Oracle Hospitality Payment Interface Cloud Service User Guide





Oracle Hospitality Payment Interface Cloud Service User Guide, Release 24.2

F96503-04

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Contents

Preface		
Functionality Overview		
Assumptions		
Configuring CHIP AND PIN (EMV)	2-:	
Configuring Credit Card Terminal	2-2	
Reservations		
Credit Card Manual Entry	3-1	
Credit Card Guarantee through the OPERA Cloud Application (Manual Entry – OPERA Pay)	3-1	
Credit Card Guarantee through the OPERA Cloud Application (Manual Entry Into Payment Device)	3-	
Credit Card Guarantee through the OPERA Cloud Application (Card Present)	3-6	
To View Token ID	3-8	
Post a Payment	3-10	
Deposit	3-11	
Deposit Cancellation (Reversal)	3-12	
Check In		
Advance Check In	4-1	
Get Token & Pre-Authorization	4-4	
Check in (Card Present)	4-4	
In House Payments		
Top Up Authorizations	5-1	
Post Check-In Payments	5-3	
Post Check-In Payments (Card on File)	5-3	
Post Check-In Payments (Card Present)	5-5	



	Post Check-In Payments with CC Surcharge Adding Alternate Credit Card for Incidentals: After Check-In (through Chip & Pin)	5-7 5-8	
	Adding Alternate Great Gard for incidentals. After Greek in (through Grip & 1 in)	3.0	
6	Check Out		
	Settlement	6-1	
	Pay Only	6-2	
7	Other Transactions		
	Delayed Charges	7-1	
	Refunds	7-3	
	Refund on existing card on file	7-3	
	Refund to a new card	7-7	
	Post It Declined or Failed transactions	7-8 7-10	
	Authorizations Reversals	7-10 7-11	
8	Prepaid Cards		
	Activating/Issuing Prepaid Card	8-1	
	Reloading (Top-up) Prepaid Card	8-4	
	Redeem Prepaid Cards	8-7	
	Balance Inquiry	8-9	
9	Bulk Prepaid Cards		
	Activating/Issuing Bulk Prepaid Cards	9-1	
	Redeeming Bulk Prepaid Cards	9-3	
10	Pay By Link		
	Send Payment Link	10-1	
	Check Payment Status - Check-in Reservation	10-4	
	Check Payment Status - Cancel Reservation	10-5	
11	Review Standard Operating Procedures		
	Pre-Authorization Rules	11-1	



12 Appendix

Consider the Landscape Channel Constitution Constitution (CCD)	10.1
Seeded roles using Shared Security Domain (SSD)	12-1
Manually Adding CCTRANS Role through OIM	12-1
Assigning CCTRANS Role to a User	12-4
Seeded roles using OPERA Cloud Identity Management	12-6
Creating a Group	12-6
Creating a User	12-9
Assigning a User to CCTRANS Group	12-12



Preface

Purpose

This document describes the steps for processing credit card and prepaid card transactions in OPERA Cloud using the Oracle Payment Interface (OPI) Cloud Service.

Audience

This document is intended for OPERA Cloud end users utilizing the OPI Cloud Service.

Customer Support

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

https://iccp.custhelp.com

When contacting Customer Support, please provide the following:

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

Documentation

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

Revision History

Table 1 Revision History

Date	Description of Change
October 2024	Initial Publication
November 2024	Updated content in Check payment status Check In and Cancel Reservation sections
March 2025	Updated images in Credit Card Guarantee through the OPERA Cloud Application (Manual Entry – OPERA Pay) section
June 2025	Updated the Refunds section to include refunds to a new card.



1

Functionality Overview

The Oracle Payment Interface (OPI) Cloud Service provides OPERA Cloud User a single interface for industry-standard payment acceptance and opens the door to an ecosystem of payment services.

In addition to the set of services for credit card and token exchange transactions, OPI Cloud also offers a hosted token exchange form (OPERA Pay) for capturing card data manually for token exchange.

The OPI Cloud Service supports Pay By Link functionality. When a hotel guest makes a reservation, OPERA Cloud sends a Pay By Link URL request to the Payment Service Provider through OPI.

The OPI Cloud Service supports Prepaid Card transactions via service-to-service communication. Card holders can redeem the prepaid cards as payment at your property. Prepaid card functionality is available with an active Stored Value System (SVS) integration service to a partner solution.

The following Prepaid card transactions are supported:

- Activate/Issue a Prepaid card
- Re-load (Top-up) a Prepaid card
- Redeem a Prepaid card Balance
- Balance Inquiry
- Bulk Prepaid Card Transactions for Issue or Redemption



