

# Oracle® Hospitality Cruise Shipboard Property Management System Spa User Guide



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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).

## **Customer Support**

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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**

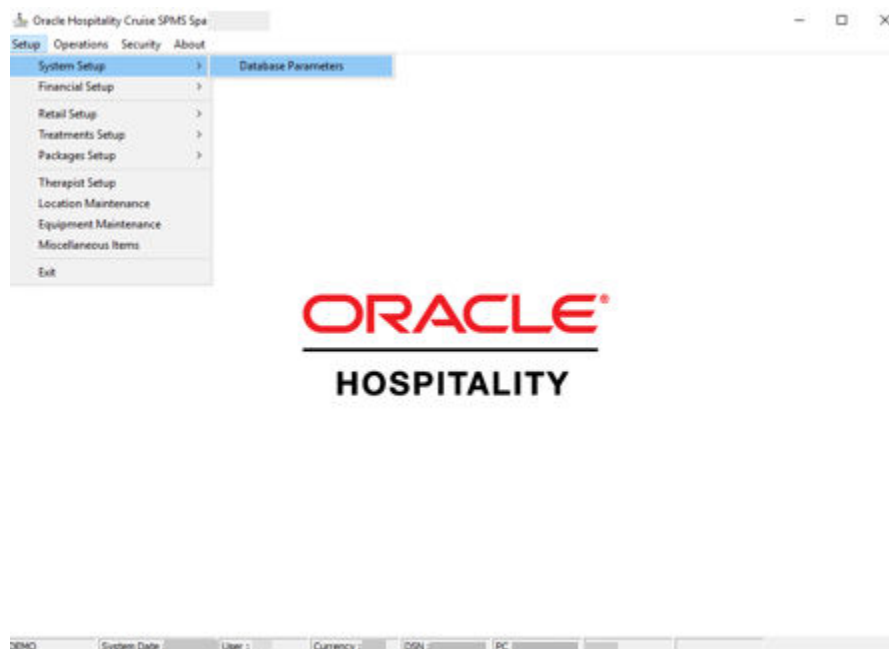
**Table 1 Revision History**

| Date           | Description of Change           |
|----------------|---------------------------------|
| September 2021 | Initial publication.            |
| July 2022      | Made minor grammatical changes. |

# 1 Setup

## System Setup

Figure 1-1 Database Parameters



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

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

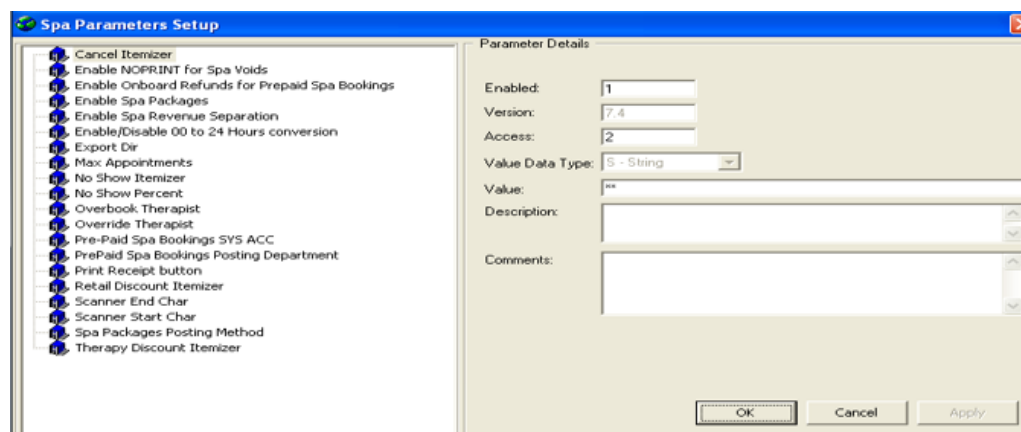
The parameters have the following definitions and acceptable values.

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. Suggestz 500 as the initial value. |

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

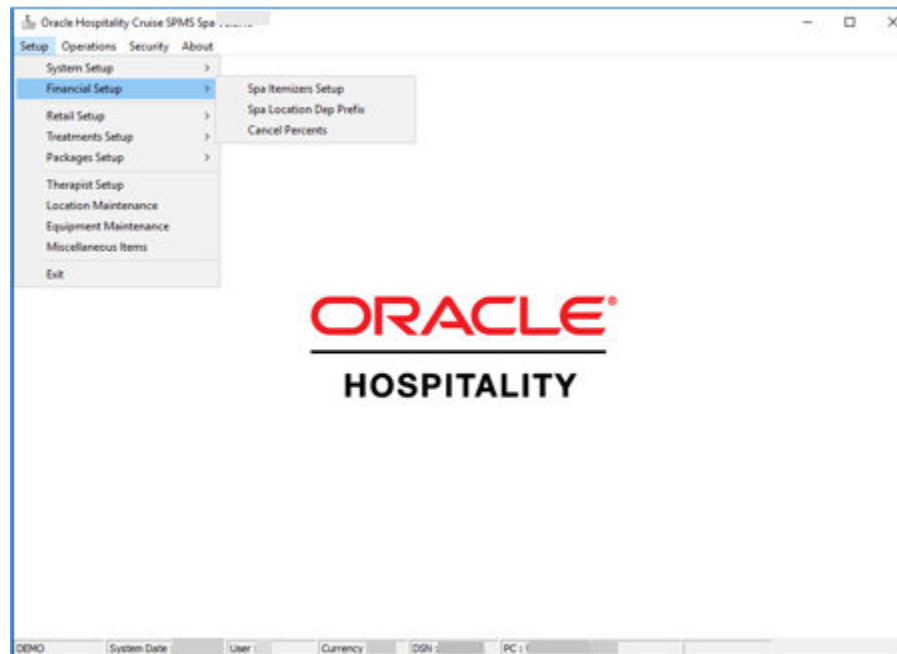
| Option                       | Description                                                                                                                                                                                                                                      |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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: <a href="#">Spa Itemizers and Location Prefixes Setup</a> for more information. |
| Start/End Scanner Characters | Start/End scanner characters used by the system to determine that the 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

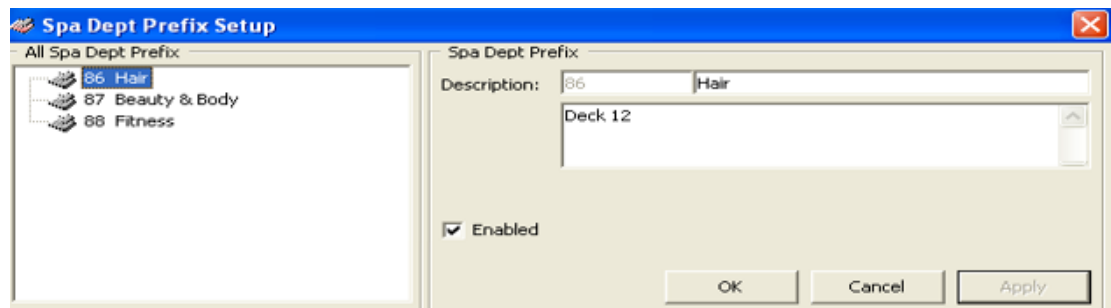
### Setting up the Spa Itemizers and Location Prefixes

**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 displays, "Are you sure you want to delete this entry?" Click **Yes**.

