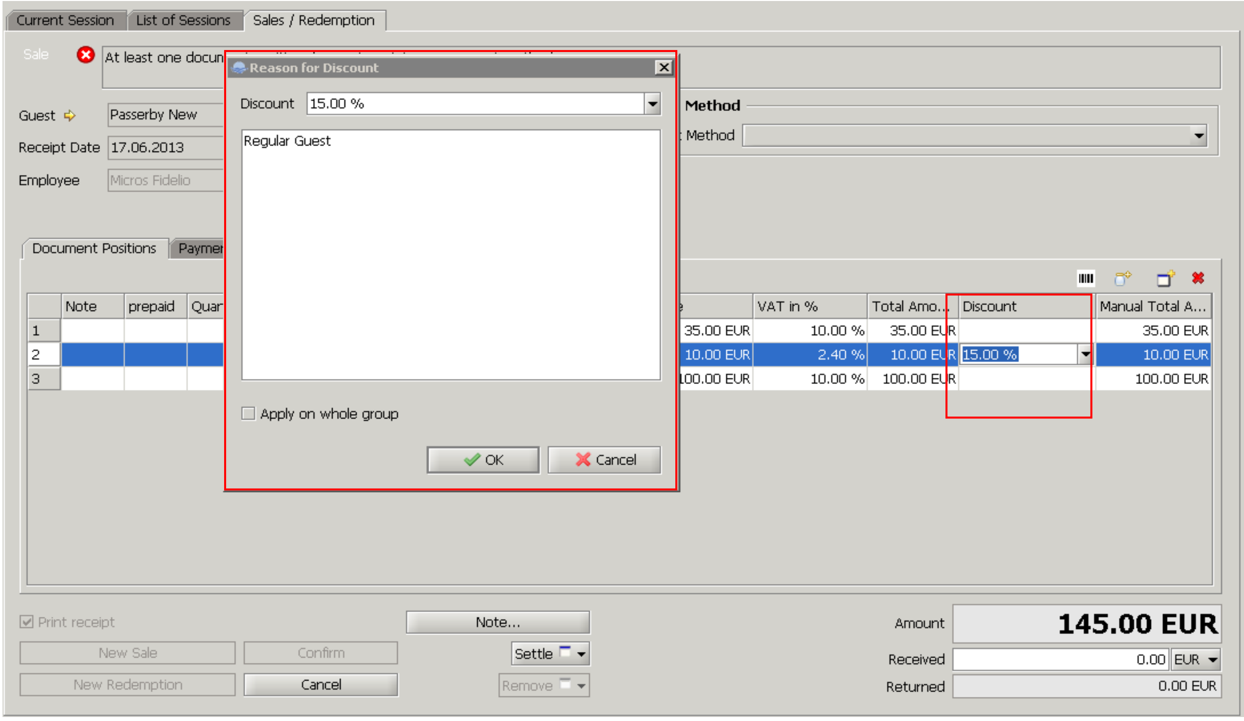
You can delete any items that you added but do not wish to sell by the red cross.



To sell a subscription, use the icon for subscriptions which brings up the above window. Select the type from the list and add it by OK.
Subscriptions will appear on the document positions list with a 0.00 EUR rate which you need to change to the appropriate amount.

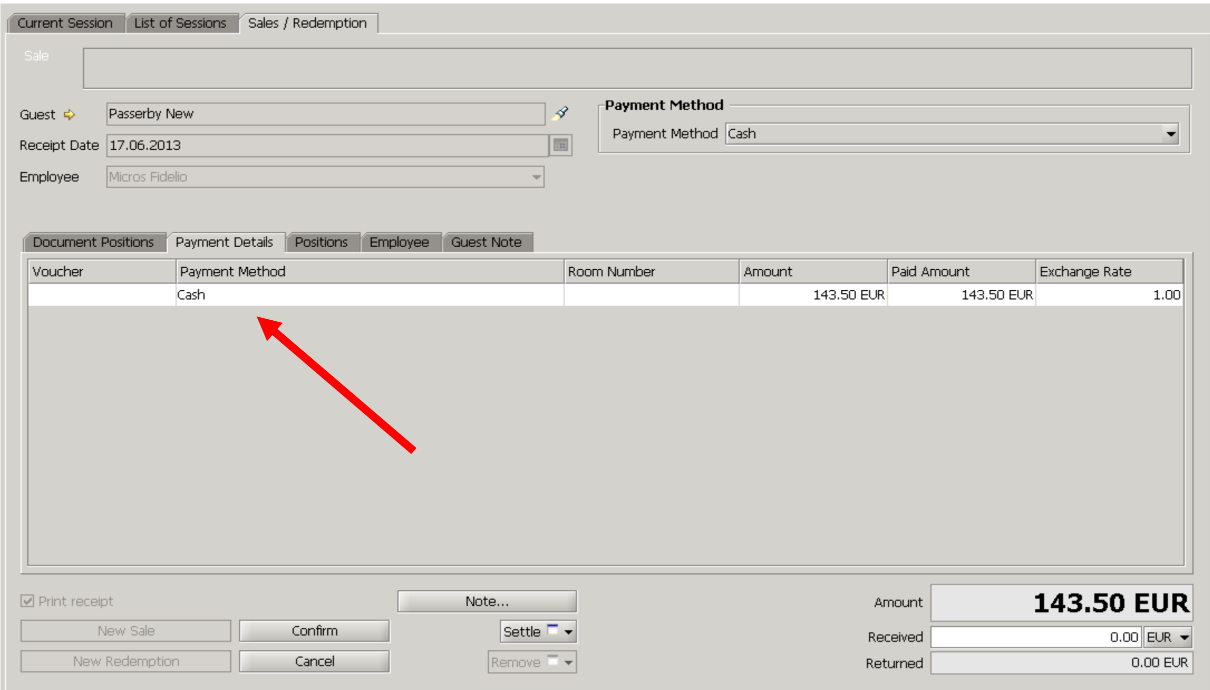


There is a setting in administration if you change any price, the system asks you for a reason for the discount (change of price). Give a short description such as standard rate. These notes appear only on your system and will be shown in the Note column.

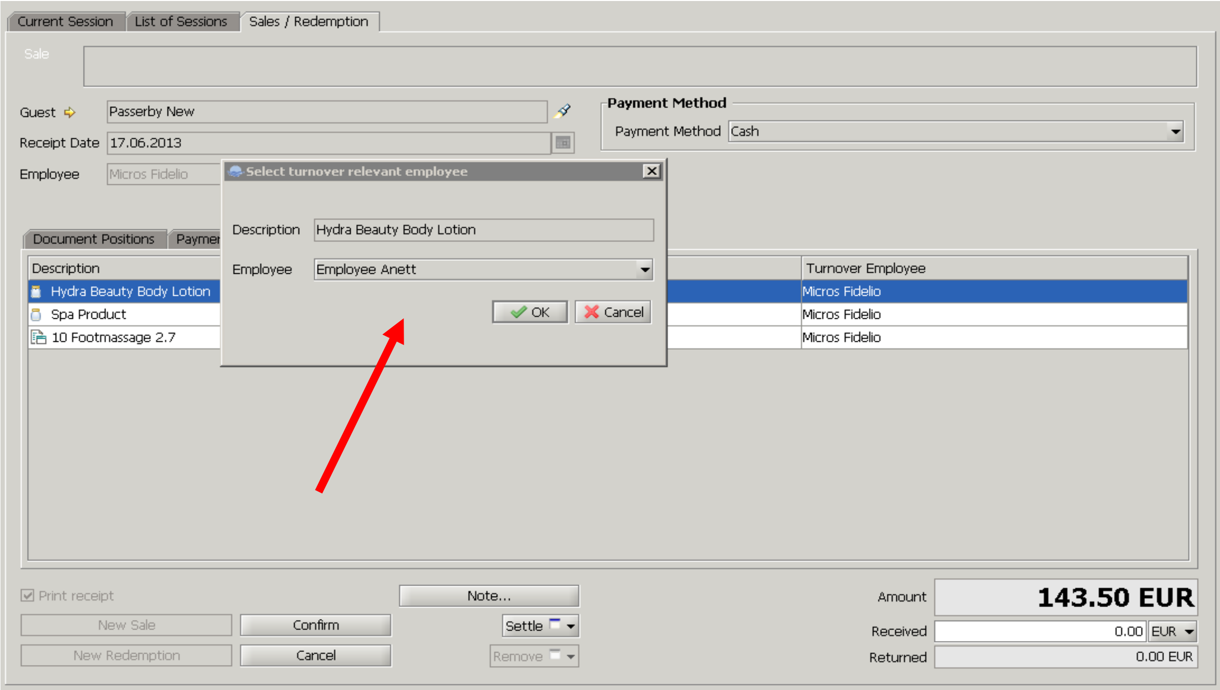


Once you are done with the posting of items, select the payment method from the drop down menu. In case of hotel room charge, you need to add the room number below the payment method.

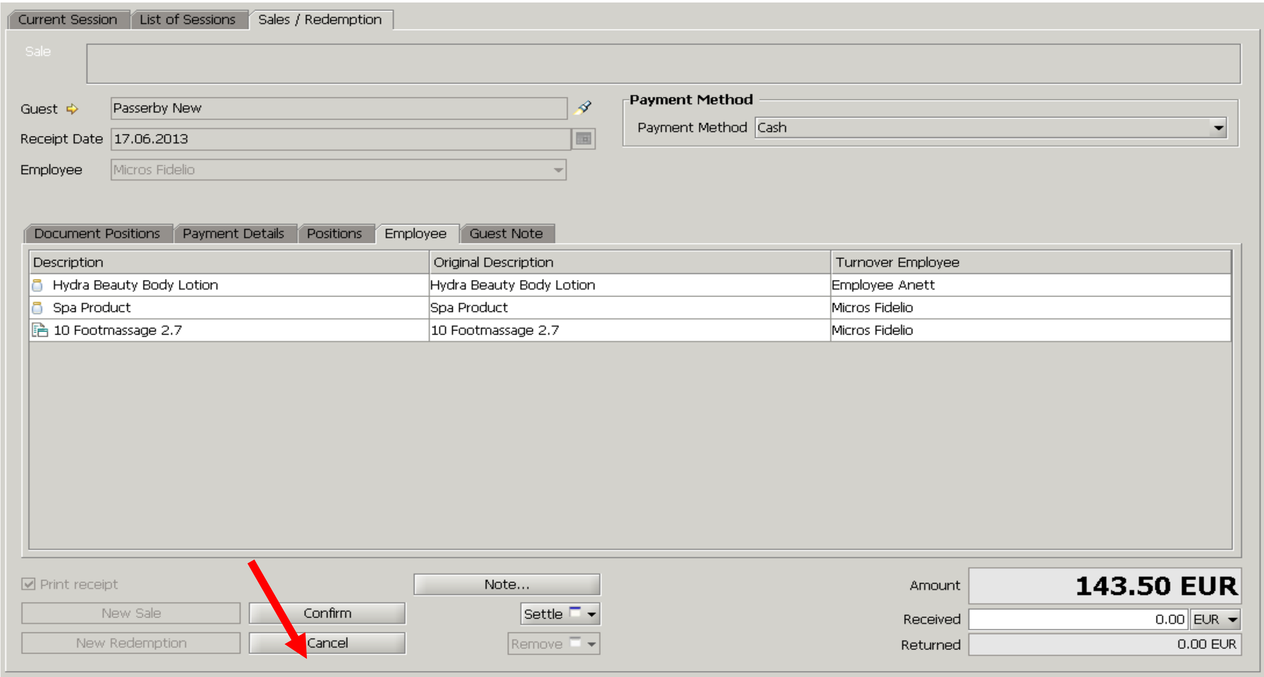
If the guest pays with multiple payment method, go to **Payment details tab** and enter the amount of the first payment method selected. This creates a second line with the remaining amount where you need to select the payment method: click in this field to get the drop down menu of the payment methods.



The **employee tab** gives you an option to change the employee from the default (the user who is logged in) to the person who should get commission for the sale of each item. Double click on the product and select the right employee from the drop down menu on the new window.



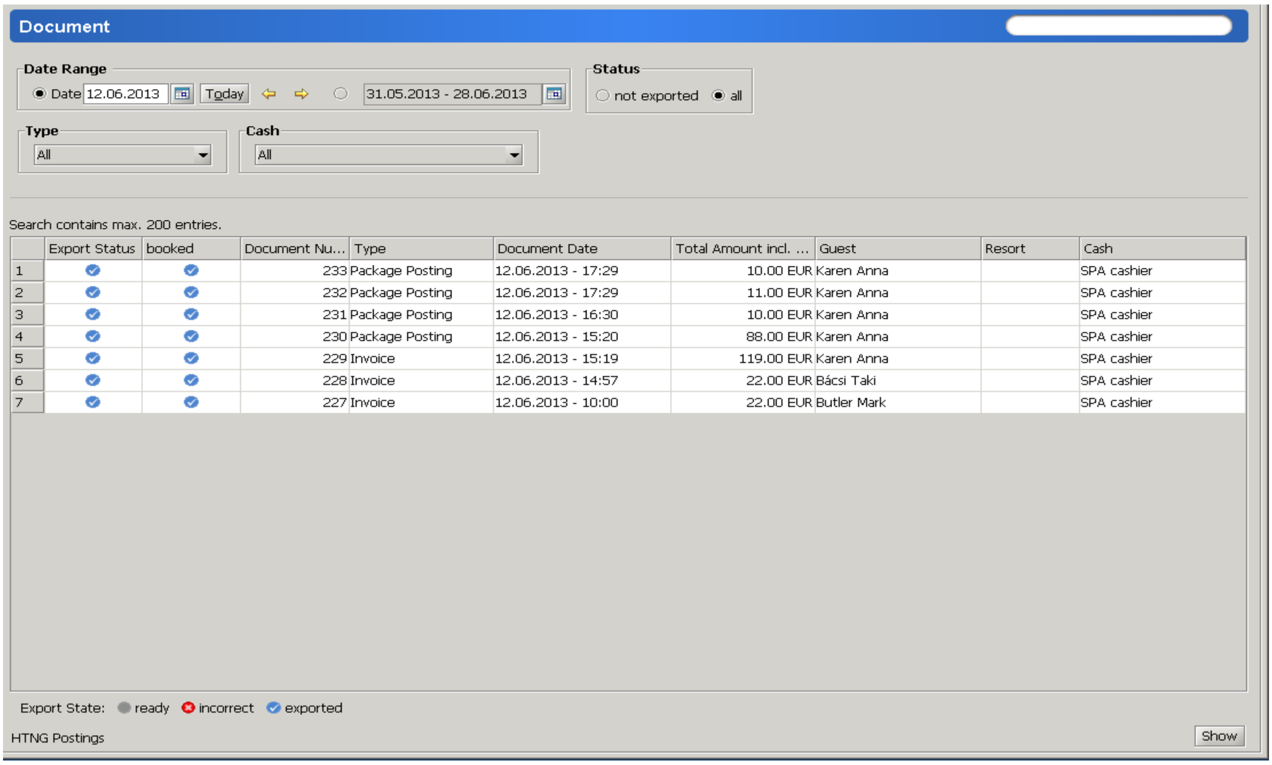
Once you are done with all the details, the Confirm button becomes available.



Click it so you are then presented with the option to print the invoice.

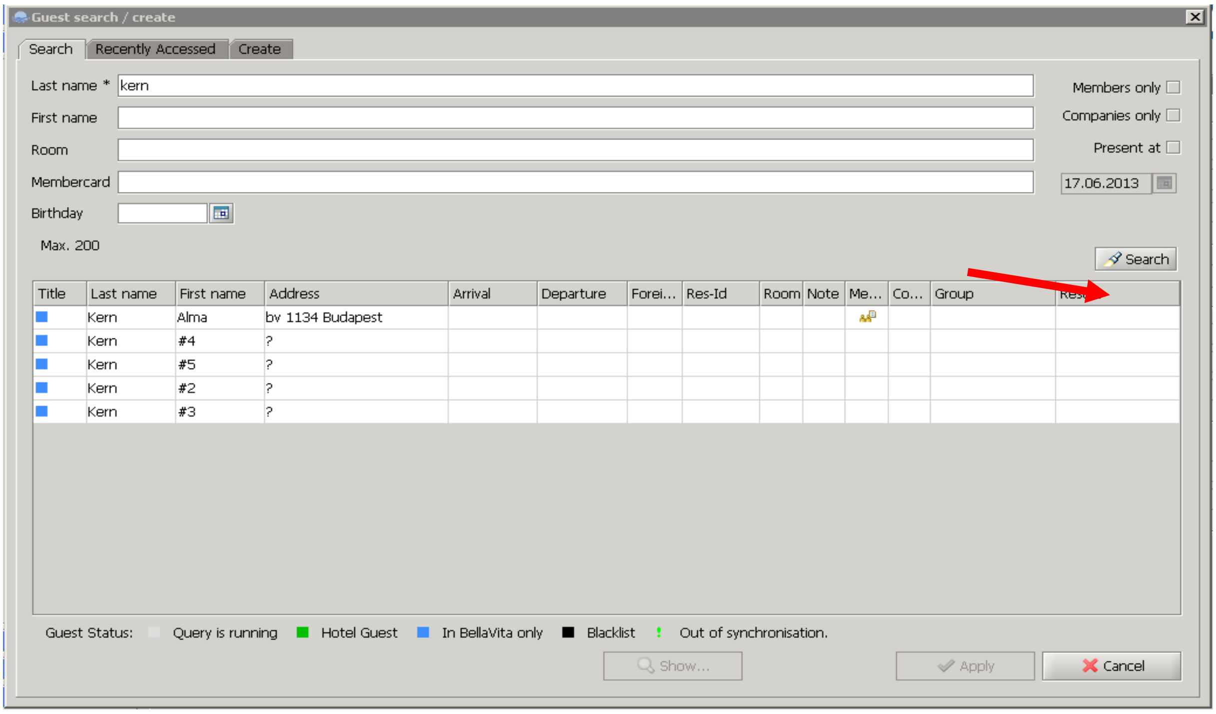
Documents

All the documents: invoices and receipts are displayed here of the current day or a certain date range.



