

Oracle® Hospitality Suites Management User Guide



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Preface

Oracle Hospitality Suites Management is designed for sports and special event venues.

Purpose

This User Guide explains how to use Suites Management features and functionality.

Audience

This document is intended for users of the Suites Management application.

Customer Support

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

<https://support.oracle.com>

When contacting Customer Support, please provide the following:

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

Documentation

Product documentation is available on the Oracle Help Center at <http://docs.oracle.com/en/industries/food-beverage/>.

Revision History

Date	Description of Change
May 2018	Initial publication.
February 2019	Updated Chapter 11 – Event Reports, specifically the Generating the Label Report topic.
November 2021	Updated <i>Adding a Suites Interface in Symphony</i> to include the required options on the Options tab.

1

Introduction to Suites Management

Oracle Hospitality Suites Management (Suites) is a management system targeted toward sports venues. Suites integrates with the Oracle Hospitality Symphony First Edition and Oracle Hospitality Symphony Point-of-Sale (POS) applications, providing a complete solution for managing luxury suites. The Suites functions include taking orders and reporting production needs prior to an event, processing orders during the event, billing after the event, and post-event reporting.

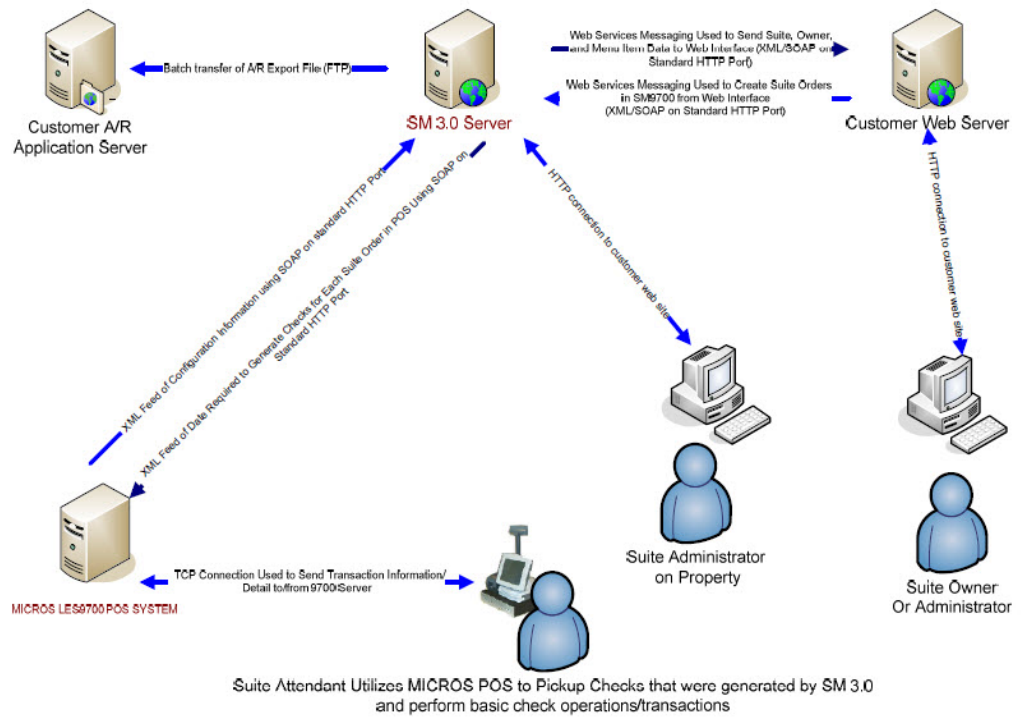
You can configure Suites from the side menu of the Suites Management home page.

2

Overview of Setting Up Suites Management

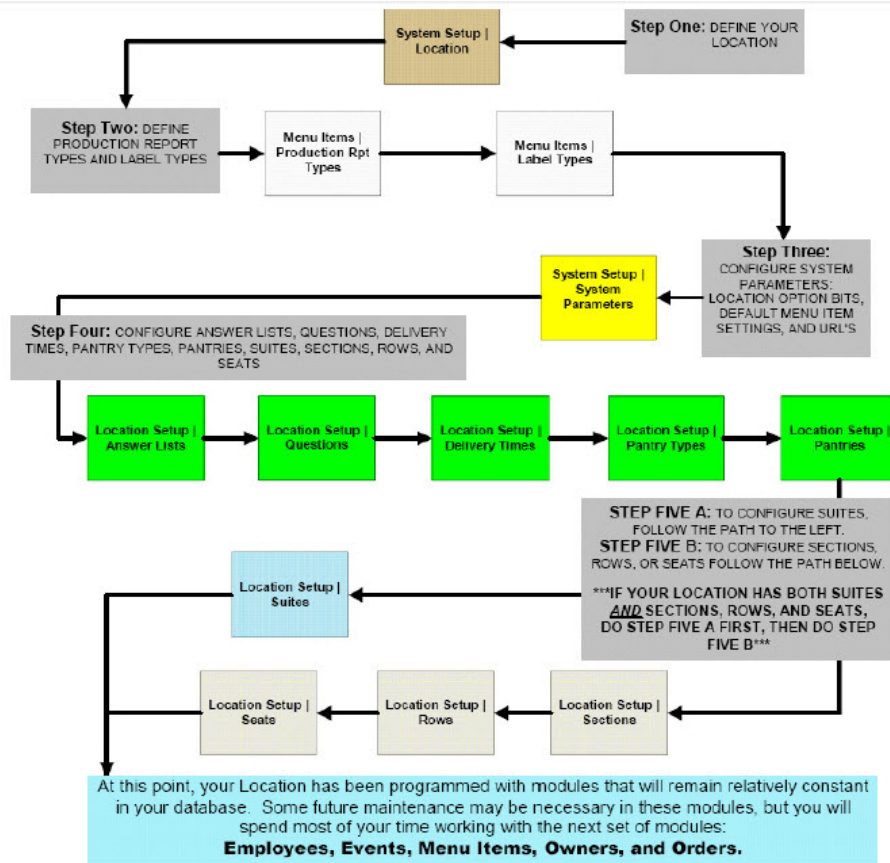
The following figure illustrates a typical Suites Management configuration:

Figure 2-1 Typical Suites Management Configuration



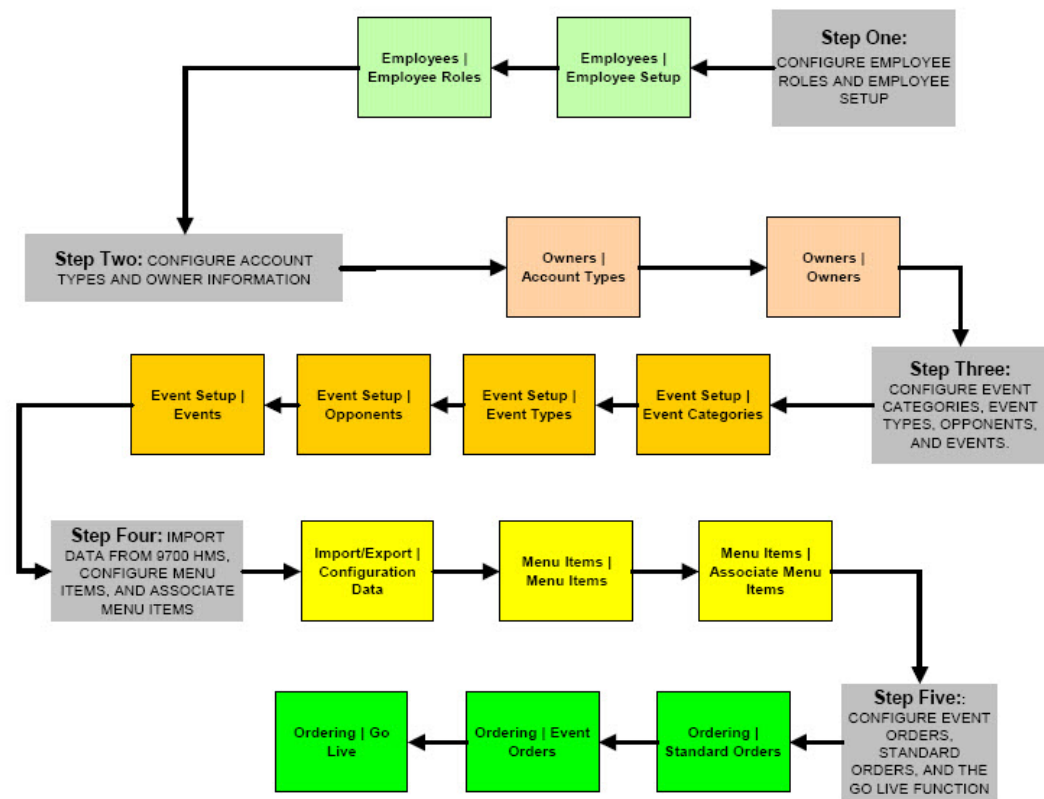
Developing the Suites Management database occurs in two phases. The initial phase is typically completed by either an Oracle Hospitality representative or a qualified IT staff member. The following figure shows the steps for completing phase 1 of the database build.

Figure 2-2 Suites Management Database Build – Phase 1



You cannot start phase 2 of the database build until phase 1 is complete. The following figure shows the steps for completing phase 2 of the database build.