 **Note:**

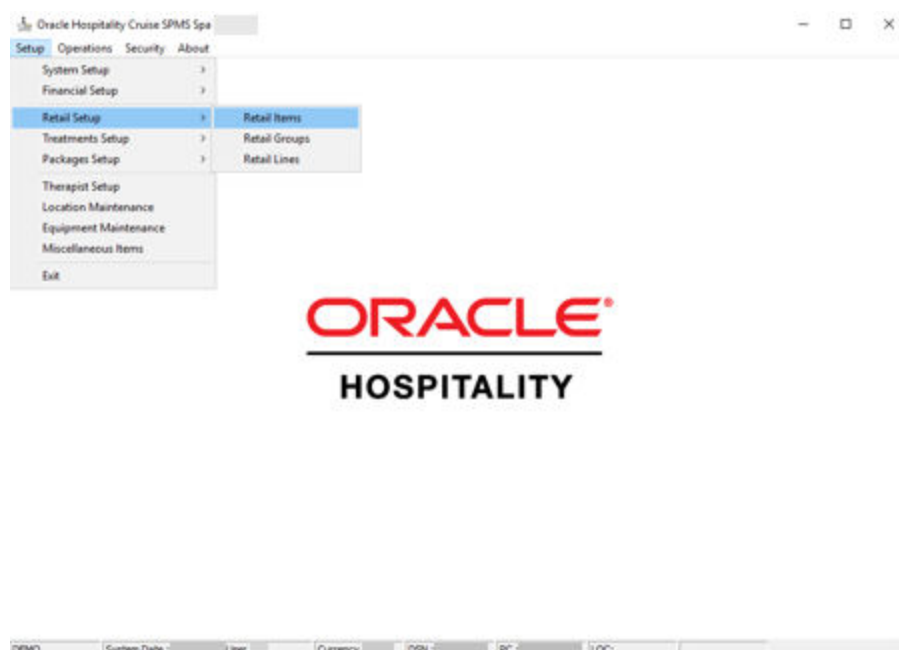
Only the Spa Department Prefixes that are not in use can be deleted.

Right-click on the tree view to add an itemizer. To delete, you must right-click on the itemizer and select the option.

## Retail Setup

### Retail Items, Groups, and Lines

Figure 1-5 Retail Setup



The Retail Group defines the type of Retail Item. Retail Group is the Retail Line that 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 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 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. |

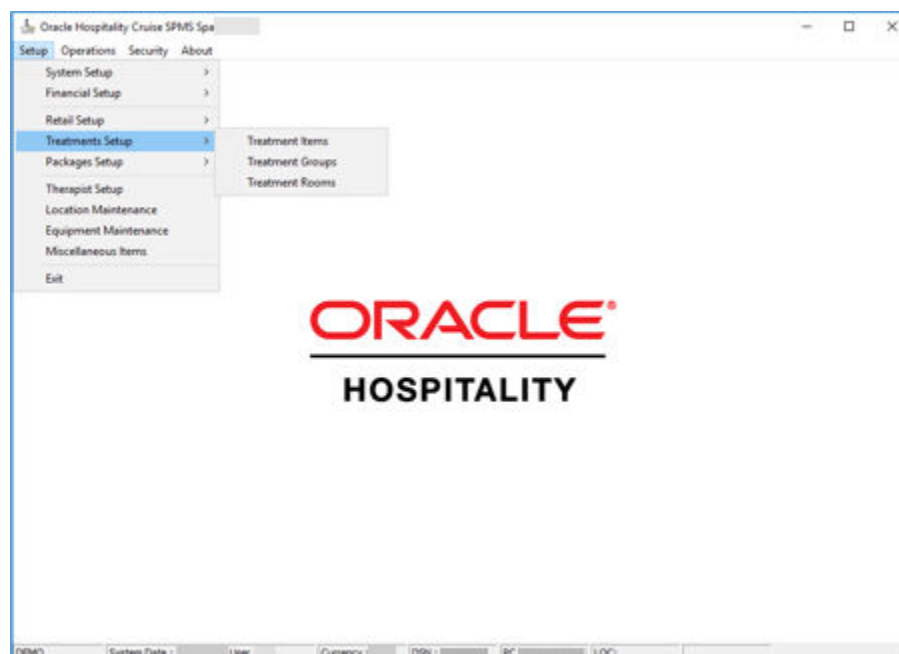
**Table 1-4 Description of the Options that Aappear on the Retails Lines Setup Screen (Pricing and Sales Tab)**

| 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 appears. 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**, make the required change, and then click **Update**.

**Figure 1-7 Treatment Items Setup**

The Treatment Items setup is divided into five 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 expands 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. |

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

| Option           | Description                                                                                                                                                                                                                                                                                  |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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).                                                                                                                                                                                        |
| 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 be either 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 appears.
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.  |

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

| Option   | Description                                                                         |
|----------|-------------------------------------------------------------------------------------|
| Active   | If this field is checked, then the room is available for treatment.                 |
| 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

1. To add, click **Setup, Packages Setup**.
  - Before you can assign any Treatment and/or Retail Items to the Package, you must 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.
2. To assign a new Treatment Item to the package, select the **Item Type**.
3. 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 on 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 following example, there are no prices previously assigned, so the example starts by adding prices.

1. Add the starting and ending dates of the pricing period and the price and click **Add Price**.
2. 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 1-9 Therapist Maintenance

**Therapist Maintenance**

**BEAUTY & BODY**

- Body Care
- Body Massage
- Body Wraps
- Body Treatments
- Body Care
- Body Massage
- Body Wraps
- Body Treatments
- Body Care
- Body Massage
- Body Wraps
- Body Treatments
- Body Care
- Body Massage
- Body Wraps
- Body Treatments

**FITNESS**

**HAIR**

Name:

Position:

Embark:  Debark:

Experience:  Ranking:

Qualification:

User Link:

Commission:

Treatment%:  Retail%:

**Therapies Trained For**

- ☐ S - Classics
- ☐ S - Extras
- ☐ S -
- ☐ S -
- ☒ S -
- ☐ S -
- ☐ S -
- ☒ S -
- ☐ S -
- ☐ S -
- ☐ S -

**Update**

Depending on the operational positions you assigned earlier in **Location Maintenance** into Crew POS, the screen will list all assigned Crew members as Therapists.

You can view Embarking / Disembarking Dates information as well as the specific values defined for each Therapist such as:

- Qualification Level
- Experience Level
- Guest Satisfaction Rating
- Assign the commission percentage each therapist receives on Therapy and/or Retail sales.
- Assign therapies that each crew member has and is qualified to perform.

## Location Maintenance

A Spa Location is associated with a main revenue area within the Spa facilities. Usually a Spa is divided between Hair/Nail, Treatments and Fitness, but some ships may have additional locations, or some may only have one (1).

The Spa location is maintained in **Location Maintenance** 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 <b>Typ_SDL</b> .<br>For example: Spa Dept Prefix is 87, the item charges will post into the 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.                                                                                                                                                                                                                                                                                                                                                                         |

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

| Option                | Description                                                                                                                                                                                                                  |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| MMS_ID                | MMS or external F&B system Department itemizer (Crunch time).                                                                                                                                                                |
| 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 list of equipment items: "ISOLATE-Isolation Tank" and "HAIRDR-Hair Dryers". The "HAIRDR-Hair Dryers" item is selected and highlighted. Below the list are two buttons: "Insert" 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 appear.
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

Similar to the setup of Treatments and Retail Items, Miscellaneous Items can be defined by various Bar Codes and Sales Price periods.