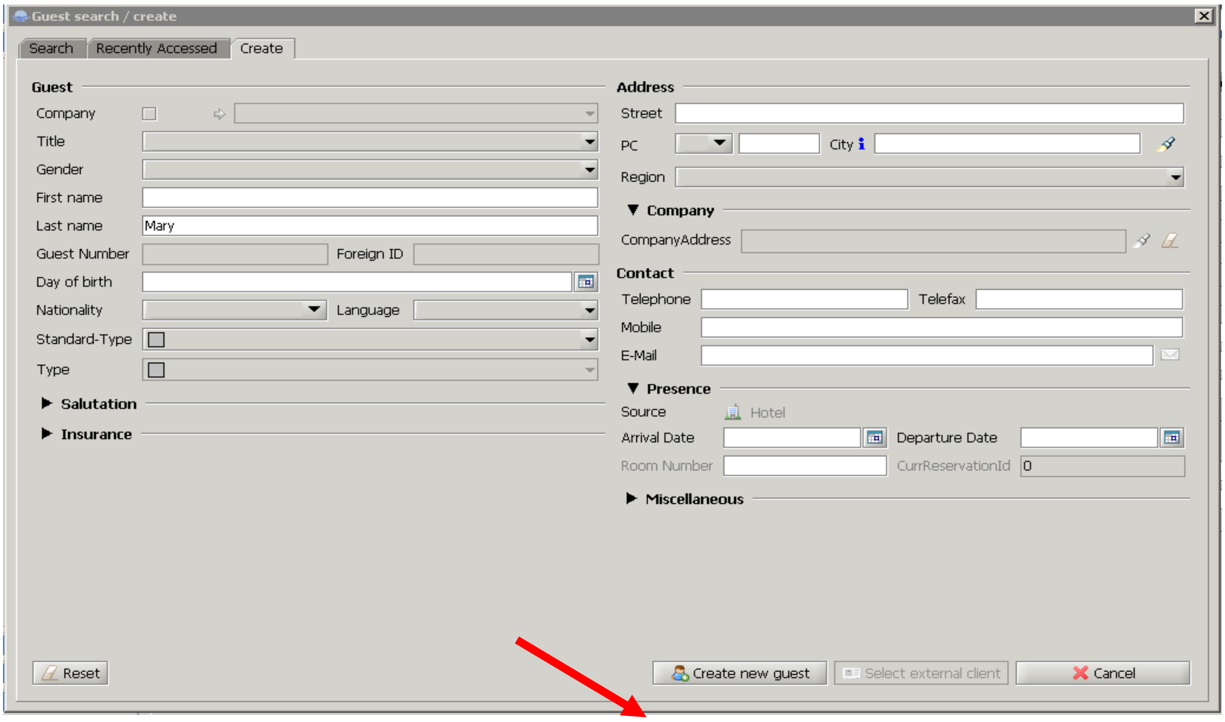
Guests (Ctrl + 1)

Using this option you are transferred to the guest search window. Enter the search criteria, and press enter or the search button.

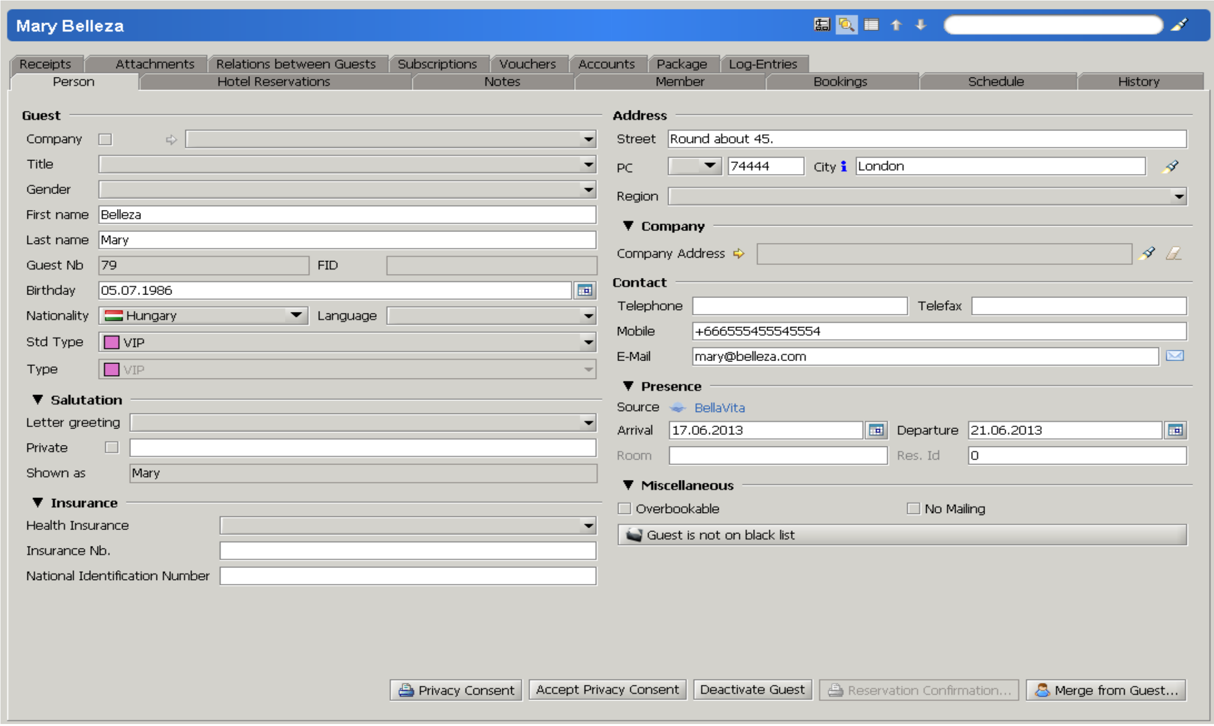


Enter the name of the guest to search for it first. If there are no results, the system offers the option to create new profile. If there are results, but you do not see the profile you are looking for on the list at the bottom, the **create tab** at the top becomes active. The **recently accessed tab** shows you all profiles that you have accessed since your last log in to Bellavita.

If you found the right profile, select apply to view it. If you need to create a new profile, enter the basic details of the guest and click *Create new Guest*.



The guest profile is presented once you either created a new guest, or selected apply in the search field.

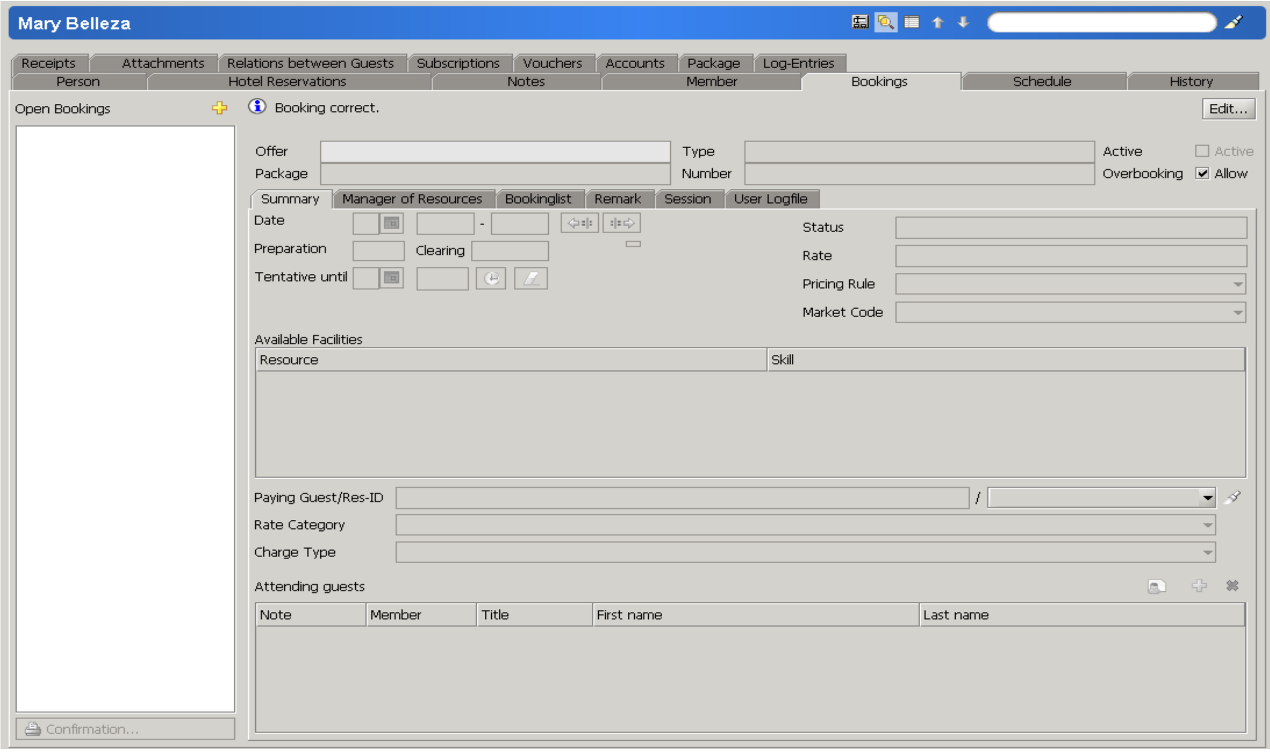


There are several tabs and options on the guest profile. In this section only the most important and commonly used ones are explained.

Person tab:

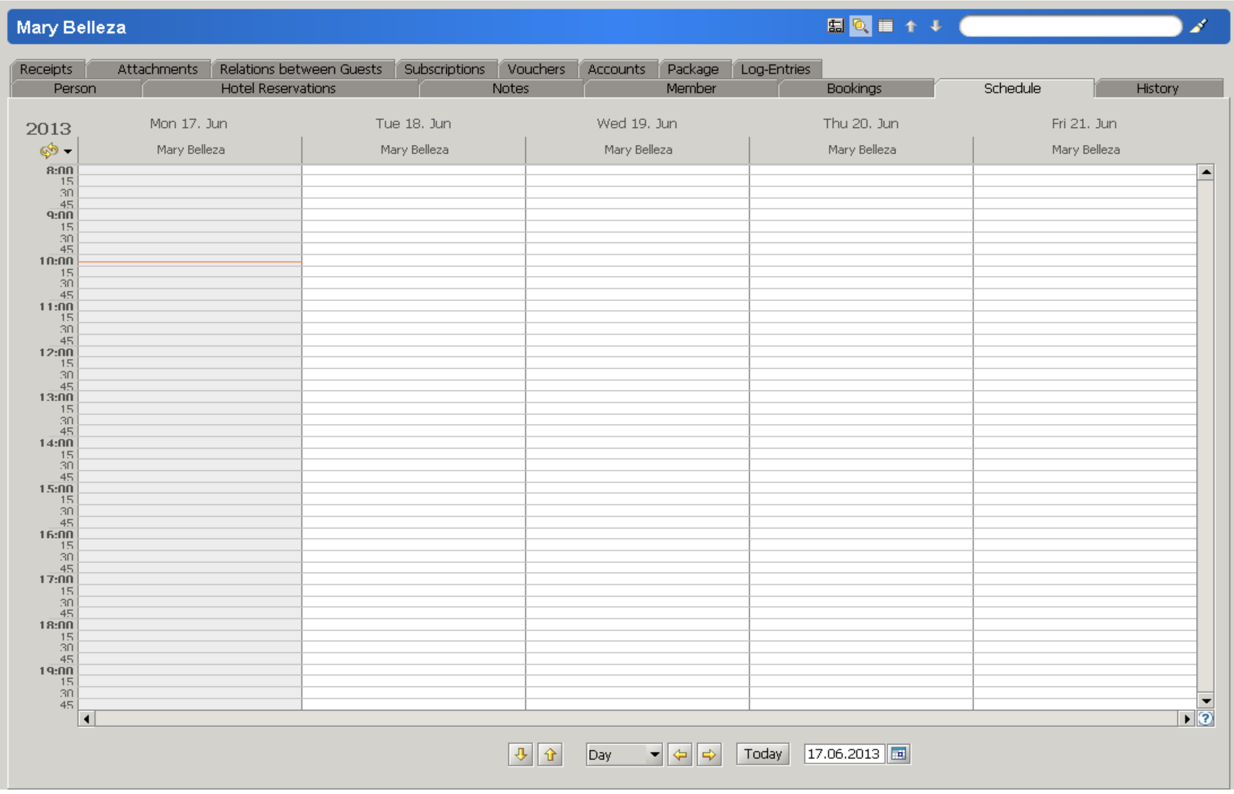
- Guest type: all hotel guests are defaulted with the value of Hotel Guest, but you can change it to VIP, Employee, etc. It is important to select it as for example some discounts and rate code categories are linked to guest types.
- Overbookable: preferable to tick it as without that you are unable to book parallel treatments for the same person, such as a manicure and pedicure at the same time.
- Guest not on black list: if you click on it, it changes to guest on blacklist – in case you had previous issue with a guest regarding payment or so.
- Merge from guest: In case you have multiple profiles for one guest, select the one with most details, click this button and select which other profile you would like to merge into this (the bookings, subscriptions and histories add up, but all other details get deleted on the second profile)

Bookings tab



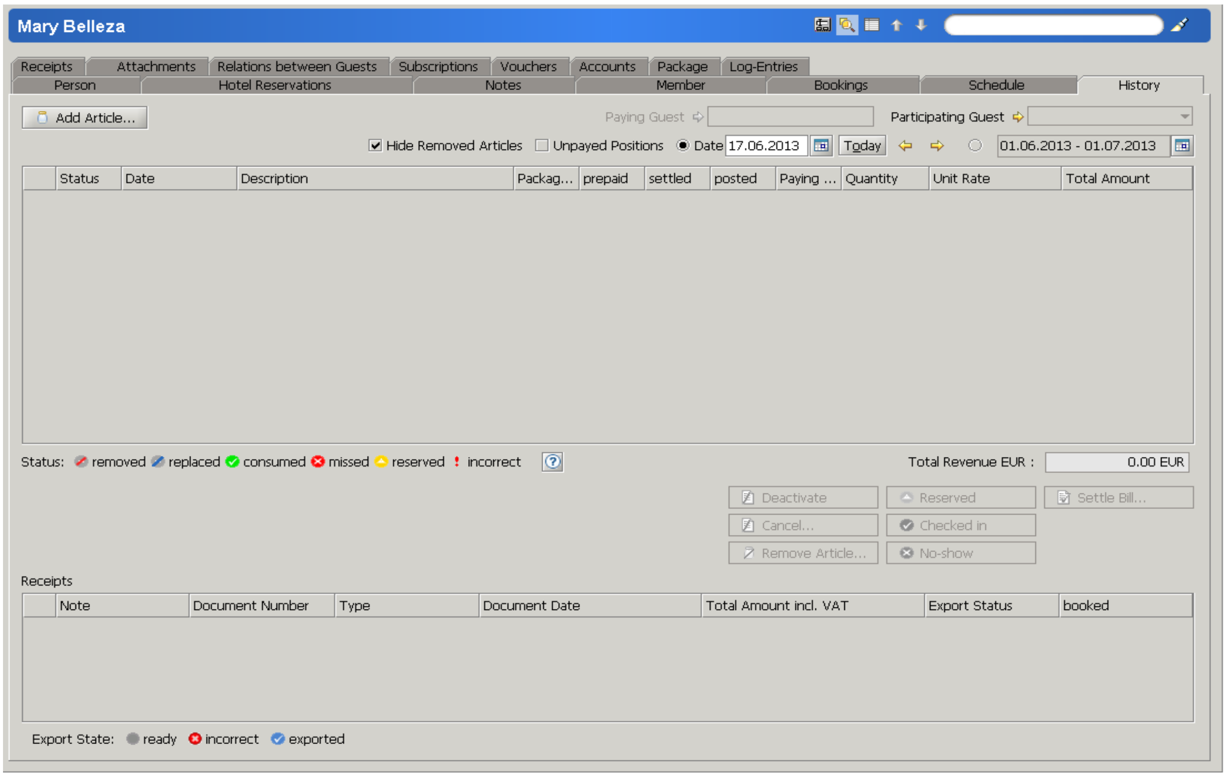
Here are all the guest's future bookings listed and you can create new ones with the yellow cross. To edit any bookings, highlight them on the list and press edit on the top right corner. It will take you to the booking screen.

Schedule tab



This is the schedule of the guest. You have the same options on it as on other schedules: create bookings, review/cancel/pay existing ones.