Figure 2-3 Suites Management Database Build – Phase 2



3

Location Maintenance

Creating Location Types

1. Click **System Setup**, and then click **Location Type**.
2. Click **New**, enter the **Location Type Name** (for example, `stadium`), and then click **Save**.

Creating Locations

1. Click **System Setup**, and then click **Location**.
2. Click **New**, select the **Location Type**, and then enter the **Location Name**.
3. (Optional) Enter the **Company** and the **Address** for the location.
4. (Optional) Enter the **City**, **State**, **Zip code**, **Country**, and **Details**.
The zip code must have five digits.
5. Click **Save**.

Setting Up Order Answers

Create and assign answers that users select when prompted with questions during order entry.

1. Click **Location Setup**, and then click **Answer Lists**.
2. Select the **Location**, enter a name for the record in the **Answer List Name** field, enter a description for the record in the **Answer List Description** field, and then click **Save**.
3. From the Answers List page, click the **Answer List Name** of the record that you created in Step 2 to open it.
4. Click **Add List Item**, enter a possible answer in the **Answer Item Text** field, and then click **Save**.
5. Repeat Step 4 until all possible answers appear in the list, and then click **Save**.

Setting Up Order Questions

You can set questions to use during the pre-event order process to manage the specialty type services offered.

1. Click **Location Setup**, and then click **Questions**.
2. Click **New**, select the **Location**, enter the **Question Number**, enter a name for the record in the **Question Name** field, and then enter the **Question Text**.
3. To print the question on order confirmation receipts, select **Print Question on Order Confirmation**.

4. Select the appropriate **List Type**.
 - a. Select **Text** to require users to enter an answer, and then enter a **Default Answer**.
 - b. Select **List** to require users to select an answer from the responses you configured when setting up the answers list, select the list of answers from the **List Value** drop-down list, and then select the **Default Answer**.
5. Click **Save**.

Setting Up Delivery Times

You must set up delivery times in order to generate the Distribution Delivery Times Report which shows the delivery times of all pre-ordered menu items for an event.

1. Click **Location Setup**, and then click **Delivery Times**.
2. Click **New**, select the **Location**, enter the **Delivery Time Name** (for example, `halftime`), and then click **Save**.

Setting Up Pantry Types

1. Click **Location Setup**, and then click **Pantry Types**.
2. Click **New**, select the **Location**, enter the **Pantry Type Name** (for example, `food pantry`), and then click **Save**.

Setting Up Pantries

1. Click **Location Setup**, and then click **Pantries**.
2. Click **New**, select the **Location**, select the **Pantry Type**, and then enter the **Pantry Name**.
3. (Optional) Enter the name of the employee in charge of the pantry in the **Pantry Supervisor** field, and then enter the phone extension number for the pantry in the **Pantry Extension** field.
4. Click **Save**.

Setting Up Suites

Setting up suites is a part of phase 1 programming. Before configuring suites, you must consider the naming convention used by the location.

Access the About page from the Suites home page to view the current number of active suites and the maximum number of suites allowed under the current license.

1. Click **Location Setup**, and then click **Suites**.
2. Click **New**, select the **Location**, and then enter the **Suite Number** and the **Suite Name**.
3. Select the appropriate **Food Pantry** and **Beverage Pantry**.
4. (Optional) Enter the following details:
 - **Suite Extension**: Phone extension number for the suite

- **Suite Server:** Name of the suite attendant
 - **Suite Seats:** Number of seats
5. Click **Save**.

Setting Up Sections

1. Click **Location Setup**, and then click **Sections**.
2. Click **New**, select the **Location**, and then enter the **Section Name**.
3. Select the appropriate **Food Pantry** and **Beverage Pantry** for the section.
4. (Optional) Enter details regarding the section in the **Suite Description** field.
5. Click **Save**.

Setting Up Rows

1. Click **Location Setup**, and then click **Rows**.
2. Click **New**, and then select the **Location**.
3. Select the **Section**, enter the **Row Number**, and then click **Save**.
4. To add another row, click **Add New**, and then repeat Step 3.

Setting Up Seats

1. Click **Location Setup**, and then click **Seats**.
2. Click **New**, and then select the **Location**.
3. Select the **Section**, select the **Row**, and then enter the **Seat Number**.
4. Click **Save**.
5. To add another seat, click **Add New**, and then repeat Steps 3 to 4.

4

Suites Owner Maintenance

Setting Up Account Types

1. Click **Owners**, and then click **Account Types**.
2. Select the **Location**, enter the account type in the **Name** field (for example, *fixed account*), and then click **Save**.

Setting Up Suite Owners

Prior to adding anyone to the Suites system, you must obtain their consent to store their personal information, while tracking their acknowledgement of said consent. Anyone can withdraw their consent at any time, which causes their personal data to be ignored by the system. If using an Application Programming Interface (API), owners are prompted to grant consent before storing their personal data.

Two settings have been added to the System Setup, System Parameters file in reference to the length of time (in days) for the system to retain owners and employees personal data. The settings are named:

- **Owner Data Retention Period:** Establishes the threshold to retain owners' personal data.

If any owners and their associated contacts are involved in an open or active event, their personal data is not automatically removed by the system.

The data retention period also applies to an owner's (or employee's) historical reports and Check Regen reports that have not yet reached the period end.
- **Employee Data Retention Period:** Establishes the threshold to retain employees' personal data.

The default data retention period for owners and employees is 999 days.

To add new owners to the system:

1. Click **Owners**, and then click **Owners**.
2. Click **New**, and then enter the following details:
 - **Lookup description:** Enter a lookup description. This is the name that appears for the owner on Suites checks at the POS client.
 - **Company:** Enter the company name.
 - (Optional) **Prefix:** Enter the prefix.
 - **Last Name:** Enter the owner's surname.
 - **First Name:** Enter the owner's first name.
 - (Optional) **PIN:** Enter the personal identification number.

- **Privacy Policy Acknowledgement:** Click the checkbox to opt in or provide your consent to the processing of personal data (when processed through the API). After you check this option, the **Acknowledgement Date** field automatically updates using the current date.

If the owner is not the person who is entering the personal data, the application end-user can do so on behalf of the owner.
- 3. On the **General** tab, select the **Default Delivery Time** and the **Default Menu Level**.
- 4. (Optional) Configure the following owner settings:
 - **Account Number:** Enter the suites account number for the owner.
 - **Account Type:** Select the owner account type.
 - **Allow Ordering:** Select **Yes** if the owner can place orders prior to an event.
 - **Guest Account:** Select **Yes** if the owner is a suite guest and not a suite owner.
 - **Allow Export:** Select **Yes** if Suites users can export owner information.
 - **Master Account:** Select **Yes** if this is the master account for a company that has multiple Suite accounts.
- 5. (Optional) Select the **Default Payment Type**.
- 6. (Optional) If you selected **Credit Card** as the **Default Payment Type**:
 - a. Click the **Edit** button adjacent to the **Credit Card Number** field, and then enter the credit card number.
 - b. Click the **Edit** button adjacent to the **Expiration Date** field, and then enter the credit card expiration date.
- 7. (Optional) Click the **Contacts** tab, and then enter the owner's contact details.
- 8. (Optional) Click the **Billing Address** tab, and then enter the owner's billing address.
- 9. (Optional) Click the **Mailing Address** tab, and then enter owner's mailing address.
- 10. (Optional) Click the **Notes** tab, and then enter additional details.
- 11. (Optional) Click the **Suites** tab, and then assign the owner to suites. See [Assigning an Owner to Suites](#) for instructions.
- 12. (Optional) Click the **Seats** tab, and then assign the owner to seats. See [Assigning an Owner to Seats](#) for instructions.
- 13. Click **Save**.

Assigning an Owner to Suites

1. Click **Owners**, and then click **Owners**.
2. From the Owner List page, click the appropriate **Lookup Description** for the owner.
3. Click the **Suites** tab, select **All Available Suites**, and then select the suites owned by the owner.
4. Click **Save**.

Assigning an Owner to Seats

1. Click **Owners**, and then click **Owners**.
2. From the Owner List page, click the appropriate **Lookup Description** for the owner.
3. Click the **Seats** tab, select **All Available Seats**, and then select the seats owned by the owner.
4. Click **Save**.

5

Employee Maintenance

Creating Employee Roles

1. Click **Employees**, and then click **Employee Roles**.
2. Click **New**, and then enter the **Role Name**.
3. (Optional) Enter the **Role Description**.
4. To make this role available for all locations in Suites, select **Yes** for **Global Role**.
5. Click **Save**.

Assigning Privileges to Employee Roles

Privileges determine the activities an employee can perform in Suites. You can configure the Suites services that are available for each employee role.

1. Click **Employees**, and then click **Employee Roles**.
2. Select an employee role, and then click **Map Services**.
3. Select the Suites services that are accessible for the role, and then click **Save**.

Creating Employees

Prior to adding anyone to the Suites system, you must obtain their consent to store their personal information, while tracking their acknowledgement of said consent. Anyone can withdraw their consent at any time, which causes their personal data to be ignored by the system.

Two settings have been added to the System Setup, System Parameters file in reference to the length of time (in days) for the system to retain owners and employees personal data. The settings are named:

- **Owner Data Retention Period:** Establishes the threshold to retain owners' personal data.

If any owners and their associated contacts are involved in an open or active event, their personal data is not automatically removed by the system.

