

Oracle® Hospitality Cruise Shipboard Property Management System Spa User Guide



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September 2020

The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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Preface

The purpose of this document is to provide an overview of the operations of the Spa module.

Audience

This document is intended for application specialists and end-users of the Oracle Hospitality Cruise Shipboard Property Management System (SPMS).

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<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

Oracle Hospitality product documentation is available on the Oracle Help Center at <http://docs.oracle.com/en/industries/hospitality/cruise.html>.

Revision History

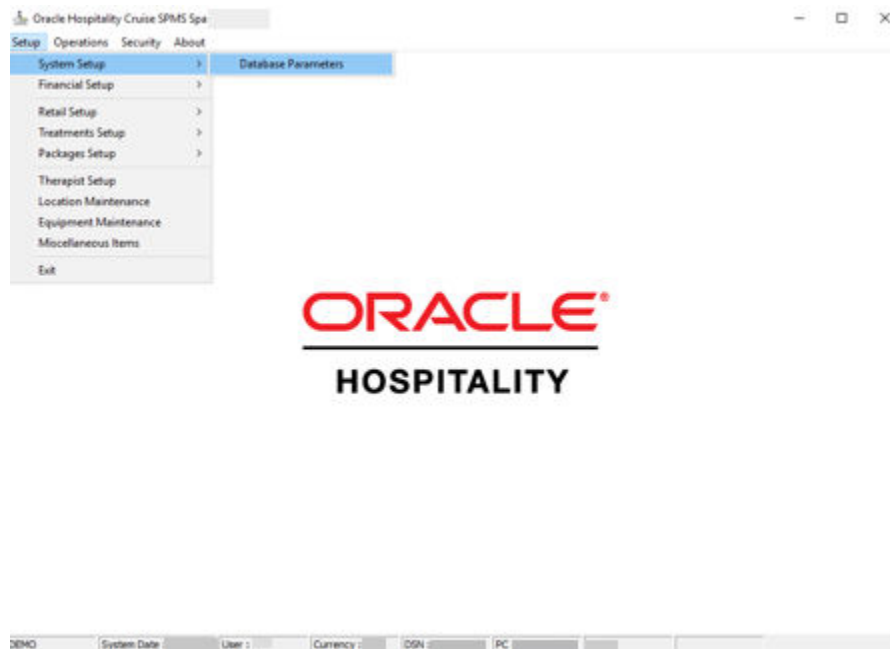
Table 1 Revision History

Date	Description of Change
September 2020	Initial Publication

1 Setup

System Setup

Figure 1-1 Database Parameters



The system uses the parameters stored in the **PAR** table.

To update the parameters, click **Administration** module and choose **Database Parameters** from the **System Setup** menu.

The parameters have the following definitions and acceptable values.

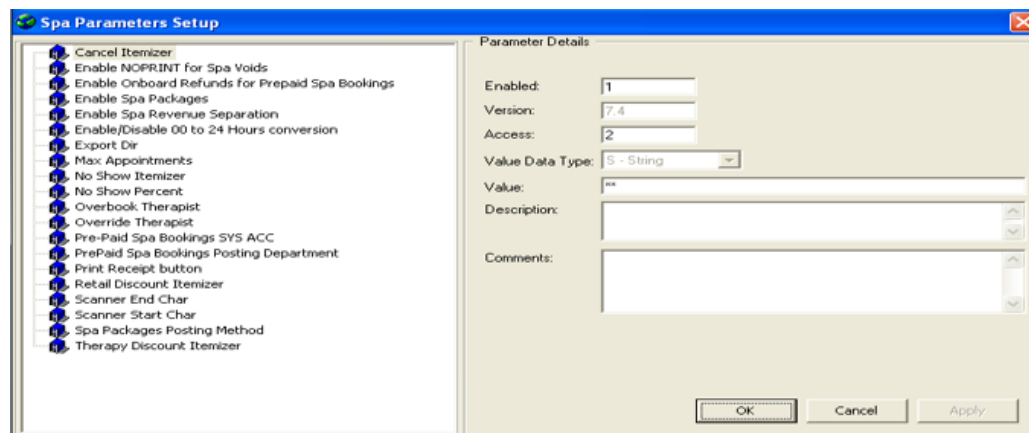
Table 1-1 Description of the Options that Appear on the Database Parameters

Option	Description
Max Appointments	Used as the upper bound on appointments for a single day and Spa location. The parameter needed to improve processing speed by setting up the number of appointments at the start-up of the system. Suggest 500 as the initial value.

Table 1-1 (Cont.) Description of the Options that Appear on the Database Parameters

Option	Description
Itemizers	Appended to the partial Department ID from Location Maintenance to create a full posting department for a charge for discounts, cancellations and no shows. See Spa Itemizers and Location Prefixes Setup for more information.
Start/End Scanner Characters	Characters used by the system to determine that bar code scanner code follows.
No Show Percent	The percent of the service charge that applies to a no-show guest.

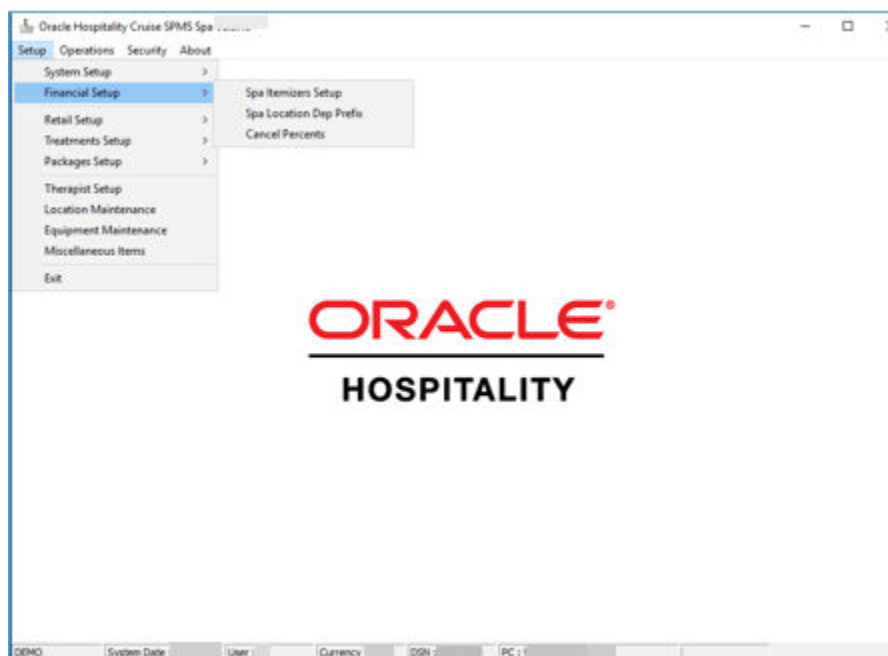
Figure 1-2 Spa Parameters



Financial Setup

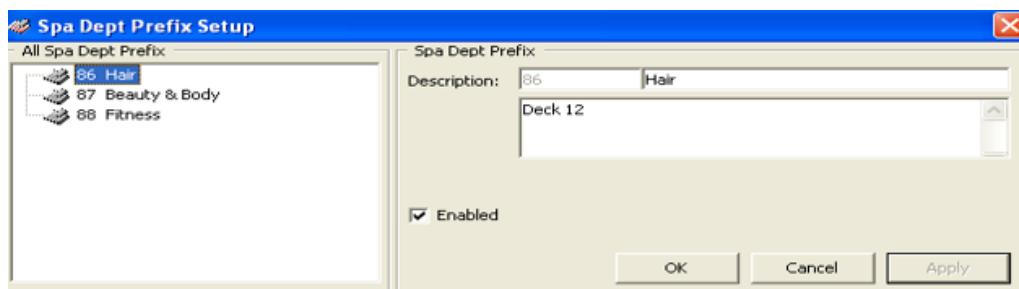
Setting up the Spa Itemizers and Location Prefixes

Figure 1-3 Financial Setup



Enter the Department prefix in the first field of the **Description**, a description for the prefix in the second field and click **Apply**.

Figure 1-4 Spa Dept Prefix Setup



Modifying an Entry

1. Right-click the code in the tree view.
2. Make the modifications and click **Apply**.

Deleting an Entry

1. Right-click the code from the tree view and select **Remove**.
2. A message box will display “**Are you sure to want to delete this entry?**” Click **Yes**.

 **Note:**

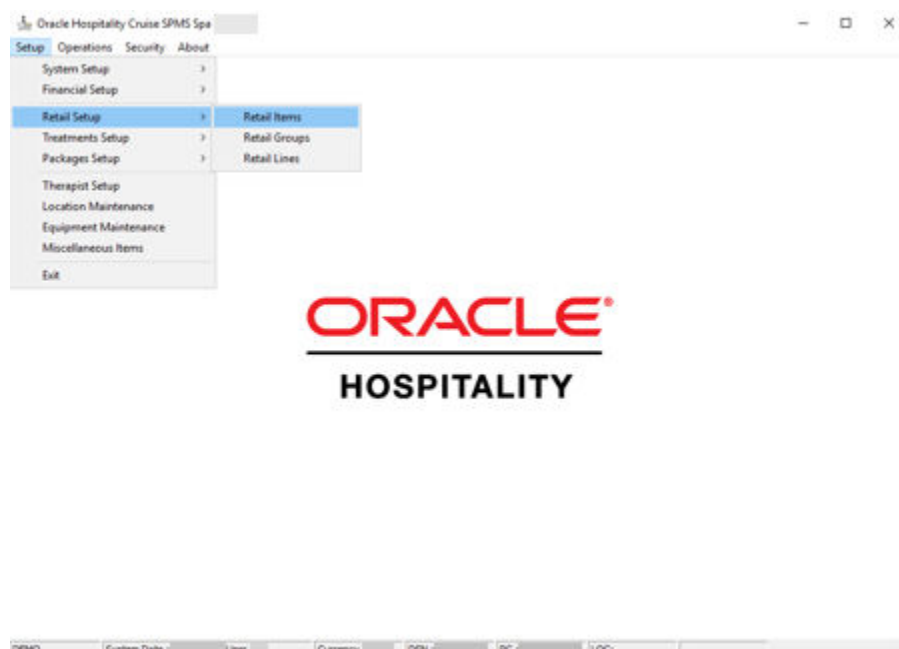
Only the Spa Department Prefixes that are not in use can be deleted.

Right-click on the tree view allows you to add an itemizer. To delete, you need to right-click on the itemizer then choose the option.

Retail Setup

Retail Items, Groups and Lines

Figure 1-5 Retail Setup



Retail Group defines the type of Retail Item. Retail Group is the Retail Line which defines the manufacturer or the sub-type of item. Retail Groups are maintained by selecting the Retail Group from the Retail Setup menu.

Adding a New Group

1. To add a new group, right-click on the tree view and select **Add New** from the option menu.
2. Enter the **Code, Description** and **Comments**.
3. Click **OK**.

Deleting a New Group

1. Select the group to delete from the tree view.
2. Right-click and select **Remove** from the context menu.

Updating a New Group

1. Select the group from the tree view.
2. Click **Update**.

The Retail Items information is divided into three (3) tabs.

- General — Displays General Information about each Retail Item.
- Pricing & Sales — Displays Pricing Period information.
- Bar Codes — Displays all available Bar Codes assigned to each Retail Item.

Table 1-2 Description of the Options that Appear on the Retail Lines Setup Screen

Option	Description
Group	The Retail Group to which this item belongs.
Shore Code	The SKU number for this item. Based on recent discussion, this field will expand so that an unlimited number of SKU's can be defined for an item.
MMS Code	MMS or external F&B system Item Code (Crunch Time).
Active	If this field is checked, then the item is available for sale.
Name	The short name of the item.
Descriptions	A longer name or description for the item.
Line	The Retail Line for this item.
Prepaid Itemizer	The Prepaid posting suffix for this item (For Prepaid Retail). Items imported using the Data Import module.