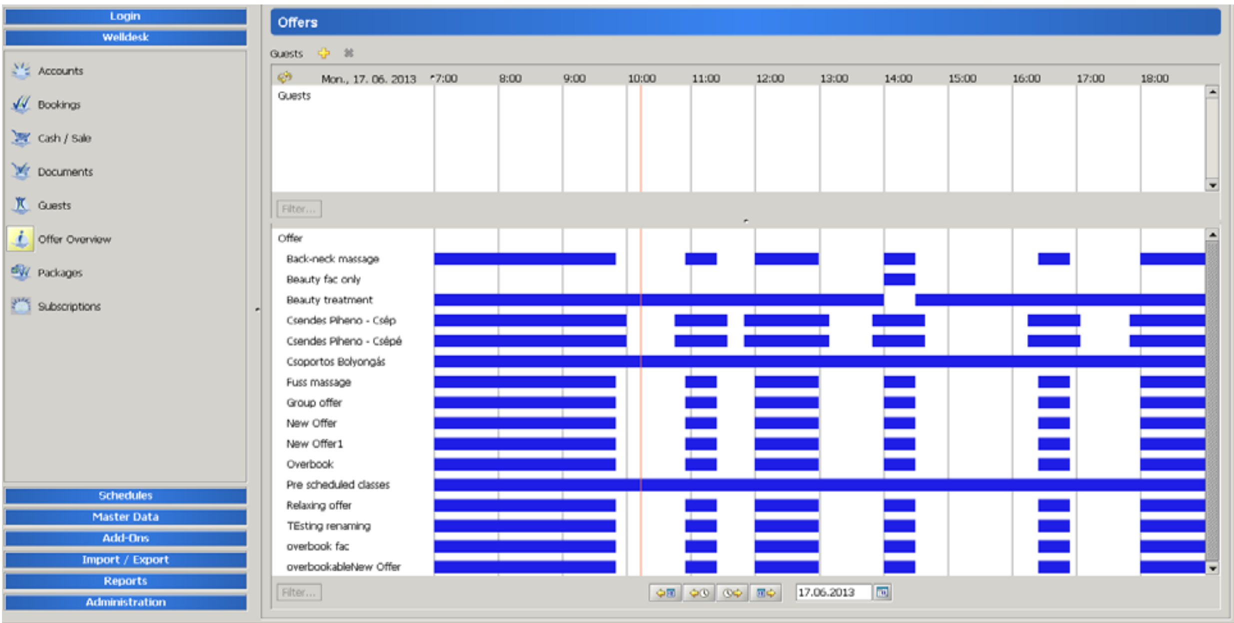
History tab



This tab shows you the history of the guest, see what treatments they paid for, what they still need to pay for, etc. The bookings where they are not the paying guest only attending guest will not appear here.

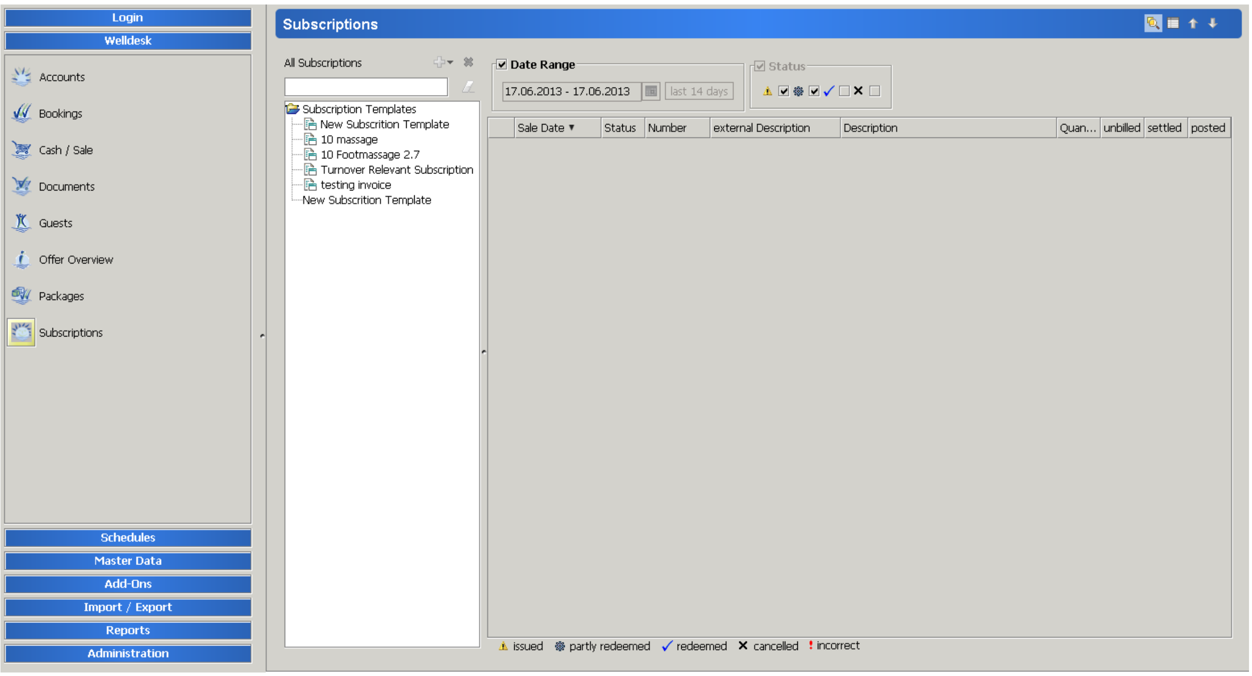
You can search by dates as well as search for only unpaid positions. You can post an article on their bill by the Add article button on the top. Highlighting any paid position (article or offer) the receipts show at the bottom under receipts. Double clicking on it will give you an option to review or reprint the receipt.

Offer overview



This option shows you the availability of each offer on the date selected at the bottom of the screen. The blue horizontal lines show when they are not available. This is based on the Employees presences and the existing bookings, absences.

Subscriptions

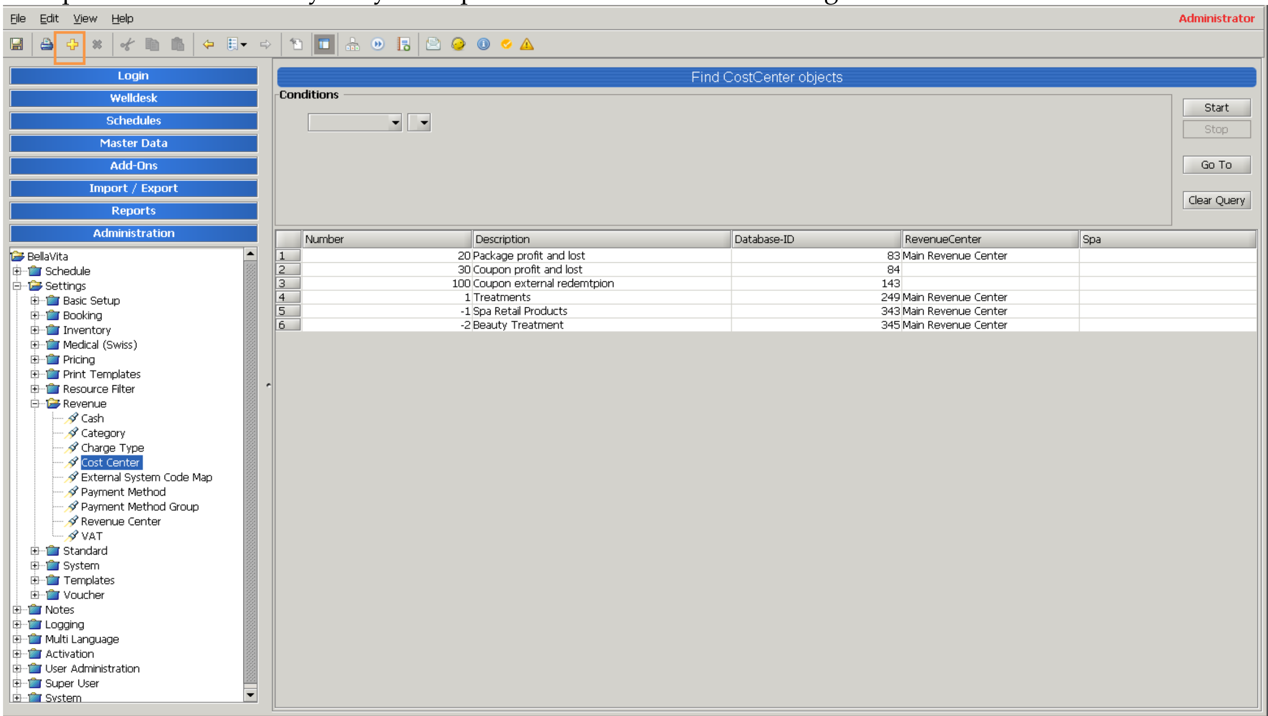


This option shows all the subscriptions issues and redeemed by category. Select the template of subscriptions on the left and all the subscriptions based on this template will be shown on the list. The code of each sign is shown in the bottom line.

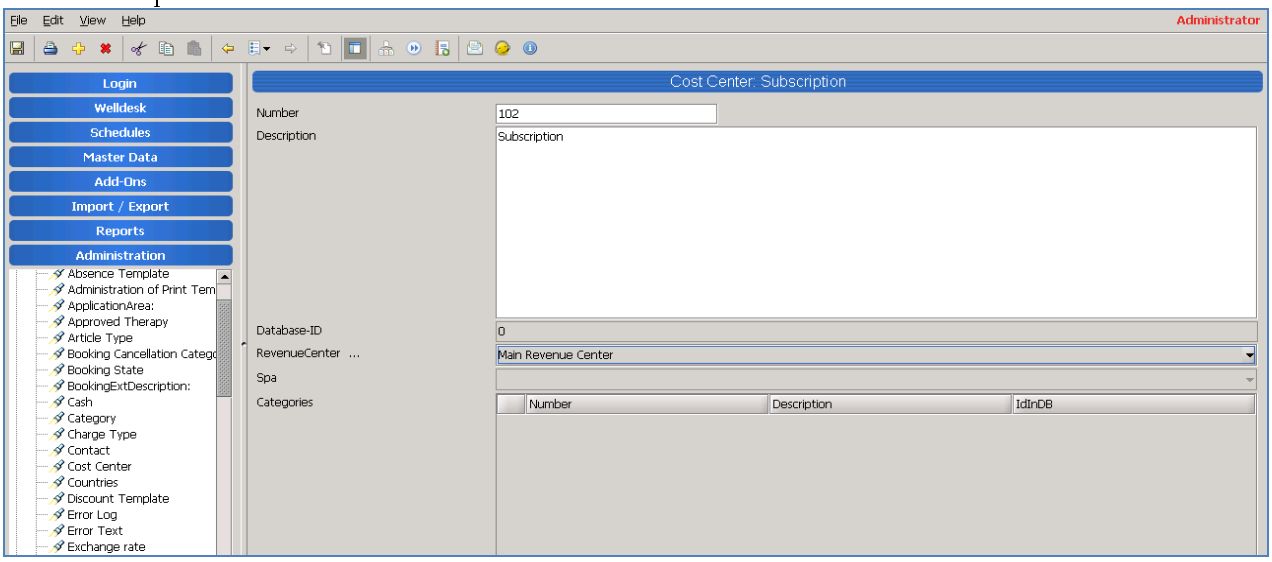
Configuration

To be able to set up subscription and to use them successfully, we need to set up a new charge type and payment method.

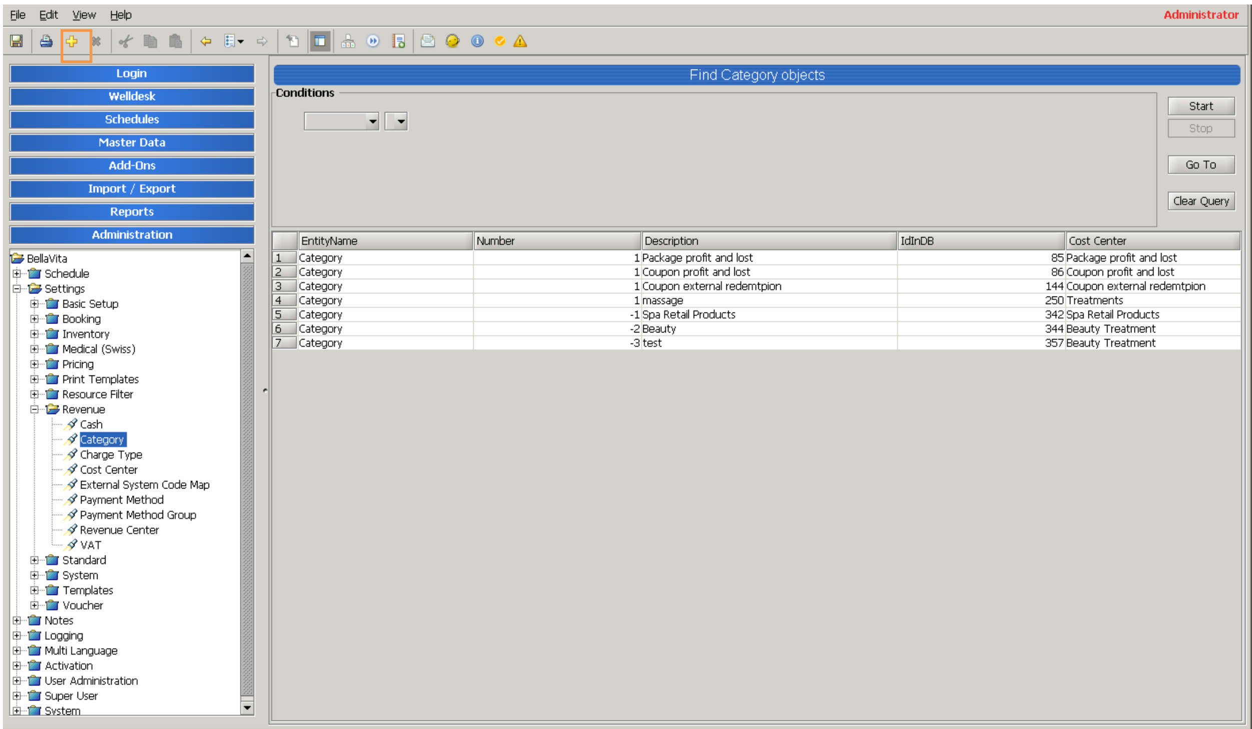
Set up a new cost center by the yellow plus in Administration – Settings – Cost Center.



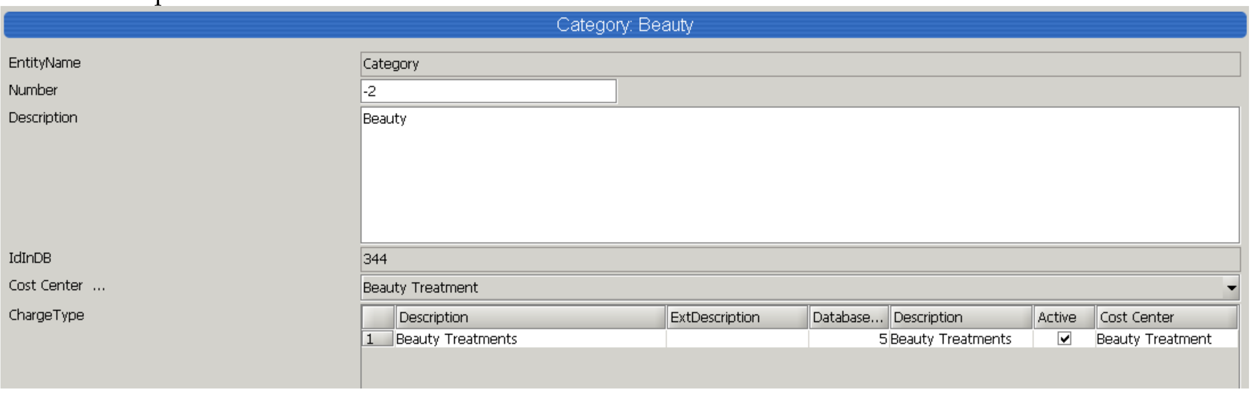
Add a description and select the revenue center.



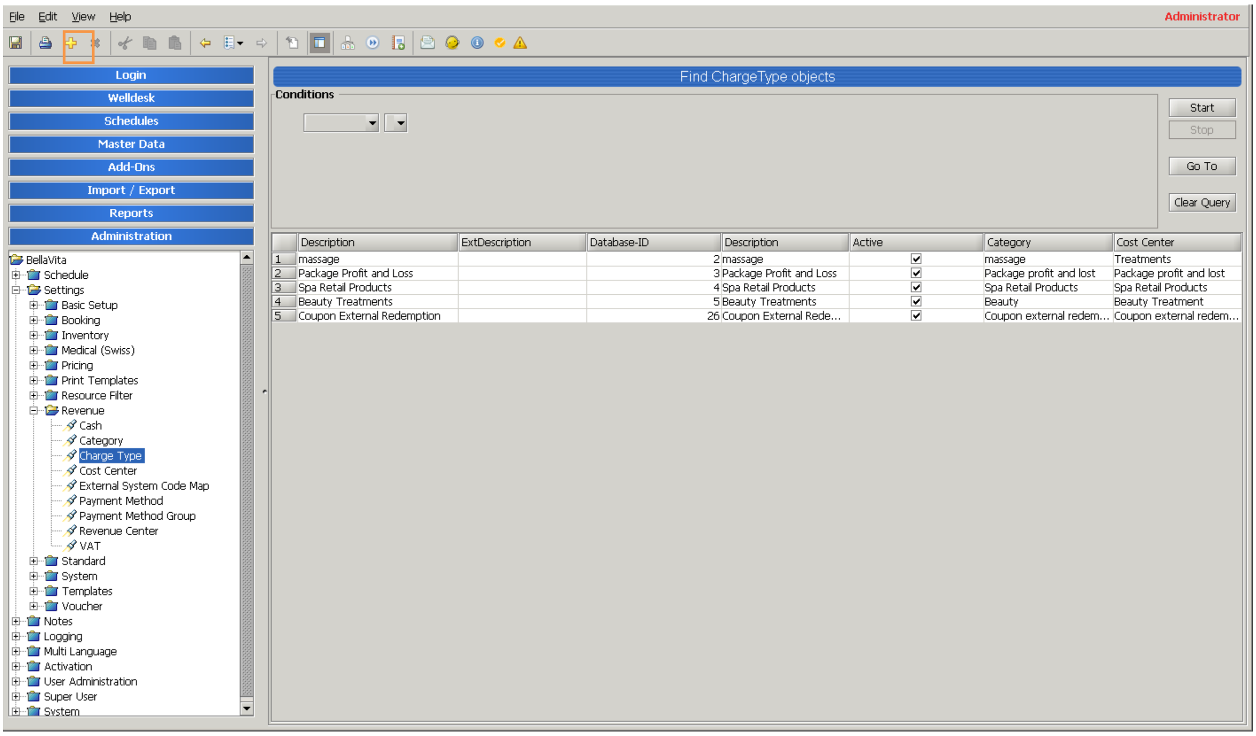
Add a category in this cost center by the yellow cross.