The data retention period also applies to an owner's (or employee's) historical reports and Check Regen reports that have not yet reached the period end.
- **Employee Data Retention Period:** Establishes the threshold to retain employees' personal data.

If employees are involved in an open transaction or active event, their personal data is not automatically removed by the system.

The default data retention period for owners and employees is 999 days.

To add new employees to the system:

1. Click **Employees**, and then click **Employee Setup**.
2. Click **New**, and then enter the following employee details:
 - **First Name**: Enter the employee's first name.
 - **Last Name**: Enter the employee's surname.
 - (Optional) **Address**: Enter the employee's home address.
 - **Privacy Policy Acknowledgement**: Select to consent to the processing of personal information.
 - **User ID**: Enter the employee's username for Suites.
 - **Password**: Enter the employee's password for Suites.
 - **Default Language**: Select the employee's language to use as the default language from the drop-down list.
3. Select one or more locations designated for the employee, and then select one of the locations to **Set as Default**.
4. Click **Save**.

Assigning Roles to Employees

1. Click **Employees**, and then click **Employee Setup**.
2. From the Employee List page, click the appropriate **Employee Name** to open Employee Maintenance.
3. Click **Map Roles**, select the designated roles for the employee, and then click **Save**.
4. Click **Cancel** to exit the User Roles Mapping dialog box, and then click the **Save** button on the Employee Maintenance page.

Editing an Employee

1. Click **Employees**, and then click **Employee Setup**.
2. Click the **Employee Name** of the employee to modify.
3. Make the necessary changes, and then click **Save**.

6

Privacy and Personal Data Management

Privacy and personal data management controls help you respond to inquiries regarding personal data storage and ongoing data maintenance for your system. Suites Management requests and stores a minimum amount of personal information in order to create profile records for owners, employees, and contacts. The minimal amount of stored personal data is comprised of:

- User ID
- Last Name
- First Name
- Password
- Default Language
- (Optional) Address

All data protection safeguards are enabled by default (for example, data retention thresholds, data encryption, and role-based access to personal data records). All new profile additions and changes are logged and auditable. You can also configure the personal data retention period for owners and employees.

Removing Owners, Employees, and Contacts Personal Data

There are two separate tasks that you can perform to remove owners, employees, and contacts:

- **Deactivation**

Deactivation is only available for owners and employees. Use the **Deactivate** button (formerly known as the **Delete** button in previous versions of Suites Management), to remove people during routine maintenance operations when owners and employees leave. The Deactivate button is located on both owners and employees records.

Deactivating an owner does not remove the owner from Suites, but makes the owner inactive and hidden from the Owner List page.

Only owners can be reactivated, and rehired employees need to be re-entered into the system. [Reactivating Deleted Suite Owners](#) contains more information.

Deactivation is logged and auditable on the system.

- **Anonymization**

Anonymization is available for owners, employees, and contacts. Use the **Anonymize** button, to respond to all formal requests to remove their personal data from your system. When you anonymize someone, it deactivates their profile and subsequently deletes their personal data from the system. Once anonymized, a person needs to be reentered into Suites Management to become active on the system again.

Anonymization is logged and auditable on the system.

1. To deactivate records:

- a. Using one of the navigational paths above, access the personal data record that you want to deactivate.
- b. Beneath the **Select** column, click the radio button adjacent to the name for the personal data you want to deactivate.
- c. Click the **Deactivate** button, and then click **OK** to confirm, or click **Cancel** to abort the action.

The methodology for anonymizing records is the same. To navigate to owners, employees, and contacts records, use the following application navigational paths:

- **Owners:** Click **Owners**, and then click **Owners** again.
 - **Employees:** Click **Employees**, and then click **Employee Setup**.
 - **Contacts:** Click **Owners**, and then click **Contact List**.
2. To anonymize records:
 - a. Using one of the navigational paths shown under Step 1-c, access the personal data record that you want to anonymize.
 - b. Beneath the **Select** column, click the radio button adjacent to the name for the personal data you want to anonymize.
 - c. Click the **Anonymize** button, and then click **OK** to confirm, or click **Cancel** to abort the action.

7

Import/Export

POS Application Data Import Prerequisites

Before importing data from Symphony First Edition or from Symphony into Suites, ensure that you have:

- [Configured the POS Settings in Suites](#)
- Prepared the POS application to interface with Suites as described in [POS Application Configuration](#)

Importing Data from the Point-of-Sale (POS) Application

This procedure allows the transfer of menu item related data from Symphony First Edition or from Symphony to Suites. If you are using Symphony version 2.9 or later, Suites also imports event information. When an event is assigned to one or more revenue centers in Symphony, only the locations that are configured in Suites receive the information. You must perform this procedure each time a menu item change is made on the POS application.

After importing the data, you must configure the menu items and the events further.

1. Click **Import/Export**, and then click **Configuration Data**.
2. Click **Get Configuration Data**.
3. To complete the configuration of imported menu items, see [Menu Item Maintenance](#).
4. To complete the configuration of imported events, see [Event Maintenance](#).

Exporting Event Data

You can export account billing information to the most commonly used accounts receivable (A/R) applications through the web services API. You can only export events that are configured to allow exports in Event Maintenance.

1. Click **Import/Export**, and then click **A/R Event Export**.
2. Select the **Event**, and then click **Export**.

The file is saved to the [Drive Letter]:\MICROS\LES\Suites\Export folder.

Exporting Personal Data

To respond to anyone's formal request to view their stored personal data, you can export this information (using .csv formatting) and forward it to them. You can only export one person's personal data record at a time. All export tasks are logged and auditable.

The methodology for generating export files is the same for every type of personal data record. Each type of personal data record uses differing navigational paths within the Suites Management application.

The three types of personal data available to export and their application navigational paths are:

- **Owners:** Click **Owners**, and then click **Owners** again.
- **Employees:** Click **Employees**, and then click **Employee Setup**.
- **Contacts:** Click **Owners**, and then click **Contact List**.

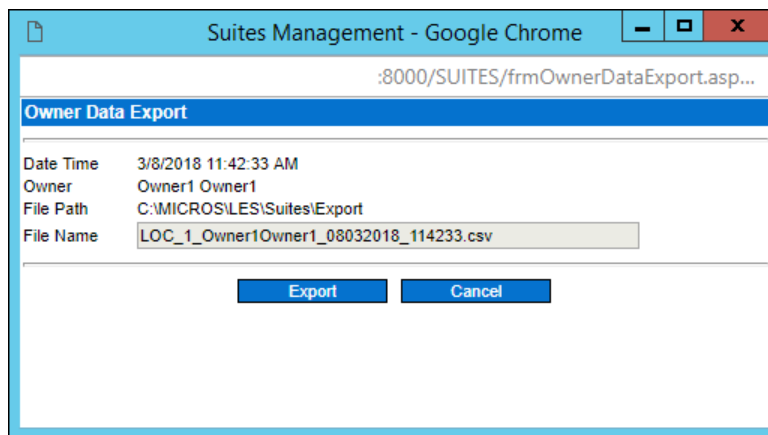
To export stored personal data from Suites Management:

1. Using one of the navigational paths above, access the personal data record that you want to export.
2. Beneath the **Select** column, click the radio button adjacent to the name of whose data you want to export.
3. Click the **Export Data** button.
4. In the Type Data Export window, click **Export** to continue, or click **Cancel** to abort the export.

The Type Data Export window contains the following information:

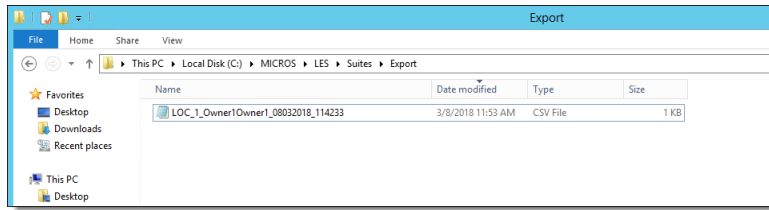
- **Date Time:** The date and time of the data export.
- **Owner, Employee, or Contact:** The person's name.
- **File Path:** The destination folder of the export file (for example, <Drive letter>:\MICROS\LES\Suites\Export).
- **File Name:** The name of the export file that is written to the **Export** folder.

Figure 7-1 Example: Owner Data Export Window



5. After the data export has completed, use **Microsoft Windows Explorer** to navigate to the <Drive letter>:\MICROS\LES\Suites\Export folder.

Figure 7-2 Destination Path of the Export Folder



6. Find the data export file and open it using a text editor (for example, Microsoft Notepad). The content is shown using comma separated values (.csv) formatting.

8

Menu Item Maintenance

Creating Production Report Types

You can create production report types in order to filter the Production Report by the type.

1. Click **Menu Items**, and then click **Production Rpt Types**.
2. Click **New**, select the **Location**, and then enter the **Production Type Report Name** (for example, `cold food`).
3. Click **Save**.

Creating Label Types

1. Click **Menu Items**, and then click **Label Types**.
2. Click **New**, select the **Location**, and then enter the **Label Name** (for example, `cold food`).
3. Click **Save**.

Configuring Menu Items

Menu items that are imported from the POS application need further definition in Suites.