Table 1-3 Description of the Options that Appear on the Retail Lines Setup Screen (Bar Codes Tab)

Option	Description
Bar Code ID	Multiple Bar Codes associated with this item

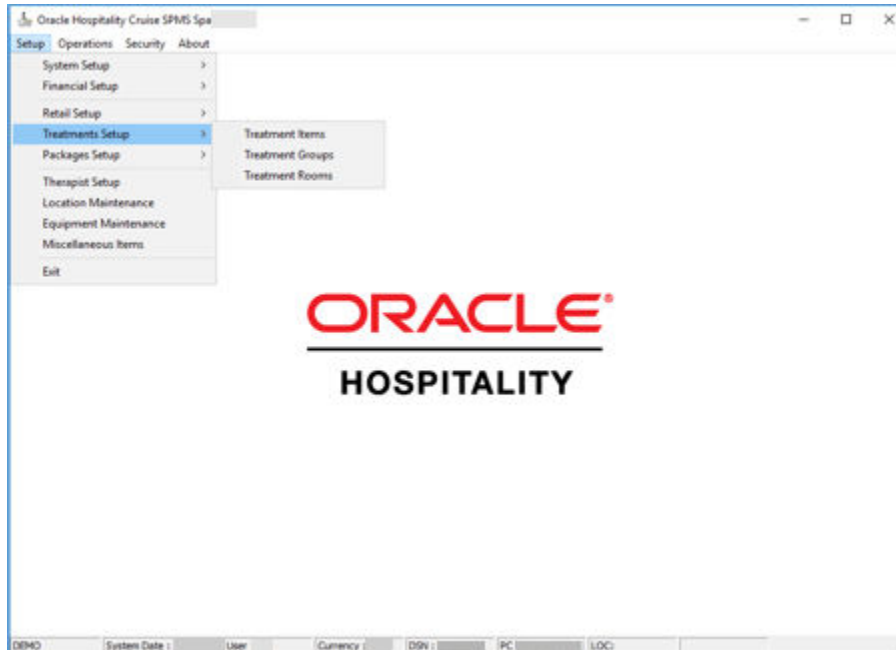
Table 1-4 Description of the Options that Appear on the Retail Lines Setup Screen (Pricing and Sales Tab)

Option	Description
From Date	The starting date for a new Price.
To Date	The ending date for a new Price.
Price	The price to apply for the period specified from The Starting Date to the Ending Date.
Price Grid	A list of all active prices for this item. The item must always have a price for all dates from today through Dec 31, 2099.

Treatment Setup

Treatment Items and Groups

Figure 1-6 Treatments Setup



Treatments are assigned to a Treatment Group for ease of search for specific Treatments. To make changes to Treatment Groups, select Treatment Groups from the Treatments Setup menu.

Adding a New Group

1. To add a new group, right-click on the tree view and select **Add New** from the options menu.
2. Enter the **Code**, **Description** and **Comments** and then click **OK**.

Deleting a Group

1. Select the group from the tree view.
2. Right-click and select **Remove** from the context menu.

Updating a Group

- To update the description of a group, select it from the tree view, make any changes required and click **Apply** or **OK**.
- To update a Treatment, select **Treatment Items** from the Treatment Setup menu. Treatment Group and Treatment Name tree view is displayed. Make the required changes and click **Update**.
- To add or delete a treatment, right-click on the **Treatment** from the tree view and select **Add New** or **Remove**. To update a treatment, click on the tree view and make the required change, then click **Update**.

Figure 1-7 Treatment Items Setup

The Treatment Items setup is divided into five (5) tabs:

- **General** — displays Pricing Periods information.
- **Pricing & Sales** — displays Pricing Periods information.
- **Rooms & Equipment** — displays Pricing Periods information.
- **Bar Codes** — displays all available Bar Codes assigned to each Retail Item.
- **Retail Items Included** — displays retail items.

Table 1-5 Description of the Options that Appear on the Retail Lines Setup Screen (General Tab)

Option	Description
Group	The treatment group to which this item belongs.
Shore Code	The SKU number for this item. This field will expand so that an unlimited number of SKUs can be defined for an item.
Active	If this field is checked, then the item is available for sale. If it is not checked, then this item is no longer available for sale.
Name	The short name for the item.
Description	A longer name or description for the item.
Duration	The number of minutes to block on the calendar for this treatment. Must be devisable by fifteen (15).

Table 1-5 (Cont.) Description of the Options that Appear on the Retail Lines Setup Screen (General Tab)

Option	Description
Print Duration	The number of minutes to print on the guests' reservation ticket. For example, a treatment may have a print duration of fifty (50) minutes, but sixty (60) minutes must be blocked in the Booking Calendar to account for the required cleanup of the room after the treatment is completed.
Sort Order	The order to display this treatment within a treatment group on the Booking Calendar.
Comments	Any additional comments or requirements for the Treatment.
Itemizer	The posting suffix for this item.
Prepaid Itemizer	The Prepaid-posting suffix for this item (For Prepaid Treatment Reservations imported using the Data Import module).

Table 1-6 Description of the Options that Appear on the Retail Lines Setup Screen (Room & Equipment Tab)

Option	Description
Rooms	Default Rooms assigned to be for selected treatment.
Equipment	Default Equipment and its quantities assigned to be used with selected treatment.

Table 1-7 Description of the Options that Appear on the Retail Lines Setup Screen (Bar Codes Tab)

Option	Description
Bar Code ID	Multiple Bar Codes associated to this item.

Retail Items Included

Retail Items can either be suggested or Included based on the **Include** check box. Items that are suggested appear on the Suggested Item grid on the Posting form.

Figure 1-8 Pricing & Sales (Add Price)

From Date	To Date	Price
01 Mar	30 Sep	20.00
01 Oct	31 Oct	22.00
01 Nov	31 Dec	20.00

Once a price has been added to an item, you can directly update the new price in the grid for that date range by typing over the old price and clicking the **Update**.

Treatment Rooms

Each treatment in the Spa Management System must be assigned to a predefined Treatment Room. The application ensures that you do not over book the available rooms with bookings. For example, the system will keep track of the room availability for a specific time and then warn the crewmember making a reservation when an appointment will over book a specific room. The descriptions are updated by selecting **Treatment Rooms** from the **Treatments Setup** menu.

Inserting a Room

1. Right-click on the tree view.
2. Select **Add New**.
3. Click **Insert**.

Deleting an Existing Room

1. Select the **Room** on the tree view.
2. Right-click and select **Remove**.

Updating an Existing Room

1. Click on the tree view and the information for that equipment is displayed.
2. Make the changes, if any and click **Update**.

Table 1-8 Description of the Options that Appear on the Treatment Rooms Setup

Option	Description
Code	Short name for this room.
Description	Long name for this room.
Active	If this field is checked, then the room is available for treatment.

Table 1-8 (Cont.) Description of the Options that Appear on the Treatment Rooms Setup

Option	Description
Bookings	If it is not checked, then this room is no longer available for treatment bookings.
Comments	Any additional comments for this room.

Packages and Packages Groups Setup

This is the area where you create and maintain the Spa Packages.

Creating a New Package

- To add, click **Setup, Packages Setup**.
 - Before you can assign any Treatment and/or Retail Items to the Package, you will need to save the Package definition by clicking the **Insert**. This tab contains the necessary controls to assign Treatment and/or Retail Items to the Package and maintain its package prices.
- To assign a new Treatment Item to the Package, select the **Item Type**.
- Choose the correct Treatment Item from the list box and click the **Add Item**. The selected Treatment Item will be assigned to the Package and appear onto the Packaged Items Linking grid. Repeat the above steps to assign to the Package all the necessary Treatment and/or Retail Items.

Packaged Items Price Definition

For a specific Package to be valid for sale, all items assigned to the Package must also have their Package Prices assigned separately.

To view, edit, create or remove Pricing periods, select the Item from the grid. All previously assigned Pricing periods will appear in a new grid.

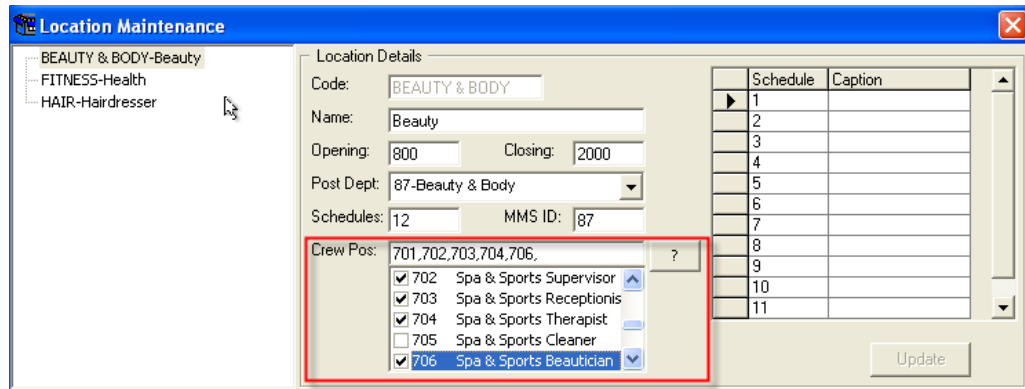
In the below example, there are no prices previously assigned, so we can start adding some.

- Add the starting and ending dates of the pricing period and the price and the price and click **Add Price**.
- Click **Update** to save all pricing definition for this item.

Therapists Setup

To maintain Spa Therapists, select **Therapist Setup** from the main Setup menu.

Figure 1-10 Location Maintenance



Adding a New Location Maintenance

Right-click on the tree view, select **Insert**, complete the form and click the **Insert**.

Deleting a Location Maintenance

Select on the tree view, right-click and select **Delete**.

Table 1-9 Description of Available Options on Location Maintenance Setup

Option	Description
Code	Short name for this location.
Name	Long name for this location.
Opening	The default opening time for this location in military time without a semicolon.
Closing	The normal time for this location in military time without a semicolon. If the location closes after midnight, the system accepts time beyond 2400 as closing time in the morning of the next day.
Post Dept	The “Departmental Prefix” – SDL for this location. This code prefixes itemizers to determine the Department ID to which a change is to be posted. This is a view name to store the SPA Department Prefix. The ‘Post Dept’ in the Location Maintenance Setup search for the setup in the Financial Setup – Spa Location Department Prefix, where the setup will store in Typ_SDL . For example: Spa Dept Prefix is 87, the item charges will post into department where the POS Revenue Center = 87.
Schedules	The default number of schedules associated with this location. A schedule represents the calendar of appointments for a single therapist.
MMS_ID	MMS or external F&B system Department itemizer (Crunch time).

Table 1-9 (Cont.) Description of Available Options on Location Maintenance Setup

Option	Description
Crew Pos	A list of Operational Positions that are assigned to work at this location. Clicking question mark (?) button will open the list-box that lists all Crew Operational Positions. Check the boxes to select the Crew Position.
Schedule/Caption Grid	For each Schedule, enter the default caption for the Schedule. This caption appears on the booking calendar to help the crew member taking reservations find a suitable therapist for a service.

Equipment Maintenance

Equipment in the Spa Management System is defined as any type of resource that must be used when fulfilling a Spa Service. Possible types of equipment include Stylist Stations, Showers, Aroma Treatment Stones, and so on.

- The system does not book individual resources when making an appointment. Instead, it ensures that the bookings do not overuse the available equipment.
- Equipment descriptions are updated by selecting **Equipment Maintenance** from the Setup menu.

Figure 1-11 Equipment Maintenance

The screenshot shows a window titled "Equipment Maintenance". On the left, there is a tree view with two items: "ISOLATE-Isolation Tank" and "HAIRDR-Hair Dryers". The "HAIRDR-Hair Dryers" item is selected and highlighted. Below the tree view are two buttons: "Insert" (highlighted in blue) and "Delete". On the right side of the window, there is a form with three fields: "Code:" with the value "HAIRDR", "Name:" with the value "Hair Dryers", and "Quantity:" with the value "8". At the bottom right of the form is an "Update" button.

Inserting an Equipment

To insert a new piece of equipment,

1. Right-click on the tree view.
2. Select **Insert**.

3. Complete the form and click **Update**.

Deleting an Equipment

To delete a piece of equipment,

1. Select the equipment on the tree view.
2. Right-click and select **Delete**.

Updating an Equipment

To update a piece of equipment,

1. Click on the tree view and the information for that equipment will display.
2. Make the changes, if any, and click **Update**.

Table 1-10 Description of Available Options on Equipment Maintenance Setup

Option	Description
Code	Short name for this equipment.
Name	Longer name for this piece of equipment.
Quantity	The number of pieces of equipment useable on board the Ship.