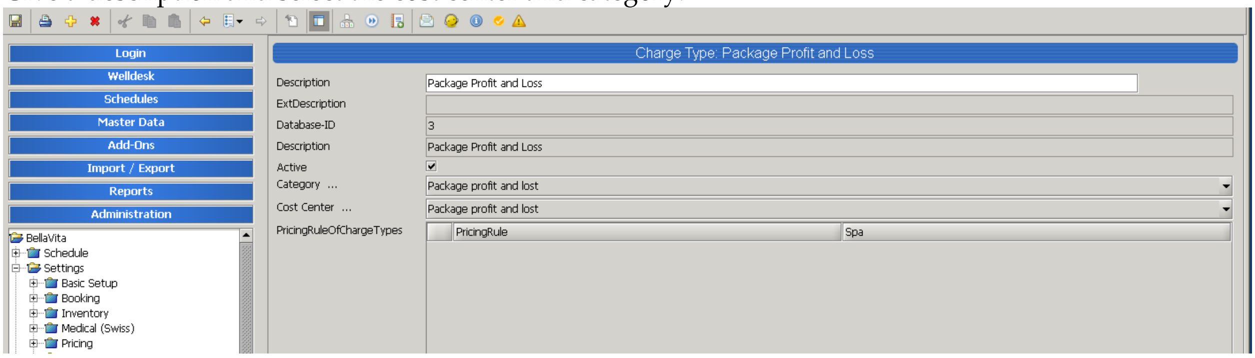
Give a description and select the cost center.



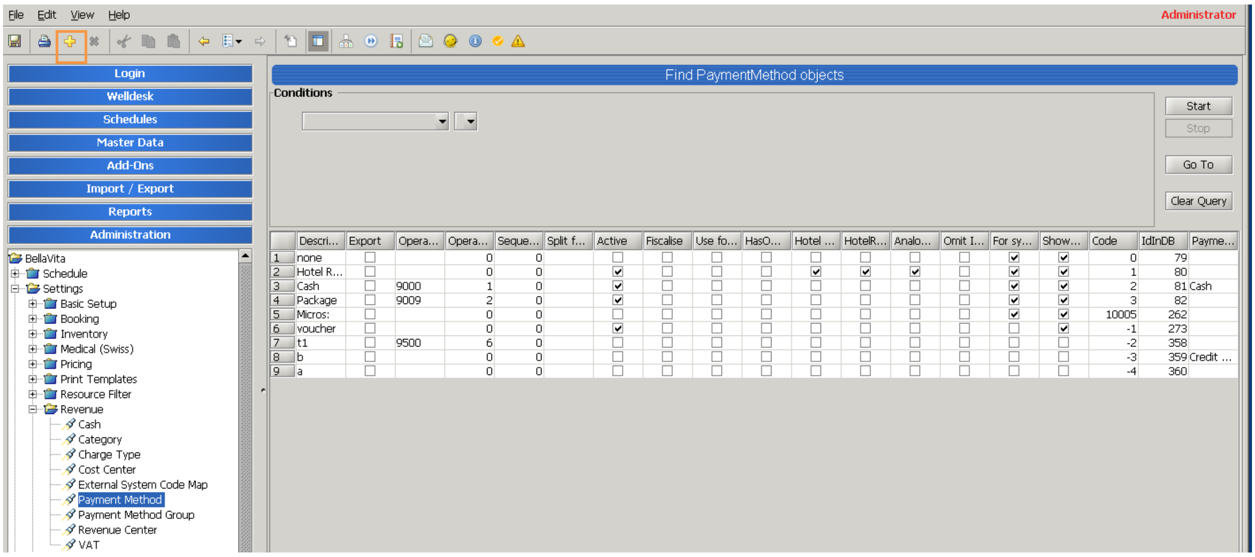
Add a new charge type by the yellow cross.



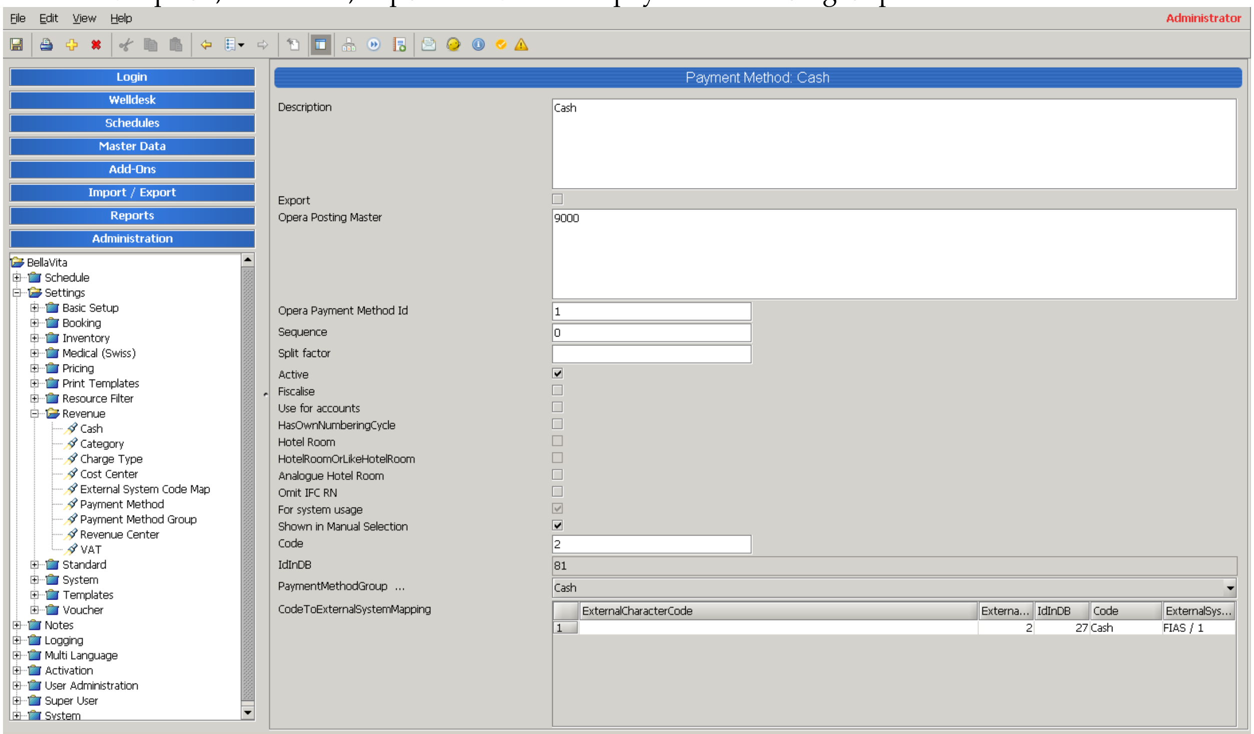
Give a description and select the cost center and category.



Now we need to set up a new payment method by the yellow cross in Administration – Settings – Payment method.



Add a description, tick active, export and select the payment method group.



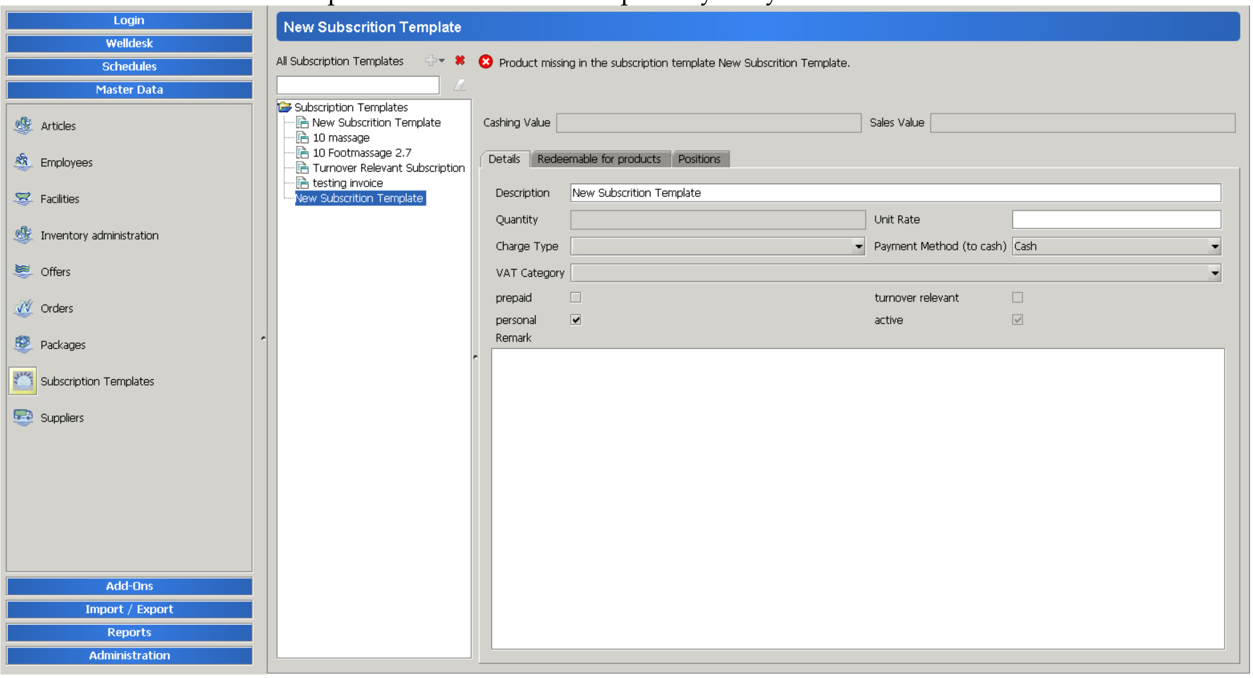
The new charge and payment types have to be mapped to the PMS transaction codes by interface specialist.

Master Data

Subscription templates are set up in Master Data. This is where we have to set up the subscriptions that can be sold later.

If a subscription can be redeemed for an offer/article that can be sold for other method of payments as well, duplicate the original item to a new group that is called subscription and change the sale price to 0.00.

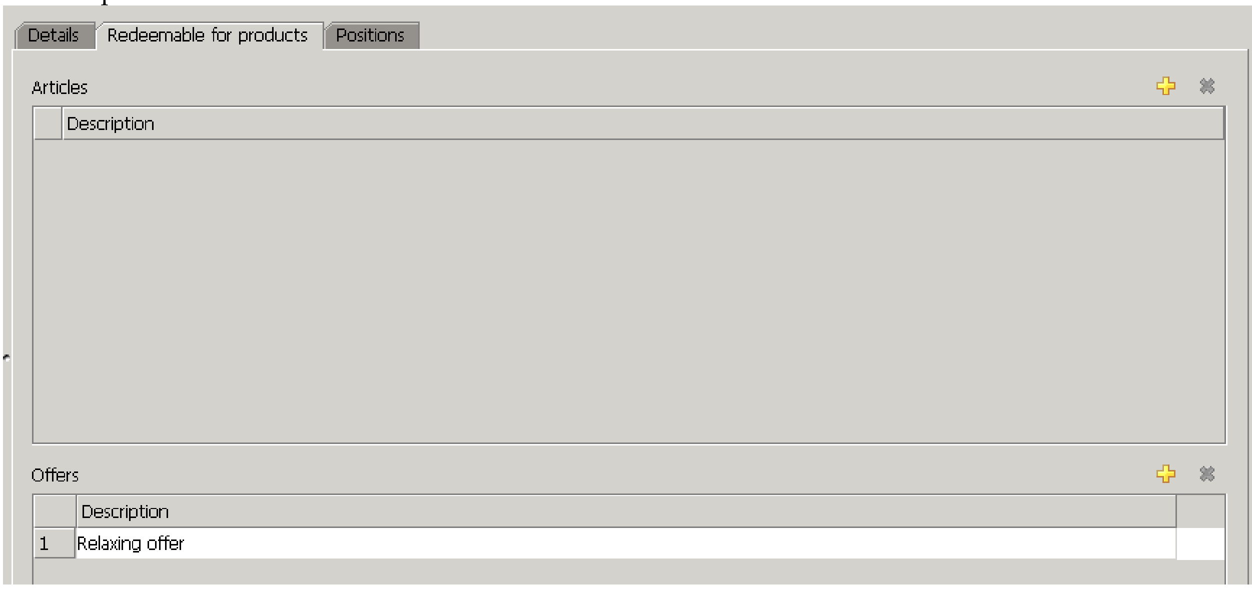
Go to Master Data – subscriptions. Create a new template by the yellow cross.



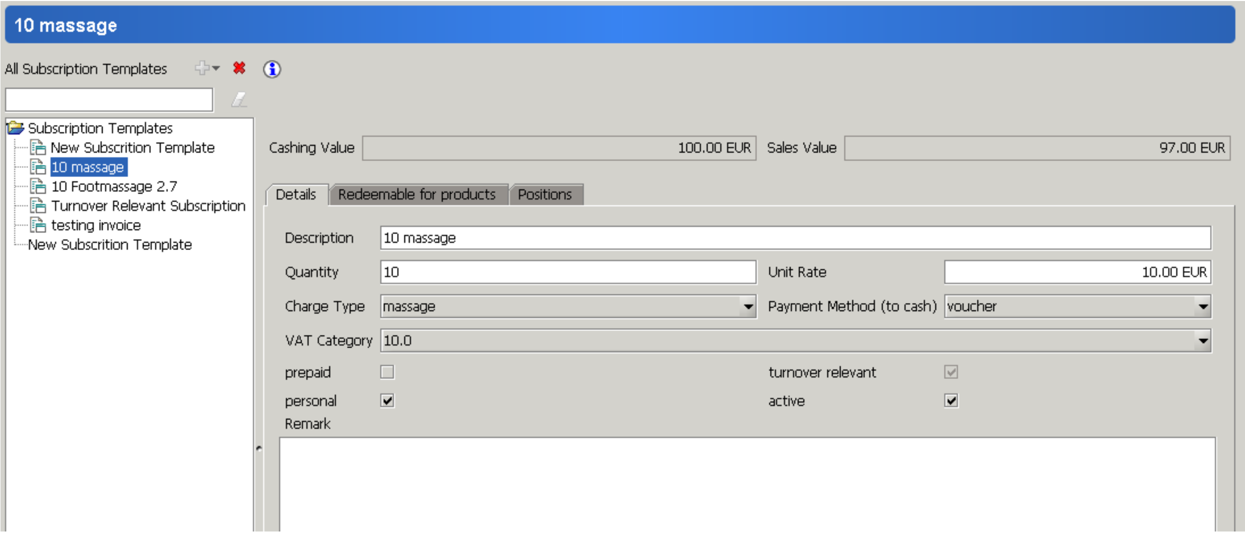
Add a description, tick turnover relevant and active.

Tick personal if the only person who can redeem this is the buyer.

Go to Redeemable for products tab and add the treatment or article that this can be redeemed for – the 0.00 priced one.