1. Click **Menu Items**, and then click **Menu Items**.
2. Click the **Menu Item Name** of the first item on the list to open it.
3. Select the appropriate **Production Report Type**, and then select the appropriate **Label Type**.
4. To allow export of menu item data for accounts receivable, select **Yes** for **Allow Exports**.
5. If the menu item is a featured item, select **Yes** for **Featured Item**.
6. If the menu item is a promotional item, select **Yes** for **Promotional Item**.
7. Click **Save**.
8. Repeat Steps 3 through 6 for all items on the list.

Creating Associate Menu Items

Use this procedure to create associate menu items such as condiments.

1. Click **Menu Items**, and then click **Associate Menu Items**.
2. Click **New**, enter the menu item **Name**, select the **Major Group**, and then select the **Family Group**.
3. Select the **Production Report Type**, and then select the **Label Type**.

4. Click **Save**.

Assigning Associate Menu Items to a Parent Item

You can assign associate menu items (for example, condiments) to parent menu items. Associate menu items are used in Suites only for reporting purposes. They do not appear on Suites checks and the information is not synchronized to Symphony.

1. Click **Menu Items**, and then click **Menu Items**.
2. Click the **Menu Item Name** of a parent item to open it.
3. Click **Map Items**, select the associate menu items from the list, and then enter the corresponding **Quantity**.
4. Click **Save**.

9

Event Maintenance

This chapter describes how to set up and configure events in Suites. If you imported events and event types from Symphony, you must complete their configuration in Suites by:

- Setting the default delivery time for imported event types. See [Editing an Existing Event](#) for instructions.
- Setting the opponent and selecting the appropriate Restock and Allow to Export settings for imported events. See [Editing an Existing Event](#) for instructions.

Setting Up Event Categories

Event category is referred to as Event Type in Symphony.

1. Click **Event Setup**, and then click **Categories**.
2. Click **New**, enter the **Event Category Name**, and then click **Save**.

Deleting Event Categories

You can only delete event categories that are not assigned to an event.

1. Click **Event Setup**, and then click **Categories**.
2. Select the event categories to delete, and then click **Delete**.

If you delete event categories imported from Symphony, you must manually delete those categories from the POS application. Otherwise, Suites imports them again the next time you import configuration data from Symphony.

Setting Up Event Types

Event type is referred to as Event Sub Type in Symphony.

1. Click **Event Setup**, and then click **Types**.
2. Click **New**, select the **Event Category**, select the **Default Delivery Time**, and then enter the **Event Type Name**.
3. If the event type requires an opponent, select **Yes** for **Require Opponent**.
4. Click **Save**.

Editing an Existing Event Type

1. Click **Event Setup**, and then click **Types**.
2. Click the **Event Type** name of the type to modify.
3. Make the necessary changes, and then click **Save**.

Deleting Event Types

You can only delete event types that are not assigned to an event.

1. Click **Event Setup**, and then click **Types**.
2. Select the event types to delete, and then click **Delete**.

If you delete event types imported from Symphony, you must manually delete those event types from the POS application. Otherwise, Suites imports them again the next time you import configuration data from Symphony.

Setting Up Event Opponents

1. Click **Event Setup**, and then click **Opponents**.
2. Click **New**, select the **Event Type**, and then enter the **Opponent Name**.
3. Click **Save**.

Creating an Event

1. Click **Event Setup**, and then click **Events**.
2. Click **New**, enter the **Event Name**, and then select the **Event Date** and the **Event Time**.
3. Select the **Event Type** and the **Opponent**.
4. (Optional) Enter the **Projected Attendance** for the event.
5. If this is a restock event, select **Yes** for **Restock**.
A restock event is similar to a normal event, but is typically used to restock beverages in the suites prior to a regular event.
6. To allow exporting event data for accounts receivable, select **Yes** for **Allow Exports**.
7. (Optional) Enter additional details in the **Comments** field.
8. Click **Save**.

Editing an Existing Event

1. Click **Event Setup**, and then click **Events**.
2. Click the **Event Name** of the event to modify.
Events imported from Symphony show the value **Yes** in the Imported column, in addition to the External Event Short Code and the External Event Code columns showing the corresponding Sub Code and Event Code configured in Symphony.
3. Make the appropriate changes, and then click **Save**.
Closing an imported event in Suites does not change the status of the event in Symphony.

Deleting an Event

1. Click **Event Setup**, and then click **Events**.
2. Select the events to delete, and then click **Delete**.

If you delete an event imported from Symphony, you must manually delete the event from the POS application. Otherwise, Suites imports the event again the next time you import configuration data from Symphony.

10

Ordering

Creating an Event Order

1. Click **Ordering**, and then click **Event Orders**.
2. Select the **Event**, and then select the **Current Booking Type**.
3. If you selected **Suite** for the **Current Booking Type**, select the appropriate **Suite**.
4. If you selected **Seat** for the **Current Booking Type**, select the **Section**, select the **Row**, and then select the **Seat**.
5. If multiple owners are available, select the appropriate **Owner**.
6. Click **New** to create a new suite order.
7. If a standard order exists for the owner, click **Standard Order** to add the menu items from the standard order to the new suite order.
8. Select the **Delivery Time**, and then select the **Menu Level**.
9. (Optional) Enter the menu item **Quantity**, and then enter the number lookup in the **NLU** field.
10. Select a menu item category from the **Category** pane, and then click the **Name** of an item from the Menu Item Listing to add it to the order.
11. To edit the menu item quantity, click the **Edit** icon adjacent to the appropriate menu item, enter the new quantity, and then click **OK**.
12. Repeat Steps 9 through 11 until the order is complete.
13. Click **Account Details** to enter credit card information.
14. If credit card details exist for the owner, select **Use Owner CC Data**.
15. If credit card details do not exist for the owner:
 - a. Click the **Edit** button adjacent to the **Credit Card Number** field, and then enter the credit card number.
 - b. Click the **Edit** button adjacent to the **Expire Date** field, and then enter the credit card expiration date.
16. (Optional) Enter alternate contact information for the owner.
17. Click **OK**.
18. Click **Question**, answer the standard questions, and then click **Submit**.
19. To add comments to the order confirmation, click **Comment**, enter the comment, and then click **OK**.
20. Click **Save**.

Creating a Standard Event Order

1. Click **Ordering**, and then click **Standard Orders**.
2. Select the **Order Type**.
3. If you selected **Suite** for the **Order Type**, select the appropriate **Suite**.
4. If you selected **Seat** for the **Order Type**, select the **Section**, select the **Row**, and then select the **Seat**.
5. If multiple owners are available, select the appropriate **Owner**.
6. Click **New**, select the **Menu Level**, and then select the **Delivery Time**.
7. (Optional) Enter the menu item **Quantity**, and then enter the number lookup in the **NLU** field.
8. Select a menu item category from the **Category** pane, and then click the **Name** of an item from the Menu Item Listing to add it to the order.
9. (Optional) Enter a **Description** for the menu item.
10. To edit the menu item quantity, click the **Edit** icon adjacent to the appropriate menu item, enter the new quantity, and then click **OK**.
11. Repeat Steps 7 through 10 until the order is complete.
12. Click **Question**, answer the standard questions, and then click **Submit**.
13. To add comments to the order confirmation, click **Comment**, enter the comment, and then click **OK**.
14. Click **Save**.

Calculating Totals

This procedure calculates the totals for event pre-orders created in Suites, and retrieves order totals from the POS client. You must calculate totals before posting event orders to the POS client through the Go Live function.

1. Click **Ordering**, and then click **Calculate Totals**.
2. To calculate totals for an event that is held today, from the **Event Filter**, select **Today's Events**.
3. To calculate totals for a future event, from the **Event Filter**, select **All Events**.
4. Select the **Event**, and then click **Calculate Totals**.

Posting Orders to the POS Client

The Go Live function initiates the transfer of all orders taken for the selected event from Suites to the POS client. Typically this procedure occurs between two to four hours prior to opening doors.



Note:

Future events should not Go Live unless Check Regeneration is run for the preceding event.

1. Calculate the order totals for the event you are going to post to the POS client. See [Calculating Totals](#) for instructions.
2. Click **Ordering**, and then click **Go Live**.
3. To transfer pre-orders for an event that is held today, from the **Event Filter**, select **Today's Events**.
4. To transfer pre-orders for a future event, from the **Event Filter**, select **All Events**.
5. Select the **Event**, and then click **Go Live**.

After the Go Live process completes, a window shows details about successful and failed order transfers.

11

Event Reports

You can generate the following reports:

- [Sales Reports](#)
- [Label Report](#)
- [Production Report](#)
- [Distribution Reports](#)
- [Historical Reports](#)
- [Check Regeneration Report](#)

Sales Reports

You can prepare for an event by reviewing event pre-orders through the following Sales Reports:

- [Order Report](#)
- [Accounts Receivable Report](#)
- [Order Confirmation Report](#)
- [Suites Standard Order Confirmation Report](#)
- [Suites Standard Order Summary Report](#)
- [Seats Order Confirmation Report](#)
- [Seats Standard Order Confirmation Report](#)
- [Label Report](#)
- [Production Report](#)

Generating the Order Report

The Order Report shows a summary of pre-orders for an event.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, click the **Sales** tab, and then select **Order Report**.
3. Click **Show Report**.

Generating the Accounts Receivable Report

The Accounts Receivable Report shows account information for an event.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then on the **Sales** tab, select **Accounts Receivable Report**.
3. Click **Show Report**.

Generating the Order Confirmation Report

The Order Confirmation Report shows event order details for a suite. Suites generates a separate Order Confirmation Report for each suite.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, click the **Sales** tab, and then select **Suites Order Confirmation**.
3. Click **Show Report**.