Figure 1-12 Miscellaneous Items Maintenance

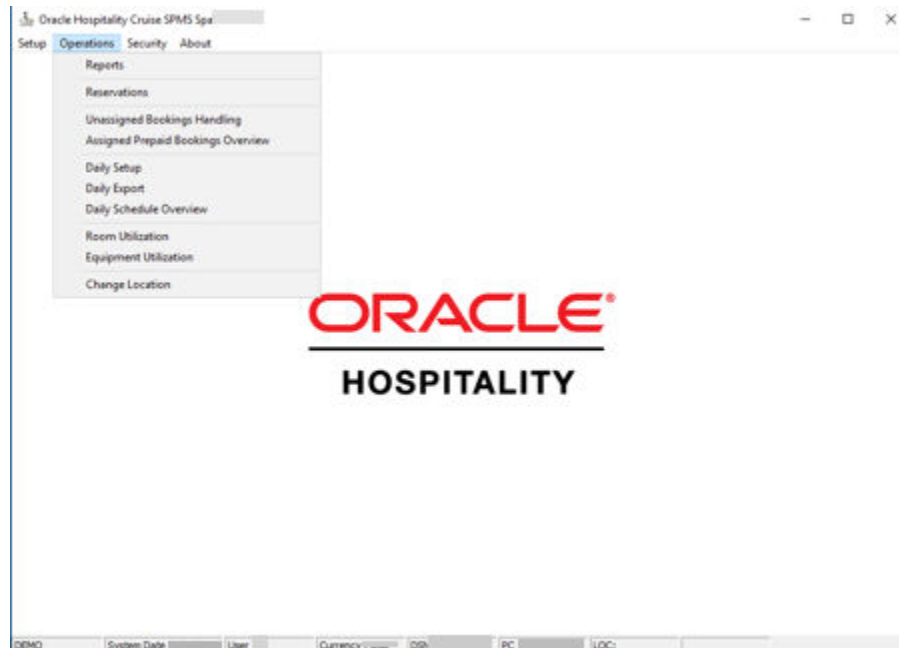
The screenshot shows a software window titled "Miscellaneous Items Maintenance". On the left is a tree view with a single node labeled "Tip". The main area contains the following fields and controls:

- Shore Code:** TIP
- Active:** ☒
- Name:** Tip
- Description:** Tip
- Itemizer:** 16 - Tips (dropdown menu)
- Bar Code ID:** (text field) with **Add Code** and **Remove Code** buttons. Below it is a table with one row containing the text "Bar Code ID".
- From Date:** 27 Jun (dropdown menu)
- To Date:** 27 Jun (dropdown menu)
- New Price:** (text field) with **Add Price** and **Remove Price** buttons. Below it is a table with three columns: "From Date", "To Date", and "Price".
- Update** button at the bottom right.

## 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.

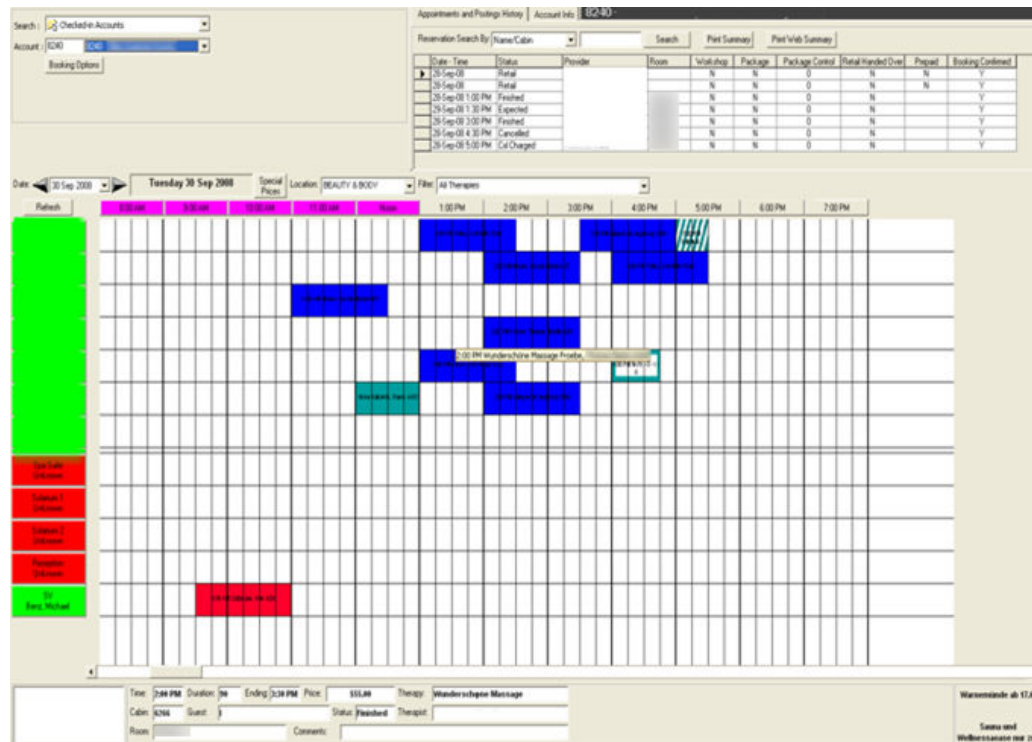
To display the Booking Calendar, select **Reservations** from the Operations main menu.



#### 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 different context menus will appear. 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 pressing the **Tab Key**.

Figure 2-3 Account Info

### Query Appointments

Appointments can be queried by selecting a 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

| StRm | Name | Due In Today | Date    | Status   | Provider |
|------|------|--------------|---------|----------|----------|
| 0606 |      | In House     | 15-MAR- | 11:30    | In-House |
| 0606 |      |              | 12:45   | Expected |          |

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 appears in the selected **Appointment** Information frame.

Figure 2-5 Status Appointment

|        |         |           |    |         |          |            |         |          |      |
|--------|---------|-----------|----|---------|----------|------------|---------|----------|------|
| Time:  | 3:00 PM | Duration: | 30 | Ending: | 3:30 PM  | Price:     | \$39.00 | Therapy: | SPA- |
| Cabin: | 8240    | Guest:    |    | Status: | Expected | Therapist: |         |          |      |
| Room:  |         | Comments: |    |         |          |            |         |          |      |

A tool tip also appears when hovering over your mouse cursor over an appointment with guest information.

### Changing Locations

You can request a booking calendar for a different location by selecting the location for the **Location** drop-down combo box.

**Figure 2-6 Changing Locations**

The screenshot shows the top section of the booking interface. At the top, there is a 'Date' field with a dropdown arrow, currently showing '30 Sep'. To its right is a 'Tuesday 30 Sep' label. Further right is a 'Special Prices' button. To the right of that is a 'Location' dropdown menu, which is currently open, showing a list of options: 'BEAUTY & BODY', 'FITNESS', and 'HAIR'. Below the 'Date' field is a 'Refresh' button. Below the 'Location' dropdown is a 'Name' field with the text 'BEAUTY & BODY'. Below the 'Name' field is a 'Kosmetik' button. The main area of the interface is a grid of appointment slots, with the first row showing times '8:00 AM', '9:00 AM', '10:00 AM', and '11:00 AM'.