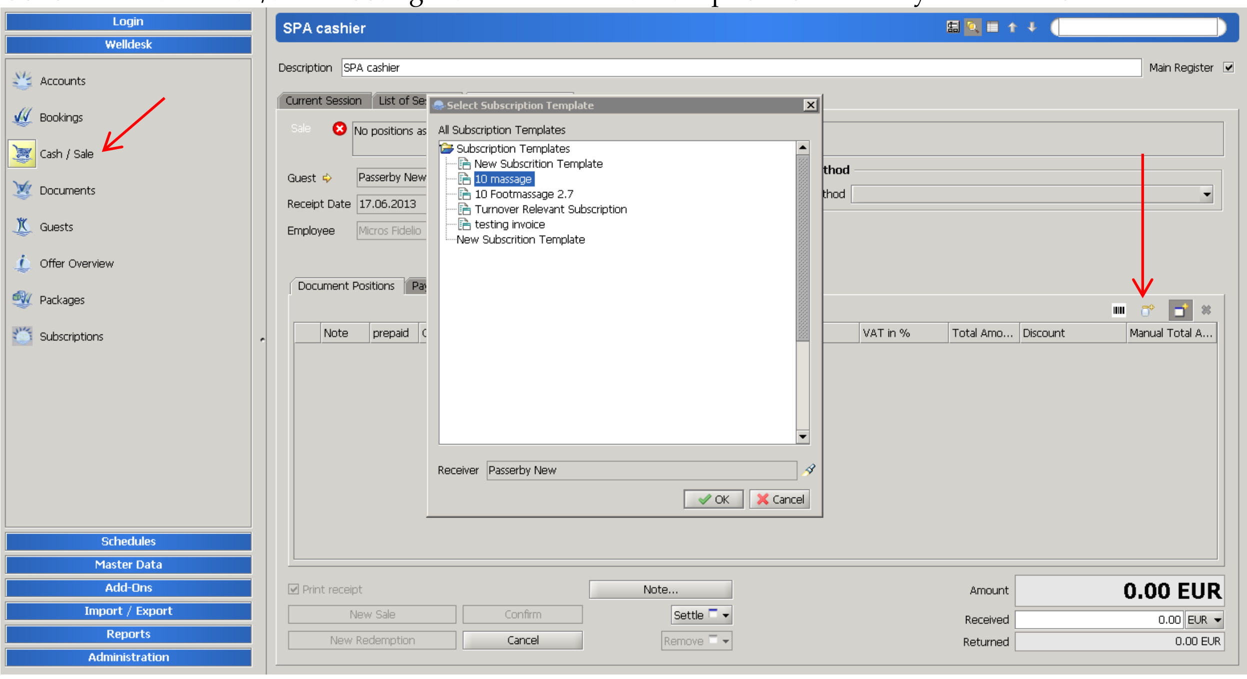


Go back to details tab and set the quantity of the selected treatment/article that this template should be redeemed for.

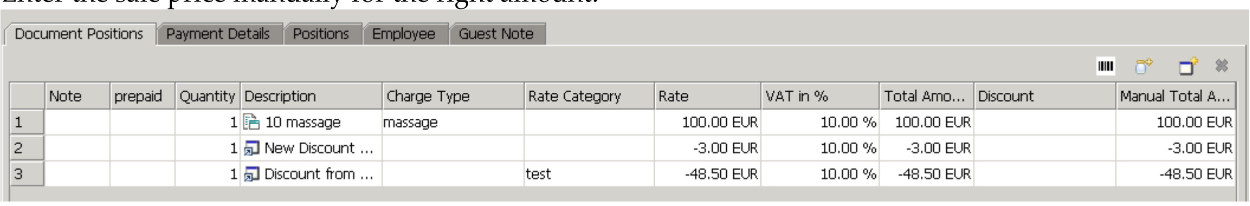


Selling subscription

Go to Welldesk – cash/sale choose guest and add the subscription to the bill by the little icon:



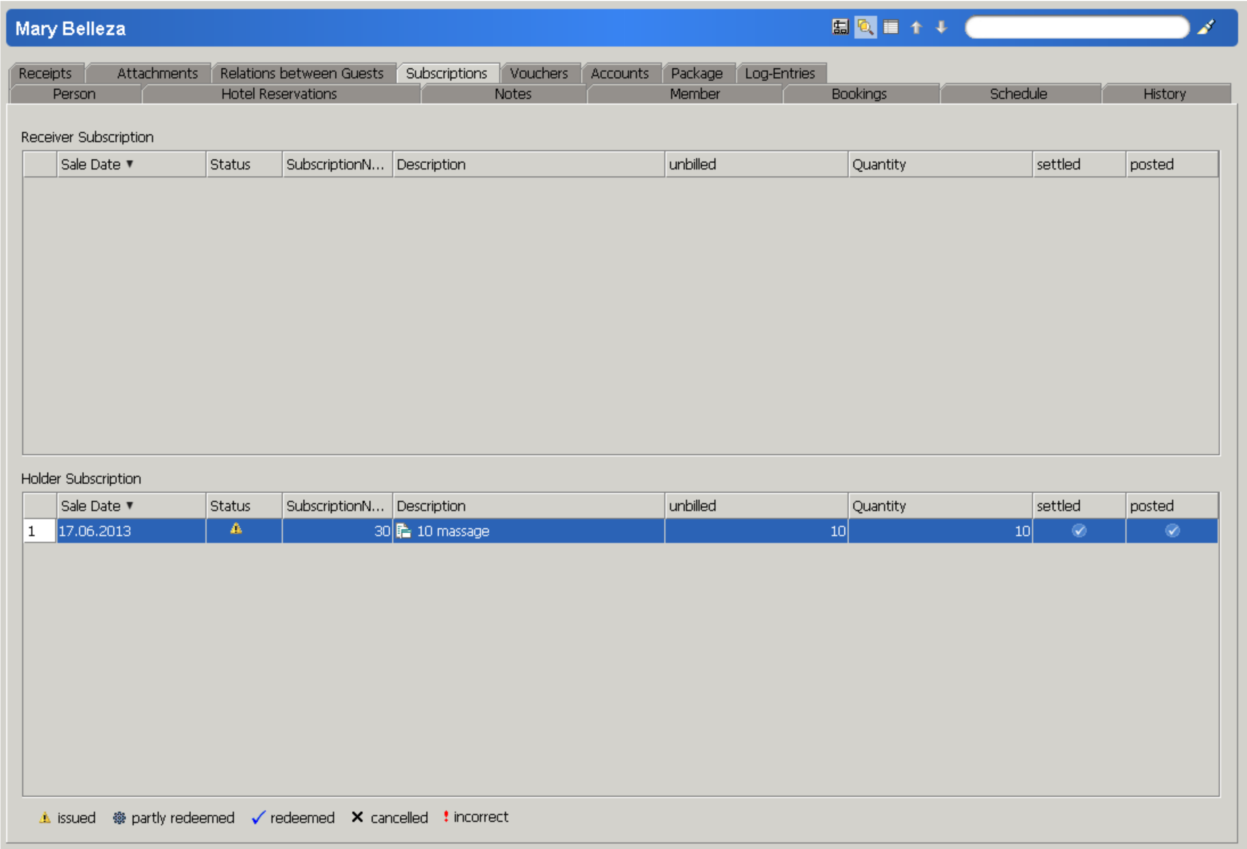
Enter the sale price manually for the right amount:



	Note	prepaid	Quantity	Description	Charge Type	Rate Category	Rate	VAT in %	Total Amo...	Discount	Manual Total A...
1			1	10 massage	massage		100.00 EUR	10.00 %	100.00 EUR		100.00 EUR
2			1	New Discount ...			-3.00 EUR	10.00 %	-3.00 EUR		-3.00 EUR
3			1	Discount from ...		test	-48.50 EUR	10.00 %	-48.50 EUR		-48.50 EUR

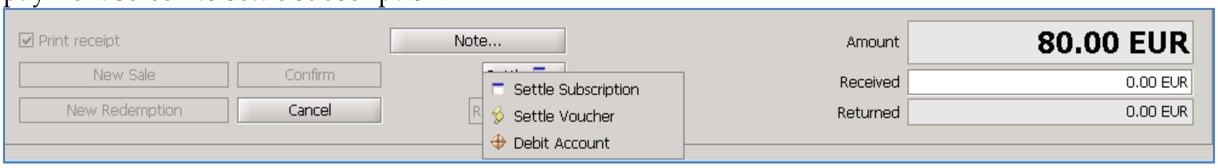
Make sure you select the guest and the right payment method and confirm the sale.
After this, the subscription will appear under the right category in Welldesk – Subscription:

As well as on the guest profile's subscriptions tab.

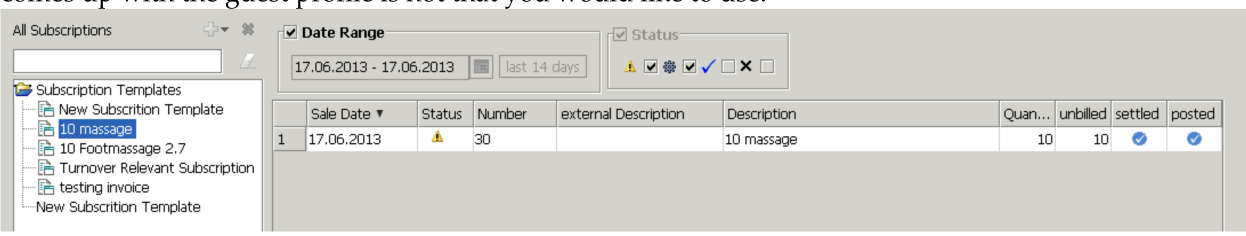


Redeeming subscription

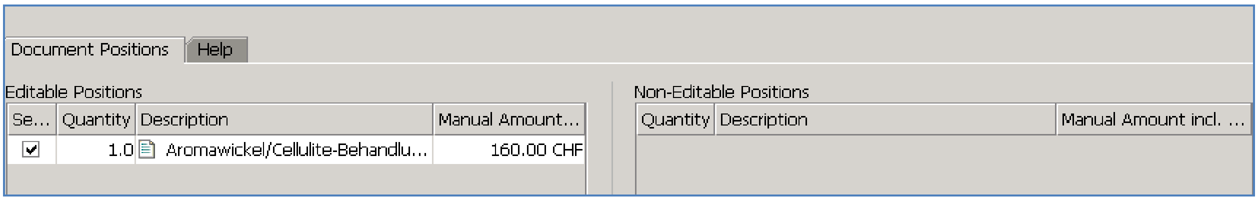
Book the treatment (or select the product) you would like to settle (0.00 price!) with the subscription and instead of selecting the payment method, use the option at the bottom of the payment screen to settle subscription.



Select the subscription that belongs to the person – search by number/category if the one that comes up with the guest profile is not that you would like to use.



You will need to make sure it is a subscription that is redeemable for this specific settlement:



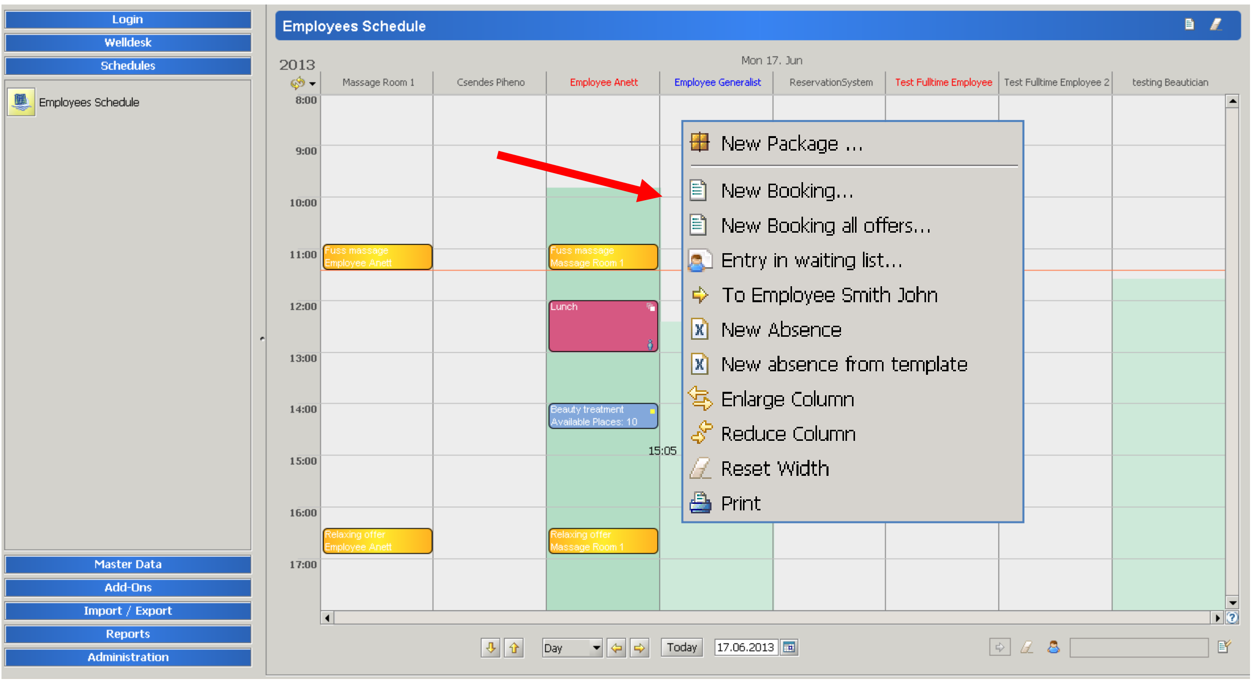
And the subscription will be automatically updated – so you can see how many more are still to be redeemed.

The revenue will be posted at the time of purchasing the subscription and as we are settling 0.00 price treatment later, the revenue is not posted at each booking.

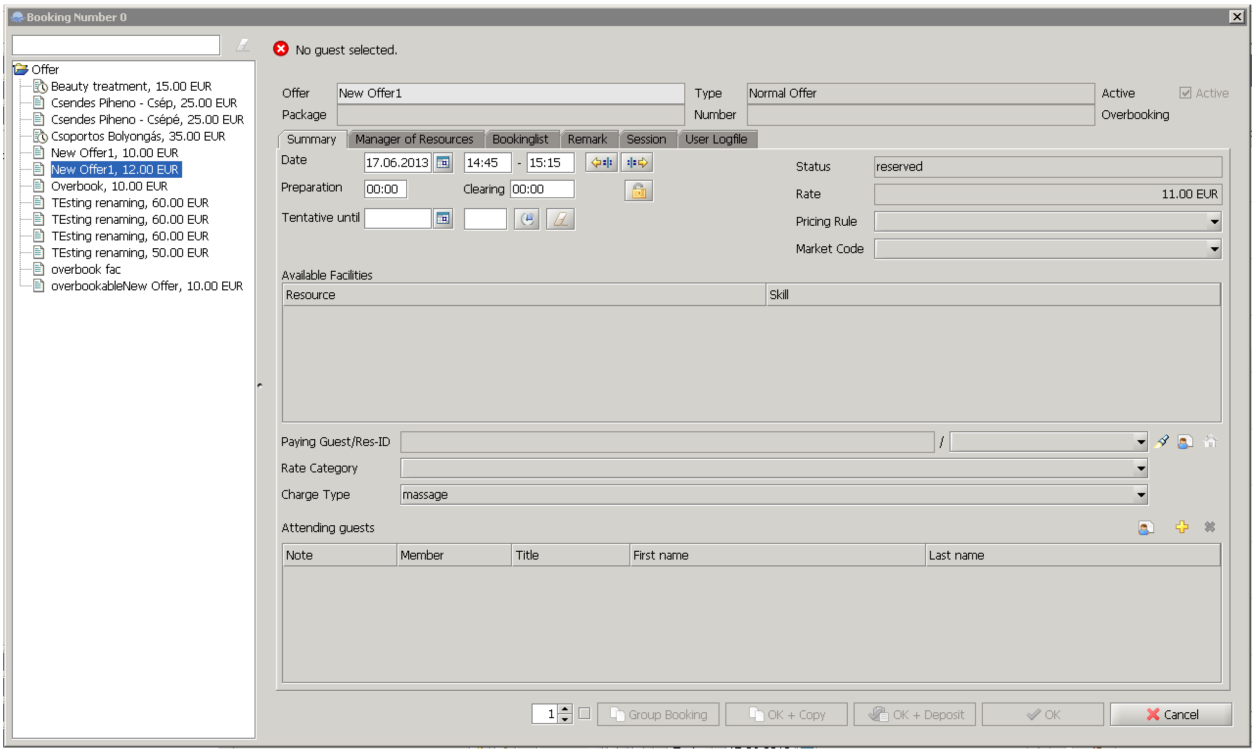
Bookings

Creating and cancelling bookings

The booking screen can be accessed in several ways; this section explains the option when you make a booking from the schedule of the employees.
Go to Schedules – Employees
Right click on any presence displayed.



Select the option new booking, or new booking all offers. Both options take you to the same screen, the difference is that the offers that you can choose from on the new booking will be only the treatments that this employee (whose presence you right clicked) can do, while new booking all offers give you all the treatment to choose from.