Generating the Suites Standard Order Confirmation Report

This Order Confirmation Report shows the standard order for a suite. Suites generates a separate Order Confirmation Report for each suite that has a standard order configured.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, click the **Sales** tab, and then select **Suites - Standard Order Confirmation**.
3. Click **Show Report**.

Generating the Suites Standard Order Summary Report

The Suites Standard Order Summary Report shows an overview of all standard orders for an event.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, click the **Sales** tab, and then select **Standard Order Report**.
3. Click **Show Report**.

Generating the Seats Order Confirmation Report

This Order Confirmation Report shows event order details for a seat, if configured.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, click the **Sales** tab, and then select **Seats Order Confirmation**.
3. Click **Show Report**.

Generating the Seats Standard Order Confirmation Report

This Order Confirmation Report shows standard order details for a seat, if configured.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, click the **Sales** tab, and then select **Seats - Standard Order Confirmation**.
3. Click **Show Report**.

Generating the Label Report

The Label Report prints labels for all pre-ordered menu items. Each label contains the following details:

Oracle recommends you should obtain and use Avery 5160 (3x10) labels or their equivalent for this printing task.

- Order number
 - Event name
 - Menu item name and price
 - Date and time
 - Suite number and name
 - Delivery time
1. Click **Reports**, and then click **Event Reports**.
 2. Select the **Event**, and then click the **Labels** tab.
 3. To generate the report for a specific label type, deselect **All** adjacent to the **Label Type** drop-down list, and then select the **Label Type**.
 4. To generate the report for a specific suite, deselect **All** adjacent to the **Suite** drop-down list, and then select the **Suite**.
 5. To generate the report for a specific food pantry, deselect **All** adjacent to the **Food Pantry** drop-down list, and then select the **Food Pantry**.
 6. To generate the report for a specific beverage pantry, deselect **All** adjacent to the **Beverage Pantry** drop-down list, and then select the **Beverage Pantry**.
 7. Click **Show Report**.

Generating the Production Report

The Production Report shows a list of all production items for an event.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **Production** tab.
3. To generate separate reports for each production type, select **All Reports**.
4. To generate a report for a specific production type, deselect **All Reports**, and then select the report to generate.
5. To generate a single report for all menu items, select **All Items**.
6. Click **Show Report**.

Distribution Reports

The Distribution Reports provide a consolidated list of all pre-ordered food items and beverages for all suites.

Generating the Food Distribution Report

The Food Distribution Report shows all pre-ordered food items for an event grouped by the family group.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **Distribution** tab.
3. Select **Food Distribution Report**, select **All**, and then click **Show Report**.

Generating the Food Distribution Report by Pantry

The Food Distribution Report By Pantry shows all pre-ordered food items for an event grouped by the pantry.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **Distribution** tab.
3. Select **Food Distribution Report**, select **By Pantry**, and then click **Show Report**.

Generating the Food Distribution Report by Suites

The Food Distribution Report By Suites shows all pre-ordered food items for an event grouped by the suite.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **Distribution** tab.
3. Select **Food Distribution Report**, select **By Suite**, and then click **Show Report**.

Generating the Beverage Distribution Report

The Beverage Distribution Report shows all pre-ordered beverage items for an event grouped by the family group.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **Distribution** tab.
3. Select **Beverage Distribution Report**, select **All**, and then click **Show Report**.

Generating the Beverage Distribution Report by Pantry

The Beverage Distribution Report by Pantry shows all pre-ordered beverage items for an event grouped by the pantry.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **Distribution** tab.
3. Select **Beverage Distribution Report**, select **By Pantry**, and then click **Show Report**.

Generating the Beverage Distribution Report by Suite

The Beverage Distribution Report By Suite shows all pre-ordered beverage items for an event grouped by the suite.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **Distribution** tab.
3. Select **Beverage Distribution Report**, select **By Suite**, and then click **Show Report**.

Generating the Distribution Delivery Times Report

The Distribution Delivery Times Report shows the delivery times of all pre-ordered menu items for an event grouped by the pantry.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **Distribution** tab.
3. Select **Delivery Times Distribution Report**.
4. To generate the report for a specific pantry, deselect **All Pantries**, and then select a pantry from the drop-down list.
5. Click **Show Report**.

Custom Reports

Custom reports are Crystal Reports that allow you to filter and sort report information according to your requirements.

Generating the Custom Accounts Receivable Report

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **User-Defined** tab.
3. Click the **Custom Report** drop-down list, select **Accounts_Receivable_Report.rpt**, and then click **Show Report**.

Generating the Custom Beverage Distribution Report

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **User-Defined** tab.
3. Click the **Custom Report** drop-down list, select **Beverage_Distribution_Report.rpt**, and then click **Show Report**.

Generating the Custom Delivery Times Distribution Report

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **User-Defined** tab.
3. Click the **Custom Report** drop-down list, select **DeliveryTimes_Distribution_Report.rpt**, and then click **Show Report**.

Generating the Custom Event Report

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **User-Defined** tab.
3. Click the **Custom Report** drop-down list, select **EventReport.rpt**, and then click **Show Report**.

Generating the Custom Food Distribution Report

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **User-Defined** tab.
3. Click the **Custom Report** drop-down list, select **Food_Distribution_Report.rpt**, and then click **Show Report**.

Generating the Custom Order Report

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **User-Defined** tab.
3. Click the **Custom Report** drop-down list, select **OrderReport.rpt**, and then click **Show Report**.

Generating the Custom Order Confirmation for Seats Report

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **User-Defined** tab.
3. Click the **Custom Report** drop-down list, select **Order_Confirmation_For_Seats.rpt**, and then click **Show Report**.

Generating the Custom Order Confirmation for Suites Report

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **User-Defined** tab.
3. Click the **Custom Report** drop-down list, select **Order_Confirmation_For_Suites.rpt**, and then click **Show Report**.

Generating the Custom Owner Report

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **User-Defined** tab.
3. Click the **Custom Report** drop-down list, select **OwnerReport.rpt**, and then click **Show Report**.

Generating the Custom Production Labels Report

1. Click **Reports**, and then click **Event Reports**.

2. Select the **Event**, and then click the **User-Defined** tab.
3. Click the **Custom Report** drop-down list, select **Production_Labels.rpt**, and then click **Show Report**.

Generating the Custom Production Report

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **User-Defined** tab.
3. Click the **Custom Report** drop-down list, select **Production_Report.rpt**, and then click **Show Report**.

Generating the Custom Questions Report

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **User-Defined** tab.
3. Click the **Custom Report** drop-down list, select **QuestionsReport.rpt**, and then click **Show Report**.

Generating the Custom Standard Order Confirmation for Seats Report

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **User-Defined** tab.
3. Click the **Custom Report** drop-down list, select **Standard_Order_Confirmation_For_Seats.rpt**, and then click **Show Report**.

Generating the Custom Standard Order Confirmation for Suites Report

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **User-Defined** tab.
3. Click the **Custom Report** drop-down list, select **Standard_Order_Confirmation_For_Suites.rpt**, and then click **Show Report**.

Historical Reports

Historical Reports provide menu item sales details from past events.

Generating the Major Group Item Sales Report

1. Click **Reports**, and then click **Historical Reports**.
2. Use the **Date From** and **To Date** fields to select the date range for the report.
3. To generate the report for specific event types, click the **Event Type List** tab, and then select the event types.
4. To generate the report for specific events, click the **Events List** tab, and then select the events to include in the report.
5. To generate the report for specific suites, click the **Suites List** tab, and then select the suites to include in the report.

6. To generate the report for specific seats, click the **Seat List** tab, select the **Section**, select the **Row**, and then select the seat numbers to include in the report.
7. To generate the report for specific owners, click the **Owner List** tab, and then select the owners to include in the report.
8. On the **Group Reports** tab in the Historical Reports Category section, select **Major Group Item Sales Report**.
9. To generate the report for specific major groups, select the major groups to include in the report.
10. Click **Show Report**.

Generating the Family Group Item Sales Report

1. Click **Reports**, and then click **Historical Reports**.
2. Use the **Date From** and **To Date** fields to select the date range for the report.
3. To generate the report for specific event types, click the **Event Type List** tab, and then select the event types.
4. To generate the report for specific events, click the **Events List** tab, and then select the events to include in the report.
5. To generate the report for specific suites, click the **Suites List** tab, and then select the suites to include in the report.
6. To generate the report for specific seats, click the **Seat List** tab, select the **Section**, select the **Row**, and then select the seat numbers to include in the report.
7. To generate the report for specific owners, click the **Owner List** tab, and then select the owners to include in the report.
8. On the **Group Reports** tab in the Historical Reports Category section, select **Family Group Item Sales Report**.
9. To generate the report for specific family groups, select the family groups to include in the report.
10. Click **Show Report**.

Generating the Suites History Item Report

1. Click **Reports**, and then click **Historical Reports**.
2. Use the **Date From** and **To Date** fields to select the date range for the report.
3. To generate the report for specific event types, click the **Event Type List** tab, and then select the event types.
4. To generate the report for specific events, click the **Events List** tab, and then select the events to include in the report.
5. To generate the report for specific suites, click the **Suites List** tab, and then select the suites to include in the report.
6. To generate the report for specific seats, click the **Seat List** tab, select the **Section**, select the **Row**, and then select the seat numbers to include in the report.