Assumptions

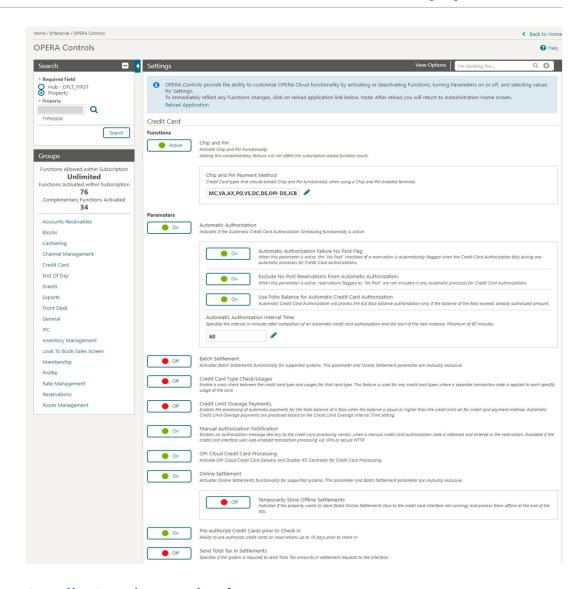
- The OPI Cloud Credit Card Processing OPERA Control needs to be active in order to use the OPI Cloud for credit card transactions. See Activating OPI Cloud Service for more information.
- The Prepaid Card OPERA Control needs to be active in order to use the Prepaid Card functionality. See Activating Prepaid Card Functionality for more information.
- The Prepaid Multi Record Processing OPERA Control needs to be active in order to use the Prepaid Multi record processing for bulk prepaid card transactions. See Activating Prepaid Card Multi Record Processing for more information.

Configuring CHIP AND PIN (EMV)

To process Chip and PIN payments, you must set up the Chip and PIN payment devices available at your property.

- 1. From the Administration menu, go to Enterprise | OPERA Controls | Groups | Credit Card | Parameters.
- 2. Online Settlement: Select this check box to allow online settlement. OPI is an online settlement and this must be checked to activate the Chip and PIN Application Setting.
- 3. Select this check box to enable CHIP AND PIN payment types.
 - Chip and PIN Enabled Payment Types: When the IFC | Chip and PIN application parameter is set to Y, this option is visible and selected by default. You may not deselect the check box. Select the LOV to choose the credit card payment types that will trigger a Chip and PIN message with or without credit card data to the EMV Device. Payment types that are configured here will not require a credit card number or expiration date to be entered when selected as a payment method on the Reservation screen or on the Payment screen. This data can be provided in the response message from the Payment Partner.





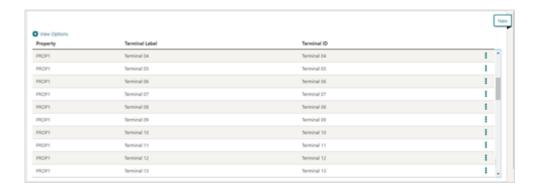
Configuring Credit Card Terminal

Configure the Payment terminals used that the payment partner will activate to have the card swiped or manually enter in.

- From the Administration menu, go to Administration | Interfaces | Interface Devices |
 Credit Card Terminals.
- Click New.
- 3. Enter the following information for the reader:
- Property: Enter or select the property.
- Terminal ID: The terminal ID number provided by the vendor. You can also locate this number on the actual card reader device. This data is what will populate the WSNum tag in the OPERA/IFC8 messages.
- 6. Terminal Label: A label or description for the terminal/device that identifies its physical location. This helps you easily identify the terminal/device when it appears in a list of devices.
- 7. Device Area: Link the device to an area.



8. Click Save.





Reservations

Credit Card Manual Entry

Credit Card Manual Entry, also known as Mail Order/Telephone Order (MOTO) Transactions, can be processed through two different methods:

- Using the OPERA Cloud Application.
- You can manually enter the details using the payment device.

For both methods, you need to notify your Payment Partner to make sure that they are informed of the requirement to support these transaction types.

In order to test the below scenarios, refer to the Booking a Reservation section of the OPERA Cloud user guide.

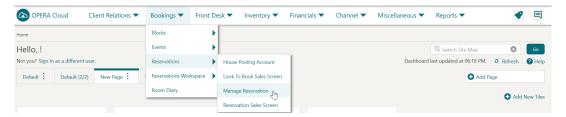
Credit Card Guarantee through the OPERA Cloud Application (Manual Entry – OPERA Pay)

The OPERA Cloud users with the CCTRANS role can directly access the hosted Token exchange form (OPERA Pay) from OPERA Cloud offered through OPI Cloud Service to manually enter the credit card details. Once the details are entered, the OPI Cloud Service (OPERA Pay) sends the details to the PSP to tokenize the card and communicate back to OPERA Cloud. See Assigning CCTRANS Role to a User using Oracle Identity Management (OIM) manually or Assigning a User to CCTRANS Group using OPERA Cloud Identity Management (OCIM) for more information.

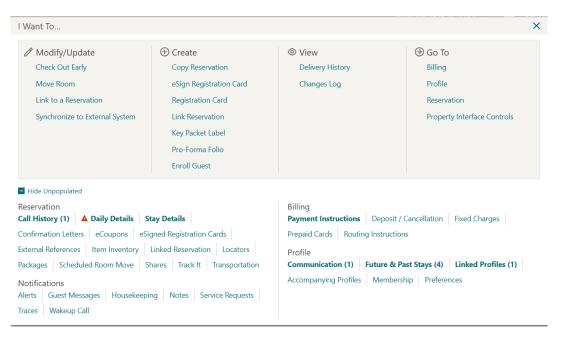
OPERA Cloud shows the masked credit card token and expiry date. You can also update the credit card details if required using the **Modify** option.

