Oracle® Hospitality BellaVita
Configuration Guide for Master Data
Release 2.7

March 2016

ORACLE®

Contents

Preface

This document has been created to provide guidance on the configuration of Master Data in BellaVita. It includes all details on Facilities, Employees, Treatments/Offers, Packages and Inventory Management. Please read the full document before starting the configuration of BellaVita.

Audience

This guide is intended for system administrators and support familiar with BellaVita.

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 Master Data

Master data contains all information which may not be changed daily.

The skills are meant to differentiate between resources, which means that it can be set up as the treatments or treatment category. Each treatment (offer) will require mandatory resources, such as massage room (facility skill) and masseur (employee skill).

If a certain skill is assigned to an employee, any other employee who has this skill will be able to complete the same treatments linked with this skill.

For example if your massage rooms are identical, then massage room is a correct skill to be set up, it is not necessary to detail them. If you have masseurs who can do different sets of treatments, it is correct to set the skills by treatments. If all therapist who can do massage – can do all types of massage, one skill may also be correct. But plan for the future: will all your future employees have all massage skills?

2   Facilities

Facilities can be found in the *Master Data > Facility.*

You can create facilities in groups and subgroups. Click on the group you would like to add the new facility or group to, and press the yellow cross to create it.

Double click or press F2 on the *new group* and give it a new name → *Press Enter* to save it.

For **regrouping,** right click on the group or employee and it gives you the option to do so.

To **delete** an employee, highlight it first, then click on the red X next to the yellow + sign, and verify. It is not possible to delete when history is linked to the item – in that case: use the Administration/Activation.
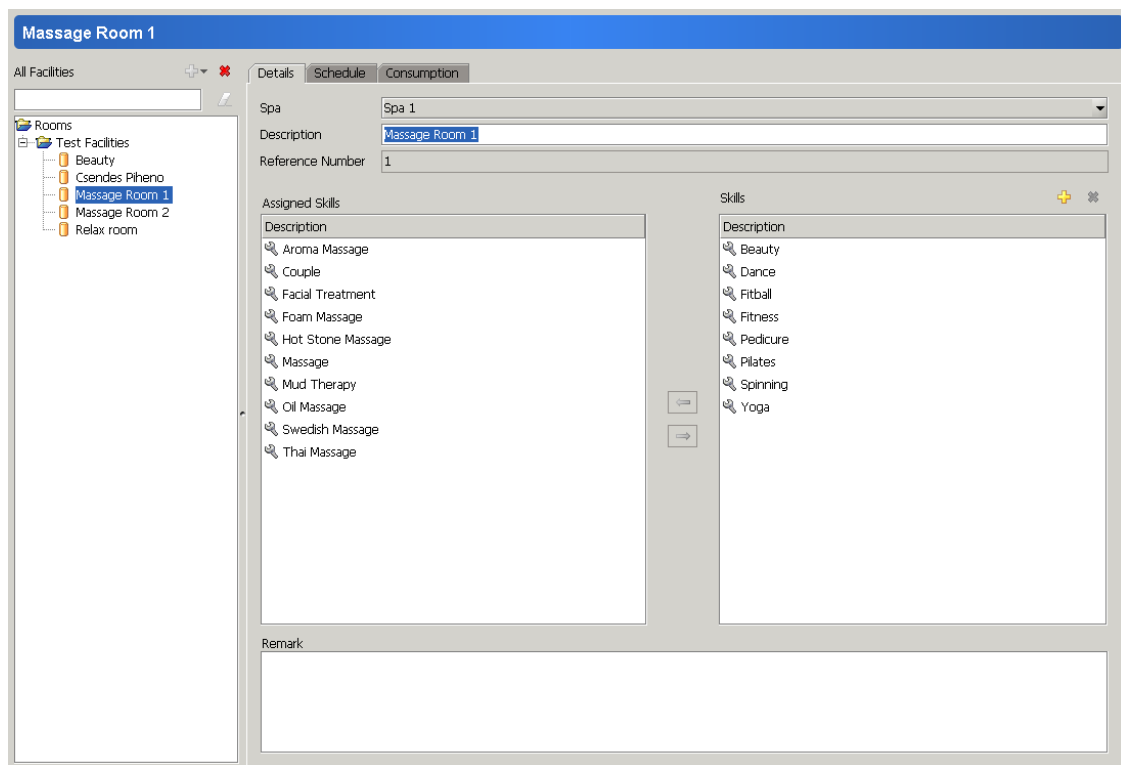
Details

Add a description/name to the facility on the **details tab.** *For multispa: select the spa where the facility is located.*

Skills

On the **skills tab** you can create and assign skills to the facilities.

Use the yellow plus to add new skill and rename it by double clicking (or pressing 'F2' on it while highlighted). Edit, then press enter to save.

To assign the skills to this facility, select the skill on the right column and press the arrow pointing to the left. To unassign a skill, select it on the left, and press the arrow pointing to the right.
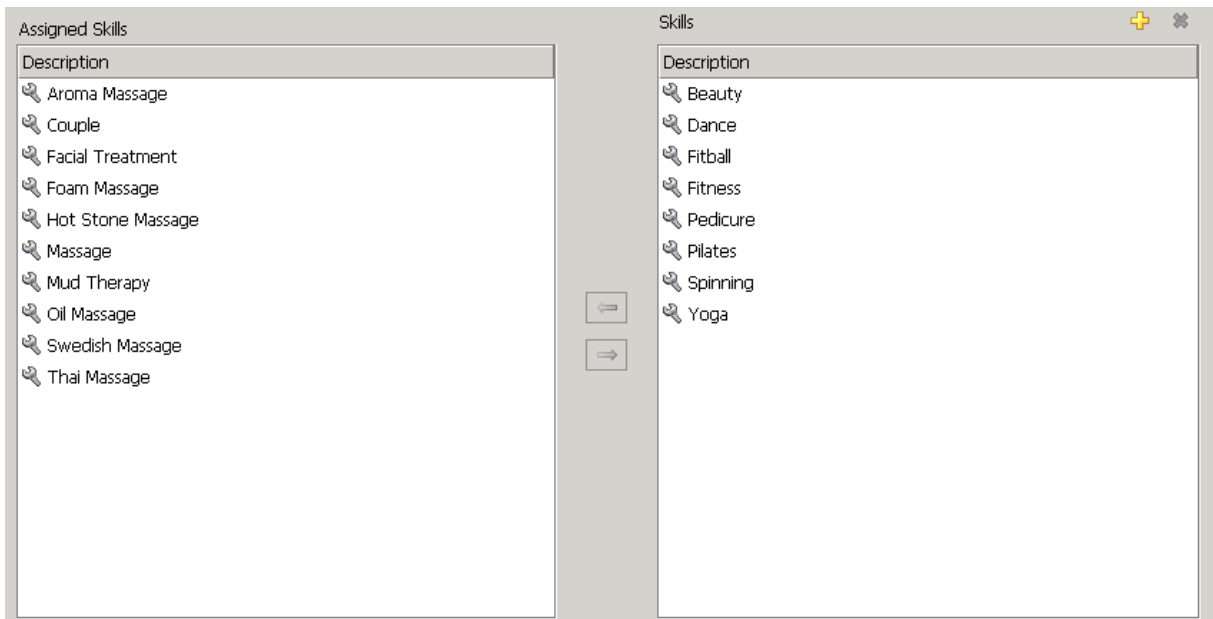
You can add an internal remark in the bottom of this tab, such as detailed description of the room, location, etc.

Schedule

The **schedules tab** shows the bookings which are allocated in this room. You can add absences to make the facility unavailable: for maintenance for example. Creation of absences is described below for employees.
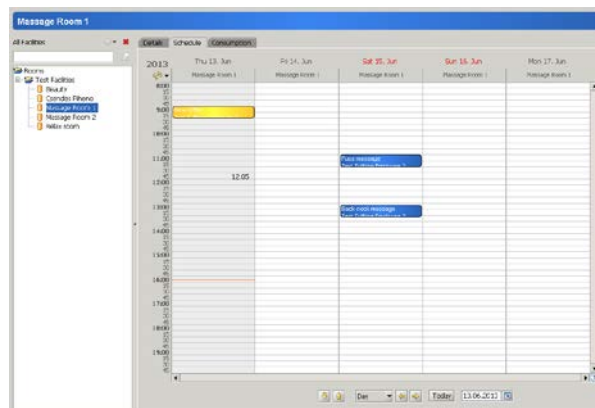
3   Employees

Employees can be found in the *Master Data > Employees.*
You can create employees in groups and subgroups. Click on the group you would like to add the new employee or group to and press the yellow cross to create it.
Double click or press F2 on the *new group* and give it a new name → *Press Enter* to save it. For **regrouping,** right click on the group or employee and it gives you the option to do so.
To **delete** an employee, highlight it first, then click on the red X next to the yellow + sign, and verify. It is not possible to delete when history is linked to the item – in that case: use the Administration/Activation.

Details

Once you created a new employee, start to fill out the information on the **details tab.** All personal information can be added here. Most fields are self-explanatory, the others are listed below:

Short name: Practical for screens and print outs when there is no space for the full name to appear. It is recommended for spas with many employees.
Same Gender: In case any of your employees can only treat guests the same gender as theirs.
In turnover selection: When this field is ticked, the employee appears on the commission reports; showing all product sales that are linked to them and the treatments they have completed.
Color: The color the bookings scheduled for this employee can appear on schedules in certain views.
Spa: For multispa, you can set the default spa for this employee.This way presences will have this spa by default and only needs to be changed when the employee is rescheduled to other spa.

Skills

On the **skills tab** you can create new skills and assign the already existing ones to the employees.

Use the yellow plus to add new skill and rename it by double clicking (or pressing 'F2' on it while highlighted). Edit, then press enter to save.

To assign the skills to this employee: select the skill on the right column and press the arrow pointing to the left. To unassign a skill, select it on the left, and press the arrow pointing to the right.