7. To generate the report for specific owners, click the **Owner List** tab, and then select the owners to include in the report.
8. Click the **Sales Report** tab, select **Suites** as the **Sales Report Type**, and then select **Sales History Item Report**.
9. Click **Show Report**.

Generating the Suites History Item Details Report

1. Click **Reports**, and then click **Historical Reports**.
2. Use the **Date From** and **To Date** fields to select the date range for the report.
3. To generate the report for specific event types, click the **Event Type List** tab, and then select the event types.
4. To generate the report for specific events, click the **Events List** tab, and then select the events to include in the report.
5. To generate the report for specific suites, click the **Suites List** tab, and then select the suites to include in the report.
6. To generate the report for specific seats, click the **Seat List** tab, select the **Section**, select the **Row**, and then select the seat numbers to include in the report.
7. To generate the report for specific owners, click the **Owner List** tab, and then select the owners to include in the report.
8. Click the **Sales Report** tab, select **Suites** as the **Sales Report Type**, and then select **Sales History Item Details Report**.
9. Click **Show Report**.

Generating the Event Item Sales Summary Report

1. Click **Reports**, and then click **Historical Reports**.
2. Use the **Date From** and **To Date** fields to select the date range for the report.
3. To generate the report for specific event types, click the **Event Type List** tab, and then select the event types.
4. To generate the report for specific events, click the **Events List** tab, and then select the events to include in the report.
5. To generate the report for specific suites, click the **Suites List** tab, and then select the suites to include in the report.
6. To generate the report for specific seats, click the **Seat List** tab, select the **Section**, select the **Row**, and then select the seat numbers to include in the report.
7. To generate the report for specific owners, click the **Owner List** tab, and then select the owners to include in the report.
8. Click the **Sales Report** tab, select **Events** as the **Sales Report Type**, and then select **Event Item Sales Summary Report**.
9. Click **Show Report**.

Generating the Owners History Item Report

1. Click **Reports**, and then click **Historical Reports**.

2. Use the **Date From** and **To Date** fields to select the date range for the report.
3. To generate the report for specific event types, click the **Event Type List** tab, and then select the event types.
4. To generate the report for specific events, click the **Events List** tab, and then select the events to include in the report.
5. To generate the report for specific suites, click the **Suites List** tab, and then select the suites to include in the report.
6. To generate the report for specific seats, click the **Seat List** tab, select the **Section**, select the **Row**, and then select the seat numbers to include in the report.
7. To generate the report for specific owners, click the **Owner List** tab, and then select the owners to include in the report.
8. Click the **Sales Report** tab, select **Owners** as the **Sales Report Type**, and then select **Owners History Item Report**.
9. Click **Show Report**.



Generating the Owners History Item Details Report

1. Click **Reports**, and then click **Historical Reports**.
2. Use the **Date From** and **To Date** fields to select the date range for the report.
3. To generate the report for specific event types, click the **Event Type List** tab, and then select the event types.
4. To generate the report for specific events, click the **Events List** tab, and then select the events to include in the report.
5. To generate the report for specific suites, click the **Suites List** tab, and then select the suites to include in the report.
6. To generate the report for specific seats, click the **Seat List** tab, select the **Section**, select the **Row**, and then select the seat numbers to include in the report.
7. To generate the report for specific owners, click the **Owner List** tab, and then select the owners to include in the report.
8. Click the **Sales Report** tab, select **Owners** as the **Sales Report Type**, and then select **Owners History Item Details Report**.
9. Click **Show Report**.

Generating the Check Regeneration Report

The Check Regeneration Report allows you to review Suites checks closed at the POS client. But before you can review Suites checks, you must transfer the checks from the POS client to Suites. The transfer must occur after the current event ends and before the new event goes live. You can configure Symphony to automatically transfer closed Suites checks by creating a PC Autosequence (see [Configuring a PC Autosequence to Import Closed Suites Checks](#)) or you can manually perform the transfer before a new event goes live.

1. To manually transfer closed Suites checks from the POS client to Suites:

- a. Open a Command Prompt and navigate to [Drive Letter]:\MICROS\LES\Suites\Suites\SUITESSERVICE\SIMScripts.
 - b. Enter SuitesCheckExport.bat, and then press the **Enter** key.
2. From the Suites Management home page, click **Reports**, and then click **Check Regeneration**.
3. Select the check box adjacent to one or more of the following filters to streamline your search. From Suites version 3.6, you can no longer search for closed checks using the credit card number.
 - **Event**: Select the event on the check.
 - **Tender**: Select the tender on the check.
 - **Search Type**: Select **Suite** to search for checks by suite number, or select **Seat** to search for checks by seat number.
 - **Suite**: Select the suite on the check.
 - **Owner**: Select the suite owner on the check.
 - **Check Date**: Select the check date.
 - **Check Number**: Enter the check number.
 - **Section**: If you are searching by seat, select the section on the check.
 - **Row**: If you are searching by seat, select the row on the check.
 - **Seat**: If you are searching by seat, select the seat number on the check.
4. Click **Search for Check**.
5. To view check details on screen, click the **View Check Detail** icon () in front of the check date.
6. To generate a PDF of the check, click the **Print Check** icon () in front of the check date.

12

Configuration Reports

The Configuration Reports allow you to review your configurations in Suites.

Generating the Event Report

The Event Report shows event details for the event that you select.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **Configuration** tab.
3. Select **Event Report**, and then click **Show Report**.

Generating the Owner Report

The Owner Report shows suites owner information for an event. Suites generates separate Owner Reports for each owner.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **Configuration** tab.
3. Select **Owner Report**, and then click **Show Report**.

Generating the Suite Report

The Suite Report shows suite information, including suite owner details, for an event.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **Configuration** tab.
3. Select **Suite Report**, and then click **Show Report**.

Generating the Questions Report

The Questions Report shows all questions included in pre-orders for an event.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **Configuration** tab.
3. Select **Questions Report**, and then click **Show Report**.

Generating the Menu Item Report

The Menu Item Report shows all menu items pre-ordered for an event grouped by the family group.

1. Click **Reports**, and then click **Event Reports**.

2. Select the **Event**, and then click the **Configuration** tab.
3. Select **Menu Item Report**, and then click **Show Report**.

Generating the Production Report Type

The Configuration Report Production Report Type shows all production items grouped by the production report type.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **Configuration** tab.
3. Select **Production Report Type Report**, and then click **Show Report**.

Generating the Label Type Report

The Configuration Report Label Type Report shows all menu items pre-ordered for an event grouped by the label type.

1. Click **Reports**, and then click **Event Reports**.
2. Select the **Event**, and then click the **Configuration** tab.
3. Select **Label Type Report**, and then click **Show Report**.

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Admin Tasks

Configuring the Operational Settings

1. Click **System Setup**, and then click **System Parameters**.
2. Configure the **Operational Settings** as follows:
 - **Default to Owner Credit Card on Every Day Orders:** Select **Yes** to use the configured credit card ID in owner Payment Information for owners whose default payment type is credit card. By default this is set to **No**.
 - **Reset Quantity After Order of Menu Items:** Select **No** if you do not want the user entered quantity in Ordering Settings on Every Day Orders to reset to 1 each time a menu item is added to the order. By default this is set to **Yes**.
 - **Calculate service charges or tax totals when saving an order:** Select **Yes** to enable Transaction Services (POSAPI) clients (using the Transaction Services Calculate Totals operation) to save service charge and tax amount values on every completed event order. Enabling this option increases system messaging by saving each order, and increases the amount of time required to generate the Order Confirmation Report. By default, this is set to **No**.
 - **Automatically Run Data Purging:** Select **Yes** to automatically purge data.
 - **Owner Data Retention Period:** Enter the number of days to retain owner personally identifiable information. When the number of days expires, all owner inactive personally identifiable information will be removed from the Suites system. The default data retention period for employees and owners is 999 days.
 - **Employee Data Retention Period:** Enter the number of days to retain employee personally identifiable information. When the number of days expires, all employee inactive personally identifiable information will be removed from the Suites system.
3. Click **Save**.

Configuring the Default Import Settings

All menu items that are imported from Symphony First Edition or Symphony are assigned to the default settings that you configure on this page.

1. Click **System Setup**, and then click **System Parameters**.
2. Scroll to the Default Import Settings section, select the **Default Production Report Type**, and then select the **Default Label Type**.
3. Click **Save**.

Configuring the POS Settings

1. Click **System Setup**, and then click **System Parameters**.

2. Scroll to the Point of Sale Interface Settings section, and then select or enter the following details:
 - **POS Version:** Select the Symphony version.
 - **Property Version:** If you selected **Simphony First Edition** as the **POS Version**, enter the property ID number of the Symphony FE property that connects with Suites.
 - **Revenue Center:** Enter the revenue center (RVC) ID of the RVC that connects with Suites.
 - **Workstation ID:** If you selected **Simphony First Edition** as the **POS Version**, enter the Workstation ID of the POSAPI client that runs Suites.
 - **Employee ID:** If you selected **Simphony** as the **POS Version**, enter the employee ID of a workstation operator.
 - **URL for Config. Web Service:** Enter the URL for the Suites application server (for example, `https://192.168.1.1:8001/SUITESSERVICE/Config9700Service.asmx`).
 - **URL for Trans. Services Web Service:** Enter the URL of the workstation that communicates with Suites (for example, `http://192.168.1.1:8080/EGateway/SimphonyPosApiWeb.asmx`).
3. Click **Save**.