Miscellaneous Items

Other than the Treatment and Retail Items, the Spa module also provides the functionality to maintain and use various items that cannot be accounted for as Treatment or Retail Items, for example Tips. Such items are the various Tips that can be used in the Posting screen while posting other Treatments and/or Retail Items

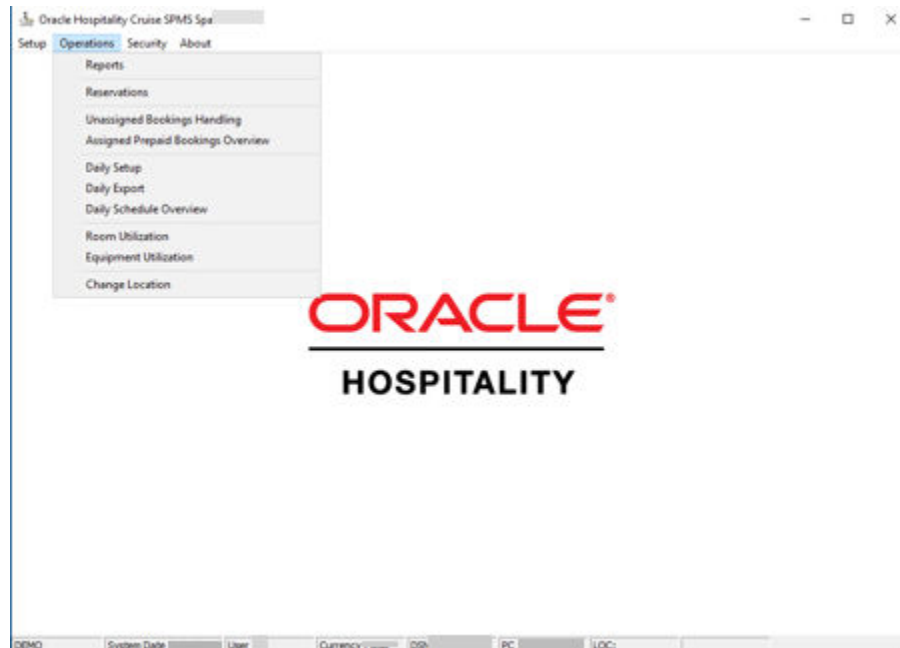
Similarly, the setup of Treatments and Retail Items, which can be defined by various Bar Codes and Sales Price periods, as well as for Miscellaneous Items.

Figure 1-12 Miscellaneous Items Maintenance

2

Operations

Figure 2-1 Operations Window



Reservations

Main Reservations Screen (Booking Calendar Overview)

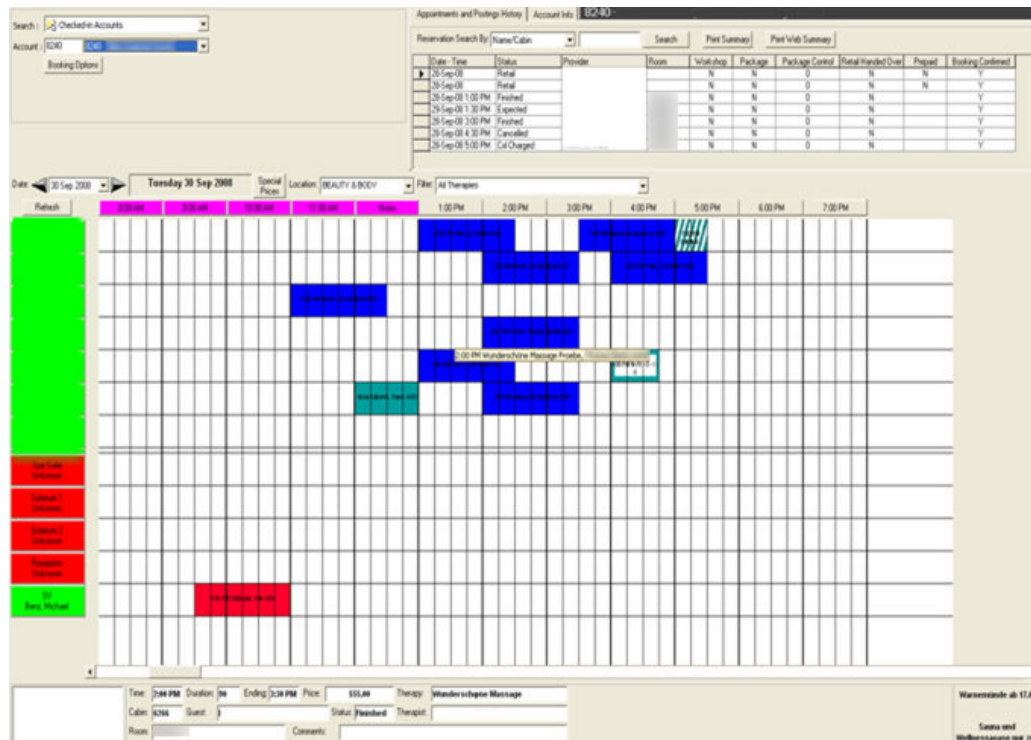
The Booking Calendar is the main form in the Spa Management System.

To display the Booking Calendar, select **Reservations** from the Operations main menu.

Note:

You can add, update, cancel, check-in and complete a reservation. The form provides grids to look-up and display guest information by a variety of look-up criteria.

Figure 2-2 Booking Calendar Overview



- Right-click on a row of the Appointments Grid. On an appointment or on an empty space will display different context menus. From the Guest selection, you can create a new regular Reservation, add a new Package or create a Retail posting for the selected guest.
- You can edit, cancel, no show, check-in, post, view posting, void posting or print the appointment ticket.
- In the Booking Calendar, you can use the Suggest feature, **Add a Reservation**, **Add a Package** or a **Workshop** and **Block the Schedule**.
- From an Appointment, you can Edit, Cancel, No Show, Check-In, Post, View Posting, Void Posting, Print the Appointment Ticket, create a new Block Schedule or Add a Reservation or a new Package or Workshop depending upon the status of the appointment.

Guest Selection

Guest Information can be queried by **Guest last Name** or **Stateroom Number** by entering look-up information into the **Account field** and press the **TAB Key**.

Figure 2-3 Account Info

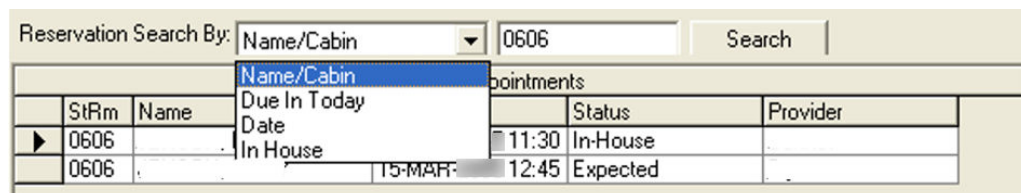


Query Appointments

Appointments can be queried by selecting which type of query to run, and then entering search criteria for that query.

The system supports query by Name/Cabin for checked in guests, query of all reservations due in today, all reservations due in on a specific date, and all guests that are currently marked as in the Spa.

Figure 2-4 Query Appointments

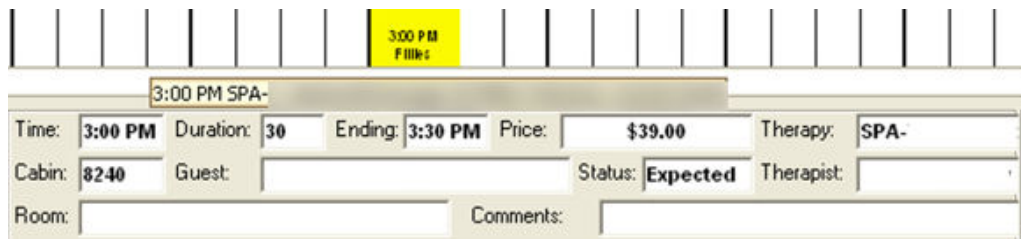


The appointment query is normally set to **Due In Today** so that the receptionist can easily take new reservations on other dates while checking in and completing appointments for today.

Viewing an Appointment Status

When you hover the mouse pointer over an Appointment, the current information about that appointment is displayed in the selected **Appointment** Information frame.

Figure 2-5 Status Appointment

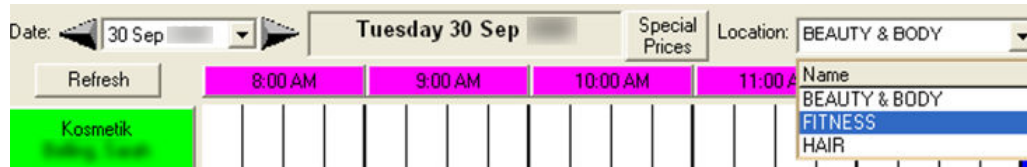


A tool tip is also displayed when hovering over an appointment with guest information.

Changing Locations

A booking calendar for a different location can be requested by selecting the location for the **Location** drop-down combo box.

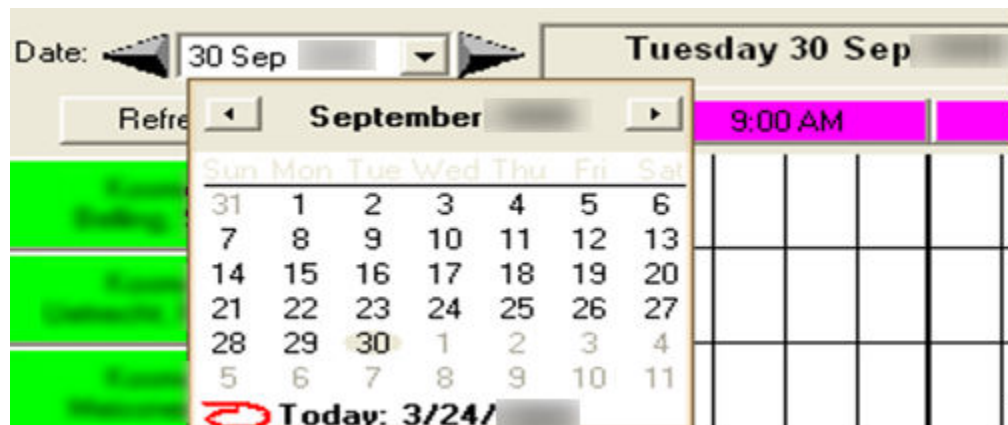
Figure 2-6 Changing Locations



Changing Dates

You can request a booking calendar for a different date by clicking the arrow buttons on each side of the **Date**, or select a new date by clicking on the date editor.

Figure 2-7 Changing Dates

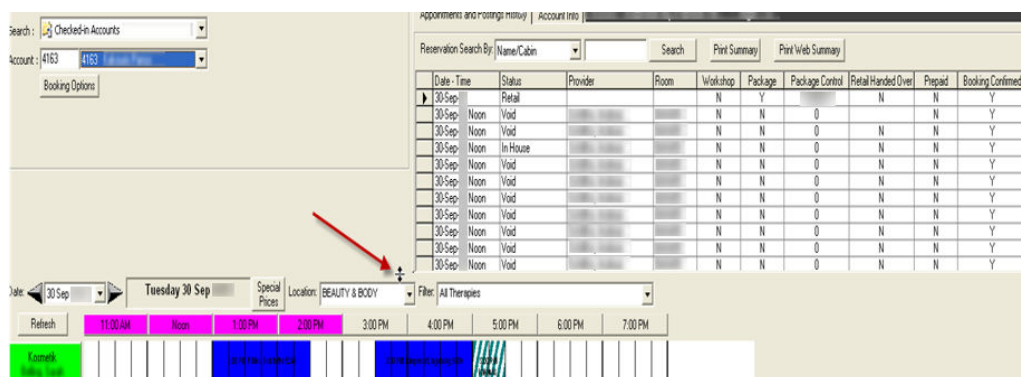


Changing Size of the Form

You can change the width of the Guest Selection frame and Appointment & Posting grid by placing the mouse pointer between the grids.

- When the pointer turns into a double-headed horizontal arrow, left-click and drag the mouse to adjust the size of the grids.
- You can achieve a similar form sizing between the lower displayed Booking Calendar and upper Account Selection and Appointment & Posting History grid by place the mouse pointer just above the Date/Area/Filter labels.