Presence

Presences are the working hours/shifts of the employees. You always need present emplyee to have availability for bookings.
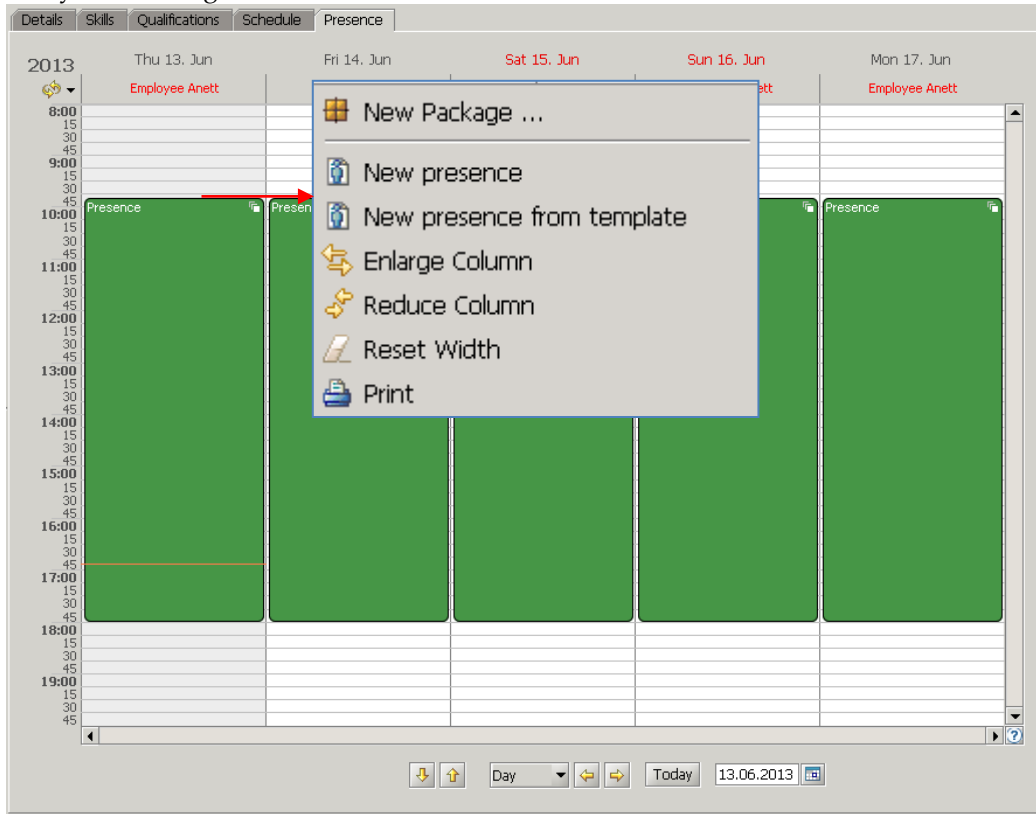
Right click on the schedule of presceces to add presence. You can choose from the options to add presence using template or not. (Templates set up in administration are useful if the shifts are mainly fixed hours. For example: Early Shift, Middle Shift, Late Shift, etc., this way you don't need to enter the same details all the time.)

Enter or change the date, "from" and "to" times.

Select spa and area where the person is present in this time for work. Linking the presence to a spa only means availability in the whole spa. Selecting an area in this spa limits the availability of employee to this area only.

You can select the series for the repetition of this presence in the series option. Set up the duration end date or "end after" the number of repetitions.

The repetitions can be used in daily, weekly, monthly and yearly periodicity.

Examples:

Series daily, every 1 day, ends after 5 appointment = the employee is scheduled for 5 consecutive days from the date set above.

Series weekly, every 3 weeks, ends after 2 appointments = employee is scheduled for the date set above and once more 2 weeks later.
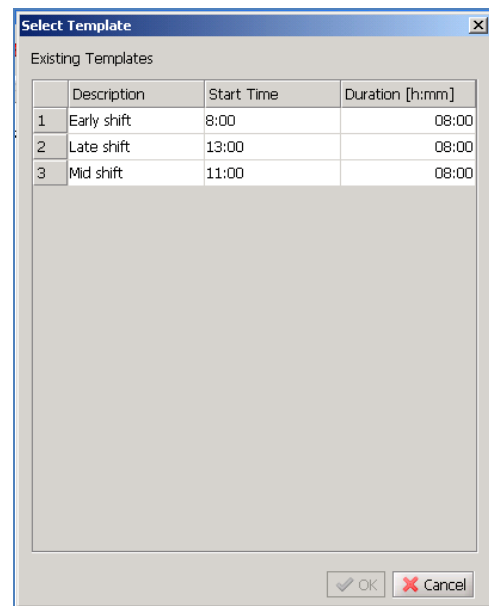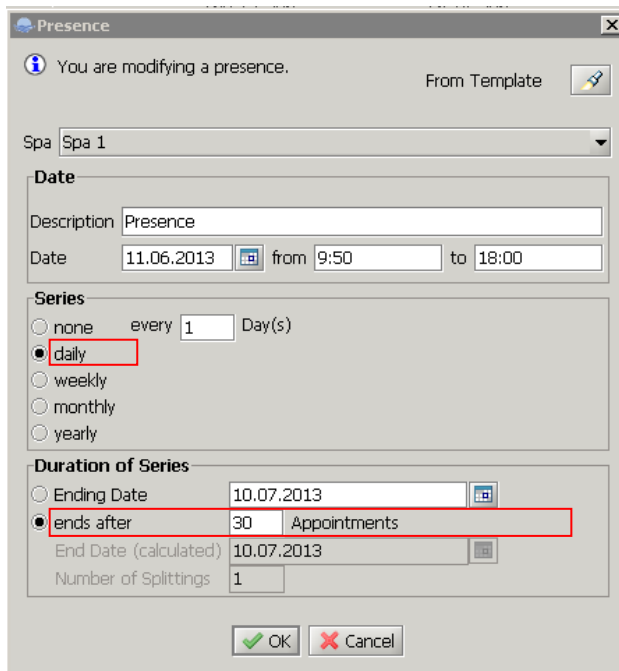
Once confirmed, all the presences are displayed. If you would like to change the whole series all together, just use the right click menu and edit series.
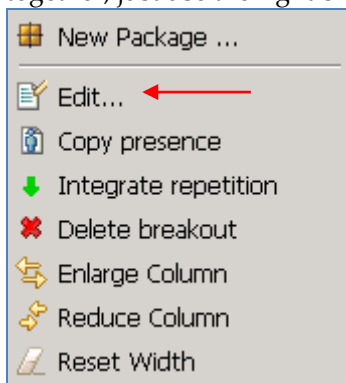
Use drag and drop to move one presence – this means that it will automatically be separated from the series and will be edited on its own. (The white squares at the top right corner of the presence show that it is part of a series, yellow means it is independent.)

Pressing the shift button and holding your cursor on the beginning or end of one shift, the cursor changes to a vertical arrow, which means that you can click and drag to extend or shorten the selected shift.

Use the 'Copy Presence' option to copy the selected shift(s) then select the future date or different employee's presence schedule where you would like to paste the same shift(s). This speeds up the process, and by editing the inserted presences, makes the presence creation much easier. Please note that when you past a presence, the start time will be matching the point you clicked on, and not the original start time.

From the Presences Tab you can print out the selected employees shifts for the certain time range by right clicking to the white area in the calendar, and selecting the 'Print' option.

The presences will be displayed on the general schedule. You can only edit and delete a presence there, not create. Presence can only be deleted, if there are no bookings or absences on it.

Absence

Absences are set on schedules to mark if the present employee is scheduled for other activities than booking (meeting, break, reception cover, etc). To set up an absence, first you need to enter the presences of the selected employee.
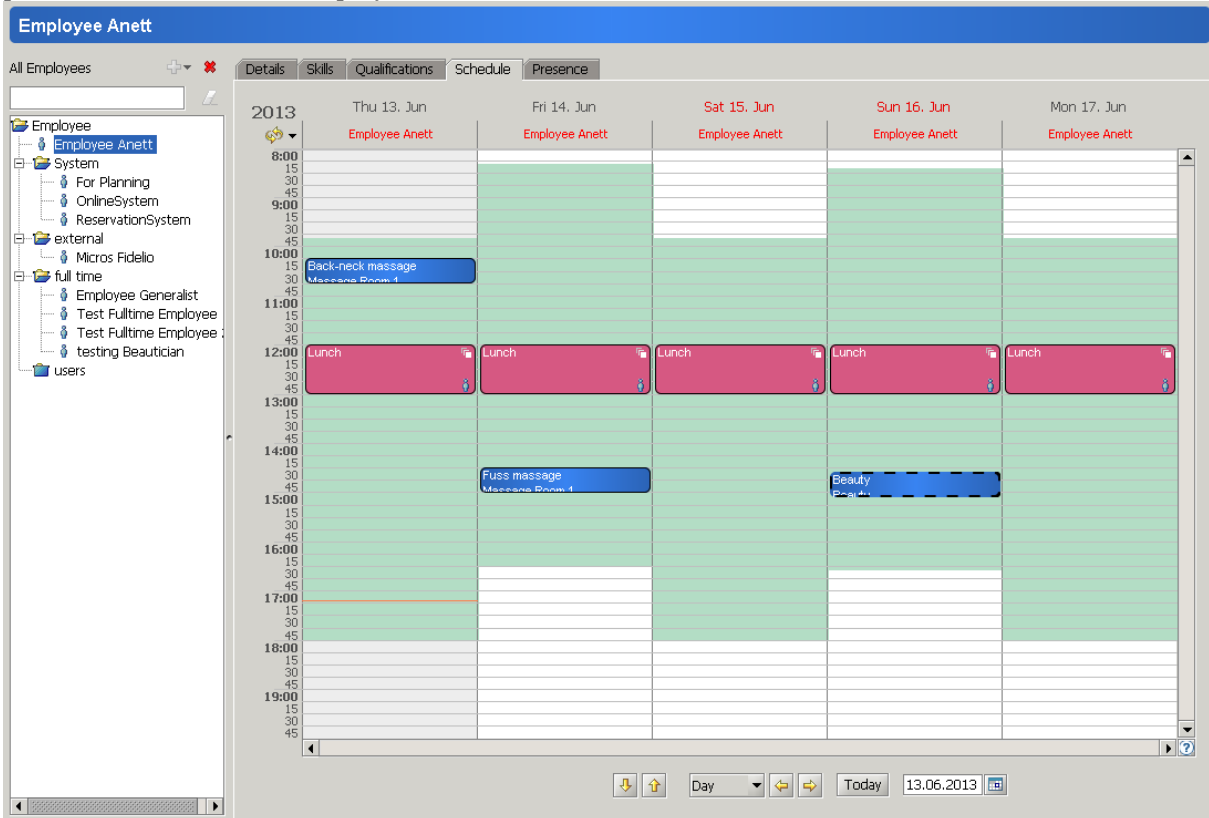
Right click on a displayed presence and select new absence from template or not. Set up the details as it is explained for presences with 2 other options:

Not in house is used for example in case of an absence set up for an external meeting.