Configuring the Suites License Count

You can configure the maximum number of licensed suites that a property can activate. Suites does not prevent you from exceeding the licensed suites threshold, although you will receive a warning message.

Suites licensing activities are logged in the LSMWeb logs. This log file identifies the username and user ID of the individual making Suites licensing configuration changes.

1. Click **System Setup**, and then click **System Parameters**.
2. From the Licensing Setting section, enter the **Number of Suites Licensed**, and then click **Save**.

Configuring the Accounts Receivable Export Settings

You can restrict the tender types that are included in Accounts Receivable event exports.

1. Click **System Setup**, and then click **System Parameters**.
2. Scroll to the Accounts Receivable Export Setting section, select the tender types that are available for export, and then click **Save**.

Adding an Image to the Home Page

Suites supports all image formats supported by web browsers. However, Oracle recommends using one of the following:

- PNG
- JPEG

- GIF
1. Place the image in the: [Drive Letter]:\MICROS\LES\Suites\Images folder.
 2. Click **System Setup**, and then click **System Parameters**.
 3. From the Miscellaneous Settings section, enter the **Home Page Image File Name** with the image extension (for example, `HomePage.jpg`), and then click **Save**.

Translating Suites to Another Language

The Suites user interface elements and messages are provided in English. To translate the interface elements and messages to another language:

1. Click **Admin Tasks**, and then click **Language Setup**.
2. Click **New**, enter the **Language Name**, enter the language **Culture Name** (for example, `fr-FR`), and then click **Save**.
3. Click **Admin Tasks**, and then click **User Message Text**.
4. For each message code in the list, select the **Language** that you created in Step 2, enter the translated **Message Text**, and then click **Add Translation**.
5. Click **Admin Tasks**, and then click **Form Text**.
6. For each form text in the list, select the **Language** that you created in Step 2, enter the translated **Form Text**, and then click **Add Translation**.

Purging Events

Purging events deletes all corresponding check details and pre-orders from Suites that fall within the date range that you select.

1. Click **Admin Tasks**, and then click **Purge Events & Sales**.
2. Select the date range for which you want to delete the events using the **Date From** and **To Date** fields, and then click **Purge Events**.

Reactivating Deleted Suite Owners

Use this procedure to reactivate owners that you deleted or deactivated from the Owner List page.

1. Click **Admin Tasks**, and then click **Re-Activate Owners**.
2. Select the owners you want to reactivate, and then click **Activate**.

Using the Audit Trail

You can use the Audit Trail module to view changes made to the Suites Management application. The Audit Trail records and reports all successful and failed logins, and configuration changes made to owner and employee records.

1. Click **Admin Tasks**, and then click **Audit Trail**.
2. To search for a user:
 - Enter the user name in the **Login Username** field, and then click the **Search** button.

3. To purge the Audit Trail logs:
 - a. Click the **Purge** button.
 - b. In the Purge Audit Trail Records dialog, select the final date in the **Purge records Up to this Date** field.
 - c. Click the **Purge Audit Trail** button.
4. To export Audit Trail logs:
 - a. Click the **Export** button.
 - b. In the Export Audit Trail Records dialog, select the date range in the **From Date** and the **To Date** fields.
 - c. Click the **Export** button. The Audit Trail log information is exported in .csv format for the dates you specified.

POS Application Configuration

This chapter describes how to set up Symphony First Edition and Symphony to interface with Suites.

To set up Symphony First Edition, complete the following tasks:

- [Add a Suites Interface in Symphony First Edition](#)
- [Configure Menu Items for Suites](#)
- [Allow Revenue Centers to Pick Up Suites Checks](#)
- [Allow Employees to Pick Up Suites Checks in Symphony](#)
- [Configure a PC Autosequence to Import Closed Suites Checks](#)
- [Configure Workstation Buttons in Symphony First Edition for Suites Check Operations](#)

To set up Symphony, complete the following tasks:

- [Add a Suites Interface in Symphony](#)
- [Enabling the Suites Extension Application for Symphony](#)
- [Configure Menu Items for Suites](#)
- [Allow Employees to Pick Up Suites Checks in Symphony](#)
- [Configure a PC Autosequence to Import Closed Suites Checks](#)
- [Configure Workstation Buttons in Symphony for Suites Check Operations](#)
- [Add Translations for Suites Operations in Symphony](#)

Adding a Suites Interface in Symphony First Edition

You must configure a new interface for the POS clients to communicate with the LSM Suites Services Listener. If multiple properties in the same enterprise are using Suites, add a new interface record for each property and repeat the steps in this section for each property running Suites.

1. From the EMC, select the Enterprise, and then click **Interfaces**.
2. Insert a new record named `Suites`, and then double-click the record to open it.
3. On the **General** tab, configure the settings as follows:
 - **Communication Name:** Enter `Suites`.
 - **Interface Type:** Select **0 - PMS/SIM**.
 - **Communication Type:** Select **1 - TCP/IP**.
 - **Timeout:** Enter 30.
 - **ISL Script Name:** Enter `SuiteMgt`.
4. On the **Options** tab, select the following options:

- **1 - Use 19 Digit Reference Entry for PMS Inquiries**
 - **2 - Enable Interface Log**
 - **3 - Allow Inquiry without Sign-In**
 - **5 - ON = Use 9 digits for Terminal ID's; OFF = Use 2 digits for Terminal ID's**
 - **8 - Enable Offline Posting**
5. Enter the **TCP Host Name** and the **Port Number**.
This is the name or IP address of the machine where the Suites Service is running.
 6. On the **Properties** tab, select the property that is using Suites.
Assign only one property for this interface.
 7. On the **Service Host** tab, select the **Service Host** that is running the Suites Service and the Transaction Services at the property level.
 8. Click **Save**.
 9. Select the revenue center, and then click **RVC Parameters**.
 10. On the **Format** tab, enter 10 for the **Number of Guest Check Information Lines**.
This allows Symphony First Edition to contain Suites information in the check detail area.
 11. On the **Interfaces** tab, assign the Suites interface to one of the interfaces fields, and then click **Save**.

Adding a Suites Interface in Symphony

1. From the EMC, select the Enterprise, click **Setup**, and then click **Interfaces**.
2. Insert a new interface record named `Suites`, and then double-click the record to open it.
3. From the General tab, enter `Suites` for the **Communication Name**, select **0 - PMS/SIM** as the **Interface Type**, and then select **1 - TCP** as the **Communication Type**.
4. From the Options tab:
 - a. Select the following options:
 - **1 - Use 19 Digit Reference Entry for PMS Inquiries**
 - **2 - Enable Interface Log**
 - **3 - Allow Inquiry without Sign-In**
 - **5 - On = Use 9 digits for Terminal IDs; Off = Use 2 digits for Terminal IDs**
 - **8 - Enable Offline Posting**
 - b. Enter the **TCP Host Name** and the **Port Number** of the server where the LSM Windows Service (`LSMWinService.exe`) is running.
The **TCP Host Name** is the name or IP address of the system running the `LSMWinService`. **Port Number** is the port on which the `LSMWinService` is listening for connections. The default value is 5009. If you are not using the

default port, you must update the value of the ListenerPort parameter in the LSMWinService.exe.config file in the [Drive Letter]:\MICROS\LES\Suites\Suites\LSMSimService folder.

5. From the Properties tab, select the properties that are using the interface definition.
6. From the Service Host tab, select the **Service Host** from which TCP communications to the LSM Windows Service is initiated.

The service host must be able to connect to the TCP Host Name and Port Number defined from the Options tab.
7. Click **Save**.
8. Select the revenue center, click **Setup** and **RVC Parameters**.
9. From the Interfaces tab, assign the Suites interface that you created in Step 2 to one of the interfaces fields, and then click **Save**.
10. Repeat Steps 8 and 9 for each revenue center that uses the Suites interface.

Enabling the Suites Extension Application for Symphony

Simphony automatically deploys the Suites Management System Interface Module (SIM) script when installing or upgrading to Symphony version 2.9 or later.

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Extension Application**.
2. In the **Options** column, click the ellipsis (...) symbol adjacent to the Suites record, and then deselect **1 - Disable Application**.
3. In the **Interface** column, click the ellipsis (...) symbol adjacent to the Suites record, select **Suites** from the list of interfaces, and then click **OK**.
4. Click **Save**.

Configuring Menu Items

Complete the following tasks to set up menu items in Symphony First Edition or Symphony for importing into Suites:

Setting Up Menu Item Classes

1. Access the Menu Item Classes module:
 - If you are using Symphony First Edition, select the revenue center and then click **Menu Item Classes**.
 - If you are using Symphony, select the revenue center, click **Configuration**, and then click **Menu Item Classes**.
2. On the **Options** tab, configure the options in the Suites Management revenue center as follows:
 - **10 - ON = Use Sub Level Pricing; OFF = Use Main Level Pricing:** Deselect this option for all menu item classes to be added in the Suites revenue center.
 - **34 - Item is Beverage:** Select this option for all menu items that are beverages in the Suites revenue center.