### Changing Dates

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

**Figure 2-7 Changing Dates**

The screenshot shows the top section of the booking interface, similar to Figure 2-6. The 'Date' field is currently showing '30 Sep'. A date editor calendar is open, showing the month of 'September'. The calendar grid shows the days of the month, with the 30th of September highlighted. Below the calendar grid, there is a 'Today: 3/24/' label. The main area of the interface is a grid of appointment slots, with the first row showing times '8:00 AM', '9:00 AM', '10:00 AM', and '11:00 AM'.

### 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 placing the mouse pointer just above the Date/Area/Filter labels.

Figure 2-8 Changing Size Form

The screenshot shows the Oracle Reservations system interface. At the top, there's a search bar with 'Checked-in Accounts' and a dropdown menu. Below it, the 'Account' field is set to '4163'. A 'Booking Options' button is visible. On the right, there's a table with columns: Date, Time, Status, Provider, Room, Workshop, Package, Package Control, Retail Handled Over, Prepaid, and Booking Confirmed. The table lists several reservations for '30-Sep' with various statuses like 'Retail', 'Void', and 'In House'. At the bottom, there's a date selector set to 'Tuesday 30 Sep' and a time slot grid with buttons for 'Refresh', '11:00 AM', 'Noon', '1:00 PM', '2:00 PM', '3:00 PM', '4:00 PM', '5:00 PM', '6:00 PM', and '7:00 PM'. A red arrow points to the 'Booking Options' button.

## 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

The screenshot shows the 'New Reservation' form in the Oracle Reservations system. The form is divided into several sections. On the left, there's a form for 'Account Information' with fields for 'Account' (5135), 'Type' (Guest), 'Cabin / Account Nr.', 'Name', 'Age' (49), and 'Gender' (M). Below this is the 'Reservation Details' section with fields for 'Date' (9/30/), 'Location' (Beauty), 'Therapist', 'Treatment', 'Time', 'Duration' (15 Min.), 'Room', 'Price', and 'Comments'. At the bottom of this section are 'Activity', 'Provider', 'When', and 'Status' buttons. On the right, there are two availability grids: 'Therapist Availability' and 'Room Availability'. The 'Therapist Availability' grid shows a grid of yellow and white cells representing availability for different therapists (Kosmetik, Massage, etc.) across time slots (1:00 PM, 2:00 PM, 3:00 PM). The 'Room Availability' grid shows a similar grid for room availability. At the bottom of the form are 'Insert' and 'Return' buttons.

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, the guest and status are listed in the grid at the bottom..
- If the start of the reservation is from the Booking Calendar, the Therapist name and Time of the reservation, 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

Select the **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 is 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 **Update** to store the change into the database. When the form closes, any changes reflect in the Booking Calendar. If the **Print Ticket** check box is checked, a revised reservation ticket prints to the Ticket Printer.

 **Note:**

Only Expected Reservations can be edited. The current information about the reservation appear 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 appears in a Message Box. The color of the reservation changes 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 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 the board card or enter thei user-id/password into the form.
3. Click **OK**. Once the User ID and Password are accepted, the **Posting** form appears with the service and any associated retail items in the posting box.

Figure 2-10 Posting

The screenshot shows the 'Spa Posting' window. On the left, the 'Posting For' section shows a date of 9/30/07 and time of 4:45 PM. Below it, the 'Post To' dropdown is set to '5135'. A table lists charges with columns 'Desc', 'Qty', 'Price', and 'Total'. One row shows 'SPA: Therapy...' with a quantity of 1, price of \$119.00, and total of \$119.00. Below the table are fields for 'Auth', 'Discount' (set to 0), and radio buttons for 'Value' and '%'. An 'Add >>>' button is next to the discount field. A 'Comments' text area is below that. At the bottom left, a 'Total' field shows '\$119.00'. On the right side, there is a 'Suggestion' grid with columns 'Retail Item Name' and 'Price'. Below it is a 'Discount Periods' grid with columns 'Item Type', 'Code', 'Value', and 'Discount Period'. Further down are fields for 'Charge Type' (dropdown), 'Charge Item' (dropdown), 'Quantity' and 'Price' (input fields), and 'Extended Price' (input field). A 'Comments' text area is below that. At the bottom right, there are fields for 'Discount' and radio buttons for 'Value' and '%', followed by an 'Auth' field. A 'Comments' text area is at the very bottom right. In the center, there are buttons for 'Remove >>>', '<<<Add To Receipt', and 'Print Receipt'. At the bottom left of the window are 'Post' and 'Return' buttons.

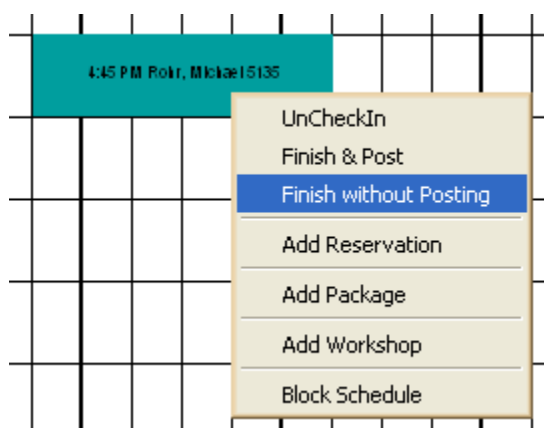
To change where the charge will be posted (Payer Account), you can enter a new cabin, name or account in the **Post To** textbox, and a posting account is selected from the drop-down box.

- If the Treatment of the reservation includes suggested retail items, they will appear in the **Suggestion** grid. Double-click on a retail item in the **Suggestion** grid to move it to the posting box. You can add additional charges for other services or retail products 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)

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

1. Right-click 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 to confirm your selection with the following message: Are you sure you want to set the status of this Reservation to Finished without Posting it?

**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 **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 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 automatically calculates 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 **Remove**.

 **Note:**

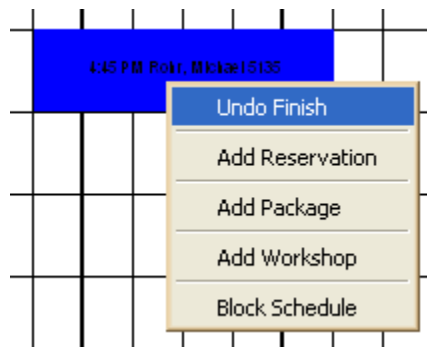
If the **Return** is selected, additional charges added to the posting area will be removed, and will have to be re-entered the next time the **Finish and Post** option is selected for that Appointment.