Overbookable can be used in case you want to arrange the breaks flexible to the occupancy of the spa. This means that when making a booking, the system takes the overbookable absence as a bookable time of the employee – which helps you to complete the booking creation and you are able to change the absence later.
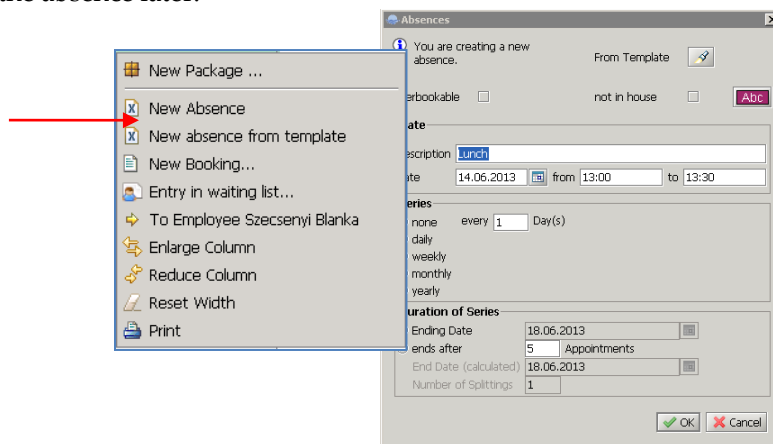
Changing absences can be done the same way as the case of presences, but on the schedules tab (and other schedules where the employee is displayed) instead of the presences tab.

It is practical to add the absences on the main daily schedule – so you can see the occupancy of the day and compare the schedule of all your employees. You can also use the option to copy absence, and paste it for another time or on other employees' presence.

Employees
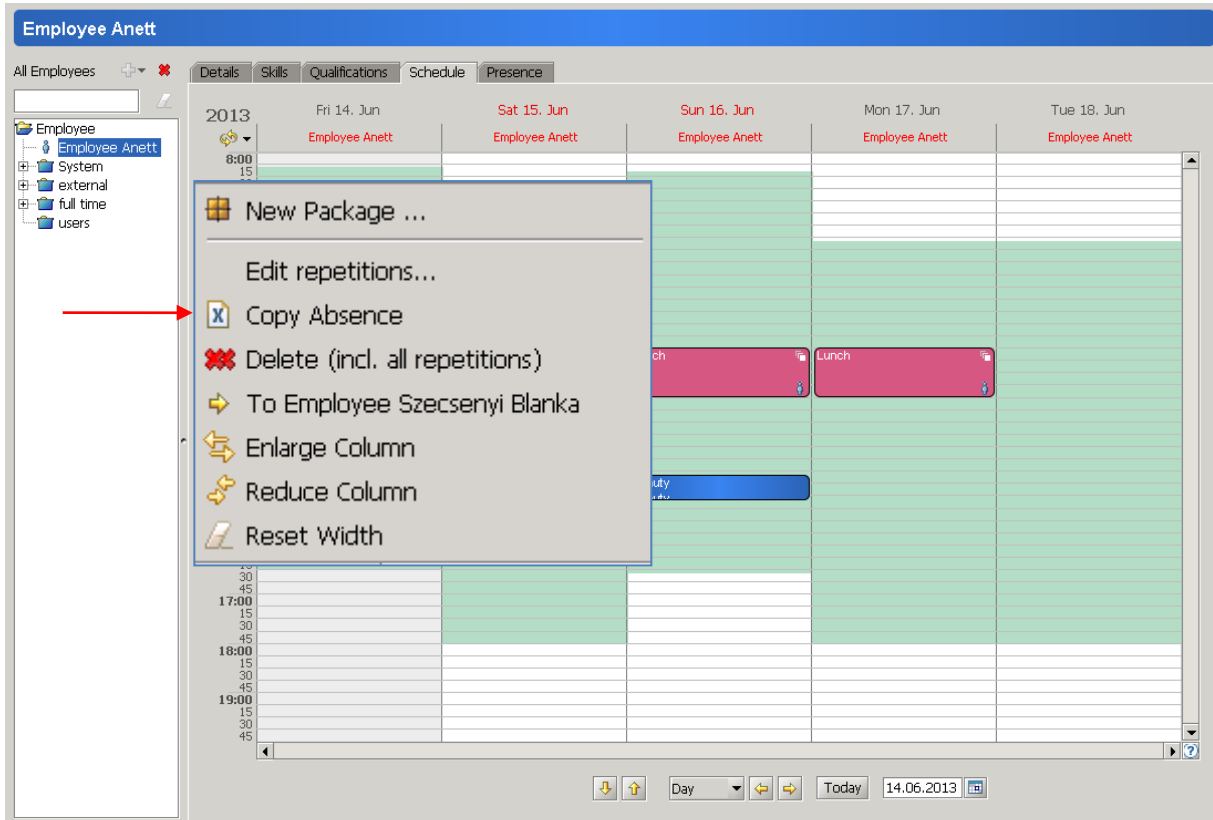
4   Treatments – Offers

Offers can be found in the *Master Data > Offers.*

You can create offers in groups and subgroups. Click on the group you would like to add the new offer or group to and press the yellow cross to create it.

Double click or press F2 on the *new group* and give it a new name → *Press Enter* to save it. For **regrouping,** right click on the group or offer and it gives you the option to do so.

To **delete** an offer, highlight it first, then click on the red X next to the yellow + sign, and verify. It is not possible to delete when history is linked to the item – in that case: use the Administration/Activation.

Details

On the **details tab**, give the description (name) and the duration of the treatment.

You can set up preparation and clearing time as well if required. These times are scheduled right before and after the booking and only occupy the resources, not the guest. In case the guest needs rest time, you can set it up, but please note that the rest time only occupies the guest, but no resources.

In the remark section you can add any text you would like as internal note.

Package Offer only: Make this tickbox active, if the selected offer can ONLY be sold as a part of a package, and not separately.

Guest is overbookable: It is mandatory to tick this box if the guest can attend on another treatment paralell with the selected one. For example this field is active on treatments like pedicure, manicure etc.

	(To book a 2ⁿᵈ treatment at the same time for the same guest, you also have to tick the 'Overbookable' box on the guest profile as well)
Max Participants:	You can setup the maximum number of guest that can attend to the selected treatment. The offer has to be either a Group Offer or a Multi Offer to setup the number of participants.
Group Offer	Group offer is one booking with more participants. On the booking one paying guest and the maximum number of participants can be set as attending guest. Only one invoice will be created upon settlement for the paying guest.
Multi Offer:	Ideal for sport classes. The resources can be scheduled before any guest books the appointment. All participating guest will pay individually.

Rates

The **rates tab**.

This tab contains information on the price of the offer.

Standard rate: the standard gross total of price to be paid for booking this offer. Where VAT is excluded from the total price (like Israel) the net price is displayed here.

VAT: select from the VAT categories set up in Administration.

Rate category: Assign rate categories applicable for this offer from the right to the left side. Enter their sequence and the rate to be used. More details can be found in „Price Management"

In multi spa environment different standard rates per spa can also be set up.

Charge type

Charge types tab (previously on rates tab)
The assigned charge type determines where the revenue of this offer is administered. Select from the available charge types and assign at least one. (Reason for multiple assigned charge types: If a Back-neck massage is accounted as wellness massage revenue when used for wellness, but medical massage if it was advised by doctor.) Select one (more often used) in standard charge type.
Please note, no bookings can be settled if charge type is missing!

As mentioned before, the link between the treatments and the resources is the skill. On the **skills tab**, you need to select at least two skills (one for an employee, another for a facility) that is required to complete the treatment.
There are certain occassions when you need other than 1 employee and 1 room for a treatments:
- when 2 employees required for a treatment (4 hands massage) you need 2 employee skills, such as: massage and massage 2nd person.
- when no facility is necessary (personal training in the gym) then do not assign facility skill.

The skills indicated by glasses are the skills of employees; the screwdrivers are skills of the facilities. The reason why you cannot add a new skill here is that you should not create an offer which you are unable to perform in the lack of skilled resources. Assign the required skills as explained earlier.

Resource occupation

On this tab you can set up the occupancy of the resources. If this offer is booked – can your resources be assigned to anything else for the same time? If not, then go on the next tab. If yes, how many parallel treatments can be assigned to one resource in the same time?

Example: one employee can handle 5 parallel mud treatments – the nb of parallel offers should be increased to 5.
If a guest can have a manicure and pedicure at the same time, the two treatments have to be in the same room, so the room needs to accommodate two parallel treatments. (In this case the guest will need to be overbookable as well, which will be set later, explained on the guest profile.)