3. Click **Save**.

Setting Up Menu Item Definitions

1. Access the Menu Item Maintenance Module:
 - If you are using Symphony First Edition, select the revenue center and then click **Menu Item Maintenance**.
 - If you are using Symphony, select the revenue center, click **Configuration**, and then click **Menu Item Maintenance**.
2. Click the **Record Type** drop-down list, select **Menu Item Definition**, and then click **Search**.
3. Ensure that the menu items have a single definition.

Menu items that are used in Suites cannot have more than one definition. Suites only recognizes the first definition for a menu item.
4. Ensure that the menu items have a Number Look Up (NLU) assigned.

Suites cannot recognize NLUs that exceed ten digits. You can leave the NLU Group empty, but the NLU number is necessary to import items into the Suites Management database. This allows operators to place orders by NLU.

Setting Up Menu Item Prices

1. Access the Menu Item Maintenance Module:
 - If you are using Symphony First Edition, select the revenue center, and then click **Menu Item Maintenance**.
 - If you are using Symphony, select the revenue center, click **Configuration**, and then click **Menu Item Maintenance**.
2. Click the **Record Type** drop-down list, select **Menu Item Price**, and then click **Search**.
3. Ensure that the menu items have at least one price record whose **Active On Level** setting is not set to **0 - All Levels**.

Suites supports only Main Menu Level pricing, and does not recognize prices that are active on all levels.

Allowing Revenue Centers to Pick Up Suites Checks

In Symphony First Edition, revenue centers need permission to pick up checks that are created through the Suites Go Live function.

1. Select the revenue center, and then click **RVC Parameters**.
2. On the **Posting and Control** tab, select **23 - Allow Pickup/Creation of Unassigned Checks**.
3. Click **Save**.

Allowing Employees to Pick Up Suites Checks

Employees need permission to pick up checks that are created through the Suites Go Live function from the POS client.

1. Access the Roles module:
 - If you are using Symphony First Edition, select the Enterprise level and then click **Roles**.
 - If you are using Symphony, select the Enterprise level, click **Configuration**, and then click **Roles**.
2. Double-click the appropriate employee role record to open it.
3. On the **Operations** tab, click the **Guest Checks** subtab, and then select **Authorize/Perform Creation and Pickup of Unassigned Checks**.
4. Click **Save**.

Configuring a PC Autosequence to Import Closed Suites Checks

During the Start of Day process, using PC Autosequences, the application can automatically import closed Suites checks into the Suites Management database with the LSMClosedCheckClient.exe file as long as the Suites Service is installed on the Symphony application server.

1. Copy the LSMClosedCheckClient.exe file to the [Drive Letter]:\Micros\Symphony\etc directory on the Symphony application server. If the site has multiple application servers, copy the file to the server running the Suites Service.

If you are using Symphony, you must create an etc folder in the directory to copying the file.

2. Access the PC Autosequences module:
 - If you are using Symphony First Edition, select the Enterprise level and then click **PC Autosequences**.
 - If you are using Symphony, select the Enterprise level, click **Configuration**, and then click **PC Autosequences**.
3. Insert a new PC Autosequence record, and then double-click the new record to open it.
4. On the **General** tab, configure the settings as follows:
 - **Name:** Enter Suites Check Export.
 - **Allowed Properties:** Select the property that uses Suites Management.
 - **Privilege Group:** Set the privilege group for users to run this autosequence. Entering 0 (zero) allows all users with EMC access to run the autosequence.
5. Click **Add** to add a new parameter, select **Property Number** as the **Parameter**, enter the property number in the **Value** field, and then click **OK**.
6. On the **Steps** tab, select **Run External Program** for the **Step Type**.

- Click **Add** to add a parameter, select **External Program File Path** as the **Parameter**, enter the absolute path for the LSMClosedCheckClient.exe file in the **Value** field, and then click **OK**.

The file is located at [Drive Letter]:\Micros\Symphony\etc\LSMClosedCheckClient.exe.

- Click **Add** to add another parameter, select **External Program Arguments** as the **Parameter**, enter `-simphony_checks` in the **Value** field, and then click **OK**.
- Click **Save**.

Configuring Workstation Buttons in Symphony First Edition for Suites Check Operations

Before a Suites event, initiate the Go Live process function from the Suites Management website to create checks in Symphony First Edition. Then, program a SIM inquiry button on the Suite Attendant screen to call the Suites Management SIM function for picking up a Suites check in the POS client. Workstation operators must pick up Suites checks using the designated touchscreen button for the specific suite information to be written correctly to the check.

To configure a SIM inquire touchscreen button in Symphony First Edition for picking up Suites checks:

- Select the revenue center, and then click **Touchscreen Design**.
- Double-click the transaction page that workstation operators use to pick up checks, and then insert a new button.
- On the **Key** tab, select **11 - Function** as the **Key Type**.
- Click the right arrow adjacent to the **Key Number** field, and then select **SIM [interface number] - Suites - Inquire 3**.
For example, SIM 1 - Suites - Inquire 3.
- Enter `Pickup Suites` for the **Legend**, and then remove all reopen checks, pickup check SLUs, and function buttons from the employee's screen.
- Click **Save**.
- Perform a database update on the workstations.

Configuring Workstation Buttons in Symphony for Suites Check Operations

This procedure describes how to configure touchscreen buttons in Symphony version 2.9 and later for Suites check operations.

- Select the Enterprise, property, revenue center, or zone, click **Configuration**, and then click **Page Design**.
- Double-click the transaction page that workstation operators use to pick up checks.
- Insert a button, on the **General** tab, select **Function** as the **Type**, and then click the right arrow directly beneath the **Type** drop-down list.

4. Select **Extensibility** from the Type pane, select **SIM Inquire** from the Results pane, and then click **OK**.
5. In the **Argument** field, enter `Suites:3`, and then enter `Pickup Suite Check` for the **Legend**.
Suites is the name of the extension application previously added.
6. Repeat Steps 3 and 4 to insert another button.
7. In the **Argument** field, enter `Suites:4`, and then enter `Add Check to Suite` for the **Legend**.
8. Click **Save**.
9. Perform a database update on the workstations and restart the workstations. You must restart the service host defined on the **Service Host** tab in the Interfaces module.

Adding Translations for Suites Operations in Symphony

This feature is only available in Symphony version 2.9 and later. Before performing this procedure, set up languages from the EMC. The *Oracle Hospitality Symphony Configuration Guide* contains more information on configuring languages in Symphony.

You can translate the dialog boxes and messages that appear when carrying out Suites operations from the POS client by adding the translations as an additional extension application.

1. Select the Enterprise, property, revenue center, or zone, click **Setup**, and then click **Extension Application**.
2. Double-click the Suites Management extension application record to open it, and then click **Insert Application Name**.
3. In the **Zoneable Key** field, enter `SuiteText_`, followed by the **Text File Name** with the translation defined in the Languages module for the relevant language.

For example, if the Text File Name is DE, the Zoneable Key is `SuiteText_DE`. The Text File Name is defined in the Symphony 2.0 File Name Setting on the General tab of the Languages module.
4. Enter a **Description**, and then click **OK**.
5. Rename the text file with the translation to the exact name as the Zoneable Key (for example, `SuiteText_DE`), and then place it in the `[Drive Letter]:\MICROS\Symphony2\Tools\Dbupgrade\Suites\Text` folder.
6. On the **Designer** tab, select **23 - Text** as the **Content Type**, click **Import from a file**, and then browse and select the text file from the location in Step 5.
7. Click **Save**.

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POS Client Operations

If you plan on performing Credit Card authorizations and payments through Suites Management, that functionality is dependent on the Transaction Services POSAPI client.

Transaction Services only supports the MCreditDebit Payment driver for credit/debit card authorizations and payment.

Creating and Picking Up Suites Checks

1. Press the **Pickup Suites Check** function key, enter the suite number, and then press **OK**.
2. To create a new Suites check:
 - a. Select a suite owner that does not have a check number from the list, and then press **OK**.
 - b. If the suite owner's name is not on the list, select **0 - ADD GUEST**, press **OK**, enter the suite guest name, and then press **OK**.
 - c. Add menu items to the Suites check and end the current service round.
3. To pick up an existing Suites check:
 - a. Select the suites owner with the appropriate check number from the list (for example, John Smith (CHK #435)), and then press **OK**.

If you are using Symphony First Edition and the suite has nine or fewer owners, the workstation shows touchscreen buttons with the owner names. If the suite has ten or more owners, an owner list appears.
 - b. If the suites owner has multiple Suites checks, enter the check number that you want to pick up, and then press **OK**.
 - c. Make the necessary changes to the Suites check, and then end the current service round.

Splitting Off Items From a Suites Check and Adding Suite Owner Information

1. Press the **Pickup Suites Check** function key, enter the suite number, and then select the Suites check you want to split.
2. Press the **Touch Split** function key, and then move the items to be paid by another guest to the new Suites check.
3. Press **Save**, and then press **Yes** when prompted for confirmation.
4. If you are prompted for confirmation to print the new Suites check, press **Yes**.
5. Make the necessary changes, and then end the current service round of the original Suites check that is open on the check detail area.

6. Make the necessary changes, and then end the current service round of the Suites check.
7. To add suite owner information to the split check:
 - a. Press the **Add Check to Suite** function key, enter the suite number, and then press **OK**.
 - b. Enter the suite guest name, and then press **OK**.
 - c. Enter the number of the check to add guest information, and then press **OK**.
 - d. Select the suite guest name that you entered in Step 7-b from the suites owner list, and then press **OK**.