**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**.

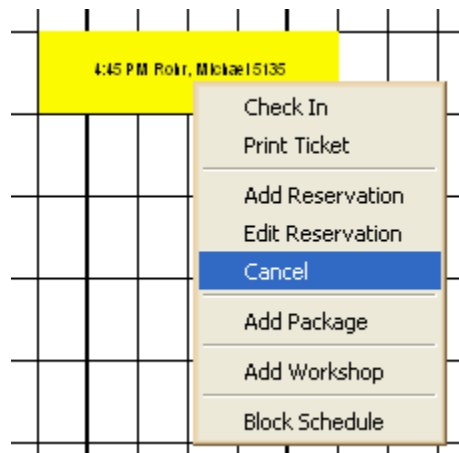
**Figure 2-12 Undo Finish**



### Cancelling Appointments

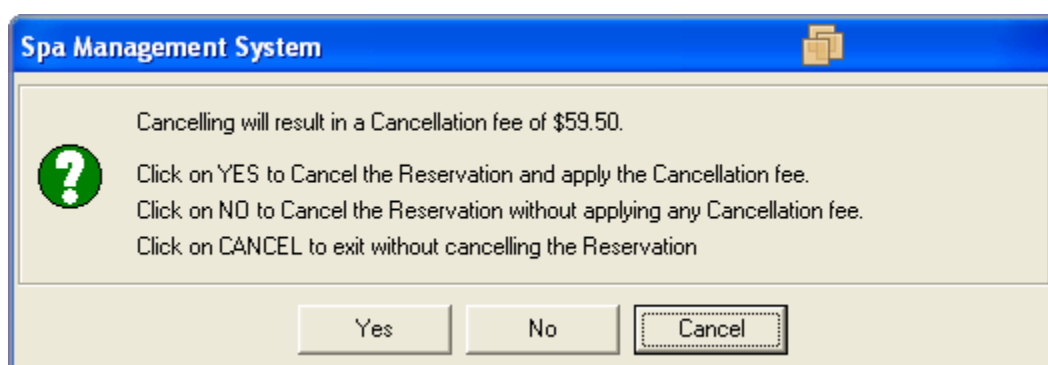
1. Right-click the appointment from the Booking Calendar.
2. Select **Cancel** from the context menu.
3. Alternatively, search for the appointment using the Reservation Search By area, select the appointment to cancel, right-click and select **Cancel** from the context menu.

**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

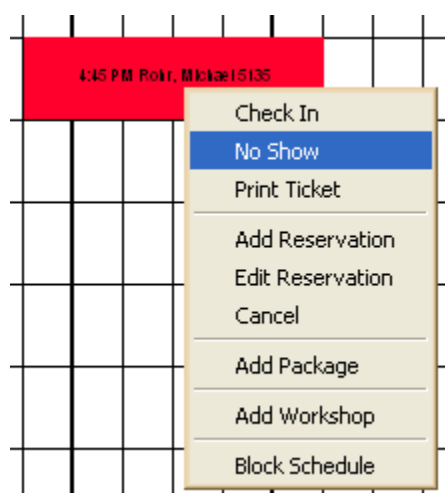


5. If you select:
  - **Yes**, the cancellation fee appears on the Spa Posting form and is placed in the Posting Area.
  - **No**, the selected appointment is canceled without posting a Cancellation Fee.
  - **Cancel**, then the reservation will not be canceled.

### No-Show Appointments

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

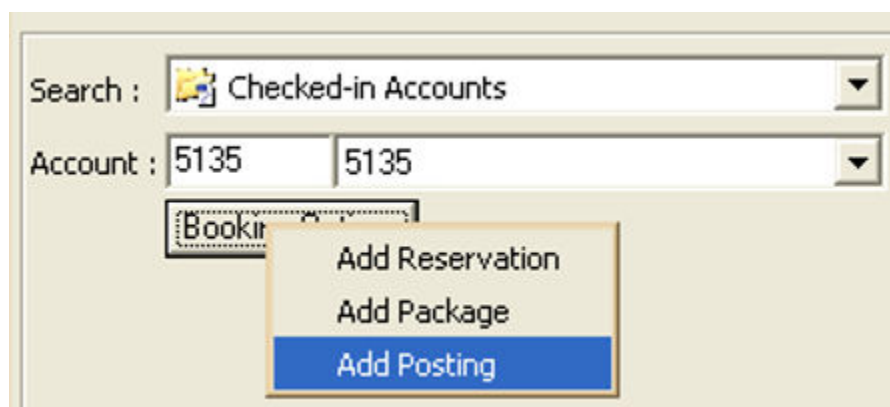
Figure 2-15 No Show



1. Click on **No Show**.
2. If you select **Yes** the No Show fee is calculated and placed in the Posting Area. You can then adjust the fee if required and post it to the guest account.
3. If you select **No**, the appointment is set to No Show without a charge. If you to click **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 Percentage 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 of the Discount Percentage textbox, and is enabled if you have the User Access Rights checked after clicking the **Auth**.
- After the user is verified, the Discount Percentage textbox gets enabled to accept valid Discount Percentage values (0-100).
- Only after those values are verified as correct, the **Add>>>** button is enabled. Click the **Add>>>** button to start the process of applying a 10 percent discount on all items.

Figure 2-17 Spa Posting

Spa Posting

Posting For: 3/25/2009 2:16:08 AM

Post To: 5135 Rohr Michael

| Desc     | Qty | Price     | Total     |
|----------|-----|-----------|-----------|
| SPA-T    | 1   | \$89.00   | \$89.00   |
| SPA T    | 1   | \$95.00   | \$95.00   |
|          | 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) |

Auth. Discount: 10 Value % Add >>>

Comments:

Total: \$345.55

Post Return

Suggestion: Retail Item Name Price

Discount Periods: Item Type Code Value Discount Period

Charge Type: Retail

Charge Item:

Quantity: 1 Price: \$199.95

Extended Price: \$199.95

Comments:

Discount: 0.00 Value % Auth.

Comments:

The above figure shows a 10 percent discount is applied to all three 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 you applied a 10 percent discount to all three items, clicking the **Add>>>** button again results in the following warning message "Discounts already exist! Adding more Discounts not possible."

When the Discount percentage is correctly applied, clicking **Post** posts all items with their Discount Percentage values into the Accounts. The Billing Image of this posting is viewable in Management.

Figure 2-18 Bill Details

Bill Details

Guest Receipt

25 Mar 02:41  
CHECK NO. :

|         |          |        |
|---------|----------|--------|
| 1       | SPA-T    | 89.00  |
| 1       | SPA T    | 95.00  |
| 1       |          | 199.95 |
| 0       | Disc SPA | -8.90  |
| 0       | Disc SPA | -9.50  |
| 0       | Disc SPA | -20.00 |
| TOTAL : |          | 345.55 |