Select the resource on the right and move it to the left by highlighting and using the arrows. Here you can enter the number of parallel activities that one employee can do or what one treatment room can accommodate at one time.
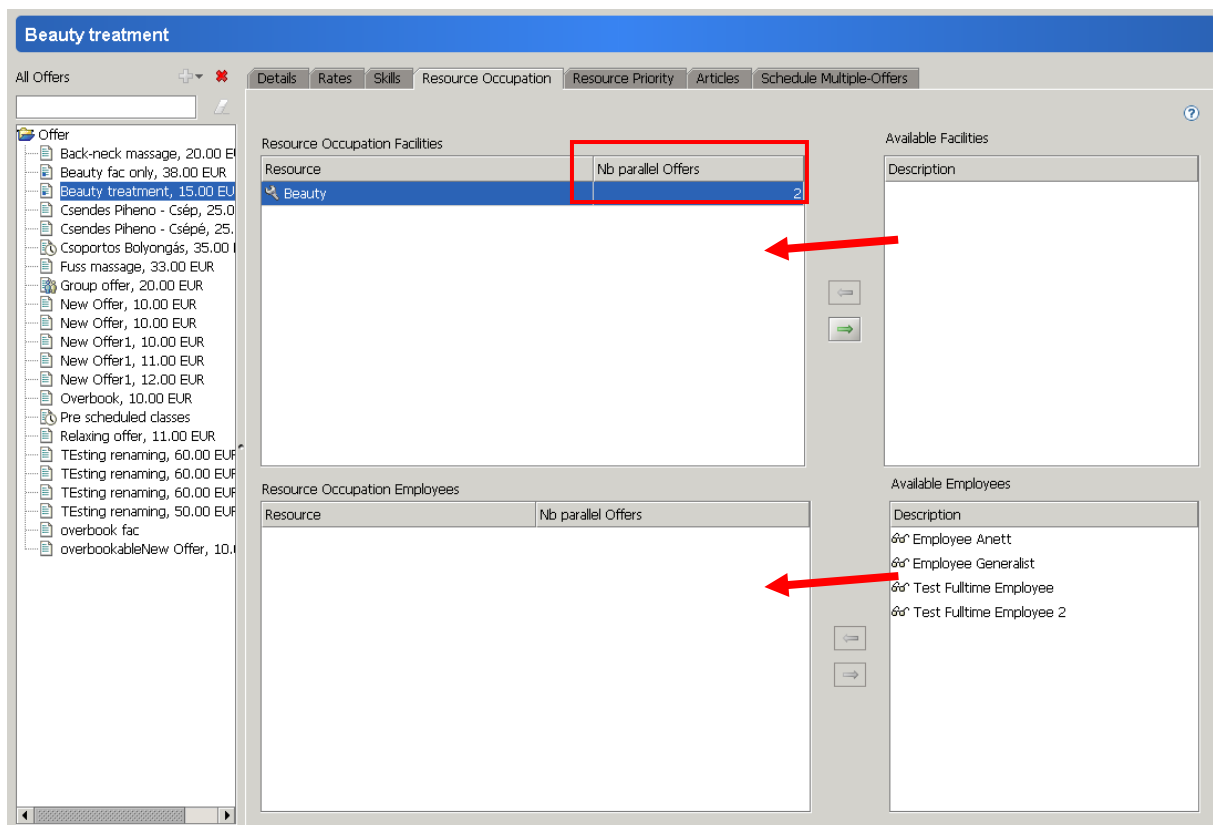
If you would like to set up a priority list for the resources to be selected by the system in a certain order, you can arrange this in the **Resource priority tab**.
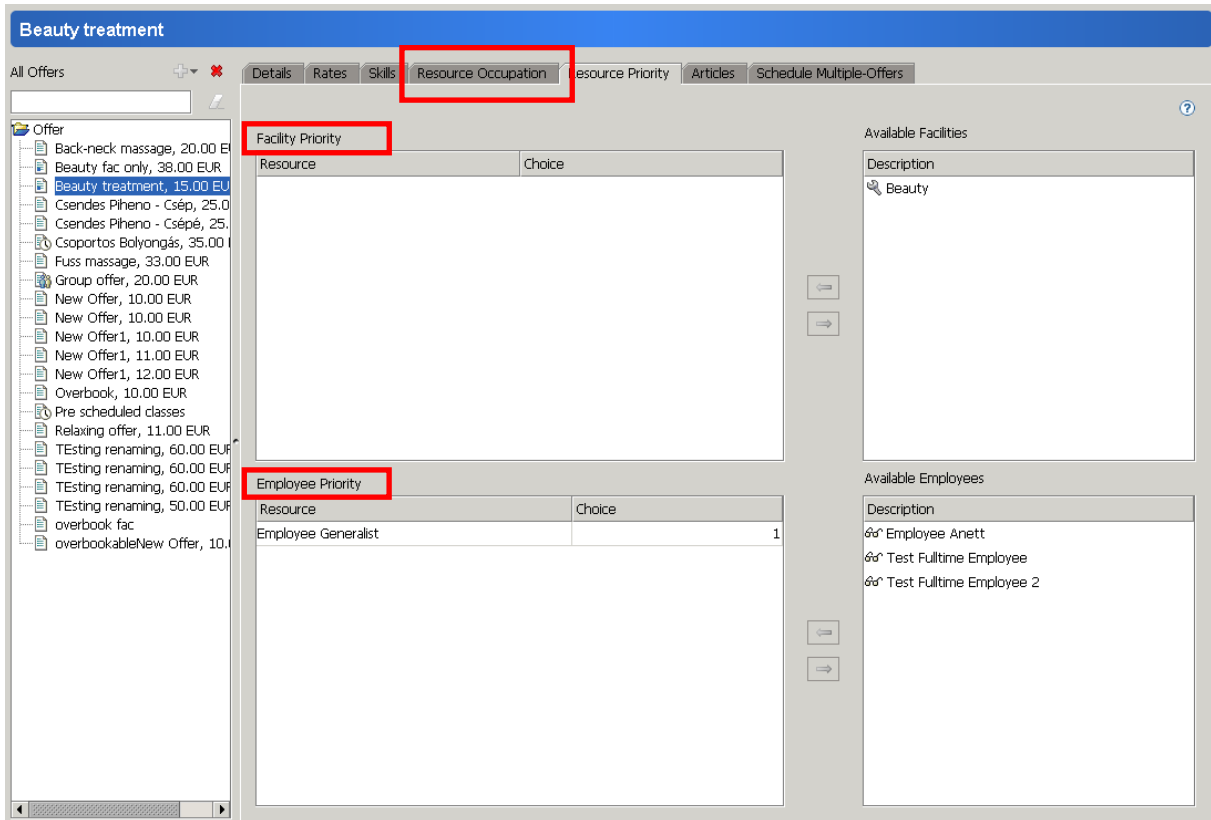
You can select one resource that should be used before others if it is available, or set up the complete list with the required order. Do this by highlighting the resource on the right, and move it to the left with the arrow, then enter a number in the choice column. If the prioritized resource is not available, the system assigns the next one in line and informs you at the time of booking.

Example: Practical to set up all your fulltime employees with choice 1 and the part time and contractors left on the right side. This way if possible, it will be your full time employees assigned to bookings before looking for a contractor.

Articles

To keep track of the products used in a treatment, you can create a recipe on the **articles tab**.
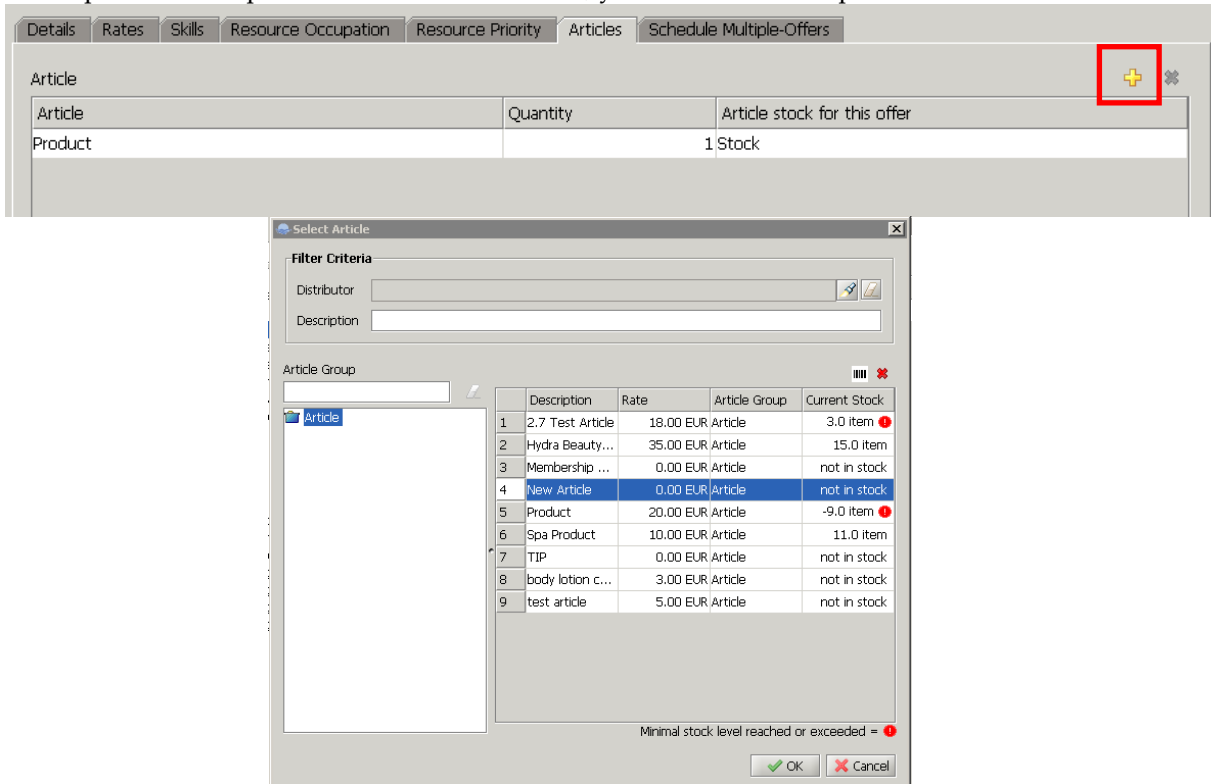
Add the articles (products) by the yellow cross. Set the amount required, the stock to be taken from. **This can be only done once the inventory details are set up!**

Multi Offer

If your offer is not a treatment but a class that more people attend, the offer is handled as a Multi offer. This has to be selected on the details tab of the offer, indicating the maximum number of participants. For these offers, the next tab becomes active.
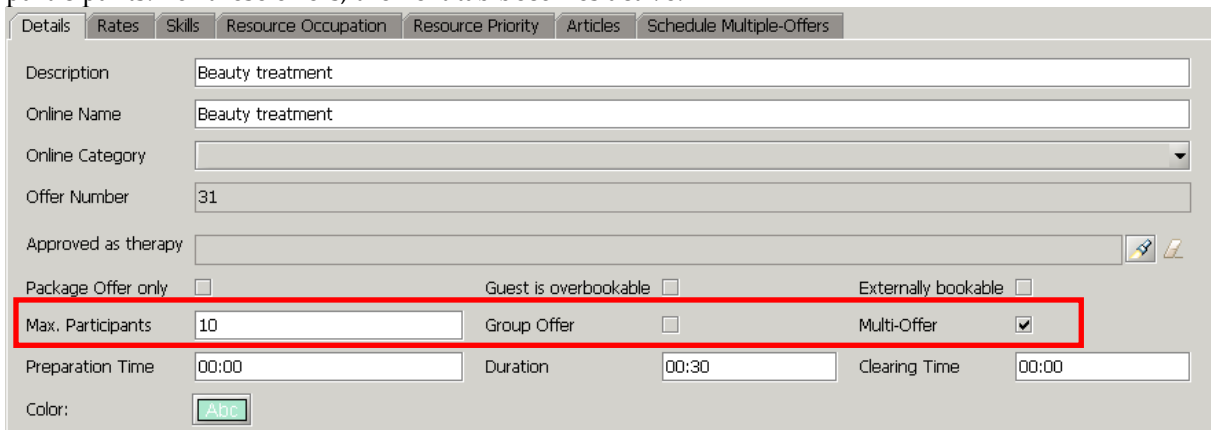
The schedule of the classes is edited on the **Schedule multi offer tab**. With the right click menu on the schedule you can enter a new date for the offer which is basically making a booking for this multi offer – reserving the time and resources.
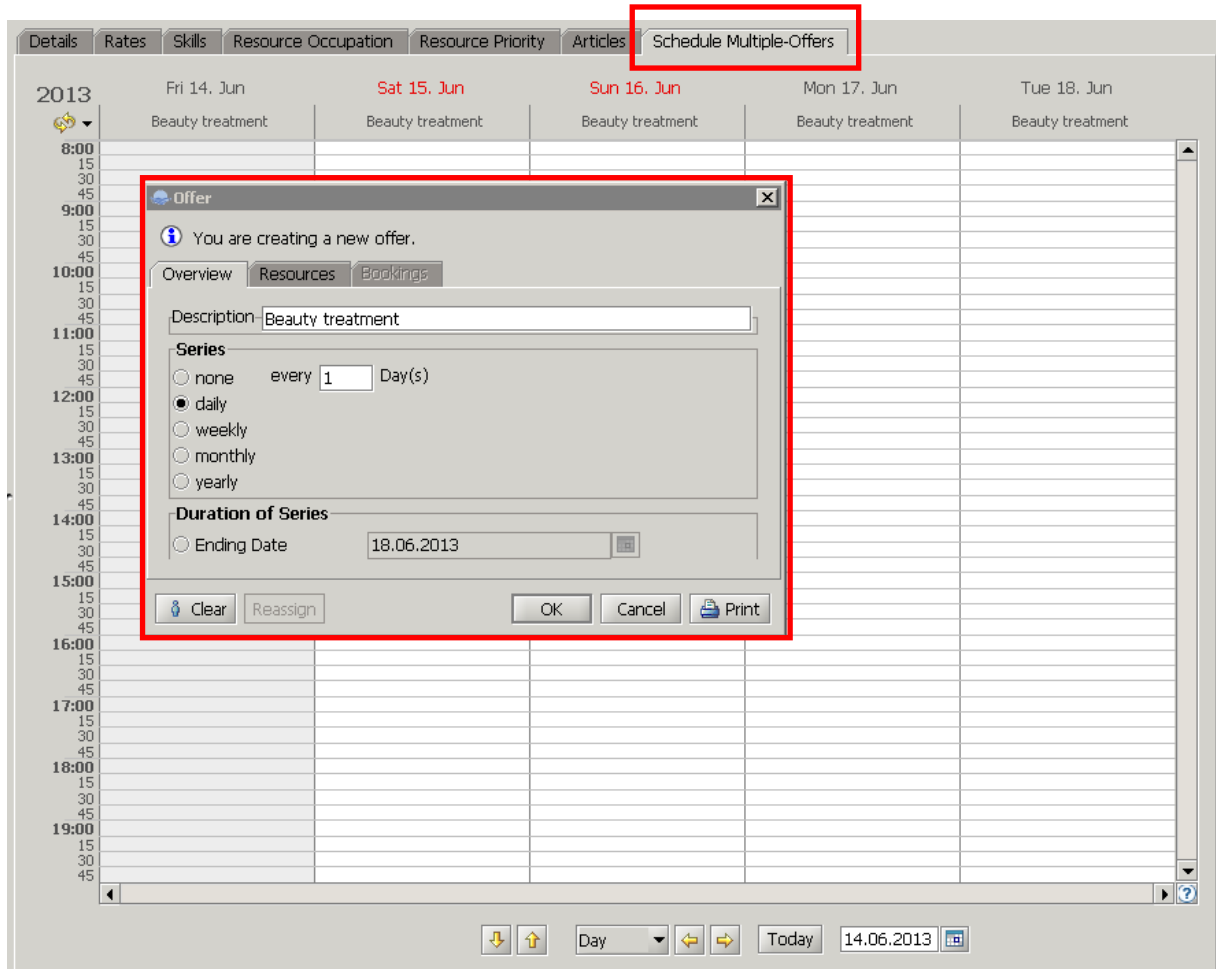
When creating a new date, you need to add the required details: time and series details (like it was explained at the presences and absences).