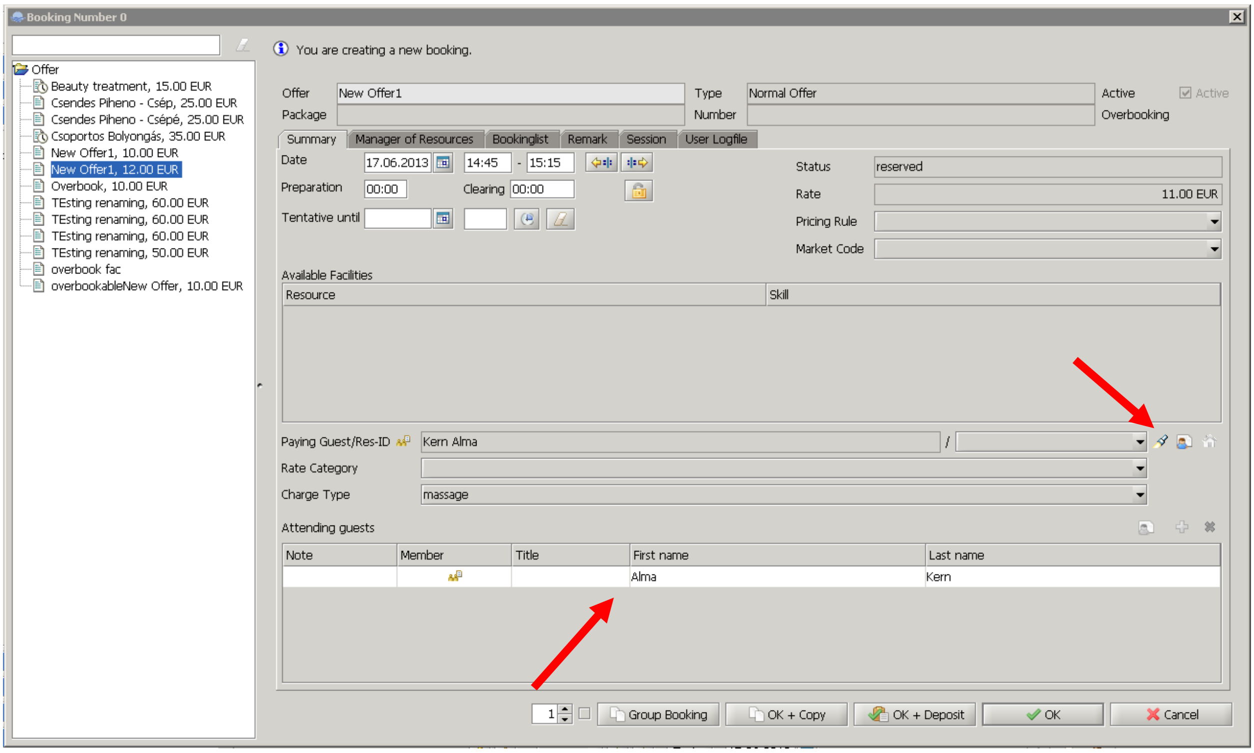


This is the booking window which will look like this no matter where you access it from (explained at the end of this section), the only difference being is that depending on how you get here, the information already given will be different. You can always change all information on this screen.

The top line will always inform you what is the next thing required to be able to save this booking. Start with highlighting the offer in the list on the right that you wish to book – this makes it appear in the offer field on the right.

Select paying guest next: search for the guest profile using the torch – and use the guest search window as explained in the Welldesk – Guests section.

Once you have the guest, it will appear on the booking screen under paying and attending guest.



In case your guest is only paying for this treatment and not attending, then highlight the guest under the attending guest and delete it with the red cross.

Once it is deleted, the yellow cross becomes active and you can add a new guest profile as attending guest.

If the OK button is not active at this point, check the top line for the warning. If it says that there are no available resources, use the arrows next to the time which will show you the closest possibility (before or after) to the desired time.

Now that there is an offer and a guest selected, and the selected time is available, the OK button is active, so you can save the booking, however it is practical to check the booking details to make sure everything is set correctly.

On the summary tab you can see and edit the date and time of the booking. If required, you can change the preparation and clearing times as they are displayed as it is set up on the offer in master data.

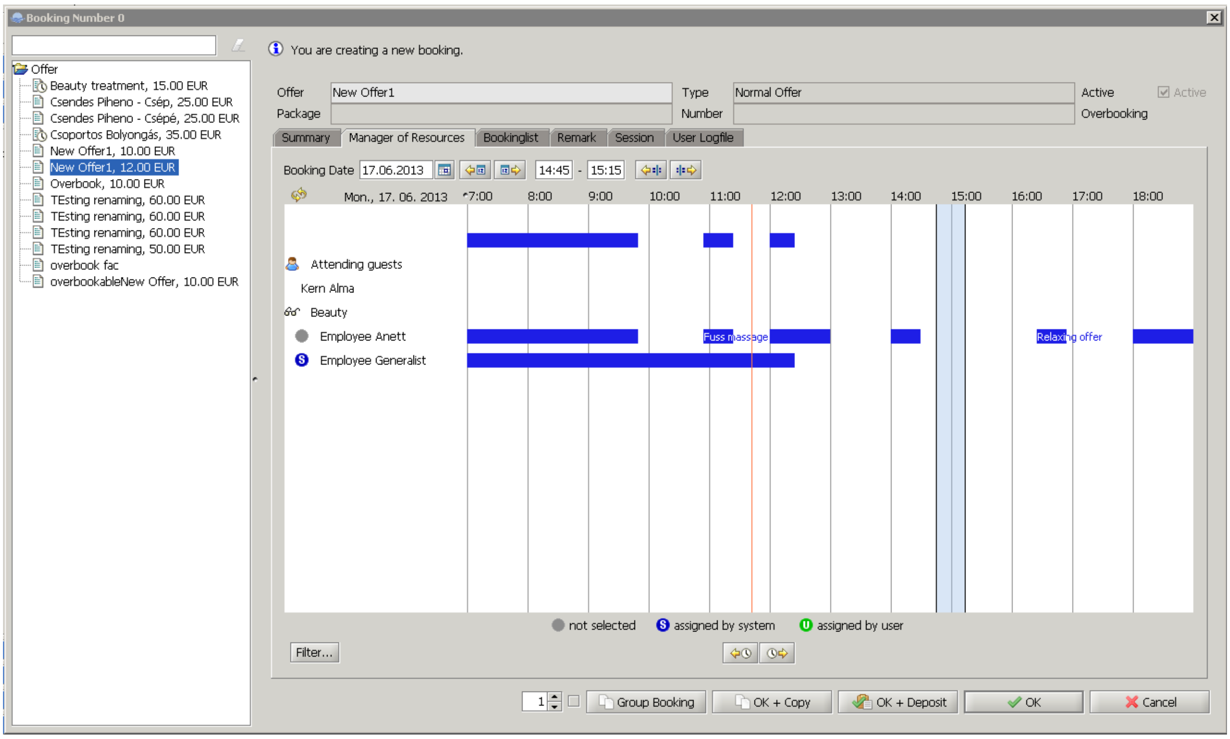
On the **manager of resources** tab you can view and change the resources (treatment room and employee) assigned to this booking by the system.

The **S** in the blue circle shows the resource assigned by the system.

The horizontal blue lines show the times when the resource is not available. (For the guest, it shows when he/she is booked for another treatment already.) Click on the grey circle in front of the name of the resource if you wish to change it from the original. Click on the **S** in the blue circle to make it a U in the green circle which will work as a do not move function. To change it back from this, simply click on it again, and it will become grey again. You cannot save the booking without selected resources.

On the **remarks tab** you can add any comments (with the yellow cross) on this booking. For any comments which you wish to link to the guest and not only this booking, it is recommended to be put on the guest profile, notes tab.

The **user logfile tab** lists all changes made to this booking, showing the users, the changes and the time of each change.



Now that all details are checked, you need to confirm the booking. You have several options:

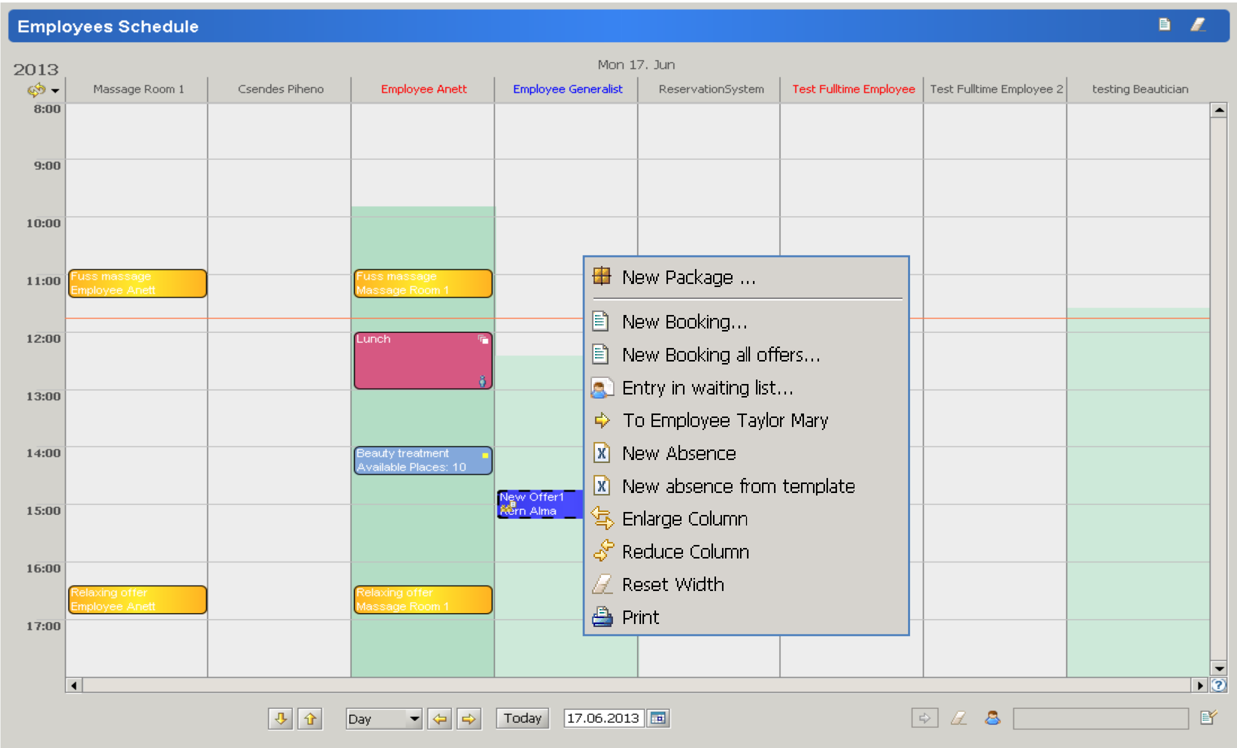
OK – created this booking only.

OK + copy – creates this booking but leaves you with the same screen where you can create the next booking starting with the exact same details: so you need to change the details to create the details. This is practical to use for example when you wish to book the same treatment but with a different guest, and on the next booking you just want to change the guest profile.

OK + deposit – creates this booking and puts the booking on the remembered list which you can access from your main menu in the top line (these shortcuts are explained later in the Other options section).

Group booking – You need to select the number of bookings in addition to this original booking. For example if you want to create 5 bookings, you need to set this number to 4. Set the number, press the group booking button which will show you how many bookings you create, then click ok. This way your first booking will be with the selected paying guest attending, but the rest will have the attending guests as #1, #2, etc. The system will allocate the resources automatically, to make the booking times as close to each other as possible.

Once the booking is created it will appear on the schedules. You may see icons on the bookings which represent different details: house for hotel guests, notes, etc. To view the booking, either double click on the booking, or select edit from the right click menu. This takes you back to the booking screen and you can change any details you need to.



Options of the right click menu on the bookings:

- New booking: same as when you click on the presence
- Edit: takes you to the booking screen as explained above.
- Entry in waiting list: if you have another person waiting for this time slot to become available (explained in detail in the waitlist section)
- Delete: deletes this booking from all records. To be used when you made a mistake or when the cancellation does not draw any charges.

- Confirmation: to print the confirmation on this booking.

- Confirmation remaining bookings: to print confirmation of all upcoming bookings of this guest

- To offer…: takes you to master data – named offer

- To paying guest… : takes you to the profile of the named guest

- Select and keep guest…: this makes the guest appear at the bottom right corner below the schedule. Here you have two options to use this: the yellow arrow in front of this takes you to the schedule of the guest; the notepad on the right shows you the availability screen with this guest and his/her bookings displayed.

- To employee…: takes you to master data – named employee

- Settle bill…: takes you to the cashiering screen where you can make a payment for this treatment.

- Cancel: this cancels the booking, but the charge of it will appear on the history of the guest and unpaid positions. Using this option, you need to give a booking cancellation reason.

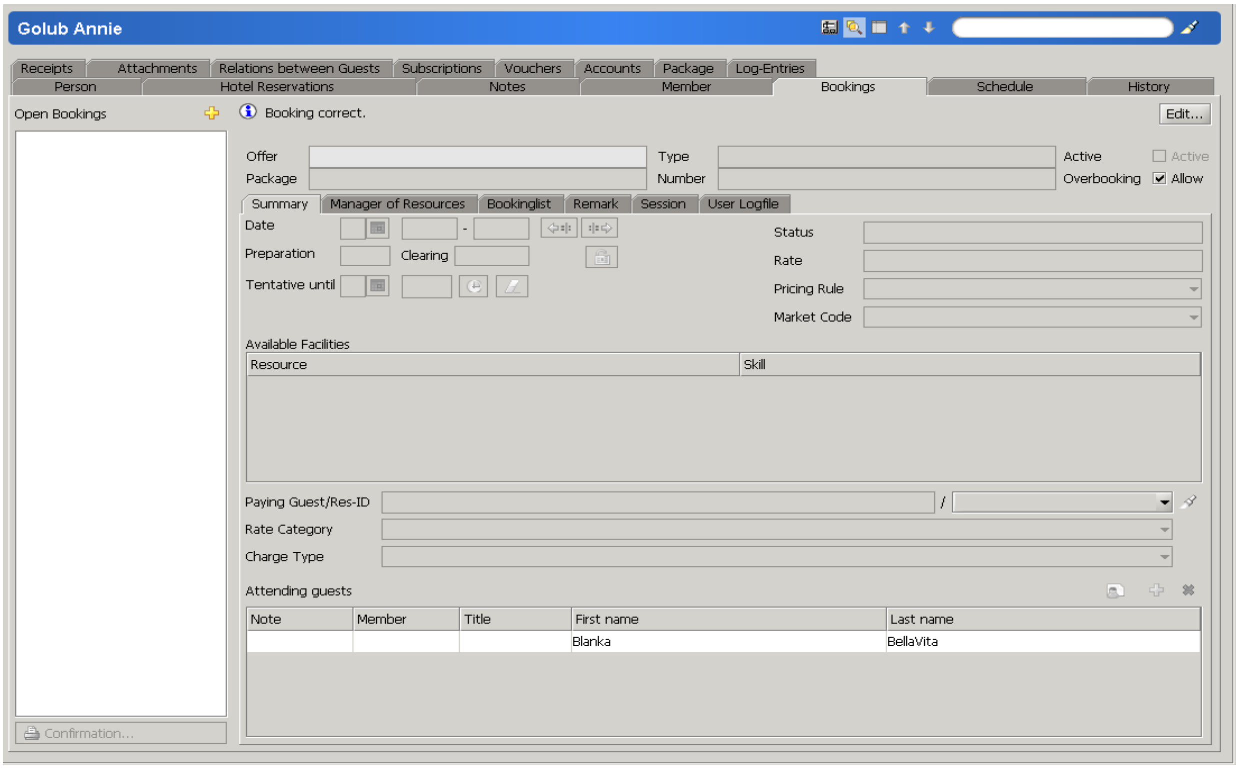
- Checked in: changes the status of the booking to checked in – to show that the guest is consuming the treatment. On a checked in booking this will be Reserved: to put the booking back to reserved status.

- No show: used if the guest did not show up for the booking.

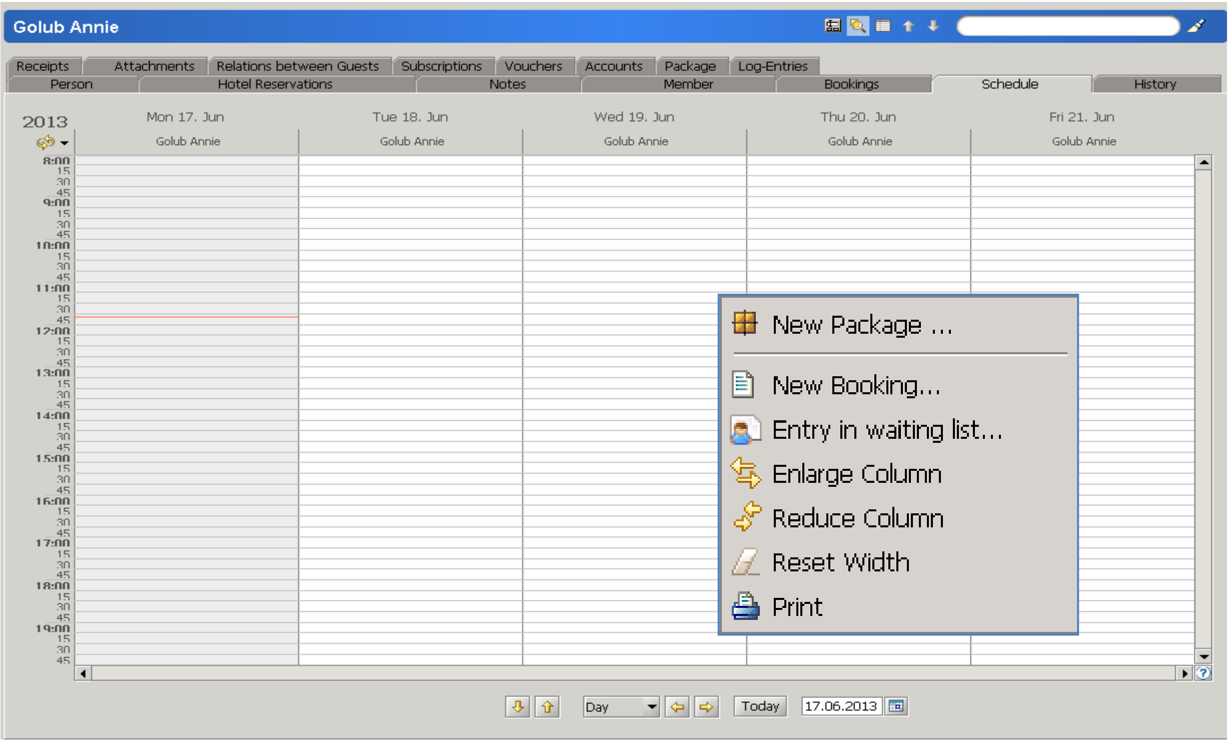
Tips on how to start creating bookings

You can reach the booking screen in several ways, here are two examples.