Figure 2-8 Changing Size Form

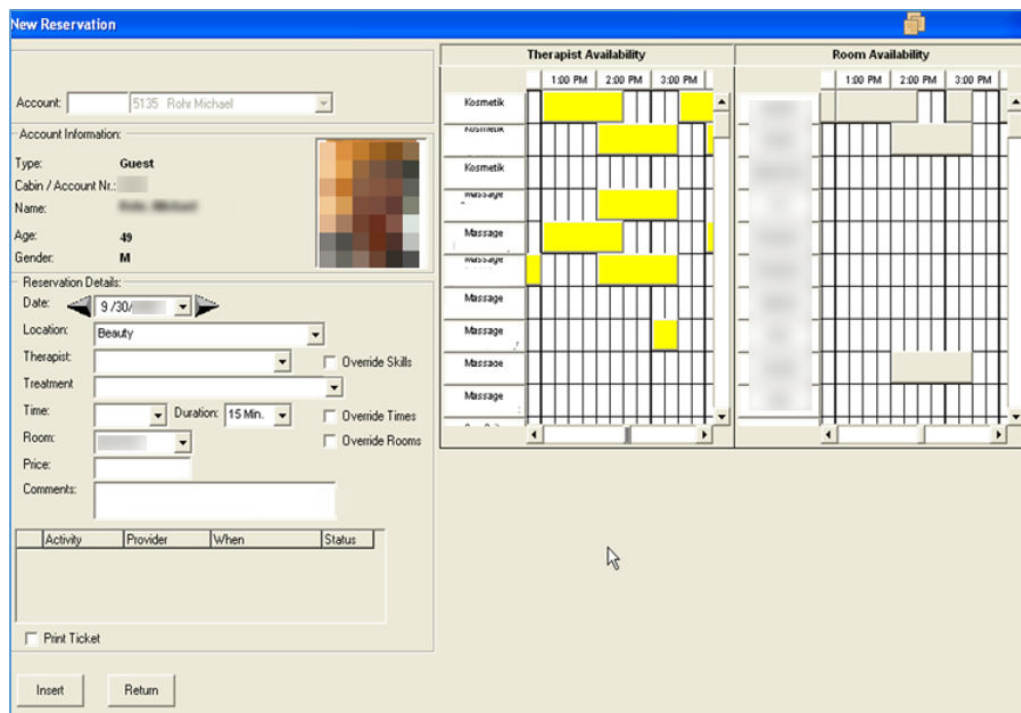


Making Reservations

To start the reservation process and display a new reservation form, do any of the following:

- Double-click on any white space on the Booking Calendar.
- Right-click anywhere on the Booking Calendar and select **Add Reservation**.
- Select a guest, click on **Booking Options** and select **Add Reservation**.

Figure 2-9 New Reservation



On the left of the form is the information about the Guest and Treatment booked.

- If the Guest is selected in the Guest selection, then the information for that guest is brought forward to this form.

- If the guest has any other Spa appointments, they will be listed in the grid at the bottom along with their status.
- If the start of the reservation is from the Booking Calendar, the Therapist name and Time of the reservation, will pre-fill based on where the Booking Calendar is selected.
- If no Guest is pre-selected, the **New Reservation** form offers a similar Guest selection area so that you can select the correct Guest for the upcoming Treatment appointment

Table 2-1 Description of the Blocks that Appear on the New Reservation Setup

Blocks	Description
Gray & Dark Green	Therapist is blocked during that time.
Yellow	Therapist already has an appointment during that time.
Lighter Green	Current selected time and duration for the appointment.

Performing Overriding Skills

Click on **Override Skills** check-box. Answer **Yes** to “Load all treatments regardless of skills?”

Performing Overriding Times

1. Click on **Override Times** check-box.
2. Select **Treatment, Time and Duration** and **Room** assignment for the appointment.
3. Click **Insert**.
4. If the Print Ticket check box has been checked, the system sends a reservation ticket to the 'Ticket' printer.

Editing Reservations

To make a change to an existing reservation, right-click on the reservation on the Booking Calendar.

1. Select **Edit Reservation** from the context menu,
2. Alternatively, search for the appointment using the **reservation Search By** area, select the appointment to be changed, right-click and select **Edit Reservation** from the context menu.
3. Make any required changes to the reservation and click the **Update** to store the change into the database. When the form closes, any changes will reflect in the Booking Calendar. If the **Print Ticket** check box is checked, a revised reservation ticket will print to the Ticket Printer.

 **Note:**

Only Expected Reservations can be edited. The current information about the reservation will display in the **Edit Reservation** form.

Checking-In Reservations

1. Right-click on the reservation in the Booking Calendar.
2. Select **Check In** from the context menu.
3. Alternatively, search for the appointment using the Reservation Search By area, select the appointment to be check in, right-click and select **Check In** from the context menu.
 - If the appointment includes a comment, the comment will be displayed in a Message Box. The color of the reservation will change to match the In-House Appointment image.
 - If an Appointment is incorrectly checked in, it can be placed back into expected by right-clicking the appointment in the Booking Calendar or Appointments grid, and selecting UnCheckIn from the context menu.

Finishing Reservations

There are two (2) ways to complete a reservation:

- Finish &Post
- Finish without Posting

Finish & Post (charges for the appointment to the selected account).

1. To **Finish & Post**, right-click the appointment on the Booking Calendar and ,select **Finish & Post** from the context menu.
2. Alternatively, search for the appointment using the Reservation Search By area, right-click and select **Finish & Post** from the context menu. At the Spa Posting Logon, either swipe their board card or enter their user-id/password into the form
3. Click **OK**. Once the User ID and Password are accepted, the **Posting** form will display with the service and any associated retail items in the posting box

Figure 2-10 Posting

To change where the charge will be posted (Payer Account), a new cabin, name or account can be entered in the **Post To** textbox, and a posting account selected from the drop-down box.

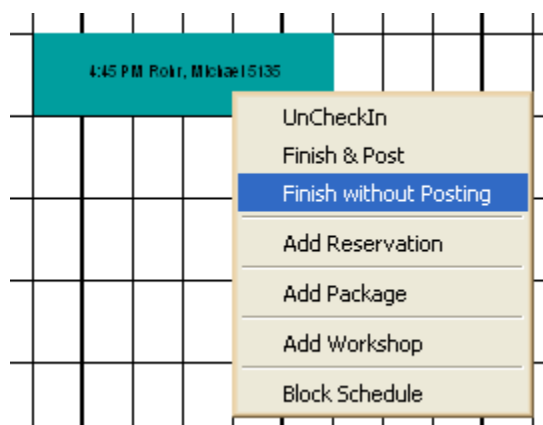
- If the Treatment of the reservation includes suggested retail items, they will be displayed in the **Suggestion** grid. Double-click on a retail item in the **Suggestion** grid will move it to the posting box. Additional charges for other services or retail products can be added to the posting area by selecting a **Charge Type**, a **Charge Item**, entering a **Quantity** and clicking the **Add To Receipt**.

Finish without Posting (any charges)

The Finish without Posting allows you to complete the reservation without posting a charge.

1. Right-click on the appointment on the Booking Calendar and select **Finish without Posting** from the context menu.
2. Alternatively, search for the appointment using the Reservation Search By area, select the appointment, right-click and select **Finish without Posting** from the context menu. You will be prompted “**Are you sure you want to set the status of this Reservation to Finished without Posting it?**”, to confirm your selection.

Figure 2-11 Finish Without Posting



Entering a Tip

On some vessels, it may be normal for the guest to be given a receipt prior to posting the charges to the system so that a tip can be entered.

1. Click the **Print Receipt** to print a receipt of all pending charges to the ‘**Receipt**’ printer. The receipt is given to the guest for signature and to capture Tip amount prior to Posting.
2. Select the **Charge Type of Miscellaneous** and the **Charge Item of Tip**.
3. Enter the Tip amount from the signed receipt.
4. The Spa Posting form will automatically calculate the Treatment and Retail discounts based on the start time of the appointment and the discount times set up for the day. Authorized users can change the price or discount percent on any item added to the posting area.

5. To remove a charge from the posting, select it in the **Post To** area, and click the **Remove**.

 **Note:**

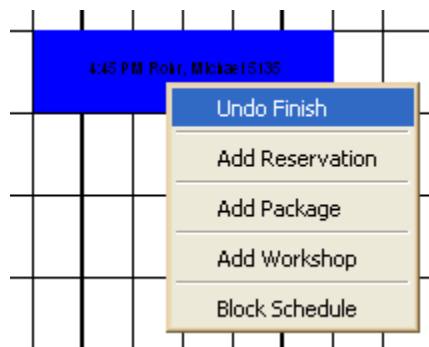
If the **Return** is selected, additional charges added to the posting area will be removed, and will have to be re-entered the next time the **Finish and Post** option is selected for that Appointment.

Undoing Finish Option

Once an appointment is finished, you have the option to revert the Check in Status of an appointment using the Finish without Posting option, similar to the Void a Posting.

- Click the **Print Receipt** to print a receipt of all pending charges to the **'Receipt'** printer. The receipt is given to the guest for signature and to capture the tip amount entered.
 1. Right-click on the appointment and select **Undo Finish**.
 2. Click **OK**.

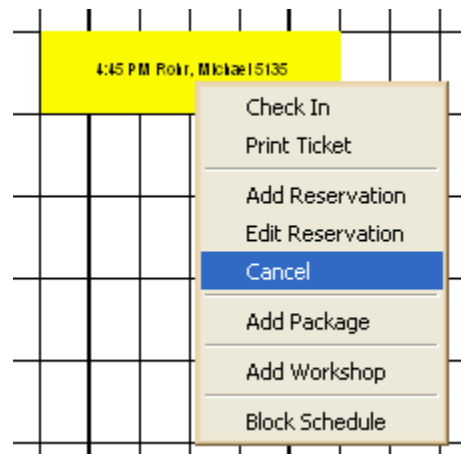
Figure 2-12 Undo Finish



Cancelling Appointments

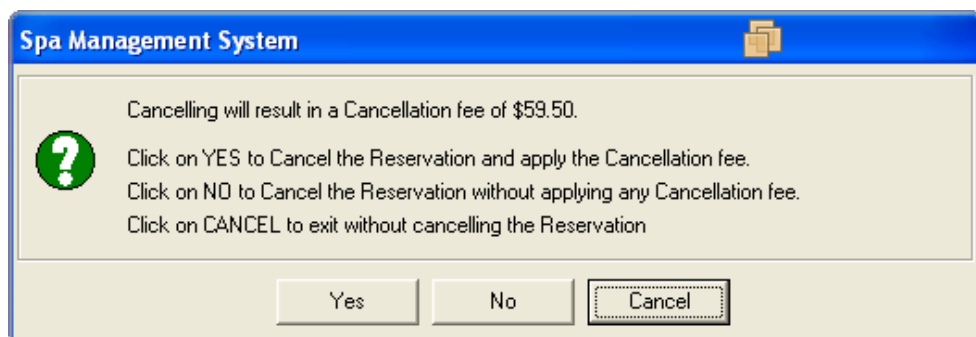
1. Right-click the appointment from the Booking Calendar.
2. Select **Cancel** from the context menu.
3. Alternatively, search for the appointment using the Reservation Search By area, select the appointment to cancel, right-click and select **Cancel** from the context menu.

Figure 2-13 Cancel



4. If the reservation is within the cancellation period based on the cancellation rules, a message displaying a warning that a cancellation fee will apply.

Figure 2-14 Cancellation Fee

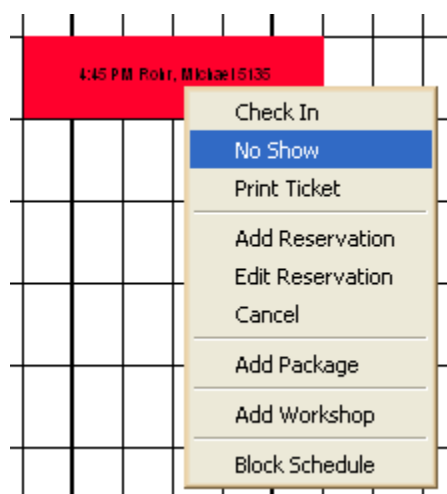


5. If you choose:
 - **Yes**, the cancellation fee calculated is display on the Spa Posting form and placed in the Posting Area.
 - **No**, the selected appointment will be canceled without Posting a Cancellation Fee.
 - **Cancel**, then the reservation will not be canceled.

No-Show Appointments

Once an appointment is late, the appointment on the Booking Calendar will display using the “**Late Appointment**” image.

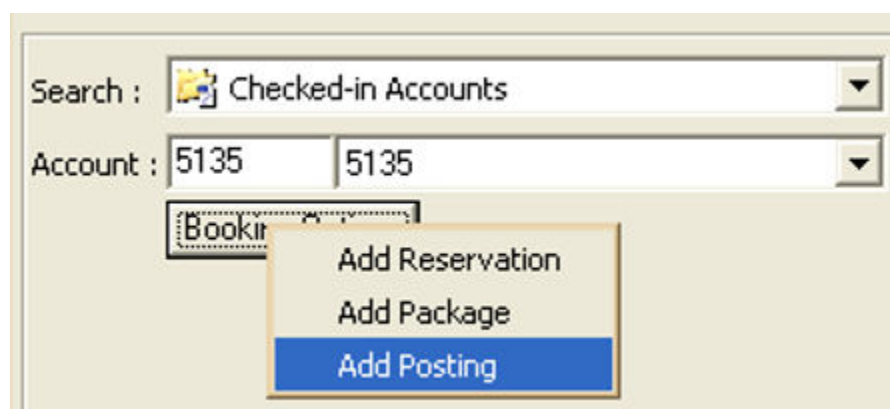
Figure 2-15 No Show



1. Click on **No Show**.
2. If you choose **Yes** the No Show fee calculated and placed in the Posting Area. You can then just adjust the fee if required and post it to the guest account.
3. If you choose **No**, the appointment will be set to No Show without a charge. If you choose to click the **Cancel**, then the reservation will not be canceled.