To manually enter a card number into the OPERA Cloud Application:

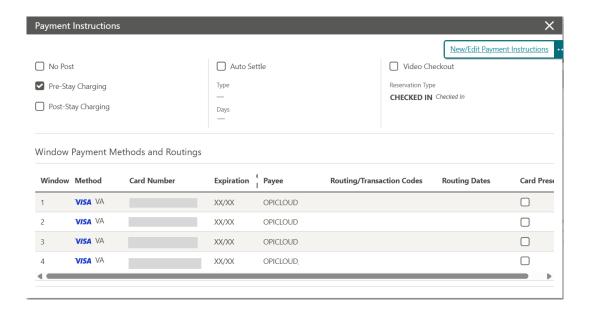
 From the OPERA Cloud menu, select Bookings, select Reservations, and then click Manage Reservation.



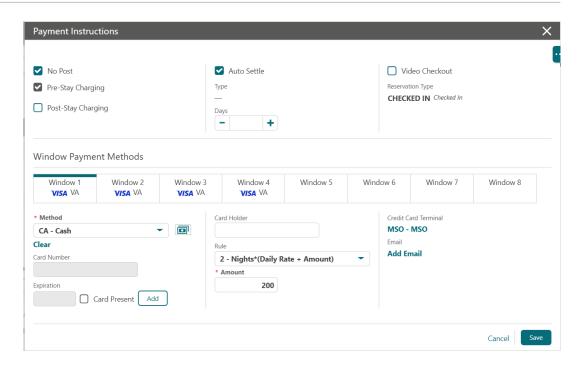
- 2. Search for and open the reservation.
- 3. Click I Want To... and select Payment Instructions.



4. Click New/Edit Payment Instructions.





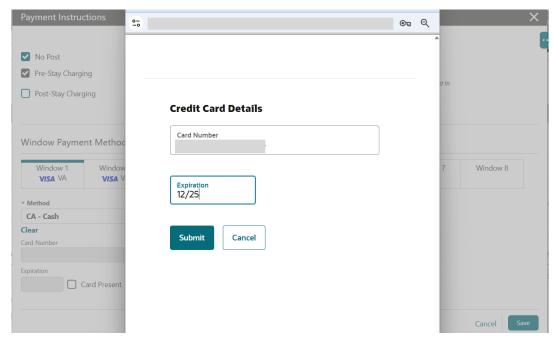


Note:

You cannot edit the Card Number and Expiration fields as they are disabled.

5. Click **Add** to manually add the credit card details.

The OPI Cloud Service (OPERA Pay) screen appears.

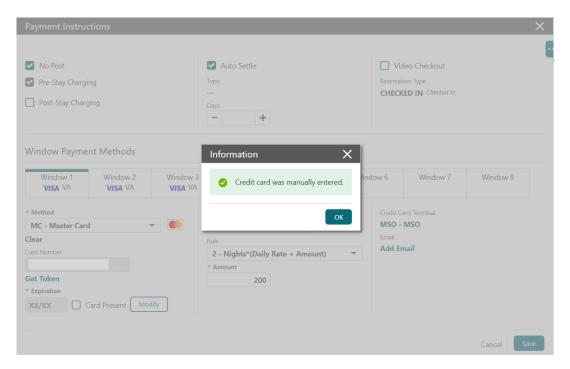


- 6. Enter the Credit Card Number.
- Enter the Expiration date.



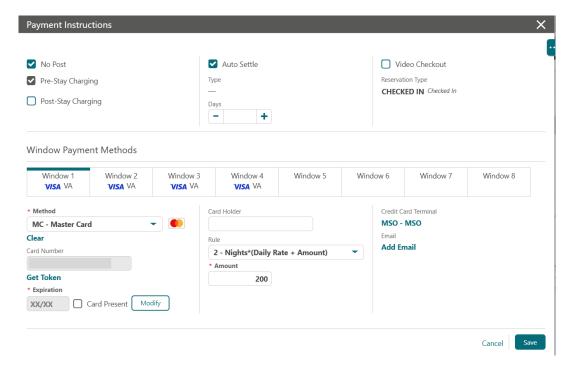
B. Click **Submit**. This transaction converts the card details to a token.

The Payment Instructions screen appears with a message as shown in the image below.

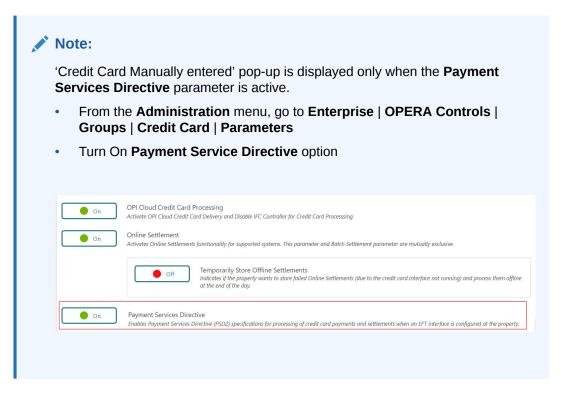


9. Click OK.

The Payment Instructions screen appears with masked **Card Number** and **Expiration** fields. If required, you can click **Modify** to update the Card details.