When making a booking for a guest in this class, you just need to double click on the booking in the daily schedule, select the bookings tab and add the booking as it will be explained later in the bookings section.

5 Packages

Packages can be found in the *Master Data > Packages*

You can create packages in groups and subgroups. Click on the group you would like to add the new package or group to, and press the yellow cross to create it.
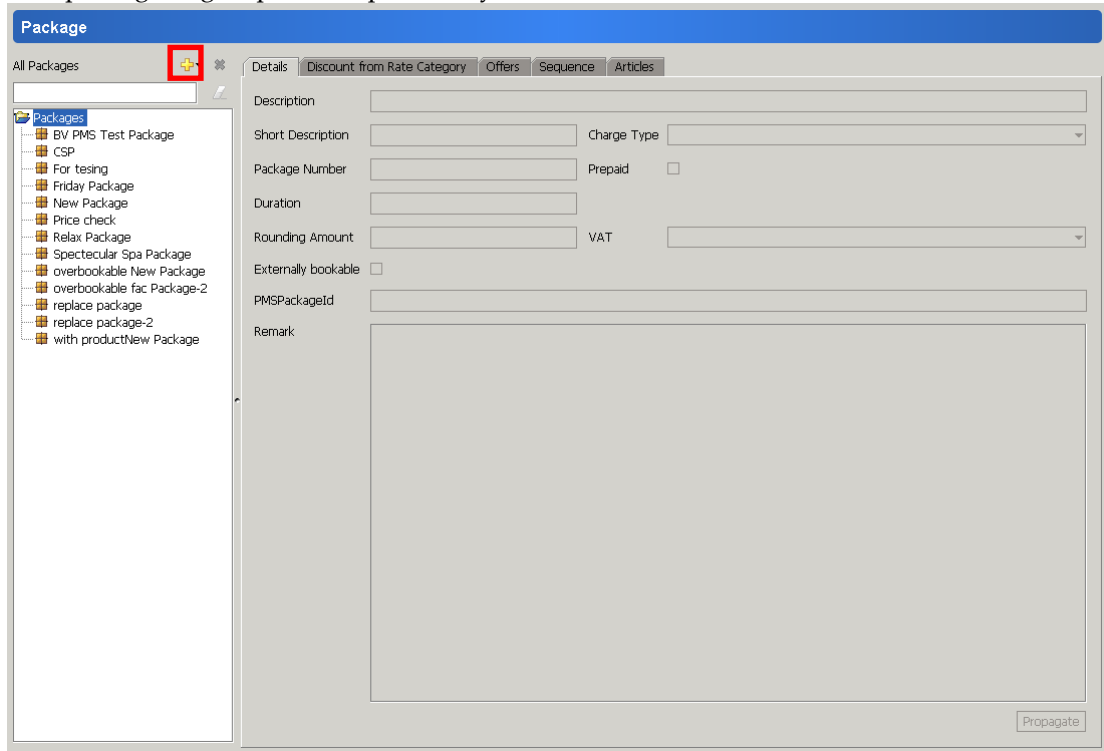
Double click or press F2 on the *new group* and give it a new name → *Press Enter* to save it.

For **regrouping,** right click on the group or package and it gives you the option to do so.

To **delete** a package, highlight it first, then click on the red X next to the yellow + sign, and verify. It is not possible to delete when history is linked to the item – in that case: use the Administration/Activation.

Details

Edit the name of the package in the description field. Choose the charge type as *packages*. This is the revenue group the sale of this package will be administered in. The contents' charge type will be calculated in the package split.

Duration has to be changed from 0 to the number of days the treatments in this package has to be consumed in. Do not leave it 0.

VAT: if the contents' VAT differs, it will be calculated accordingly upon settlement.

Rounding amount: the amount which the total price for package differs from the total value of treatments/products included in it.This will be charged with the package profit/loss charge type, even if the value is 0.

| Details | Discount from Rate Category | Offers | Sequence | Articles |

Description	Relaxing Massage Package
Short Description	for relaxation
Charge Type	Package Profit and Loss
Package Number	48
Prepaid	☐
Duration	10
Rounding Amount	99.00 EUR
VAT	10.0
Externally bookable	☐
PMSPackageId	
Remark	package

Propagate

Offers

Use the yellow + to add the offers included in this package.

Price reduction, if removed: if someone does not consume the whole package, the price of this offer will be deducted.

Replaceable: when booking this package, this offer can be changed to another offer.

Articles

If your package includes sales articles, you can add them here by the yellow cross. It is not the same as the articles tab on offer: these are products that are given to the customer, not used in the treatments.

You can see that the total amounts are changing on the top of the window as you add the treatments/products. The rounding amount set in the details tab appears and the total amount shows the price of the package.
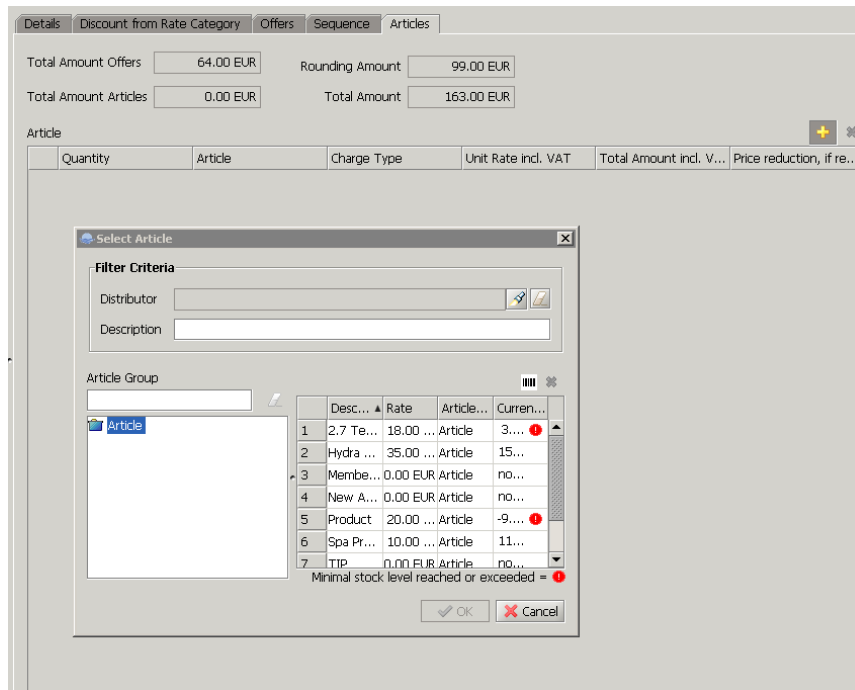
Package with fixed total quantity from version 2.7.1.4
When creating a new package, another option is available:package with fixed total quantity. This is ideal for packages where only the total quantity is set and the contents often vary. A maximum amount can be also set up per offer. All details can be entered on the offers tab.