- Welldesk – guest: select the bookings tab on the guest and add booking with the yellow cross:



- Welldesk – guest: select the schedule tab on the guest and add booking by right clicking on the schedule.



Payment of treatments

To make a payment for a booking, you need to choose the ***settle bill option***. This is available several places:

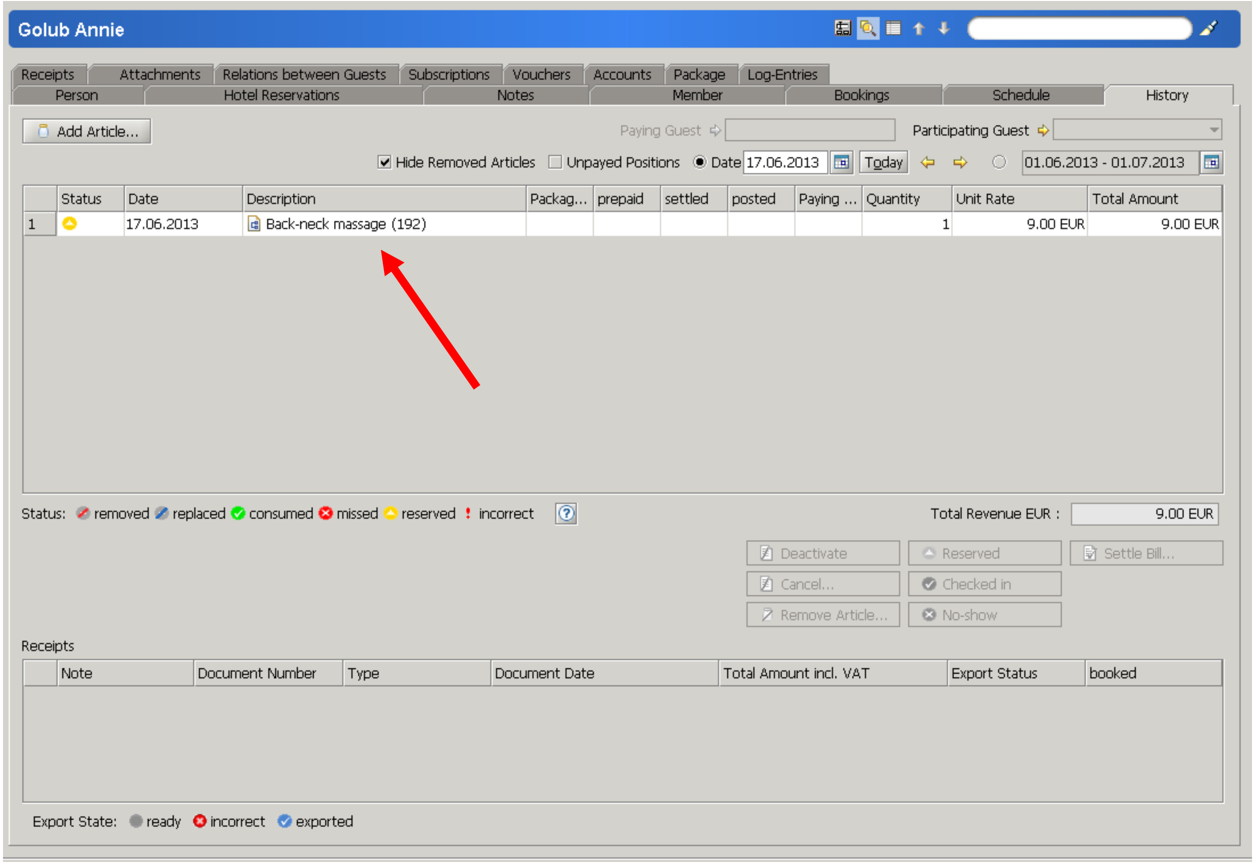
- The right click menu of the booking in the schedule
- The button on the Welldesk – Bookings list when you highlight a booking
- The history tab on the guest profile when highlighting the booking (here you can select more bookings to be paid at once highlighting them with shift/ctrl and click).

Please note that the charge of the booking will always appear on the "bill" and history tab of the paying guest.

To make a payment on another person's name, you need to change the paying guest on the booking.

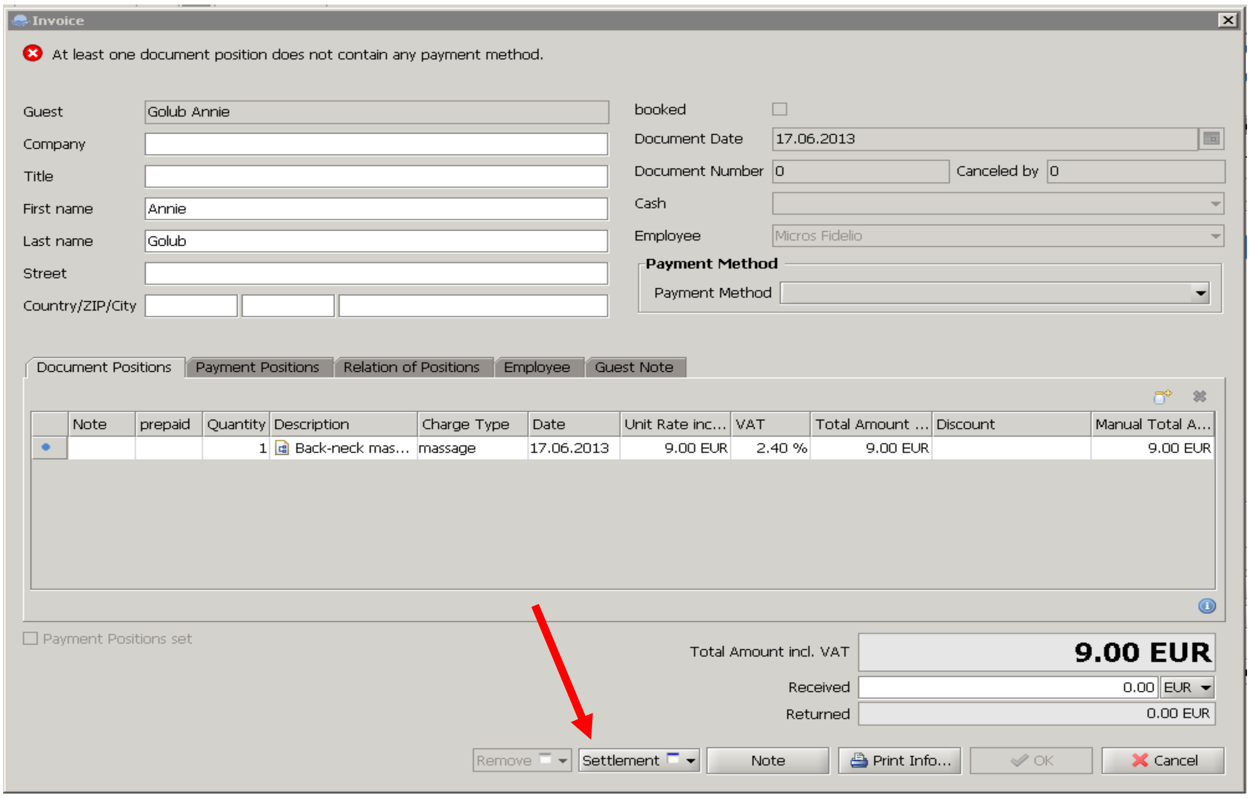
Below is the guide on how to take payment for more bookings at one time from the guest profile - **history tab**.

In case you have a regular guest, the list in the history may be too long to search for the unpaid treatments. This case you can tick the box of unpaid positions, so it will only display the treatments not yet settled. You can also search here by data.

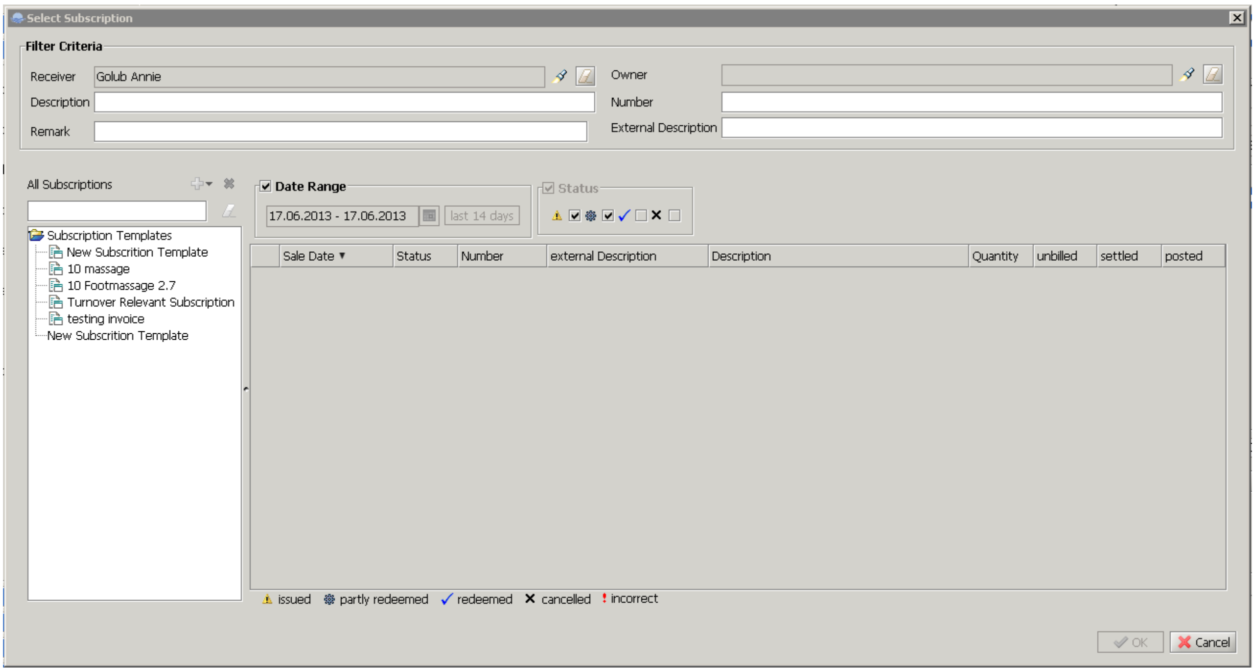


Once the treatments are selected, press Settle Bill… to be transferred to the **Invoice window**.

Here you have the same options as described in the cashiering section – the only difference is that the treatments appear here. You can still add any products.
There is the additional option of print info – to be given to the guest to be viewed and signed. Once the payment method is selected, the OK becomes active to close the invoice.



If the payment method is a subscription, instead of selecting payment method, select Redeem Subscription.



This window displays all subscriptions purchased by the paying guest. If the subscription was sold to someone else (even Passer By) you can search for it by the number of the subscription.

It will show how many treatments they still have on the subscription – just confirm the redemption with OK once the right one is highlighted.

At the end of the payment you are presented with the option of printing the invoice.

Invoice correction / cancellation

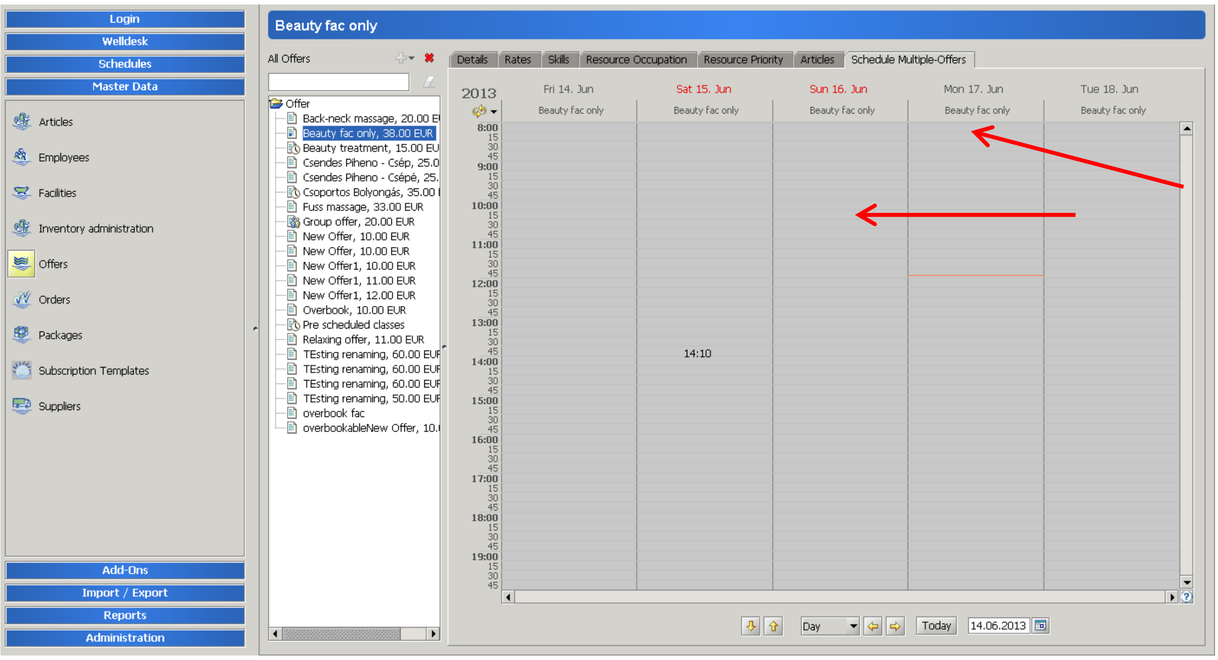
On the history tab of the guest profile, highlight the offer/article which is on the invoice you would like to edit.
The receipt will show on the bottom in the receipts list. Right click on it, and choose from the menu to cancel or correct bill.

Cancellation should only be used if you just need to revert the postings, this way when you click on it, you get the exact same window as the payment, but instead of invoice, in will say credit on the top of the window. You click OK, give a reason for the credit, and it is done.

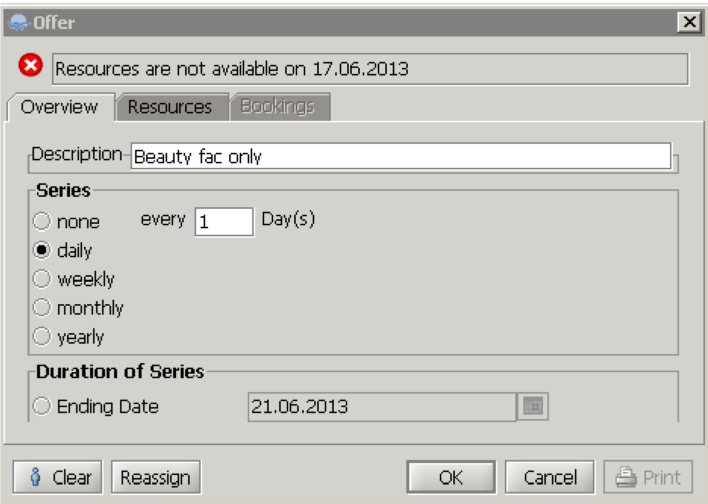
If you need to correct the invoice, you are again taken to the payment window, change what you need to, and submit with OK. This way the system automatically does the revert of your invoice (which you can do on the cancellation separately) and generates a new invoice with the corrected details.

Multi-offer bookings

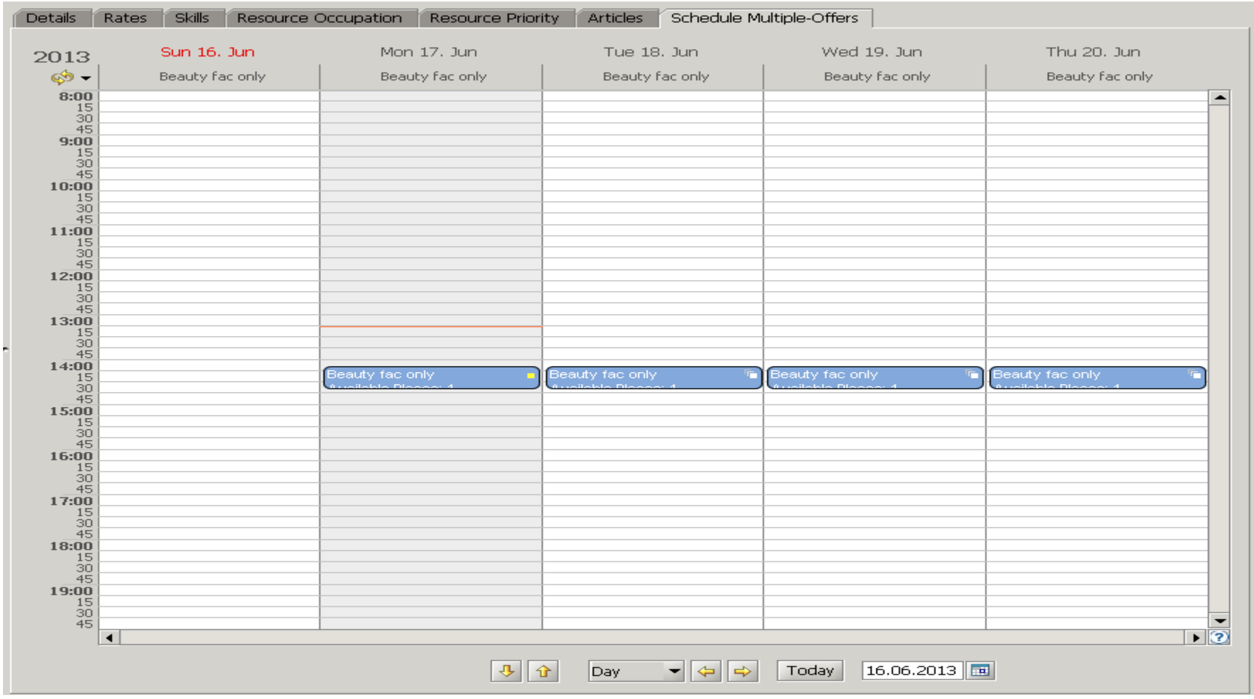
Search for the multi-offer booking (for example aerobics class) in *Master Data – Offers*. Click on the Schedule Multi-Offers Tab. Here right-click on the schedule and select New date for offer. A new window will pop up.