10. Click **Save** to attach the token to a reservation.



Credit Card Guarantee through the OPERA Cloud Application (Manual Entry Into Payment Device)

To enter a card number into the payment device:

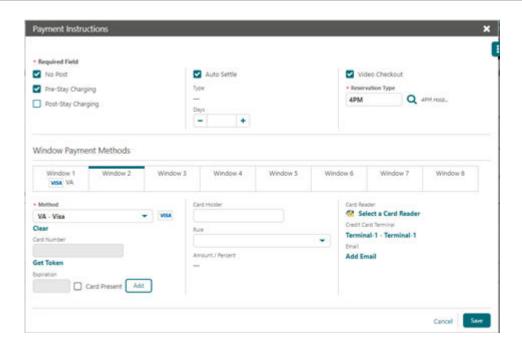
- 1. From the OPERA Cloud menu, select Bookings, select Reservations, and then click Manage Reservation.
- 2. Search for and open the reservation.
- 3. Click I Want To... and select Payment Instructions.
- 4. ClickNew/Edit Payment Instructions.
- 5. Select the general **CP-Chip and Pin** Payment Method, or a specific defined Chip and Pin Payment, such as Master Card, or VISA.
- 6. If the Hotel does not have a Payment device for reservations, enter the Card Number and Expiration date manually. A token request is triggered automatically.



If the Hotel has a Payment device for reservations, do not enter **Card Number** or **Expiration** data. If not already selected, select the Payment device you wish to trigger.

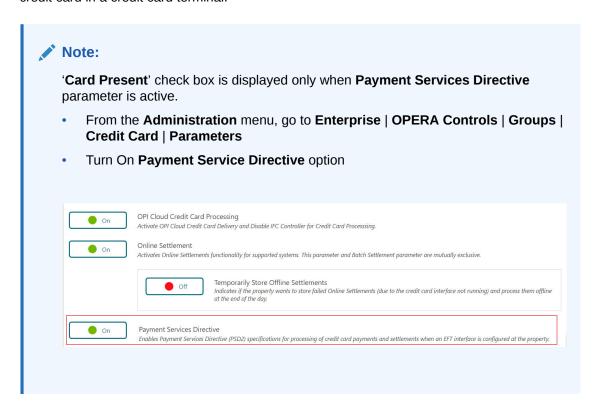
7. Click **Get Token**. This step triggers the Payment device.





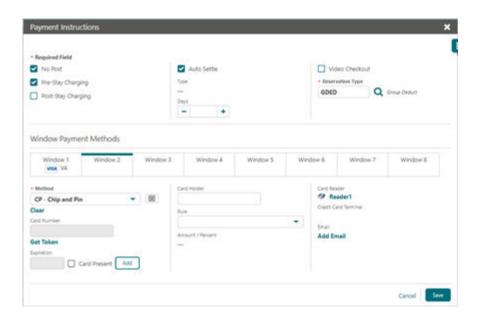
Credit Card Guarantee through the OPERA Cloud Application (Card Present)

The **Card Present** check box is deselected by default and remains deselected if you manually enter a credit card number. A 'Credit card was manually entered' message appears when you manually enter a credit card. This check box is automatically selected if you insert or swipe a credit card in a credit card terminal.



To enter a card number through OPERA Cloud:

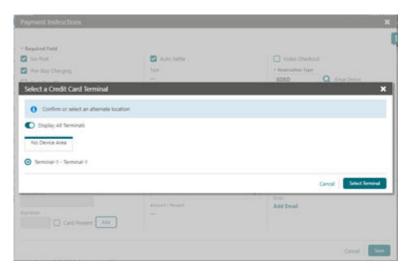
- 1. From the OPERA Cloud menu, select Bookings, select Reservations, and then click Manage Reservation.
- 2. Search for and open the reservation.
- 3. Click I Want To... and select Payment Instructions.
- 4. ClickNew/Edit Payment Instructions.
- 5. Select the **Method** of payment.
- 6. Click **Get Token**. This step triggers the Payment device.



Note:

If you are accessing the Payment device for the first time after Chip and Pin installation, a panel appears to select a Credit Card Terminal (the pin pad terminal mapping is previously completed by the OPI Installer).

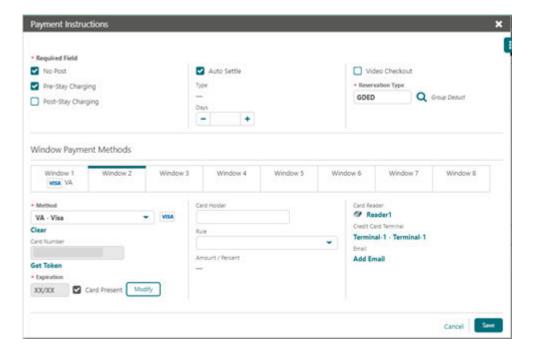
- 7. Select a terminal to be activated for this transaction.
 - Once the terminal is selected, it will be saved for future use until the application or browser cache is cleared.
- 8. Click Select Terminal.



- A request to receive a token is automatically initiated.
- **10**. The device is activated to swipe, or chip read the card.
- **11.** The Token, Card Type, Expiration Date, and last 4 digits of the card number are successfully returned.

The **Card Present** check box is automatically selected indicating the card was present.

12. Click **Save** . The token is saved into a reservation.



To View Token ID

Only users with the task to view sensitive data can access the full token number.

To view the token:

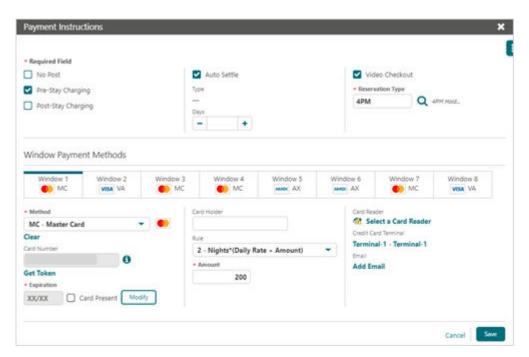
 From the OPERA Cloud menu, select Bookings, select Reservations, and then click Manage Reservation.