Posting Services and Retail without a Reservation

Figure 2-16 Add Posting



1. Select the appropriate guest, click **Booking Options** and select **Add Posting**.
2. Swipe your board card or enter the user-id/password, click **OK**.
3. Select **Charge Types** and **Charge Items** from the drop-down list, add them to the Posting Area, and post the transaction.

Ability to Assign % Discount on the Entire Invoice During a Posting Process

In addition to adding a Discount percentage (%) on a per item basis before clicking the **Add To Receipt**, you can also apply a Discount percentage (%) to all items listed.

- By default, the Discount percentage (%) textbox is disabled, as with the right side Discount% textbox, and is enabled if you have the User Access Rights checked after clicking the **Auth**.
- After the user has been verified, the Discount percentage (%) textbox gets enabled to accept valid Discount% values (0-100).
- Only after those values have been verified as correct, the **Add>>>** button is enabled. Click the **Add>>>** button to start the process of applying a 10% Discount on all items.

Figure 2-17 Spa Posting

The screenshot shows the 'Spa Posting' application window. The 'Posting For' field is set to '3/25/2009 2:16:08 AM' and 'Post To' is '5135 Rohr Michael'. A table lists items with a 10% discount applied to three SPA items. The total amount is \$345.55. The interface includes fields for 'Charge Type' (Retail), 'Charge Item', 'Quantity' (1), 'Price' (\$199.95), and 'Extended Price' (\$199.95). There are buttons for 'Add >>>', 'Remove >>>', 'Print Receipt', 'Post', and 'Return'.

Desc	Qty	Price	Total
SPA T.	1	\$89.00	\$89.00
SPA T.	1	\$95.00	\$95.00
SPA T.	1	\$199.95	\$199.95
Disc SPA	0	(\$8.90)	(\$8.90)
Disc SPA	0	(\$9.50)	(\$9.50)
Disc	0	(\$20.00)	(\$20.00)

Total: \$345.55

The above figure shows a 10% Discount is applied to all three (3) listed items in one easy step. The system only allows you to apply the discounts as long as there are no other Discounts already applied, this way or the existing way from the right side of the screen.

For example, in a case where we have already applied a 10% Discount to all three (3) items, clicking the **Add>>>** button again, will result in the following warning message **“Discounts already exist! Adding more Discounts not possible.”**

When the Discount percentage (%) has been correctly applied, clicking **Post** will post all items with their Discount% values into the Accounts. The Billing Image of this posting can be viewed in Management.

Figure 2-18 Bill Details

Bill Details

Guest Receipt

25 Mar 02:41
CHECK NO. : [redacted]

1	SPA-T	89.00
1	SPA T	95.00
1	[redacted]	199.95
0	Disc SPA	-8.90
0	Disc SPA	-9.50
0	Disc [redacted]	-20.00

TOTAL : 345.55

Print to Epson TMT88IV | Print | Close

Viewing a Posting

To view a posted Appointment or Retail sale, select the appointment from the Appointments Grid or Booking Calendar. Right-click and select **View Posting** from the context menu. The Spa Posting form will display all the details for the posted Appointment.

Once displayed, the receipt for the posting can be reprinted by clicking **Reprint**.

Figure 2-19 Spa Posting (View)

Desc	Qty	Price	Total
Mangobutter Creme, 50g ...	1	\$68.00	\$68.00

Voiding a Posting

To Void the POS transactions for an appointment, Retail sale or Cancellation/No Show Fee, select the appointment from the Appointments Grid or the Booking Calendar, right-click and select **Void Posting** from the context menu.

The Spa Posting form will display the information needed to Void the Posting. When the **Void** is clicked, all charges will be reversed and the appointment will be marked as a status “V” for Voided. If the posting was for a true appointment, the new Appointment record created with a status of “I” for “In-House”.

Blocking Time

Blocked Time represents time when a therapist is not available to take appointments.

There are four (4) types of Blocking Time:

- Free Time.
- Working Time.
- Security Control.
- Internet Block.

To distinguish these different Blocked Time options in the screens where the schedules are displayed, the following colors are used.

Table 2-2 Description of the Blocks that Appear on the New Reservation Setup for Blocked Time

Block Colors	Description
Original Gray	Free Time.
Dark Gray	Working Time.
Dark Green	Security Control.
Black	Internet Block.

On the Reservations screen, where a lot of information is displayed, the Working Time Type is displayed in a dark gray color on white fonts. To enter a Blocked Time, right-click on the Booking Calendar and select **Block Schedule** from the context menu.

Figure 2-20 Block Time

Quick Time Blocking

Quick Time Blocking provides the ability to define the same Time Blocks for multiple Therapists in one process.

1. You must select the **Enable Multiple Therapists selection** check box to expand the Block Time form and display the Multiple Therapists assignment list box.
2. Once you have selected all necessary Therapists, click **OK** to automatically create all Blocked Times for all selected Therapists.

**Note:**

Ending a Blocked Time schedule is only allowed on a one to one Therapist basis.

Multiple Reservations — Workshops

Workshops are defined as specific Group Treatments, such as Yoga, Walking and Aerobic or Hairstyling workshops, where multiple Participants (Attendees) are assigned.

Similar to regular Spa Reservations, Workshops are handled in the daily schedule as appointment blocks using the following options:

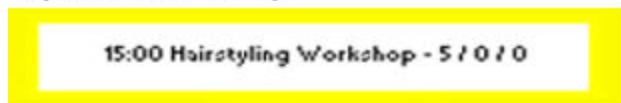
Table 2-3 Description of the Multiple Reservation Workshops Overview

Option	Description
Add Workshop	Create the original Workshop Reservation.
Edit Workshop	Add or remove Workshop Attendees.
Check-In / Un-Check-In Individual Workshop Attendees	Check-In or Un-Check-In Individual Workshop Attendees as they show up.
Cancel Workshop	Cancel entire Workshop with the option to apply Cancellation Fees to all or selected Workshop Attendees (supports Cancelling Workshops without any Cancellation Fee posting).
No Show Workshop	No Show entire Workshop with an option to apply No show Fees to all or selected Workshop Attendees (supports the No Show Workshop without any No Show Fee posting).
Finish & Post Workshop	Finishing the Workshop with the option to apply the Workshop therapy amounts to all or selected Workshop Attendees.

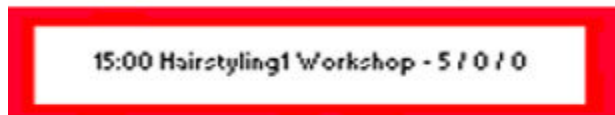
To distinguish between regular Guest Reservations blocks, and Workshop Reservations blocks, you can use the same colors but different styles.

Figure 2-21 Workshops

Expected Workshop



Expected Workshop (Delayed)



Checked In Workshop (partially or complete)



Finished & Posted Workshop (complete All Attendees)



Finished & Posted Workshop (Partial Attendees)



Since there is limited space to display all Workshop participants into the Daily schedule block, the Workshop Reservation block contains the following information.

Figure 2-22 Workshop Hairstyling

14:00				15:00				16:00				17:00			
14:00 Gast-Acker, Sonja 7243				15:00 Hairstyling Workshop - 5 / 0 / 0											
				15:00 - Workshop Hairstyling - Hairstyling Workshop - 5 / 0 / 0											

Hover over the Workshop Reservation block, to display the following information in the Tool tip text, as shown in the above figure.

Another way of displaying more detailed information about each Workshop Reservation is at the bottom of the Reservations screen, where an enhanced Workshop Information area is created to display all Workshop relevant data when hovering the mouse pointer over the Workshop Reservation block.

Figure 2-23 Workshop Reservation

Time:	15:00	Duration:	120	Ending:	17:00	Price:	£20.00	Therapy:	Workshop Hairstyling
Workshop:	Hairstyling Workshop.		Status:	Expected	Room:	01MAS1		Therapist:	
Attendees Expected:	5	CheckedIn:	0	Posted:	0	Comments:			

For a detailed listing of all Workshop Reservation related data as well as the Workshop participants, the above described **Edit Workshop** option will display all necessary information related to the selected Workshop.

Similar to regular Spa Reservations, you can create Workshops by selecting the option **Add Workshop** from the right-mouse click context options.

The New Workshop Reservation screen that opens is similar to the regular Spa Reservation screen with additions to handle Workshop specific requirements.

Figure 2-24 New Workshop Reservation

It is not mandatory to assign a description to the main reservation time plan of the workshop or the treatment description.

- An account selection area created to search for Accounts and assign them to the workshop.
- A list box displays all Expected Workshop Attendees as well as Checked In Attendees.

Within the two (2) list boxes, the following options are available:

- Check In and Expected Attendee.
- Check In All listed Expected Attendees in one single step.
- Un-Check In a selected Checked In Attendee.
- Un-Check In all listed Checked In Attendees in one single step.
- Remove selected Expected Attendee from Workshop.
- Print individual Workshop Tickets for selected Checked In Attendees.

When you first create a Workshop Reservation using the Add Workshop option, you can only create the Workshop reservation during the initial creation. You need to create the Workshop Reservation before you can see the necessary options to control the Workshop attendees such as assign Attendees, Check In Attendees, Un-Check In Attendees.

In the example shown in the screenshot above, a Workshop is created with the description “Hairstyling Workshop”. Then we select the appropriate Treatment, Workshop Hairstyling, and assign the correct starting time and Room. When ready, we created it by clicking the **Insert** button.

The Workshop created will appear in the main Reservations time plan.

Figure 2-25 New Attendees

The screenshot shows a reservation time plan with columns for 15:00 and 16:00. A yellow highlighted cell contains the text "15:00 HAIRSTYLING WORKSHOP - 0 / 0 / 0". A red circle highlights this cell, and a mouse cursor is positioned over it.

15:00		16:00	
15:00 HAIRSTYLING WORKSHOP - 0 / 0 / 0			

There are still no Attendees assigned, therefore all values for Assigned / Checked In / Posted attendees is 0.

Editing Workshop Reservations and Assigning Attendees into Workshops

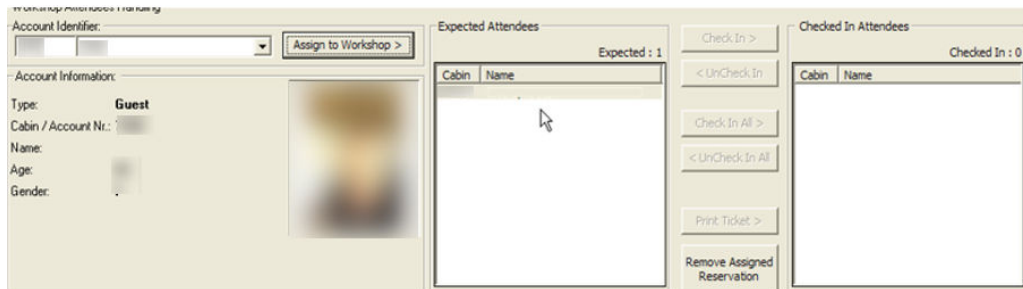
To assign the necessary Workshop Attendees,

1. Right-click over the Workshop Reservation and select **Edit Workshop**. The Edit Workshop Reservation screen that opens is the same as the one you used before to create the Workshop Reservation except that you are now able to assign Attendees to the Workshop.

You can also review and change all Workshop Reservation related information from within this screen. The cursor is positioned at the **Account Identifier** field and is ready to search for Accounts.

2. Select the appropriate account and click **Assign to Workshop**.
3. The selected Account is moved to the Expected Attendees list box and the Expected Attendees count shows 1.

Figure 2-26 Workshop Attendees Handling



You can also assign more Accounts at the same time, assuming that you know other Guests that would like to participate in this Workshop or you could assign them later.

 **Note:**

The Remove Assigned Reservation option becomes available once you have an Attendee assigned to the Workshop. You can remove an Attendee you select from the Expected Attendees list box, if you want to correct a wrongly entered assignment.

To edit Workshop Reservation data, click the Update to save the Workshop Reservation related data you just updated. This addition of the first attendee is reflected in the Workshop Reservation block.

Figure 2-27 Expected



This is also shown in the Workshop Reservation data.

Figure 2-28 Expected Workshop

Time:	15:00	Duration:	120	Ending:	17:00	Price:	£20.00	Therapy:	Workshop Hairstyling
Workshop:	HAIRSTYLING WORKSHOP.		Status:	Expected	Room:	04MAS4		Therapist:	
Attendees Expected:	1	CheckedIn:	0	Posted:	0	Comments:			

You can assign more Attendees by following the below steps:

1. Right-click the Workshop Reservation and select **Edit Workshop** from the context menu options.

2. Select the appropriate account and click **Assign to Workshop**.
3. Click **Return** to close the Edit Workshop screen.