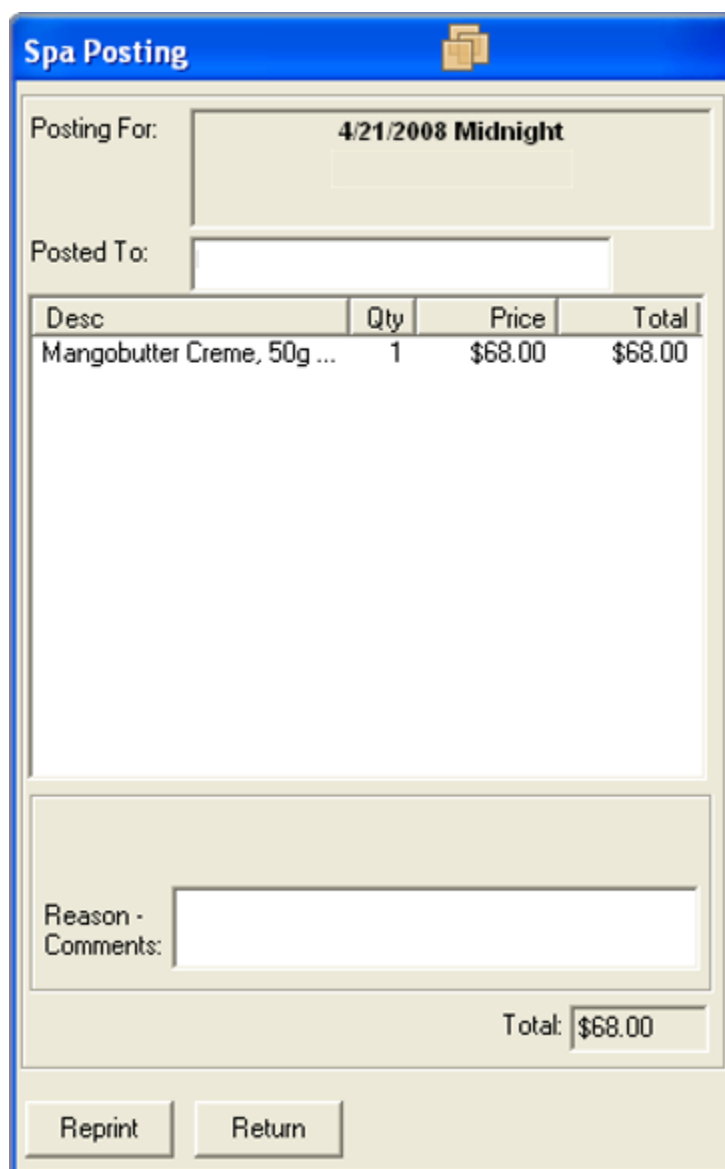
Print to Epson TMT88IV Print Close

### 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 displays all of 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)



The Spa Posting (View) window displays transaction details. It includes fields for 'Posting For' (4/21/2008 Midnight) and 'Posted To'. A table lists items with columns for Description, Quantity, Price, and Total. The table shows one item: Mangobutter Creme, 50g ... with a quantity of 1, price of \$68.00, and total of \$68.00. Below the table is a 'Reason - Comments' field. At the bottom right, the 'Total' is \$68.00. At the bottom left, there are 'Reprint' and 'Return' buttons.

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

### Voiding a Posting

To void POS transactions for an appointment, a retail sale or a 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 you click the **Void**, all charges are reversed and the appointment is marked as a status **"V"** for Voided. If the posting was for a true appointment, the new appointment record is 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 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 appears in a dark gray color with 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**

The screenshot shows a 'BlockTime' dialog box. It has a title bar with a close button. The main area contains several fields: 'Date' with a dropdown showing '9/30/', 'Area' with a dropdown showing 'Beauty', 'Therapist' with a dropdown, 'Time' with a dropdown showing '10:00 AM', 'Duration' with a dropdown showing '45 Min.', 'Type' with a dropdown showing 'Free Time', and 'Reason' with a list box containing 'Block Type', 'Free Time', 'Working Time', 'Security Control', and 'Internet Block'. There is a checkbox labeled 'Enable Multiple Therapists selection' which is currently unchecked. At the bottom right, there are 'OK' and 'Return' buttons.

### 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**

15:00 Hairstyling Workshop - 5 / 0 / 0

**Expected Workshop (Delayed)**

15:00 Hairstyling1 Workshop - 5 / 0 / 0

**Checked In Workshop (partially or complete)**

15:00 Hairstyling1 Workshop - 3 / 2 / 0

**Finished & Posted Workshop (complete All Attendees)**

15:00 Hairstyling1 Workshop - 0 / 0 / 5

**Finished & Posted Workshop (Partial Attendees)**

15:00 HAIRSTYLING WORKSHOP - 0 / 4 / 1

Since there is limited space to display all Workshop participants in 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 your mouse pointer 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 appears 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, and Un-Check In Attendees.

In the example shown in the screenshot above, a Workshop is created with the description "Hairstyling Workshop". Then, you can select the appropriate Treatment and, Workshop Hairstyling, and assign the correct starting time and Room. When ready, click the **Insert** button.

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

**Figure 2-25 New Attendees**



| 15:00                              |  | 16:00 |  |
|------------------------------------|--|-------|--|
| 15:00 HAIRSTYLING WORKSHOP - 01010 |  |       |  |

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

### 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 can now 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 the number 1.

Figure 2-26 Workshop Attendees Handling

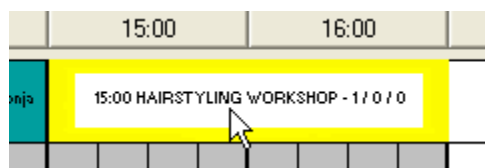
You can also assign more Accounts at the same time, assuming that you know other guests that would like to participate in this Workshop or you could assign them later.

**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 **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

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 are 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 checks in all Expected Attendees and the Main Reservations time plan is being refreshed to reflect this change.

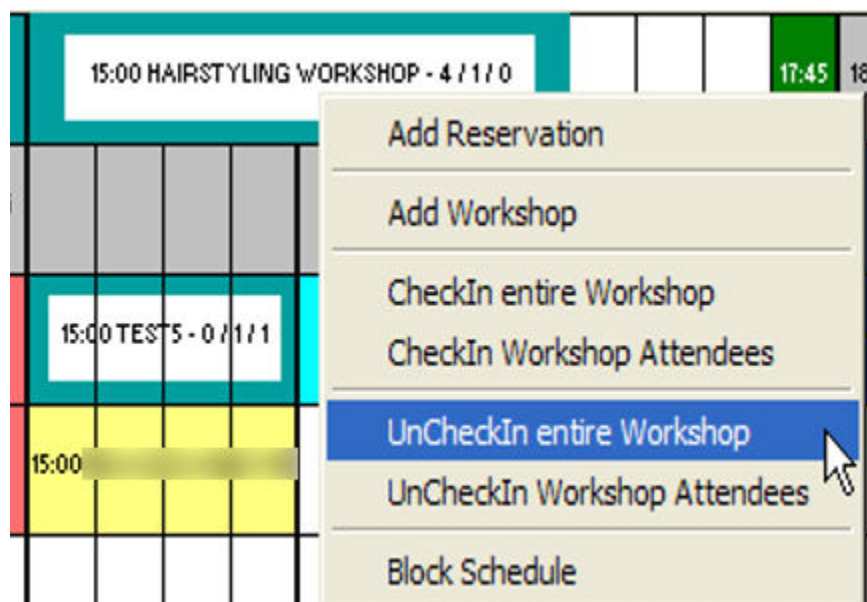
#### Checking in each Attendee manually.

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 >** are 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 does the following:
  - Checks in the selected attendee and moves it into the appropriate Checked In Attendees list box.
  - Removes 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 **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 uncheck each attendee:

1. Select the UncheckIn Workshop Attendees option. The Edit Workshop Reservation screen shows 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 **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 become unavailable when there are no any attendees in the list.

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

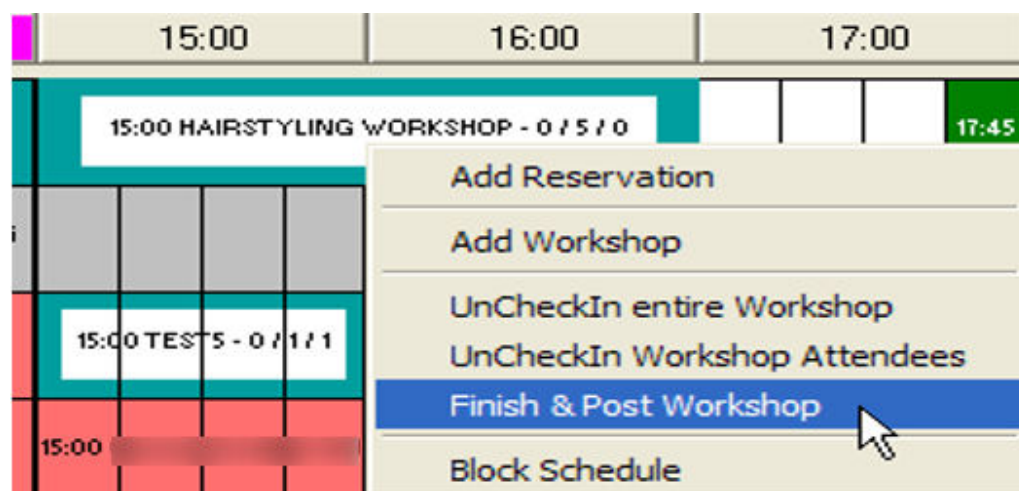
- Selecting and assigning new Attendees to the Workshop by using the Account Identifier search capability as well.
  - Removing already assigned Attendees from the Workshop Use the Remove Assigned Reservation for a selected Expected Attendee to remove an assigned attendee.
  - Editing Workshop Reservation 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 this example, the Hairstyling Workshop lists five Checked In Attendees that you would like to charge the displayed Workshop Hairstyling treatment charge of \$20.00.