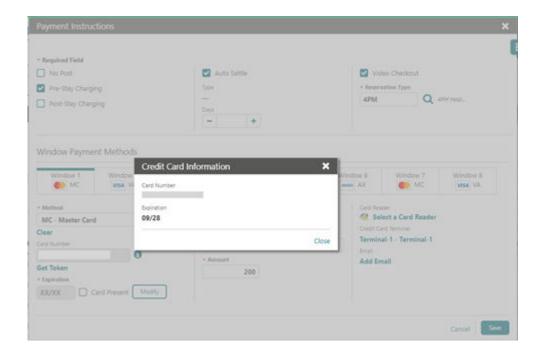
- 2. Search for and open the reservation.
- 3. Click I Want To... and select Payment Instructions.
- 4. Click New/Edit Payment Instructions .
- 5. Click information icon



) next to the Card Number to view the full token.



6. The Token Number appears in the **Credit Card Information** window as shown in the image below.

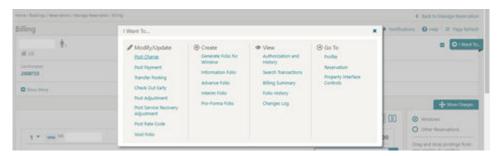




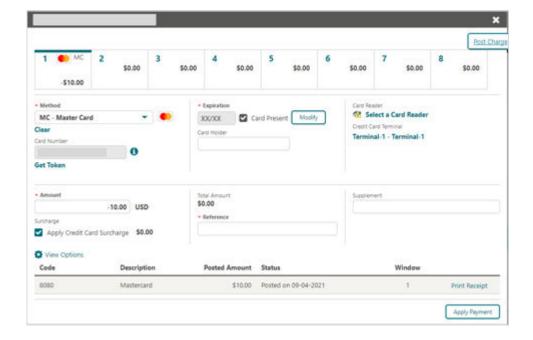
Post a Payment

To perform a post payment:

- From the OPERA Cloud menu, select Bookings, select Reservations, and then click Manage Reservation.
- 2. Search for and open the reservation.
- 3. Click I Want To... and then select Billing.
- 4. Enter your credentials, if requested.
 - a. Select the Cashier ID.
 - **b.** Enter the **PIN** to proceed.
 - c. Click Login.
- 5. Click I Want To... and select Post Payment.



- 6. Enter the paymentAmount.
- 7. Click Apply Payment.
- **8.** The payment is processed and appears in the guest's reservation as shown in the image below.

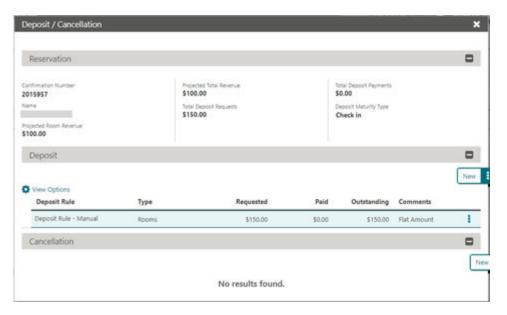




Deposit

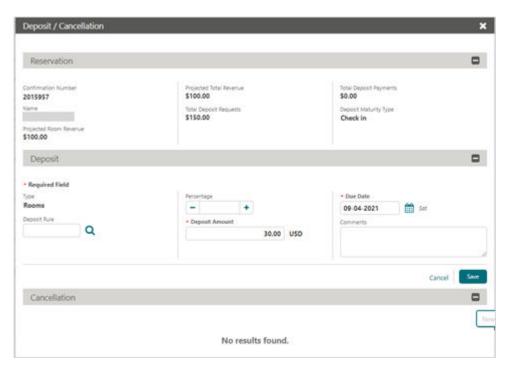
To create a deposit payment:

- From the OPERA Cloud menu, select Bookings, select Reservations, and then click Manage Reservation.
- 2. Search for and open the reservation.
- 3. Click I Want To... and select Deposit / Cancellation.
- 4. In the Deposit panel, click **New** to create a new deposit.

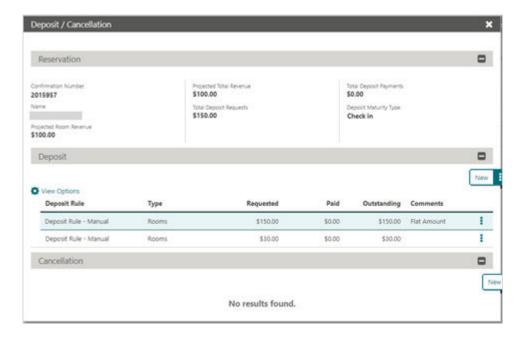


- 5. Enter the **Deposit Amount**.
- 6. Enter the **Due Date**.
- 7. Click Save.