Checking-In Workshop Attendees

After all the Attendees have been successfully assigned to the Workshop as Expected, you can check them in using one of these options:

Checking in all the Workshop Attendees in one single step.

1. Right-click the booking menu and select the first option, **Checkin Entire Workshop** to automatically check in all workshop attendees.
2. Confirm your selection by answering **Yes** in the context message.
3. The system automatically checked in all Expected Attendees and the Main Reservations time plan is being refreshed to reflect this change.

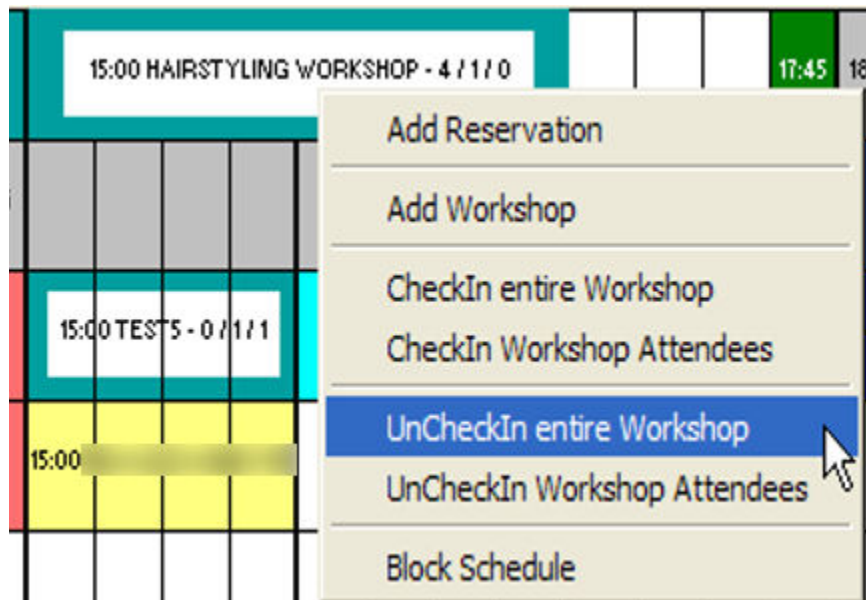
Checking in each Attendee manually.

1. Select the option **Checkin Workshop** Attendees.
2. This opens the Edit workshop reservation screen, where all Expected Attendees are listed in the appropriate Expected Attendees list box. The buttons **Check In >** and **Check In All >** have been enabled to allow you to Check In specific or all Expected Attendees. Selecting the correct name from the Expected Attendees list and clicking the Check In button will:
 - Check In the selected Attendee and move it into the appropriate Checked In Attendees list box.
 - Remove the selected Attendee from the Expected Attendees list box.
 - While checking In the Workshop Attendees, the Edit Workshop Reservation screen allows you to complete any of the following tasks that you might want to do.
 - Selecting and assigning new Attendees into the Workshop by using the Account Identifier search capability as well as using the **Assign to Workshop**.
 - Removing already assigned Attendees from the Workshop, by selecting the **Remove Assigned Reservation** for a selected Expected Attendee.
 - Editing Workshop Reservation related data, such as Room, Starting Time or Comments.
3. Click **Return** to close the Edit Workshop screen and go back to the Main Reservations time plan. (Remember to click on Update in case you have performed any changes in the other Workshop Reservation related data that needs to be saved).
4. The Workshop reservation block reflects the status change of the first Checked in Attendee.

Un-checking In Workshop Attendees

If there are situations where you would like to Un-Check In some or all of the Workshop Attendees, below are the available options for Un-Checking In all the Workshop Attendees in one single step.

Figure 2-29 UnCheck Entire Workshop



1. Selecting the first option **UnCheckIn** entire Workshop will automatically uncheck-in all the attendees.
2. Confirm the selection by selecting **Yes** in the context message.
3. The system automatically un-checked in the Expected Attendees and the Main Reservations time plan is refreshed to reflect this change.

 **Note:**

Due to all Attendees status being updated to Expected, the entire Workshop Reservation block also turned Yellow to reflect the overall Workshop Expected status.

To manually unchecked each attendee:

1. Select the option UncheckIn Workshop Attendees. The Edit Workshop Reservation screen will show the Expected Attendees (listed in the appropriate Expected Attendees list box) and the Checked In Attendee (listed in the appropriate Checked-In Attendees list box), if any.
2. Select one of the Checked-In Attendees from the Checked-In Attendees list and click on the **UncheckIn** and move it into the appropriate Expected Attendees list box. This removes the selected Attendee from the CheckedIn Attendees list box

 **Note:**

The < **UnCheck In** and < **Un Check In All** buttons will become unavailable when there are no any attendees in the li

In the process of Un-Checkin the Workshop Attendees, the Edit Workshop reservation screen will still allow you to complete any of the following tasks.

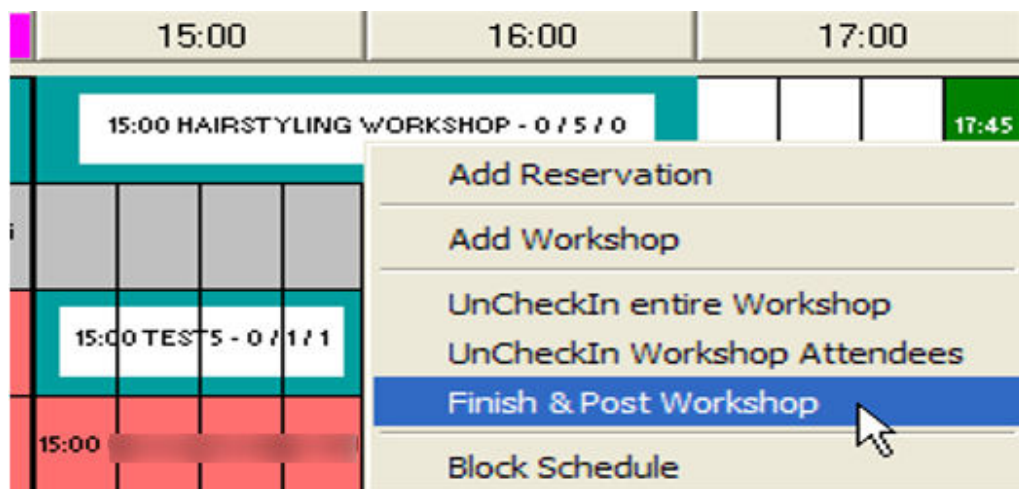
- Selecting and assigning new Attendees to the Workshop by using the Account Identifier search capability as well.
 - Removing already assigned Attendees from the Workshop Use the Remove Assigned Reservation for a selected Expected Attendee to remove an assigned attendee.
 - Editing Workshop Reservation related data, such as Room, starting time or Comments.
3. When finished click **Update** and then the **Return** to close the Edit Workshop screen to ensure that the changes you have performed in other Workshop Reservation related data is saved. The Workshop Reservation block reflects the status change of the first Checked In Attendee back to Expected.

Finishing & Posting the Entire Workshop

When the Workshop is completed, the system gives you the option to assign it as **Finished and Post** the appropriate Treatment fees into the Attendees accounts.

To Finish & Post a Workshop reservation, right-click and select the **Finish & Post Workshop** option.

Figure 2-30 Finish & Post Workshop



The Spa Workshop Posting screen is similar to the regular Spa Posting screen with additions to handle Workshop specific requirements.

- An accounts information area where information is displayed for every selected Workshop Attendee.
- There are list boxes that displays all Checked In Workshop Attendees as well as all Finished & Posted Attendees.

Within the two list boxes, there are buttons that give the options to:

- Finish & Post only selected Checked In Attendee.
- Finish & Post All listed Checked In Attendees in one single step.

In our example, the Hairstyling Workshop lists five (5) Checked In Attendees which we would like to charge the displayed Workshop Hairstyling treatment charge of \$20.00.

If the **Post** button is disabled, this means we have not selected any of our five (5) Checked In Attendees to assign them as Finished.

To do so, click the **Finish & Post All >** button which will result in:

- Mark all five (5) Attendees as Finished and list them into the appropriate Finished Attendees list box.
- Removing all five (5) Attendees from the Checked In Attendees list box.

As soon as minimum one (1) Attendee appears into the Finished Attendees list box, the **Post** button becomes available and we are ready to Post the \$20.00 Treatment charge.

Clicking on the **Post**, as with regular Spa Reservations Postings.

1. Posting the defined Workshop Treatment charge to each Attendee account.
2. Print a posting receipt for each Attendee account.
3. Assign each Attendee account to **Finished** status.
4. Assign the complete Workshop Reservation to Finished status.
5. As soon as all above actions are completed, the Spa Workshop Posting screen closes and the system refreshes the Main Reservation time plan and set the Workshop status to Finished.

Figure 2-31 Finished

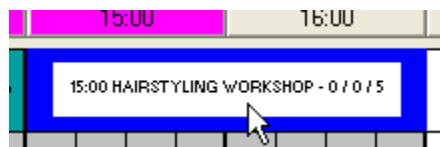


Figure 2-32 Finished Workshop

Time:	15:00	Duration:	120	Ending:	17:00	Price:	£20.00	Therapy:	Workshop Hairstyling
Workshop:	HAIRSTYLING WORKSHOP.	Status:	Finished	Room:	04MAS4	Therapist:			
Attendees Expected:	0	CheckedIn:	0	Posted:	5	Comments:			

Finishing & Posting Selected Workshop Attendees

Apart from the above steps, the system also provides the option to Finish & Post each workshop attendee singularly, as they register at the Spa Reception desk, by selecting the same option Finish & Post Workshop from the context menu.

To complete the posting for the selected attendee, right-click at the Checked In Attendees list box select **Finish & Post >**.

This will:

- Mark the selected Attendee as Finished and list it into the appropriate Finished Attendees list box.

- Remove the Attendee from the Checked In Attendees list box.

Clicking on **Post** as with regular Spa Reservations will result in:

- Posting the defined Workshop Treatment charge to the one listed Finished Attendee account.
- Print a posting receipt for this Attendee account.
- Assign only this Attendee account to Finished status.
- Assign the complete Workshop Reservation to Finished status.

As soon as all the above actions are completed, the system refreshes the Main Reservation time plan with the Workshop status change to **Finished** and closes the screen.

 **Note:**

The Workshop Reservation block will maintain this Blue & Cyan color combination until all Workshop Attendees have been Finished & Posted.

Viewing Workshop Postings

Other than finishing and posting the workshops, you can also **View Workshop Postings** for reviewing purposes as well as Reprinting of Receipts.

1. Select the Finished Workshop you wish to View its postings and select the option View Workshop Postings from the context menu. This option will open the View Spa Workshop Postings screen in three (3) different areas.
 - An accounts Information area where you get displayed information for every selected Workshop Attendee.
 - The Finished Attendees list box that displays all Workshop Attendees that have been marked as Finished.
 - The Postings List that lists all posted transactions as part of the current Finished & Posted Workshop of each selected Finished Attendee.
2. Clicking on **Reprint** will reprint Posting Receipt for the current selected Finished Attendee.

Voiding Workshop Postings

Same as for Viewing Workshop Postings that have been Finished & Posted, these are functionality to Void Workshop Postings.

1. Select the Finished Workshop you wish to View its postings and select the option Void Workshop Postings from the context menu.
2. This option will open the Void Spa Workshop Postings screen in three (3) different areas.
 - An accounts information area where you get displayed information for every selected Workshop Attendee.
 - The Finished Attendees list box that displays all Workshop Attendees that have been marked as **Finished**.
 - The Postings List that lists all posted transactions as part of the current Finished & Posted Workshop of each selected Finished Attendee.

3. Clicking on **Void** will void all the listed Transactions that have posted as part of the current Finished Workshop for the current selected Workshop Attendee and will print a Void Receipt.

Deleting Workshop reservations (No-Shows)

If for any reason the entire Workshop Reservation has not shown up and are marked as late in the Main Reservations time plan (Red color), the system provides the necessary option to define this Workshop as No Show.

The No Show definition gives you the option to:

- Define the Workshop Reservation as No Show and charge the predefined No Show fee to all or selected attendees accounts.
- Define the Workshop Reservation as No Show without charging any No Show fees to the Attendees accounts.