Discount from Rate Category tab

To use different rate categories, assign them here. Select the rate category on the right column and press the arrow pointing to the left to assign it. You can set discount by percent or by manual total amount.
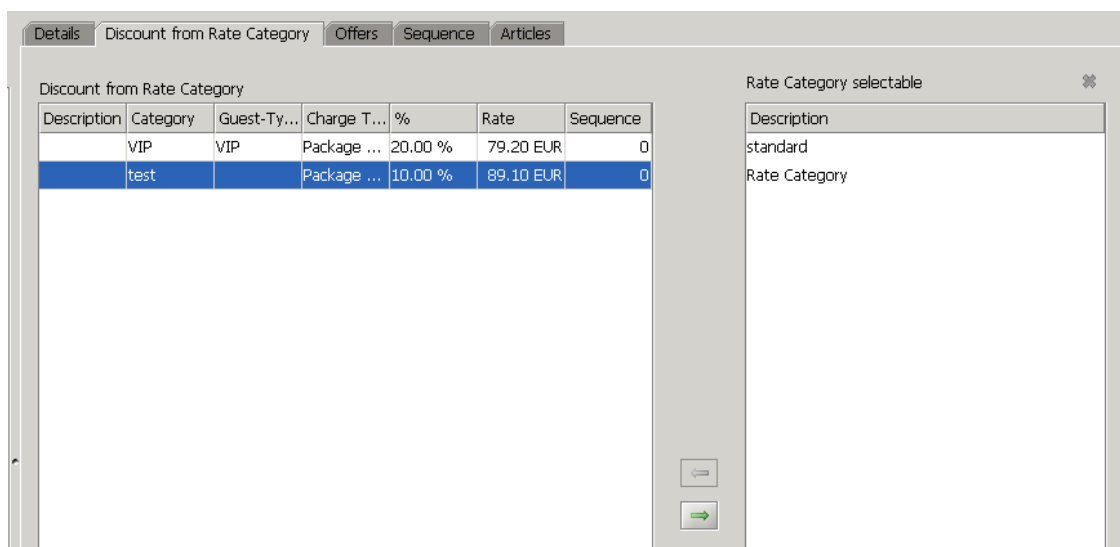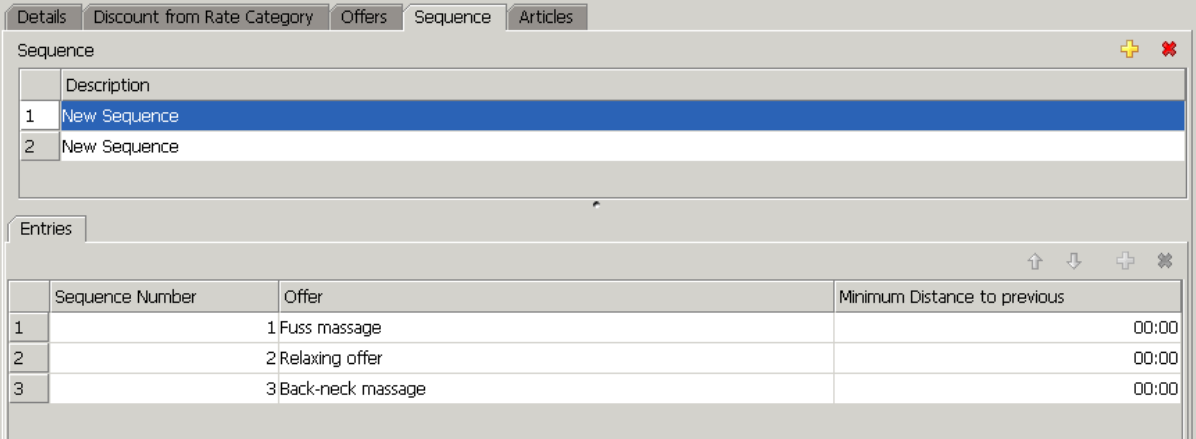
Sequence tab

The sequence of treatments included in the package can be set here. This is most practical for automatic distribution of the package.

On the top part of the tab you can see the default New Sequence, which uses the order you added the offers to the package.

You can rename the sequence and add more sequences by the yellow plus. The details of the selected sequence are displayed below. You can change the sequence by highlighting the offers and using the up and down arrows. You can also set up "minimum distance to previous" if any of the treatments cannot be done right after each other.

When you click on any treatments, the yellow + becomes active on the top of the list in the line of Entries. Using this you can add "day break" when you have multi day packages.

6   Inventory

Inventory management can be used as basic or as advanced as you need it. The general idea is that there are two types of products in the inventory: **retail products used for sale** and **products used during treatments**. Starting with suppliers, the products can be grouped by categories with separate subcategory for the non-retail products; and once it is done we can work with orders and inventory administration.

Suppliers

After clicking on Suppliers in Master data, add a new supplier by the yellow cross on top. (screenshot)
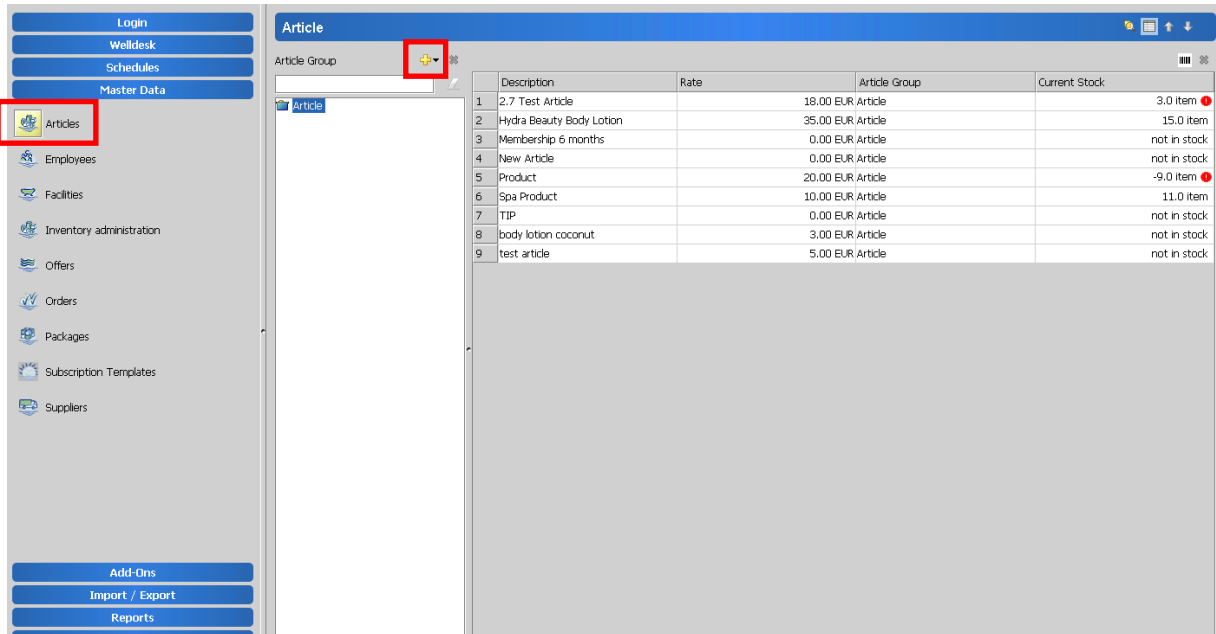
Fill out all the details, but please note that apart from the remarks section all details will be printed on the order form. If there is more than one supplier, you can access the list with the 'list' icon on the top right corner: type % in the search field and press enter.

Articles/ Products

Articles can be found in the *Master Data > Articles.*

You can create articles in groups and subgroups. Click on the group you would like to add the new group to, and press the yellow cross to create it.

Double click or press F2 on the *new group* and give it a new name → *Press Enter* to save it.

For **regrouping,** right click on the group and it gives you the option to do so.

To **delete** a group, make sure it is empty, then highlight it, then click on the red X next to the yellow + sign, and verify.

To create new article, highlight the group you want to add it to, and click the yellow plus on the right side of the screen. The new article will show on the right hand side, as 'New Article'.

To delete an article, highlight the article on the list on the right and use the red cross in the top right corner. If the article has stock transactions or sales, it cannot be deleted any more. Use Administration/Activation.

To edit the new article, double click on it to be navigated to the next window where you can rename it and add additional information.

- Change the *Description* to the name of the article.
- *Article Number* is automatic (can be set to manual by systemparameter)
- *Article group* is showing in which group you created/moved this article to.
- *EAN-13* is the barcode of the product – used only when you have a barcode reader
- *Quantity unit* is **item for all retail products**. Choose **litre, kg, etc for the salon products**.
- *Turnover relevant* will make this product become commissionable. Only tick it for the sales products.
- *Article type: only select it for tip.*
- *Card Validity (months)* is used if you are setting up membership cards for sale.
- *Remarks* are for your internal notes.

The **purchase tab** requires information of your supply of this product. If your article is membership or tip, do not fill this out.

Supplier: Search for supplier with the torch, and apply the selected company – or create new by the yellow plus on the Supplier search screen.

Order Number: This can be entered as the code of the product used by the supplier on your orders.

Purchase price (net):   Enter the last price you had on your order for this product. (It can be updated on every order in the future.)

Purchase price (gross):   This field will be automatically populated after you enter the VAT on the next tab.

n the **sales tab** contains information on the price of the article. For salon products, only VAT is needed to be set.

Standard rate: the standard gross total of price to be paid for this item. Where VAT is excluded from the total price (like Israel) the net price is displayed here.

VAT: select from the VAT categories set up in Administration.

Rate category: Assign rate categories applicable for this article from the right to the left side. Enter their sequence and the rate to be used. More details can be found in „Price Management"
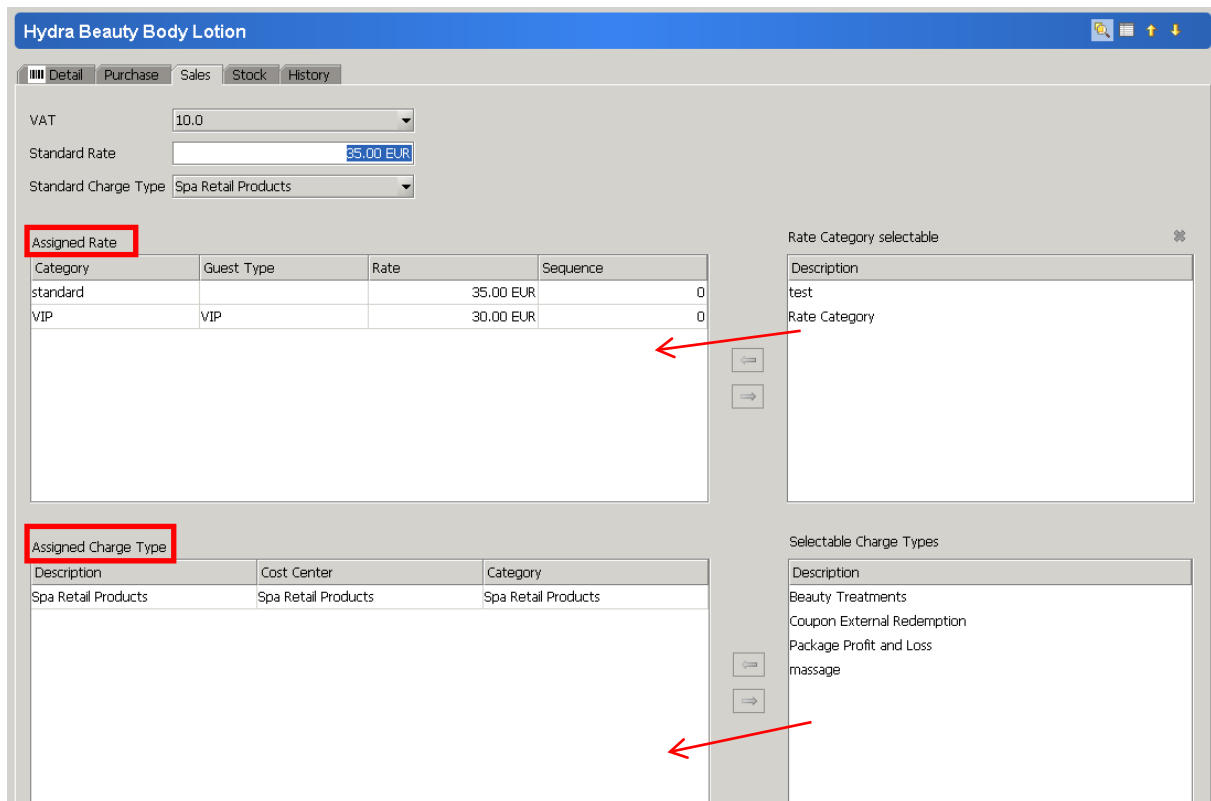
Charge types The assigned charge type determines where the revenue of this product is administered. Select from the available charge types and assign at least one. Select one in standard charge type on top.
Please note, articles can be settled if charge type is missing!