8. The Deposit payment is processed and appears in the guest's reservation as shown in the image below.

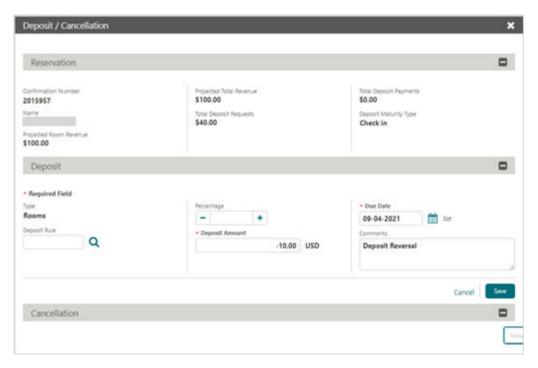


Deposit Cancellation (Reversal)

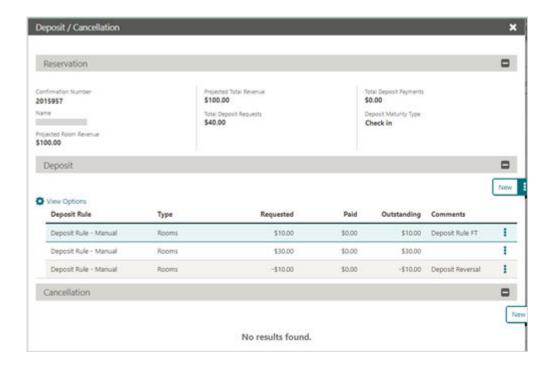
To cancel an advanced deposit:

- From the OPERA Cloud menu, select Bookings, select Reservations, and then select Manage Reservation.
- 2. Search for and open the reservation.

- 3. Click I Want To... and select Deposit / Cancellation.
- 4. Enter a negative amount in the **Deposit Amount** field.
- 5. Enter the **Due Date**.
- 6. Enter the comments, if any.
- Click Save.



B. The Reversal is processed and appears in the reservation as shown in the image below.





4

Check In

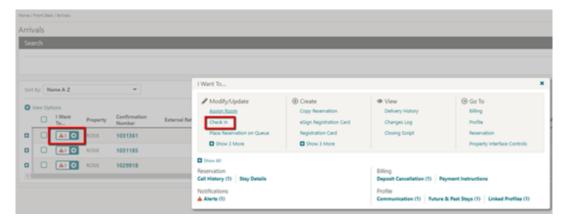
Advance Check In

At times, when guests arrive to the property prior to a room being ready, you can flag a reservation as Advance Checked In for arrivals due in on the current business date. This enables guests to post charges to their reservation folio prior to check in, and helps the rooms management team prioritize room cleaning and assignment. Individual reservations (including Walk In reservations, Pre Registered reservations, and reservations that are in Queue) and group block reservations can be Advance Checked In. See Advance Check In sections of the OPERA Cloud help documentation for more information.

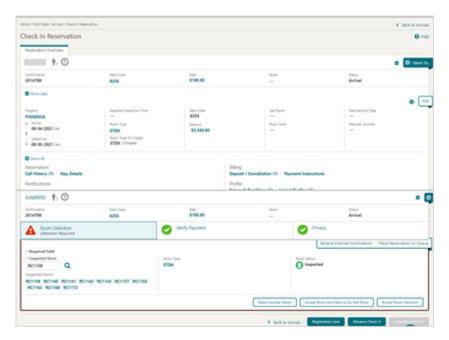
This guide will focus on the arrivals from the **Front Desk** menu —>**Arrivals** and details the steps to be followed where the card is presented on arrival.

To perform Advance check in:

- 1. From the OPERA Cloud menu, select Front Desk, and then select Arrivals.
- 2. Search for and open the reservation.
- 3. Click I Want To....
- 4. Select Check In.



- 5. On the **Check In Reservation** screen, review the guest reservation details:
 - a. In the Room Selection panel, assign a room to the reservation.



- b. Select the **Verify Payment** panel.
- Click the payment Method drop-down and select the payment type as CP-Chip and Pin.
- d. Verify the authorization rule from the Rule field.
- 6. Click Advance Check In.



Note:

If you are accessing the Payment device for the first time after Chip and Pin installation, a panel appears to select a Payment Terminal (the pin pad terminal mapping is previously completed by the OPI Installer).

7. Select a terminal to be activated for this transaction.

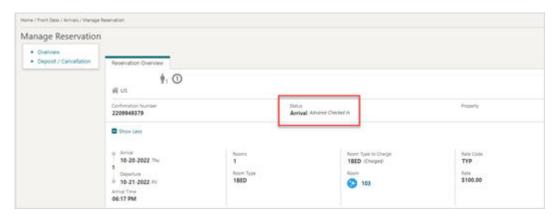
Once the terminal is selected, it will be saved for future use until the application or browser cache is cleared.

8. Click Select Terminal.



Upon Terminal Selection:

- The payment device will alert the customer to present the card.
- After guest inserts / swipes a card, a Token / Authorization request is automatically initiated.
- A Token, Card Type, Expiration, and last 4 digits of the card number is successfully returned along with a successful authorization.
- Upon successful authorization / tokenization, the guest will be Advanced checked in.
 To review the guest's reservation information, click Go to Reservation.



9. The authorization is processed and appears in the Payment Authorization window as shown in the image below.



10. The authorization approval is saved with the reservation and when the room is ready, the reservation is automatically checked in.