To define a Workshop reservation as No Show,

1. Select the option No Show Workshop from the context menu. The system will display a confirmation message.
2. Click **No** will result in deleting the entire Workshop Reservation and will reflect in the Main Reservation time plan. Click **Yes** will open the Spa Workshop Posting screen, which allow you to charge the predefined No Show Fee to the Workshop Attendees It also provides:
 - An accounts information area where you get displayed information for every selected Workshop Attendee.
 - List boxes that display all Expected Workshop Attendees as well as No Show & Charged Attendees.

Within the two list boxes, the following options are available:

- No Show & Post only selected Expected Attendees.
- No Show & Post All listed Expected Attendees in one single step.
- The predefined Treatment No Show Fee is listed and ready to be charged.

To proceed with charging the No Show Fee to the Workshop Attendees,

1. Select some or all of the Expected Attendees.
2. Click the **No Show & Post >** to move them into the Attendees To Be No Show & Posted list box.

 **Note:**

If only a few attendees is selected, the remaining attendee's status will change to No Show without a charge.

Clicking on the **Post** will:

- Post the predefined Treatment No Show Fee to the two Attendee's accounts listed in the Attendees to be No Show & Posted list box.
- Print posting receipts for both Attendee's accounts.

- Assign those two (2) Attendee's accounts to No Show & Posted status and the rest to No Show status.
- Assign the complete Workshop Reservation to No Show & Posted status.

The Spa Workshop Posting screen closes and the system refreshes the Main Reservation time plan with the Workshop status changed to No Show & Posted (the Workshop Reservation block is being displayed in blue to indicate that something has posted to the Attendee's accounts. This way you still have the options to View & Reprint as well as Void those posted transactions.

Canceling Workshop Reservations

If for any reason the entire Workshop appointment needs to be cancelled, right-click from the **Booking Calendar** and select **Cancel Workshop** from the context menu.

1. If the reservation is within the cancellation period, based on the cancellation rules, a message will display, warning you that a cancellation fee will apply.
2. As with the regular Reservations, the Cancel definition gives you the option to:
 - Define the Workshop Reservation as Cancelled and charge the predefined Cancellation fee to, all or selected Attendees' accounts.
 - Define the Workshop Reservation as Cancelled without charging any Cancellation fees to the Attendees' accounts
3. Answering with **No**, will result in Cancelling & Deleting the entire Workshop Reservation and this reflects the same moment into the Main Reservations time plan.
4. Answering with **Yes**, will open the Spa Workshop Posting screen, which has been updated to handle the requirements for charging the predefined Cancellation Fee to the Workshop Attendees. The Spa Workshop Posting screen now shows:
 - An accounts information are where you get displayed information for every selected Workshop Attendee.
 - List boxes that display all Expected Workshop Attendees as well as all Cancelled & Posted Attendees.
5. Within the two list boxes, the following options are available:
 - Cancel & Post only selected Expected Attendees.
 - Cancel & Post All listed Expected Attendees in one single step.
 - The predefined Treatment Cancellation Fee is already being listed and ready to be charged.
6. Clicking on the **Post** will result in:
 - Posting the predefined Treatment Cancellation Fee to the two Attendees account listed in the Attendees To Be Cancelled & Posted list box.
 - Printing posting receipts for both Attendees account.
 - Assign those two Attendee account to Cancelled & Posted status and the rest to Cancelled status.
 - Assign the complete Workshop Reservation to Cancelled & Posted status.

As soon as all above actions are completed, the Spa Workshop Posting screen closes and system refreshes the Main Reservation time plan with the Workshop status change to Cancelled & Posted (the Workshop Reservation block is being display in

Blue color to indicate that something been posted into the Attendee accounts. This way you still the options to View & Reprint Receipts as well as Void those posted transactions.

Packages Handling

Similar to regular Spa Reservations, Packages are handled in the daily schedule as appointment block, with these options:

- **Add Package:** assign a specific Package to an Account.
- **View/Edit Package:** assign a Reservation to a Package Treatment, edit a Package Treatment Reservation or assign Package Retail Items as Handed Over or Not Handed Over.
- **Cancel Package:** Cancel entire Package with all included Treatment Reservations with option to apply Cancellation Fees to all Treatment Reservations.
- **No Show Package:** No Show entire Package with option to apply No Show Fees to all Treatment Reservations.
- **Edit Reservation:** Update specific information of a Treatment Reservation that is part of a Package.
- **Finish & Post:** Finishing a Packaged Treatment Reservation will result is posting the entire Package into the payer's Account.

To distinguish between regular Guest Reservations blocks, Package blocks uses the same colors but different style , as shown below.

Figure 2-33 Packages Treatment

Expected Package Treatment Reservation



Expected Package Treatment Reservation (Delayed)



Checked In Package Treatment



Finished & Posted Package Treatment Reservation



Another way of displaying more detailed information about each Package Reservation, is the bottom of the Reservations screen, where an enhanced Package Information area has been created to display Package relevant data upon hovering with the mouse pointer over the Package Reservation block.

Ending: 6:30 PM	Price: \$30.00	Therapy: SPA
Cabin: <input type="text"/>	Guest: <input type="text"/>	Status: In House
Package: WELLSTART - Wellness Starter	Room: <input type="text"/>	Therapist: <input type="text"/>
		Comments: <input type="text"/>

For detailed listing of all Package Reservations related data, the above described **View Package or Edit Reservation** option will display all necessary information related to the selected Package block.

Assigning Packages to Accounts

Packages are assign to Accounts by selecting the option Add Package from the context menu. Assigning Packages can also be achieve by clicking on **Booking Options**.

The Add New Spa Package screen gives you the option to select certain Spa Packages from certain Package Groups.

Figure 2-34 Add New Spa Package

Account Information:
 Account:
 Type: **Guest**
 Cabin / Account No.:
 Name:
 Age:
 Gender:

Package selection:
 Group: **Spa Packages**
 Package: **WELLSTART - Wellness Starter**

Package Information:
 Shore Code: **WELLSTART** Name: **Wellness Starter**
 Description:

Packaged Items:
WELLSTART - Wellness Starter Current Package Price : 70.00

Code	Description	Type	Handed Over	Assigned	Posted	Status	Today's Price	Treatment Date/Time	Duration	Therapist
	Body Lotion Lile, 125ml	Retail	✘	-	-	-	15.00			
	SPA-	Treatment	-	✘	-	-	30.00			
	SPA-	Treatment	-	✘	-	-	25.00			
							70.00			

Package Control No. : 0 Insert Return

As soon as a Spa Package is selected, all Items included are displayed, including the Package's current Price. All Treatment Items may appear as not assigned because there is not many Treatment Reservation created yet. To proceed with inserting the Package into the selected Account, the **Insert** remains disabled and we will need to assign all Package Treatment Reservations.

To do that,

1. Select each **Treatment Reservation** from within the grid and right-click to display the menu.
2. For Packaged Treatment, the new / Edit Reservation screen appears that you use for regular Treatments. You can select the **Date**, **Time** and **Therapist** to create the Packaged Treatment Reservation.
3. Click **Insert**, the Packaged Treatment Reservation is created and the Package Treatment Reservation creation is reflected into the Packaged Items grid.
4. The Treatment Reservation appears with Expected Status and all the Treatment Reservation information are listed (Treatment Date/Time, Duration, Therapist, Room). Enable the Insert, you can assign the current Spa Package into the selected Account.

Viewing & Editing Packages

Editing a Packaged treatment Reservation can be done in two ways:

- Using the known Edit reservation option from the context menu.
- Using the View Package option from the context menu. This option will open the known Edit Reservation screen which is now enhanced with Spa Packages related information.

Selecting any Treatment Reservation and right-clicking on it will display the context menu with the **Edit Reservation** available, where you can edit certain Treatment Reservation settings. Selecting any Retail Item and right-clicking on it, will display the context menu with option to Hand Over the Retail Item to the customer.

The following confirmation message will display “**Are you sure you want to Hand over the selected Retail Item**”.

Clicking on **Yes**, will assign the selected Packaged Retail Item as Handed Over and will refresh the relevant information into the data grid.

If any of the Package Treatment Reservations or the entire Package needs to be cancel, the system provides the necessary **Cancellation** options.

The available menu options are to either:

- Cancel the selected Package Treatment.
- Cancel the entire Package and all its included Treatment Reservations.

Choosing to **Cancel** the selected Package Treatment, the system will ask you to reconfirm the available options;

- Cancel all expected Treatment Reservations for this Package.
- Cancel the selected Package Treatment Reservation only.
- Cancel the selected Package Treatment only (click **No**).

The Cancel Selected Spa Packaged Treatment screen shows the following information:

- All Package Items (Treatments and Retail Items) listed with their Package Price as well as their Regular onboard Price.
- The Treatment selected to cancel marked with Red and a Cancellation Fee price appears based on the existing Cancellation Percent value.
- At the lower left corner, detailed information about the necessary steps that will perform to complete the Cancellation of the selected Treatment.

Cancelling the selected Packaged Treatment will result in restoring the entire Package to a non-Package status by performing the following actions.

- Void the entire Package with the Package Price.
- Re-Charge the already finished Package Treatments with Regular Price.
- Re-Charge the already handed over Package Retail items with Regular Price.

Update all expected Package Treatments with Regular Price.

At the lower right corner, these are the available user actions:

1. Click **Yes** to cancel the selected Packaged Treatment Reservation and apply the Cancellation Fee.
2. Click **No** to cancel the selected Packaged Treatment Reservation without applying any Cancellation Fee.
3. Click **Cancel** to exit without cancelling this package.

Unassigned Bookings Handling

The Unassigned Bookings Handling screen lists all single Treatment or Package Reservations imported through the Data Import module before they are confirmed and assigned a Treatment Room.

To ease the imported Reservations handling, the system provides separation of those Bookings by system Cruise.

The screen is divided into two (2) main areas:

- **The Unassigned Cruise Bookings grid.**

This grid lists all imported Cruise Treatments Reservations sorted by the scheduled Treatment Date & Time. The sorting order can be modified by clicking on the grid column Headers.

-

- **A smaller edition of the main Reservations & Schedules screen.**

Displays all current (already confirmed) Appointments for the selected date in gray color to distinguish those Appointments from the Unassigned Appointments that you selected on the top grid. The system is able to process it and propose the correct Therapist Schedule according to the predefined Treatment Date & Time.

Clicking on every imported Unassigned Treatment Reservation will initiate the internal process of finding the necessary available-open time space that fits the Booking's requested Treatment Date & Time as well as the first available Therapist that is able to perform it. As soon as an available period is found, the system will place the Unassigned Treatment Reservation into the Reservations & Schedules time scale on the lower part of the screen, colored in Yellow to identify it as an Expected Appointment.

There are only two (2) options available for the Unassigned Expected Appointments:

- **Assign Room & Confirm Booking**

The Unassigned Treatment Appointment is ready to be confirmed and added into the system as a regular Expected Treatment Reservation assigned to a valid & available Date, Time & Therapist. The last step is to define the Treatment Room.

- **Edit Reservation**

The system provides a way to edit specific reservation data before we can proceed to confirm the booking.



Note:

The System will not allow updating the Treatment and Price for imported Prepaid treatment Reservations.

As soon as you select the Room and confirm the selected Unassigned Treatment, the Treatment will appear in the Reservations Schedule in gray color similar to the rest of the regular Bookings. At the same time, it will disappear from the Unassigned Bookings grid on top for the user to continue confirming the rest of the Unassigned Bookings still listed in the grid.

If no availability for requested Period found, the system will place the Unassigned Treatment Reservation into the first Therapist Schedule colored in Red indicating the overlap with another existing Appointment or Time Block. There is still the option to assign the Appointment to another Time and/or Therapist by either selecting Edit Reservation or move the Red colored Reservation Block using the drag and drop method and position it to the desired available Time and/or Therapist.

3

Assigned Prepaid Bookings Overview

The Assigned Prepaid Bookings Overview screen provides a central place where you can Print Web Summaries in a batch process using specific data filters as well specialized sorting options.

Printing Web Summaries for Prepaid Bookings can initiate for all Bookings displayed on the screen as well as for a selected number of bookings (rows) using the combination of control keys (Ctrl and Shift) and single mouse click.

4

Daily Setup

Daily Setup Overview

The Daily Setup screen contains the following information:

- Location Schedule information.
- Therapists Schedule information.
- Discount Period setup and maintenance.

Before you can create a setup for a specific Location and Date, the system must have been the information about the Location – see [Location Maintenance](#) – as well as the Therapists assigned to each Location – see [Therapists Setup](#)

Location Schedule Information

The following information uses the Location Maintenance to prepare the Daily setup with default values:

- Opening & Closing Times
- Schedules number
- Schedules captions

These default values can be altered to the values appropriate for each Daily Setup.