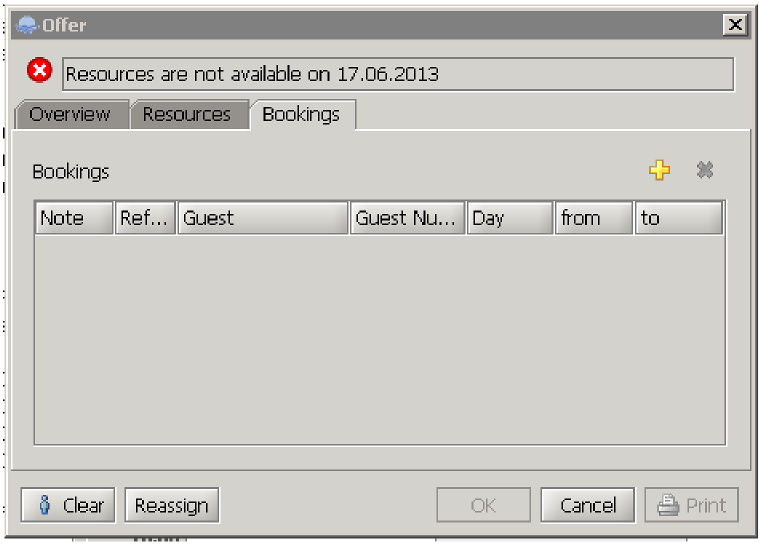
In this window you can set the desired starting date and times for the multi-offer, then set the series (periodicity such as daily, weekly, monthly, yearly). At Duration of series you can also set and end date of the series either by setting a desired date or to end after a number of appointments. Then click OK.



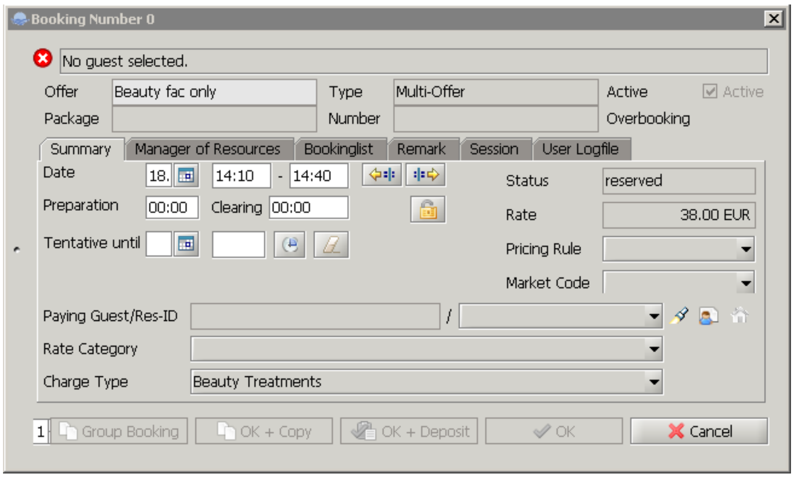
Your multi-offer will appear in the schedule as follows:



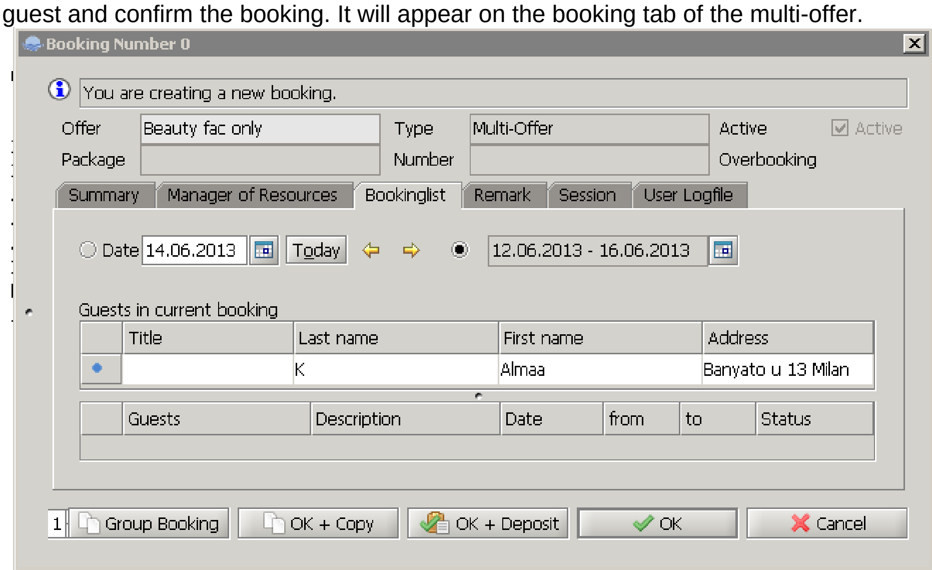
To make bookings for these classes, find them on your main schedule. It displays the available places as well. Double click on the booking and use the Bookings tab.



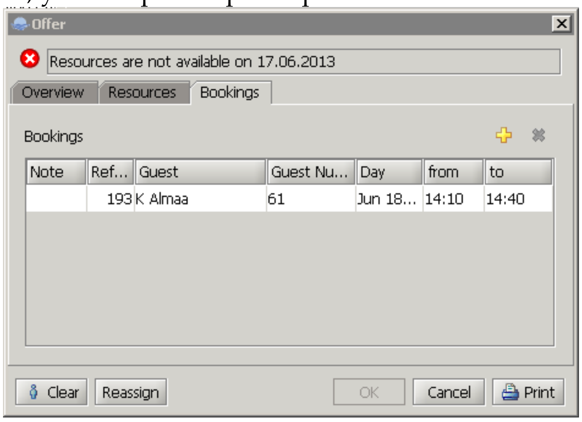
Add new participant by the yellow +. This takes you to a modified booking window.



Select the guest and confirm the booking. It will appear on the booking tab of the multi-offer.

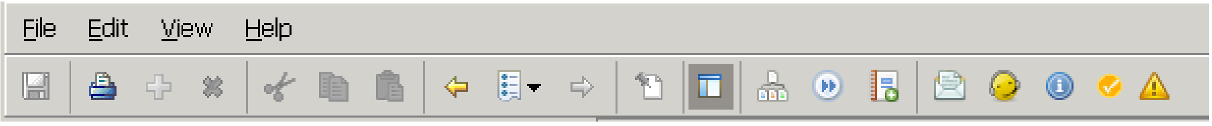


Using the print option here, you can print a participant list.

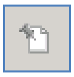


2 Other options

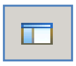
There are several shortcuts on the top menu of Bellavita. Hold your cursor on the top of any icon and it will show you where it transfers you to.



The yellow arrows take you to the previous or next instance which is the previous window you were working on. The list between the two arrows lists the last few windows.



The note with the pin is active if you used the OK + deposit on any booking to make it remembered booking. Clicking the icon will open that booking.

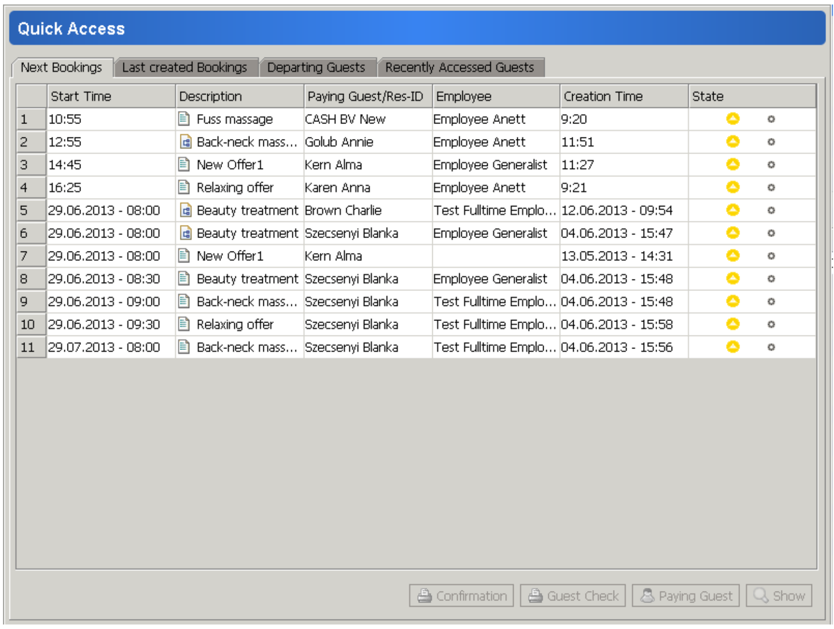


The icon with the blue square gives you an option if you wish to see the main menu of Bellavita on the left or not.

The next icon shows you the quick keys that can be used and when clicking on the description you will be transferred to the same window.

Packages to acknowledge in Welldesk/ Packages

The fast forward button is for quick access, it displays the below window.



	Start Time	Description	Paying Guest/Res-ID	Employee	Creation Time	State
1	10:55	Fuss massage	CASH BV New	Employee Anett	9:20	
2	12:55	Back-neck mass...	Golub Annie	Employee Anett	11:51	
3	14:45	New Offer1	Kern Alma	Employee Generalist	11:27	
4	16:25	Relaxing offer	Karen Anna	Employee Anett	9:21	
5	29.06.2013 - 08:00	Beauty treatment	Brown Charlie	Test Fulltime Emplo...	12.06.2013 - 09:54	
6	29.06.2013 - 08:00	Beauty treatment	Szecsenyi Blanka	Employee Generalist	04.06.2013 - 15:47	
7	29.06.2013 - 08:00	New Offer1	Kern Alma		13.05.2013 - 14:31	
8	29.06.2013 - 08:30	Beauty treatment	Szecsenyi Blanka	Employee Generalist	04.06.2013 - 15:48	
9	29.06.2013 - 09:00	Back-neck mass...	Szecsenyi Blanka	Test Fulltime Emplo...	04.06.2013 - 15:48	
10	29.06.2013 - 09:30	Relaxing offer	Szecsenyi Blanka	Test Fulltime Emplo...	04.06.2013 - 15:58	
11	29.07.2013 - 08:00	Back-neck mass...	Szecsenyi Blanka	Test Fulltime Emplo...	04.06.2013 - 15:56	

Here you can see all the records, bookings and guest profiles that you accessed since the last log in. It also gives you an option to print confirmation, guest check or simply view the booking or guest.

The smiley with the headset if your help line. Hold you cursor above it to see the number that you need to call if you have any problems with the system. If our colleagues need access to you computer, you need to click this icon and follow the instructions.

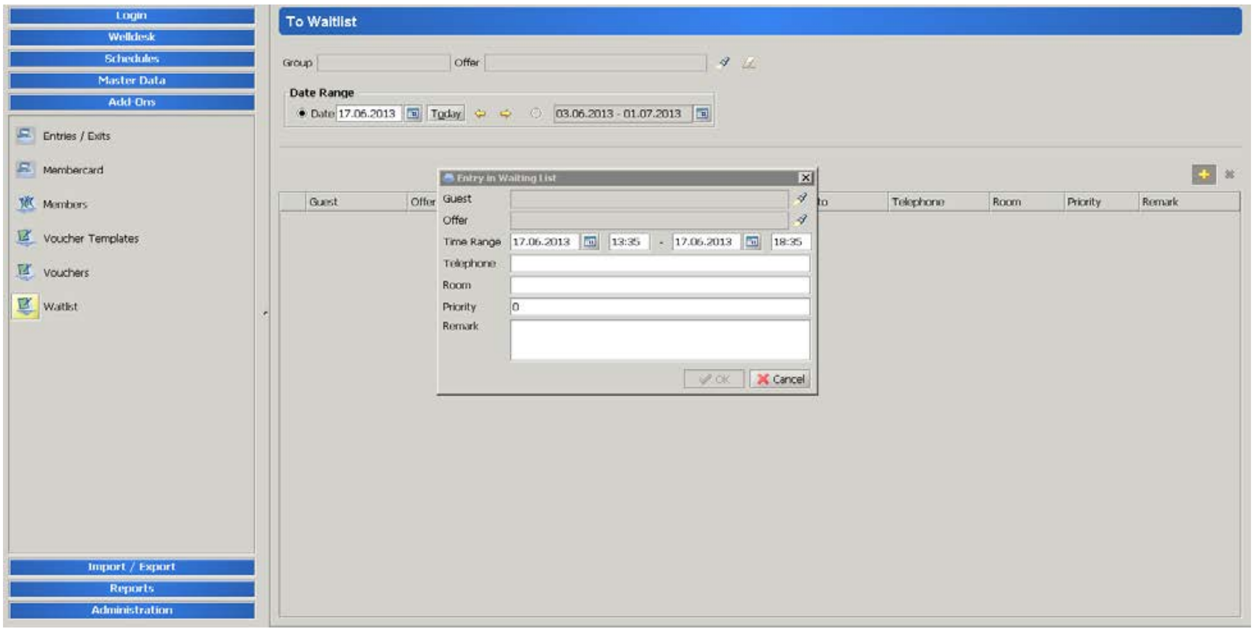
The information icon shows information about the software.

The yellow triangle appears if there are intraday booking changes: takes you to Welldesk – Bookings – Intraday booking changes.

Waitlist

Enter a booking in waitlist

There are two ways to enter any information on the waitlist. One is through Add-on – Waitlist.



Add new booking on the waitlist by the yellow cross. Enter the details:

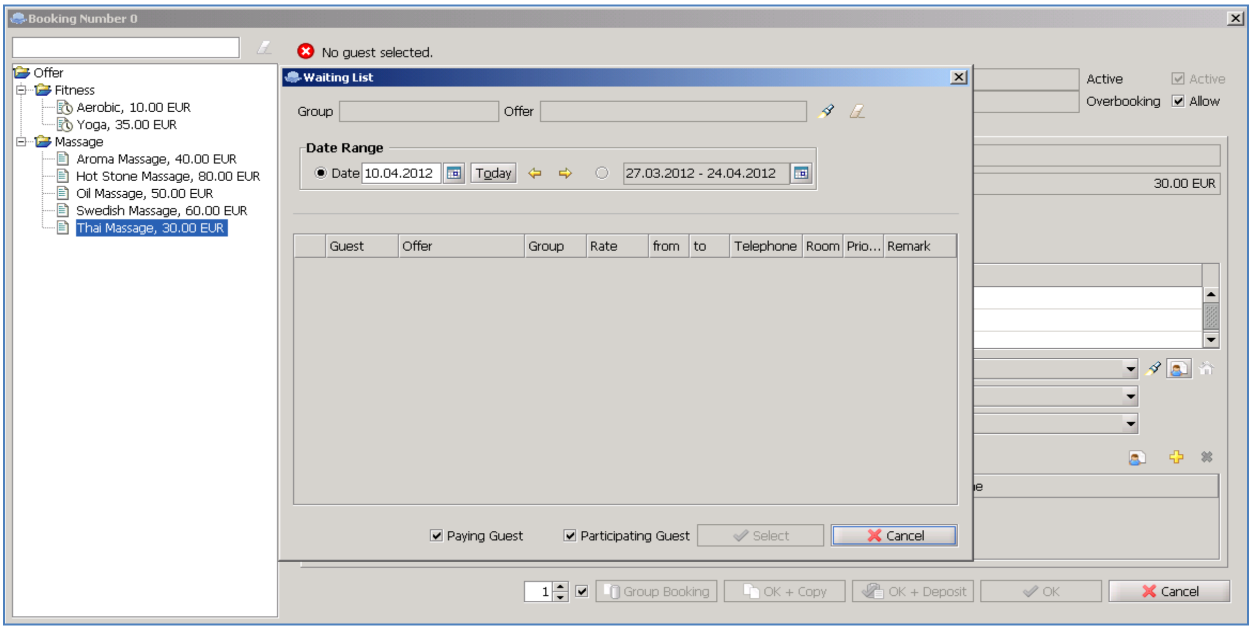
- Guest: search for guest profile or create new
- Offer: search for the treatment they would like to have
- Time range: the time of the desired booking.
- Telephone: for contact details.
- Room: if hotel guest.
- Priority: if any of the guests on the waitlist are prioritized.
- Remark: such as please call back to confirm, etc.

Save it with OK.

The other option is to right click on the schedule on a presence (or booking on the presence) and select entry in waitlist. It will transfer you to the same window to add the details of this record.

To make booking for someone who is on the waitlist

Start creating a booking as usual, but when selecting the guest, do not use the torch to search, but the waitlist icon right next to it.



Pick the person listed on the waitlist. Confirm with OK and the guest will be automatically removed from the waitlist.