If the **Post** button is disabled, this means you must select any of our five Checked In Attendees to assign them as Finished.

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

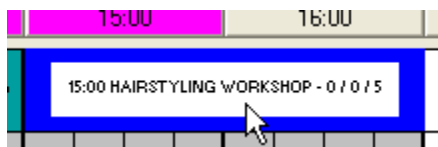
- Mark all five (5) Attendees as Finished and list them into the appropriate Finished Attendees list box.
- Removing all five (5) Attendees from the Checked In Attendees list box.

As soon as a minimum of one attendee appears in the Finished Attendees list box, the **Post** button becomes available and you can post the \$20.00 Treatment charge.

Click 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 the above actions are completed, the Spa Workshop Posting screen closes and the system refreshes the Main Reservation time plan and sets 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 guests 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 on the Checked In Attendees list box and 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 results in:

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

As soon as all of 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 the 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 a Finished Workshop to view its postings and select the option **View Workshop Postings** from the context menu. This option opens the View Spa Workshop Postings screen in three different areas.
  - An accounts Information area where you get 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. Click on **Reprint** to reprint the Posting Receipt for the current selected Finished Attendee.

### Voiding Workshop Postings

As with Viewing Workshop Postings that have been Finished & Posted, the following functionalities are for Voice Workshop Postings.

1. Select the **Finished Workshop** to view its postings and select the option Void Workshop Postings from the context menu.
2. This option opens the Void Spa Workshop Postings screen in three 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 **Void** voids all of the listed Transactions posted as part of the current Finished Workshop for the current selected Workshop Attendee and prints 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 displays a confirmation message.
2. Click **No** to delete the entire Workshop Reservation and reflect in the Main Reservation time plan. Click **Yes** to 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 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 Expected Attendees into the Attendees To Be No Show & Posted list box.



#### Note:

If you select only a few attendees, 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 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 appears 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.

### Cancelling 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 warns 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 Attendee accounts.
  - Define the Workshop Reservation as Cancelled without charging any Cancellation fees to the Attendees' accounts
3. Answering with **No** results in Cancelling & Deleting the entire Workshop Reservation and this reflects the same moment into the Main Reservations time plan.
4. Answering with **Yes** opens 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 where you get 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** results 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 of above actions are completed, the Spa Workshop Posting screen closes and the system refreshes the Main Reservation time plan with the Workshop status change to Cancelled & Posted (the Workshop Reservation block appears in blue color to indicate that something has been posted into the Attendee accounts. This way you still have 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 the entire package with all included Treatment Reservations with the option to apply Cancellation Fees to all Treatment Reservations.
- **No Show Package:** No Show the entire package with the 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 in posting the entire Package into the payer's Account.

To distinguish between regular Guest Reservations blocks, Package blocks use the same colors but a 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 displays package relevant data upon hovering with the mouse pointer over the Package Reservation block.

|          |                              |         |          |            |     |
|----------|------------------------------|---------|----------|------------|-----|
| Ending:  | 6:30 PM                      | Price:  | \$30.00  | Therapy:   | SPA |
| Cabin:   | Guest:                       | Status: | In House | Therapist: |     |
| Package: | WELLSTART - Wellness Starter | Room:   |          | Comments:  |     |

For a 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 assigned to Accounts by selecting the **Add Package** option from the context menu. Assigning Packages can also be achieved by clicking **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**

**Add New Spa Package**

Account:

Account Information:

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    | <b>X</b>    | -        | -      | -      | 15.00         |                     |          |           |
|      | SPA-                    | Treatment | -           | <b>X</b> | -      | -      | 30.00         |                     |          |           |
|      | SPA-                    | Treatment | -           | <b>X</b> | -      | -      | 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 are not many Treatment Reservation created yet. To proceed with inserting the Package into the selected Account, the **Insert** remains disabled and you 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 lists all the Treatment Reservation information (Treatment Date/Time, Duration, Therapist, Room). Enable the Insert, and 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 displays 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 the option to Hand Over the Retail Item to the customer.

The following confirmation message appears “Are you sure you want to Hand over the selected Retail Item?”

Clicking on **Yes**, assigns 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 canceled, 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.

Upon selecting 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 are performed 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 bookings by system Cruise.

The screen is divided into two main areas:

- 1. The Unassigned Cruise Bookings grid.**

This grid lists all imported Cruise Treatments Reservations sorted by the scheduled Treatment Date & Time. You can modify the sorting order by clicking on the grid column headers.

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

This screen displays all current (already confirmed) appointments for the selected date in the colour gray to distinguish those appointments from the unassigned appointments that you selected on the top grid. The system can process the appointment and propose the correct Therapist Schedule according to the predefined Treatment Date & Time.

Clicking on every imported unassigned treatment reservation initiates 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. As soon as an available period is found, the system places the unassigned treatment reservation into the Reservations & Schedules time scale on the lower part of the screen, in the colour yellow to identify it as an Expected Appointments.

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

- 1. Assign room and confirm booking**

The Unassigned Treatment Appointment is ready to be confirm and added into the system as a regular Expected Treatment Reservation assigned to a valid and available date, time & therapist. The last step is to define the Treatment Room.

- 2. Edit reservation**

You can edit specific reservation data before confirming the booking.

**Note:**

The System does not allow you to update the Treatment and Price for imported prepaid treatment Reservations.

As soon as you select the room and confirms the selected unassigned treatment, the treatment appears in the Reservations Schedule in the color gray similar to the rest of the regular bookings. At the same time, the treatment disappears from the Unassigned Bookings grid for the user to continue confirming the remaining unassigned bookings still listed in the grid.

If no availability for requested period found, the system places 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, either by selecting Edit Reservation or by moving the red colored reservation block using the drag and drop method and positioning 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.

The 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 a 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 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 and closing times
- Schedules number
- Schedules captions

You can alter these default values to the values appropriate for each Daily Setup.

Additionally, you can enter the following information to appear 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 selection boxes, allowing you to assign the appropriate therapist to each schedule at a later time.

Each displayed therapist's schedule number color is similar to the 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 shows either Expected or Checked-In next to the existing Expected Disembarkation Date.