Get Token & Pre-Authorization

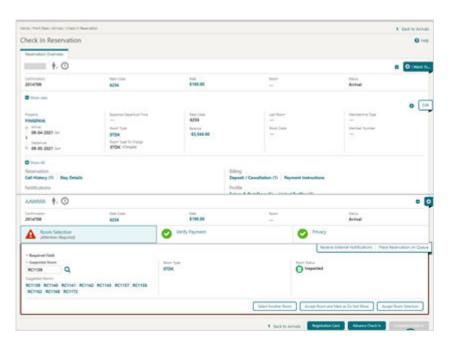
Check in (Card Present)

The check-in process described below is the same from any area of the application where check-in is initiated. Refer to the Front Desk and Reservations sections for the check ins performed through Front desk and Reservations.

This guide will focus on the arrivals from the **Front Desk** menu —>**Arrivals** and details the steps to be followed where the card is presented on arrival.

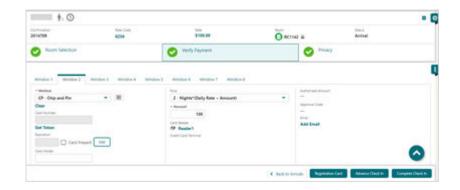
To perform check in:

- 1. From the OPERA Cloud menu, select Front Desk, and then select Arrivals.
- 2. Search for and open the reservation.
- 3. Click I Want To... and select Check In.
- 4. On the **Check In Reservation** screen, review the guest reservation details:
 - a. In the **Room Selection** panel, assign a room to the reservation.



- b. Select the Verify Payment panel.
- c. Click the Payment **Method** drop-down and select the payment type as **CP-Chip and Pin**.
- d. Verify the authorization rule from the Rule field.
- Click Complete Check In.





Note:

If you are accessing the Payment device for the first time after the Chip and Pin installation, a panel appears to select a Payment Terminal (the pin pad terminal mapping is previously completed by the OPI Installer).

6. Select a terminal to be activated for this transaction.

Once the terminal is selected, it will be saved for future use until the application or browser cache is cleared.

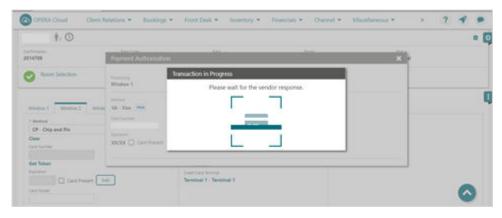
Click Select Terminal.



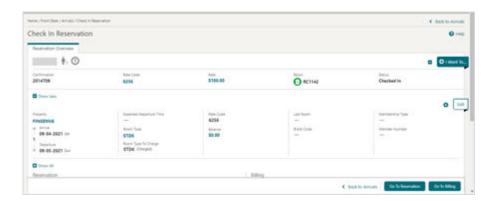
Upon Terminal Selection:

- The payment device will alert the customer to present the card.
- After the guest inserts/swipes a card, a Token / Authorization request is automatically initiated.
- A Token, Card Type, Expiration, and last 4 digits of the card number are successfully returned along with a successful authorization.
- Upon successful authorization, the guest will be checked in.
- 3. The authorization is processed and appears in the Payment Authorization window as shown in the image below.





9. The guest is checked in successfully. To review the guest's reservation information, click **Go to Reservation**.



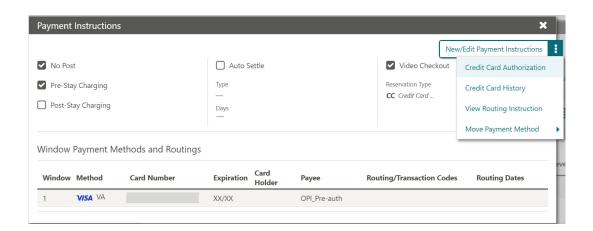
In House Payments

Top Up Authorizations

A Top Up Authorization allows an additional authorization amount to be taken during the guest's stay.

To enter the authorization amount:

- From the OPERA Cloud menu, select Bookings, select Reservations, and then click Manage Reservation.
- 2. Search for and open the reservation.
- 3. Click I Want To... and select Payment Instructions.
- 4. Click the vertical ellipsis, and select Credit Card Authorization.



The Authorization and History screen appears.

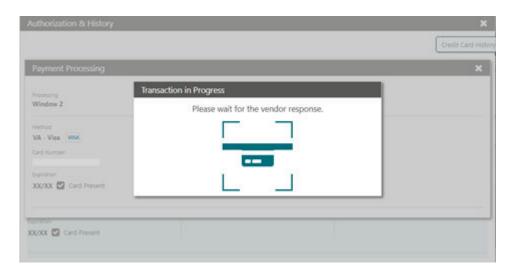
5. Select the **Additional** option to obtain additional authorization amount on the required payment method or window.



- 6. Enter the Authorization Amount.
- 7. Click Run Additional Authorization.

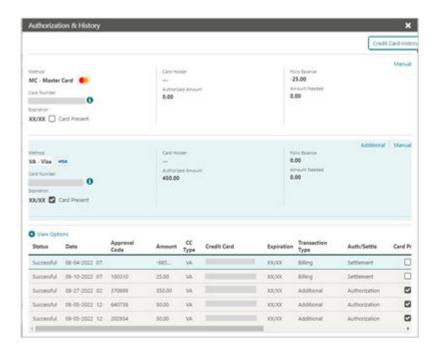


8. The payment processing screen appears.



9. Confirmation of posted authorization appears in the **Authorization and History** screen.





Post Check-In Payments

Post Check-In Payments (Card on File)

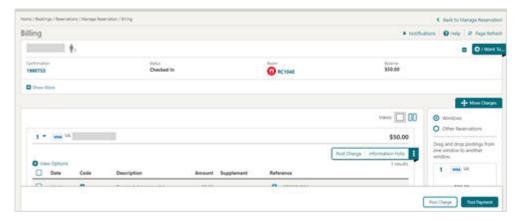
Payments during the guest's stay can be made at any time from the billing screen using the tokenized card on file.