The **stock tab** allows you to select the stock information of the product. Do not use it for membership and tip!

Select from the drop down list the standard stock you administere these items.
Once it is done, the 'add to stock' button becomes active and you can add the existing items to your stock.
*Minimum stock:* when the system should warn user that this level is reached.
Target stock: used for order suggestions.

"Remove from Stock…" lets you remove any items from the stock.
"Transfer…" lets you select another stock to move items to.

Your current stock will appear on the top in the *Current Stock*. You can check any stock transactions, sales on the **stock transactions tab**.
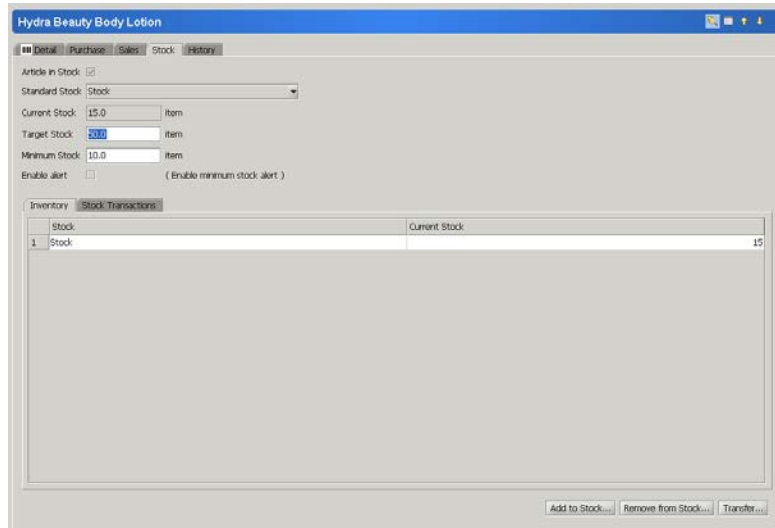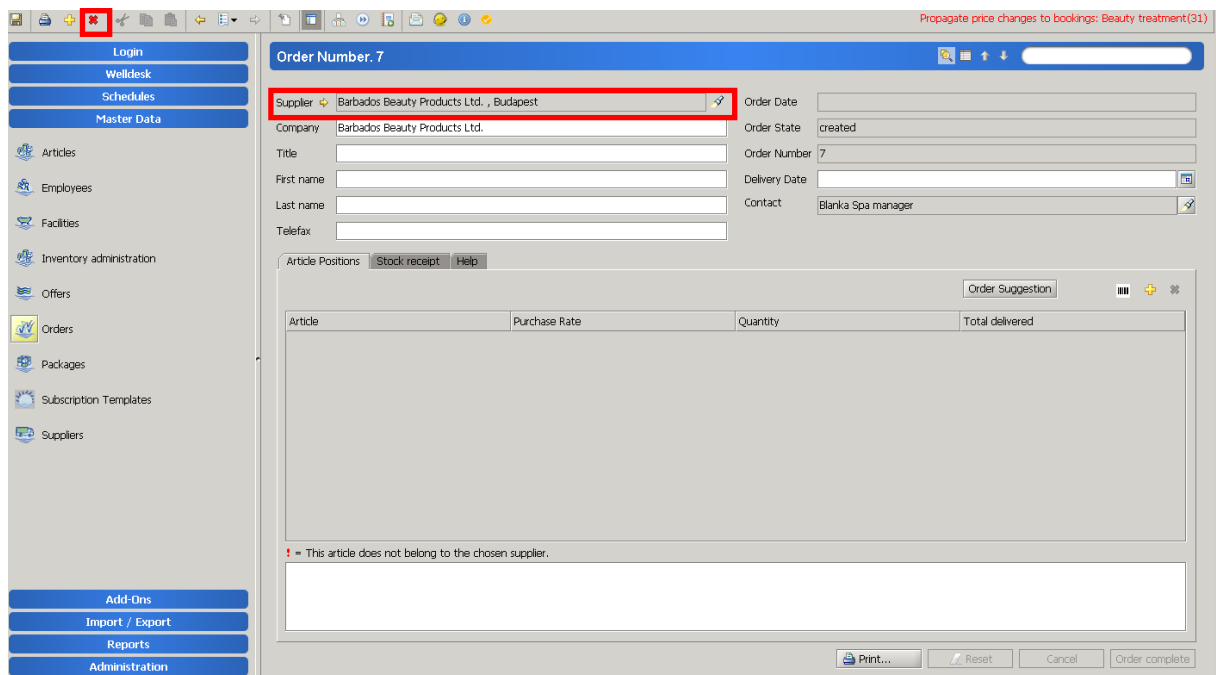
To get back to the main list of articles <u>double click on the title of the article</u> in the blue field.

Orders

Select Orders from Master data and add a new order by the yellow cross. Add the details of the supplier first – so the articles of this supplier will be available. Select the supplier as explained in the articles – stock tab section.

The order number is automatic. Depending on the details you added to your supplier, fill up the fields for this order. You can add the *Title*, *First name*, *Last name* of your contact of the supplier to be shown on the order form.

Order status shows if it is in progress, sent, completed or partially completed (the delivery differs from the order in any way).

Delivery date can be set as required.

The*contact* will be the Spa Manager as set up in the configuration.

Using Order Suggestion means that Bellavita comes up with a list of articles according to the target stock level that was set up. Every article that is below the target stock will appear with the quantity that is required to be on the target level. With the yellow cross you can add any articles that you wish to order:

Every selected article appears on the list of articles on your order screen where you can change the quantity and purchase rate as you wish.
If you order articles that are administered with another supplier, the system will warn you.
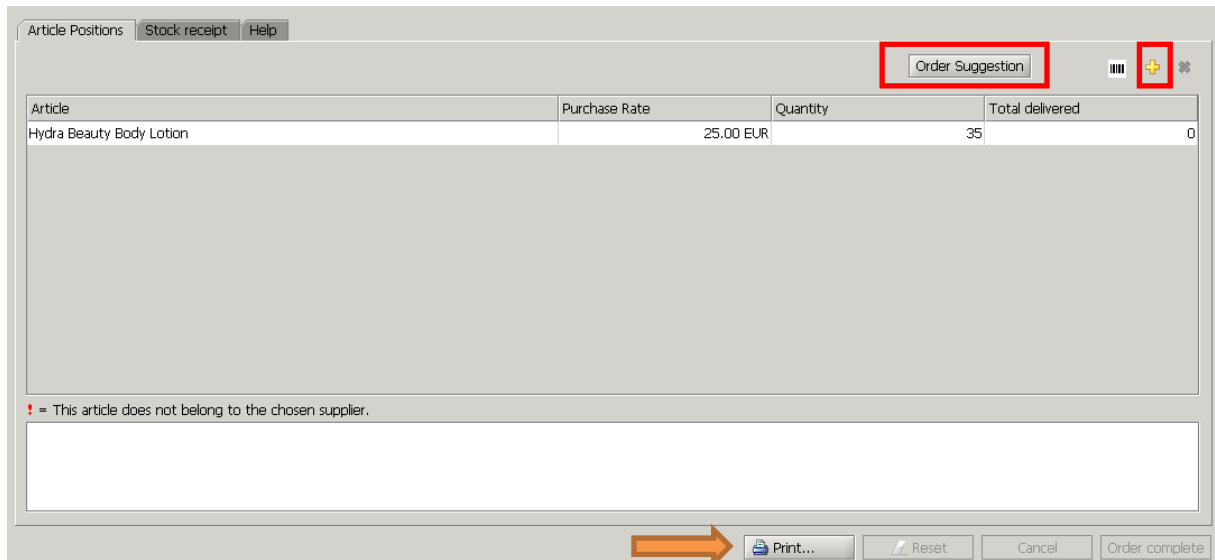
Once you have the complete list of the articles you wish to order, click **PRINT** at the bottom of the page which created the order form that you can print or save and e-mail. This print button submits the order and the Order state changes to dispatched.

To review your orders: either double click the top line of the order or enter a % in the search field and press enter. This is the screen where all your orders will appear:

Double click on the order you need to edit – when the stock gets delivered:

Select the **Stock receipt tab** and press the yellow cross to select the articles that arrived. Article Positions will list all items you ordered, while from the Articles tab you can select any articles that you received but were not on the original order.
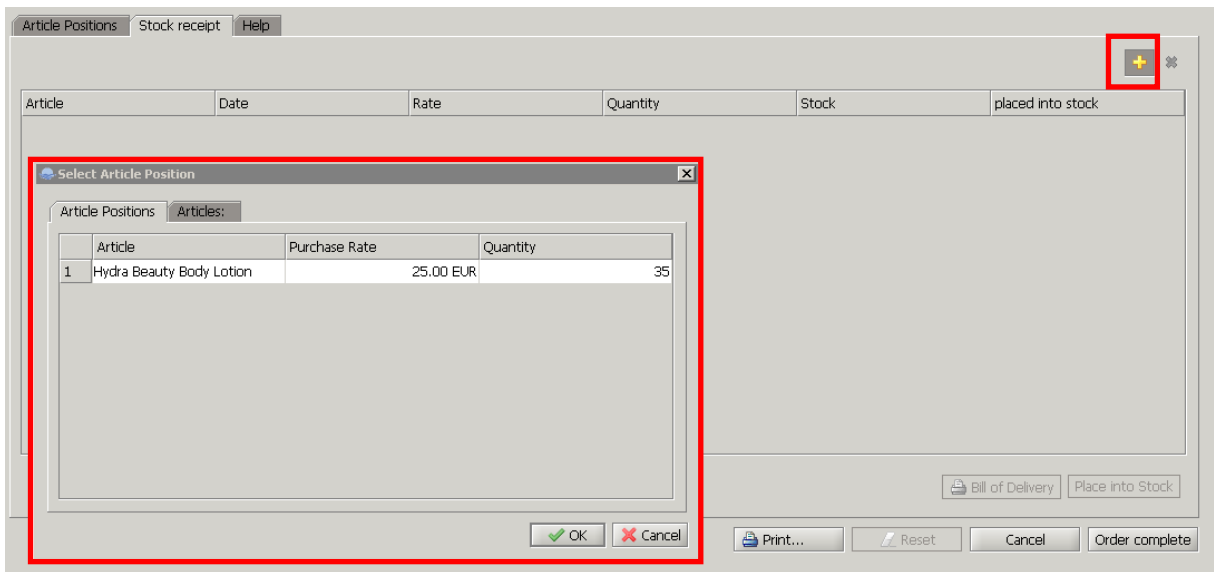
Highlight the item on this list, edit the quantity and price if required and use the *Place into Stock* button to put it in your stock. Once you have put ALL the received items in stock, press *Order complete*.
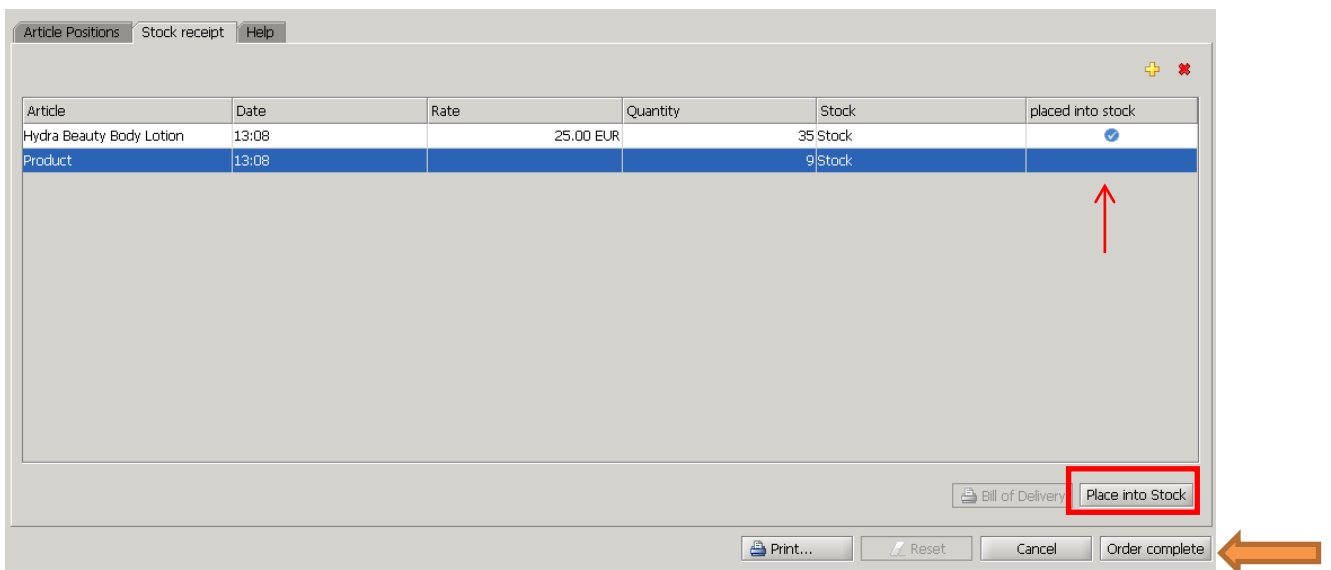
Inventory Administration

Inventory administration is used to check your stock. It prints a count list, you check the exact numbers as you go through your stock and enter them in the system. Then the current stock will be updated in the system according to your calculations. A report is availble with the differences.

Select Inventory Administration from Master Data.

Add new by the yellow cross. Fill out the details on the pop up window according to your needs.

Description can be changed to a title that makes the look up easier in future, for example: "monthly inventory September"

Countlists: this is how many copies of countlists you want to print.

Start date and time can be set for any time in future, but as the "*Stock movements locked*" is ticked, that means that from the start time until you update the numbers, you will not be able to sell any products or use any products in the treatments. So it is practical to do this when you actually start your check, after the spa is closed.
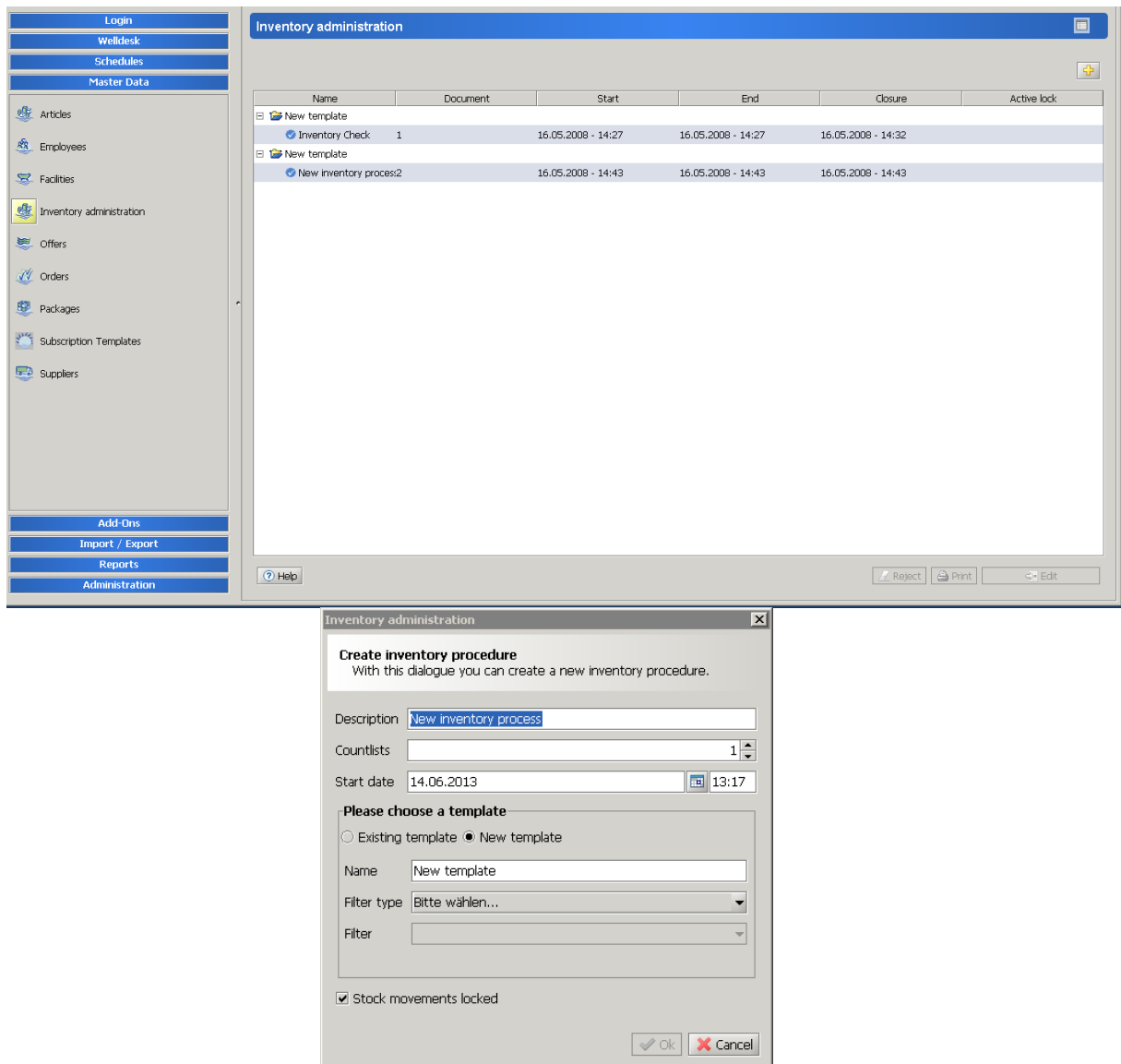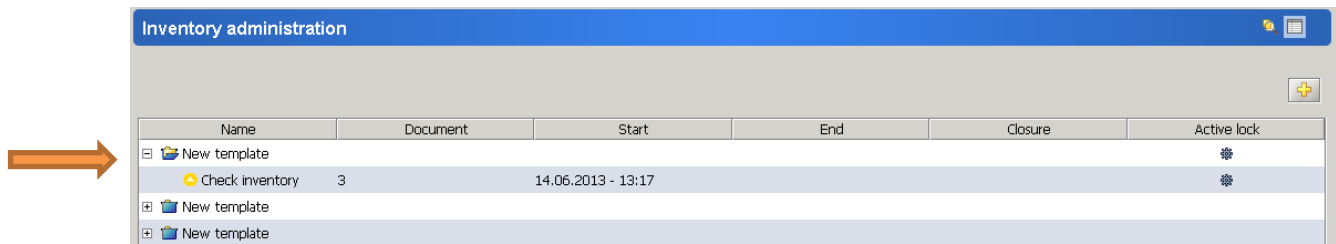

The first time you use this, you will be creating a *template*. Rename it, so you can reuse it later. The *filter type* can be selected as supplier, stock, etc., then the *filter* will list you all the possibilities within that filter from which you need to use one.
Later, if inventory process template already exists, then you do not have to create a new one but instead choose the existing template and confirm with OK.

The *Stock movement locked* is practical to set so the calculations will be accurate, however in this case you need to make sure that there are no sales at the time of the check.
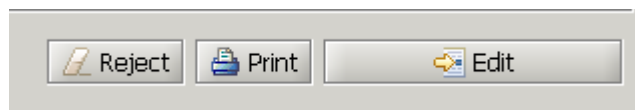
Once you click OK, the process appears on your list:

Click print when the process is highlighted on the list and print the count lists.
You can navigate from this list back to your actual inventory process either double click the top line of the order or enter a % in the search field and press enter. This is the screen where all your inventory processes will appear.

Please note that **only** the products that had any stock movements (added to stock in the beginning) will appear on this list no matter which filter you use.
Once you filled it out, go back to the list of inventory processes and select the one you are dealing with. Use the button "Edit" at the bottom of the screen.

Add the stop date and time when you finish. Go through the list and put in the relevant numbers in the list 1 (or all of the count lists) column. Only when you have a stop date will the Closing button become active.

Once you chose Closing, a security message appears. If you select yes, another message comes up:

This means that any articles that you did not put an amount to, will be updated as if you found 0 quantity. Is this is not the case, select NO.

Then the system goes through every line and warns you if any articles have gone below the minimum stock.
At the end you get this screen with a message that the process is completed.

Now your stock is updated with the new values – only where you gave any information, but the ones left empty stay on the value they were. You have the option to choose to print the list, export it to a csv file, or go back to the overview of your inventory processes.