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

**Figure 4-1 Expected Status**

| Schd | Caption | Therapist | Default Room |
|------|---------|-----------|--------------|
| 1    |         |           |              |
| 2    |         |           |              |
| 3    |         |           |              |
| 4    | Message |           |              |
| 5    | Message |           |              |
| 6    | Message |           |              |
| 7    | Message |           |              |

Next to each Therapist Schedule is an exact overview of the actual Booking Calendar of the selected date and location. The displayed time blocks have the following colors:

- The blocked times appear in the default gray / dark gray / dark green and black colors.
- All other Treatment Reservations (Expected and In House) are in yellow.

**Note:**

Only Expected and In House Treatment Reservations appear 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 the Daily Setup screen.

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

The default Discount percentage definition includes the options to define Discount Value or Discount Percentage.

**Setting up a Day**

To set up a Day, select 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 loads the default values for the 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, loads all appropriate therapists into each schedule Therapist drop-down list box, and prepares them for further editing.

The system also loads 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. Accept 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 set up a Day by copying the setup of an existing working Day.

Select the date you want to set up from the calendar. The system displays 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**

The screenshot shows the "Spa Daily Set-Up" window. It includes a "Schedule" section with a "Location" dropdown set to "BEAUTY & BODY" and a "Date" calendar for August. The date "8" is selected. Below the calendar are fields for "Schedules" (12), "Opening" (8 AM), and "Closing" (8 PM). There are also fields for "Port Info" and "Therapist Info". To the right is a "Discounts Periods" section. At the bottom, there is a table with columns for "Schd", "Caption", "Therapist", "Default Room", and time slots from 8:00 AM to 2:00 PM. A "Saturday 08 Aug" label is above the table. On the right side of the table, there is a date picker showing "07/08/" and a "Copy Date" button. An "Insert" button is at the bottom right.

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

The copy process begins immediately, and the date will have the same setup as the one you copied from.

Additionally, the system displays two more buttons: the Update button updates the proposed/ copied setup, the Remove Date button removes the proposed setup.

Click on Remove Date to remove the Daily Setup for the selected day. The following appears **“Are you sure you want to remove the Daily Setup for selected Date: 08/08/2019”**

### Adding and Removing Schedules

The function allows 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         |

Place the cursor in 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 two additional schedules where you can 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 **Yes**, will remove the last two Schedules and reduce the total number of schedules for this working date to four.

**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 clicking **Update**.

### Multiple Discount Periods

The Daily Setup screen displays all Multiple Discount Periods assigned to each day on the upper right. The Discounts Periods display 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 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 a selected date, including the following information:

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

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 and 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 can 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 **New**. A new window opens where you can enter all necessary information to create a Discount Period.

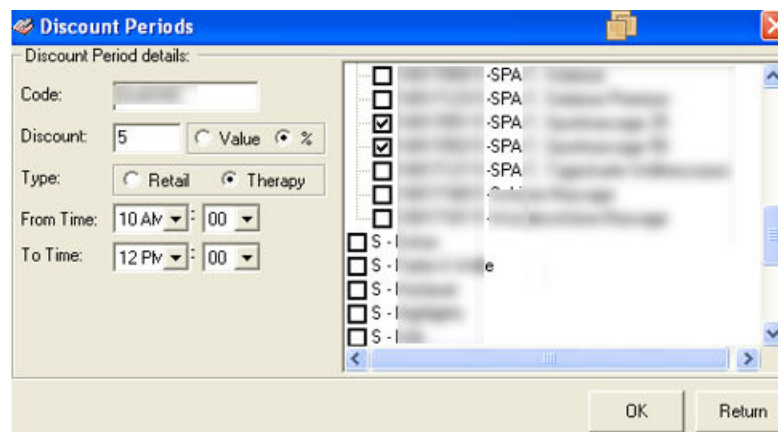
- **Code:** Enter a short description for the new Discount Period. This is used later to describe this Discount Period in the Reservations and Posting screen.
- **Discount:** Enter the amount of the Discount and its type: Value.
- **Percentage (%):** 2.50 or 10 percent.
- **Type:** Select whether this Discount Period will include Retail.

- **Therapies Items:** Clicking on each type results 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. Select 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 and to select specific items to include into the Discount Period.

**Figure 4-4 Discount Periods**



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 overlap 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.

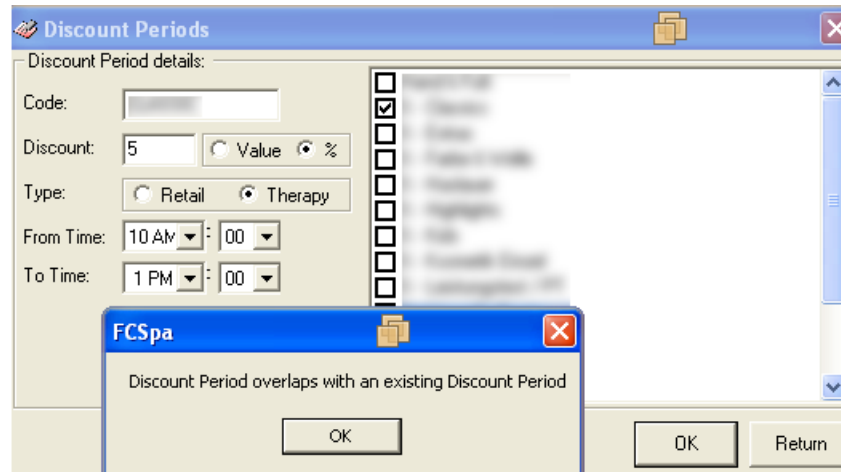
In other words, looking at the screen above, we are having 2 Discount Periods for Therapies.

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.

**Figure 4-5 Discount Periods Overlap**



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

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

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

If trying to extend the ending time for the first period – CLASSIC – from 12:00 to 13:00, the following message appears "Discount Period overlaps with an existing Discount Period."

The system allows you to create new Discounts Periods for Retail Items as needed, as long as they do not overlap with the existing one from 10:00 – 14:00.

### Discount Periods and Reservations

When Discount Periods exist for the selected/displayed Date and 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.

Multiple Discount Periods handling during reservations is implement as follows: The first time the system checks for reservations that include therapies that might be assigned 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 percentage). After you update the reservation record with all necessary discounting information, the Original Treatment price and the discounted price in the Reservation Info layout appear. At a later point, during the Finish and Post process, the discount is

automatically calculated and appears in the Posting screen. Additionally, the posting screen will list on the right side all available Discount Periods of the 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 shows the Multiple Discount Periods, and also checks whether a selected Retail Item falls into an existing Discount Period.

In this case, the system:

1. Calculates the Discount and display the new Extended Price (after discount). Also, it display the Discount value and type (under the Extended Price).
2. When you finally click **Add To Receipt**, the calculated Discount amount appears together with the Retail Item on the Invoice list (left side). The Total Amount automatically reflects the final price. In the same way, the system calculates Discounts that are assigned as Discount values (instead of percentages).

## Daily Export

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

The system displays the default preset file location where the Daily Export Sales file is placed upon completion of the export process. You must select the **Sales Date** and click on **Export**.



#### Note:

Once the Sales Data is exported for a specific date, the Sales Data resets and the systems cannot 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.

The screenshot shows the 'Room Utilization' application window. At the top, there's a title bar. Below it, a date selector shows '26/06' and a 'Refresh' button. The main display is a grid with 10 columns representing time slots from 8:00 AM to 10:00 PM. The grid has 10 rows representing different rooms. Occupancy is indicated by colored blocks: green for standard occupancy and red for a specific period (around 9:00 AM to 10:00 AM in the 4th row). A vertical scrollbar is visible on the right side of the grid.

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