Additionally, the following information can be enter to have it displayed in the main Reservations screen:

- Port Info
- Therapist Info

Therapists Schedule Information

In the same way as for Location Schedule, the appropriate Therapists are loaded from the Therapists Setup into the Therapists drop-down list boxes, allowing you to assign the appropriate Therapist to each schedule later.

Each displayed Therapist's schedule number color is similar to main Reservations screen colors.

- **Red:** for Expected Therapists (and for schedules that are not link to any Therapists).
- **Green:** for Checked-In Therapists.

Each displayed Therapist's tool tip text is showing the word Expected or Checked-In next to the existing Expected Disembarkation Date

Inside the Therapists drop-down selection box, you will find an additional column Status next to each Therapist's name (Expected or Checked-In).

Figure 4-1 Expected Status

Schd	Caption	Therapist	Default Room
1			
2			
3			
4	Massage		
5	Massage		
6	Massage		
7	Massage		

STATUS
EXPECTED
CHECKED-IN
CHECKED-IN
CHECKED-IN
CHECKED-IN

Next to each Therapist Schedule, we are able to see an exact overview of the actual Booking Calendar of the selected Date and Location. The time blocks displayed here have the following colors:

- The Blocked Times are displayed with the default gray / dark gray / dark green & black colors.
- All other Treatment (Expected & In House) Reservations are displayed in yellow.

 **Note:**

Only Expected & In House Treatment Reservations are display here since this is a pure availability overview.

Multiple Discount Periods

This functionality extends the existing single Discount Period per Day into Multiple Discount Periods for each Day in Daily Setup screen.

Additionally, you can now define the selected or all Item Groups and/or selected or all specific Items (Retail & Therapies) that will be assign to the specific Daily Discount period.

The default Discount percentage definition includes option to define Discount value or Discount percentage.

Setting up a Day

To set up a Day, choose the Location and Date from the calendar.

As soon as you click on the Calendar into a Date that does not exist as a Spa Location Daily Schedule, the system will load the default values for this Location as found in the Location Maintenance as well as in the Therapists Setup.

The default values loaded are:

- Number of Schedules
- Opening and Closing times

The system will create the Therapists Schedules with their default captions, will load all appropriate Therapists into each Schedule's Therapist drop-down list box and prepare them for further editing.

The system will also load all available Rooms into each Schedule's Default Room drop-down list box.

Having all this information in place, you can now edit each Schedule.

1. Accepting the default Schedule caption or edit it.
2. Select the correct Therapist for each Schedule from the Therapist drop-down list box.
3. Select the default Room for each Schedule from the Default Room drop-down list box.
4. When done creating the schedule, click **Insert** to save it.

Copying a Previous Day

To avoid setting up each single working day, the system provides the functionality to setup a Day by copying the setup of an existing working Day.

Choose the Date you want to setup by selecting it from the calendar. The system will display an empty working Day as well as the option to select an existing Working Day and copy this Day's Setup into the selected empty Setup.

Figure 4-2 Spa Daily Setup

Select the working Date you want to copy the setup from and then click **Copy Date**.

The copy process commence immediately and the date will have the same setup as the one yo copied from.

Additionally, the system will display two more buttons to either Update the proposed/ copied setup or Remove Date to remove the proposed setup.

Clicking on Remove Date will result in removing the Daily Setup for selected Day “**Are you sure you want to remove the Daily Setup for selected Date: 08/08/2019**”

Adding & Removing Schedules

The function allow you to add additional schedules and therapist to the selected date.

Figure 4-3 Schedules

Schd	Caption	Therapist	Default Room
1	Trainer		NONE
2	Trainer		NONE
3			NONE
4			NONE

To do that, place the cursor to the Schedules text box and replace the number as shown in above figure from four (4) with six (6) and click **Tab**. The system will create to additional schedules where you can now enter their captions as well as select Therapists and default Rooms

After finishing all necessary changes, click **Update** to save. You can remove existing Schedules from a Daily Setup the same way, by reducing the Schedules number and clicking the **Tab** key. Clicking on **Yes**, will result in removing the last two (2) schedules and bring the total Schedules for this working Date to four (4) Schedules.

Note:

When you try to remove a Schedule that already has Appointments or Blocked Times assigned, the system will not allow it and will display the following warning message “**There are already appointments for one of the schedules you are trying to delete. Cannot continue.**”

Assigning Crew Member to Schedules

When adding Schedules into the Daily Setup, the system by default leaves the **Captions, Therapists** and **Default Rooms** empty.

You can assign Therapists to those Schedules, by selecting the Therapist from the Therapist drop-down combo box and then click **Update**.

Multiple Discount Periods

The Daily Setup screen displays all Multiple Discount Periods assigned to each day on the upper right. The Discounts Periods displays the list of assigned Discount Periods and the Retail, or Therapy Groups and Items assigned to each Discount Period.

The main Discount Periods frame consist of two (2) separate frames:

- A tree view listing of all Discount Periods grouped by retail and Therapies types.
- A tree view listing of all Groups and items assigned to each Discount Period.

The necessary buttons needed to **Create, Edit** or **Delete Discount Periods**, are place at the bottom of the Discounts Period frame. The listing on the left lists all available Discount Periods of selected Date including the following information:

- Short Code description.
- Discount value as amount of percentage (%)
- Starting & Ending time of Discount Period

While the listing on the right displays all Retail or Therapies Groups and items that are currently assigned to the selected **Discount Period** of the left side.

Creating & Editing Multiple Discount Periods

The assignment of Groups and Items works in the same way as the assignment of Trained Therapies in the Therapists Setup screen. You are able to assign to each Discount Period an entire Group of Items or selected Items.

This can be done during the creation of a Discount Period (**New**) or when editing an existing Discount Period (**Edit**).

To create a new Discount Period, click on **New**. A new window will open where you can enter all necessary information to create a Discount Period.

- **Code:** Enter a short description for the new Discount Period. This will be used later to describe this Discount Period in the Reservations and Posting screen.
- **Discount:** Enter the amount of the Discount and its type: Value
- **Percentage (%):** 2.50 or 10%
- **Type:** Select whether this Discount Period will include Retail
- **Therapies Items:** Clicking on each type will result in automatic loading of Retail or Therapies Groups and Items on the right side tree view listing.
- **From Time:** Enter the starting time of the Discount Period.
- **To Time:** Enter the ending time of the Discount Period.

On the right side of the window, you will see all available Groups and Items that you could assign into the Discount Period.

1. Click on the check box of a Group to select the entire Group and all items belonging to the Group.

2. Double-click on the Group to expand the listing to display the individual items that each Group contains to select specific items to include into the Discount Period.

In the above example, we have entered information for the following Discount Period, 5% Discount from 10:00 — 12:00 or both Sport massage items.

1. Click **OK** create this Discount Period and save it into the current displayed Date. The Daily Setup screen will be automatically updated to display the addition of the new Discount Period.
2. To edit some or all of the information of a Discount Period, simply click on **Edit**.
3. The same window as before will open to edit the information you wish the change. Clicking on **OK** will save the changes and will update the Daily Setup screen automatically.

Discount Periods Overlaps

The Discount Periods functionality has a limitation in multiple Discounts Periods overlapping. Discount periods of the same type (Retail or Therapies) cannot be overlapped or the system will not accept multiple periods existing for the same type in the same or overlapping period with another Discount Period of the same type.

In other words, looking at the screen above, we are having 2 Discount Periods for Therapies.

The first is CLASSIC from 10:00 – 12:00 for 5% for the 2 SPORT MASSAGE Therapies.

The second is HARMONY from 12:00 – 17:00 for 20% for all Therapies.

If we try to extend the ending time for the first period – CLASSIC – from 12:00 to 13:00, we will get the following message.

In other words, looking at the screen above, we are having 2 Discount Periods for Therapies.

The first is CLASSIC from 10:00 – 12:00 for 5% for the 2 SPORT MASSAGE Therapies.

The second is HARMONY from 12:00 – 17:00 for 20% for all Therapies.

If we try to extend the ending time for the first period – CLASSIC – from 12:00 to 13:00, we will get the following message “Discount Period overlaps with an existing Discount Period.

But, the system will allow you to new Discounts Periods for Retail Items as you wish, as long as they do not overlap with the existing one from 10:00 – 14:00.

Discount Periods and Reservations

When Discount Periods exists for the selected-displayed Date & Location, the system displays the Multiple Discount Periods in the lower left corner of the main Reservations screen, using the same tree view listing as in the Daily Setup screen.

The Multiple Discount Periods handling during reservations is implement as follows. The first time the system checks for Reservations that include Therapies that might be assign into Discount Periods is during Checking-In of appointments. At this time, the system checks and looks for all Therapies Discount Periods that might contain the currently checked-in Therapy that falls inside the specified Starting and Ending Time.

If the system finds that the current Reservation includes a Therapy that applies for a Discount, it automatically updates the Reservation record internally with the Discount amount and type (value or %). Now, after the Reservation record has been updated with all necessary Discounting information, you see the Original Treatment price and the discounted price in the Reservation Info layout.. At a later point, during the Finish & Post process, the Discount will be automatically calculated and displayed in the Posting screen. Additionally, the posting screen will list on the right side all available Discount Periods of current selected Date, sorted by Type (Retail or Therapies) and then by Starting Time.

Discount Periods and Retail Items

When posting Retail Items, the Posting screen will not only show the Multiple Discount Periods, but also will check if a selected Retail Item falls into an existing Discount Period.

In this case, the system will:

1. Calculate the Discount and display the new Extended Price (after discount). Display the Discount value and type (underneath the Extended Price).
2. When you finally click on **Add To Receipt**, the calculated Discount amount will be displayed together with the Retail Item on the Invoice list (left side). The Total Amount will automatically reflect the final price. The same way, the system will calculate Discounts that are assign as Discount values (instead of %).

Daily Export

This is the option where the Manager would generate the Daily Sales Export file at the end of the day and it can be used to import the Daily Items consumption into various Inventory systems like Materials Management System, Crunch Time etc.

The system will display the default preset File Location where the Daily Export Sales file will be place upon completion of the export process. You need to select the **Sales Date** and click on **Export**.

Note:

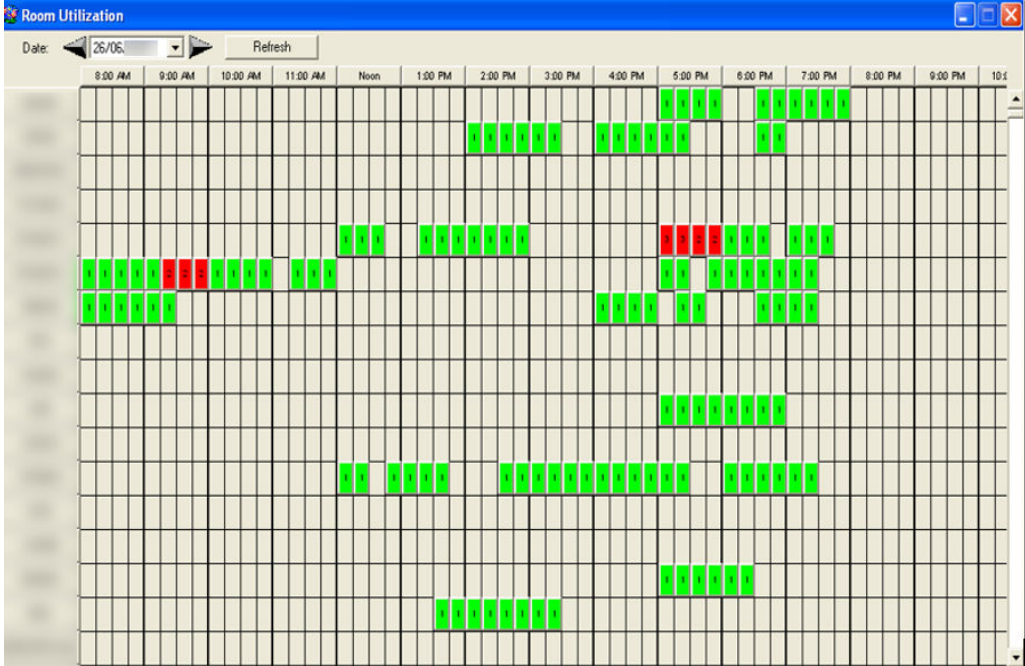
Once the Sales Data have been exported for a specific date, the Sales Data resets and system will not be able to reproduce Sales Data Export for the same Date again.

Daily Schedule Overview

The Daily Schedule Overview screen is a graphical representation of the actual main Reservations screen using the same default colors to represent all Appointments and Time Blocks.

Room Utilization

Figure 4-4 Room Utilization



The Room Utilization screen is a graphical representation of the actual times each Treatment Room has been used during a sales date in the default fifteen (15) minutes time intervals.