To process a payment using the tokenized card on file:

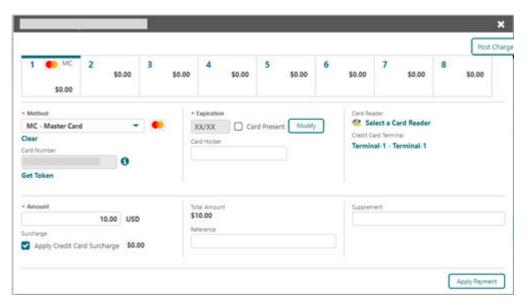
- 1. From the OPERA Cloud menu, select Bookings, select Reservations, and then click Manage Reservation.
- 2. Search for and open the reservation.
- 3. Click I Want To... and then select Billing.
- 4. Enter your credentials if requested.
 - a. Select the Cashier ID.
 - **b.** Enter **PIN** to proceed.
 - c. Click Login.

The Billing Information screen appears.

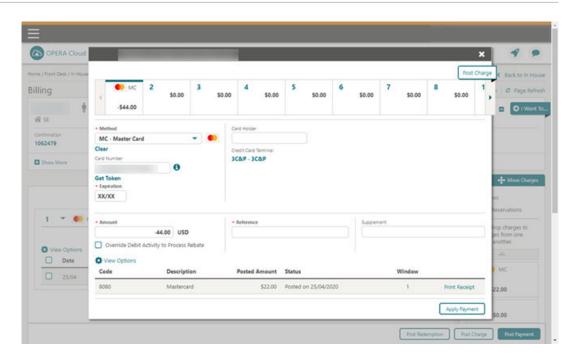




- 5. Click Post Payment.
- 6. Enter the payment Amount to be charged and click Apply Payment.



7. The payment is processed and applied to the reservation.



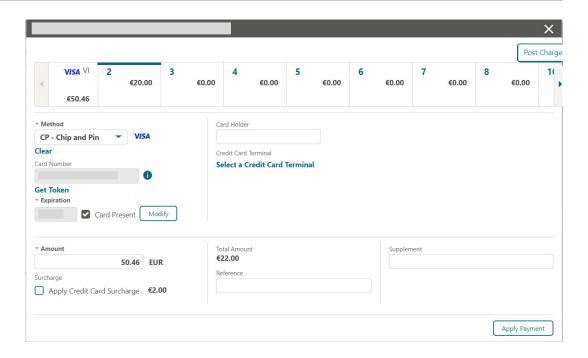
Post Check-In Payments (Card Present)

As a best practice have the guest present their card whenever possible to process a payment.

To process a payment using a card presented by the guest:

- 1. From the OPERA Cloud menu, select Front Desk, and then select In House.
- 2. Search for and open the reservation.
- 3. Click I Want To... and select Billing.
- 4. Select the guest room which requires the payment.
- 5. Click Post Payment.
- Click the Payment Method drop-down and select the payment type as CP-Chip and Pinor Pay Only.
- 7. Enter the payment Amount to be charged and click Apply Payment.



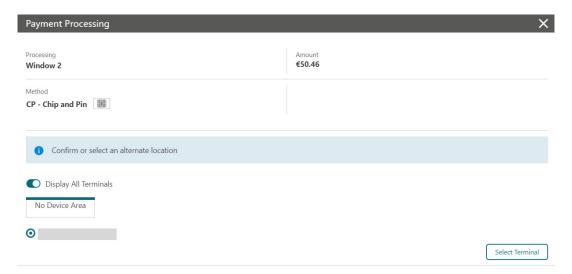


Note:

If you are accessing the Payment device for the first time after Chip and Pin installation, a panel appears to select a Payment Terminal (the pin pad terminal mapping is previously completed by the OPI Installer).

8. Select a terminal to be activated for this transaction.

Once the terminal is selected, it will be saved for future use until the application or browser cache is cleared. The payment device will alert customer to present the card. After guest inserts / swipes a card, if transaction is successful, a Token, Card Type, Expiration, and last 4 digits of the card number is returned to OPERA.



The payment applies to the guest folio.



Post Check-In Payments with CC Surcharge

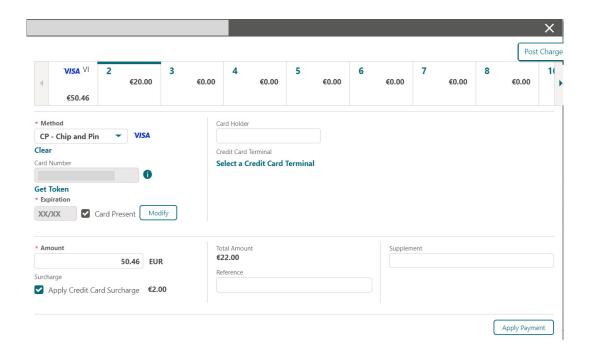
To process a payment using a card presented by the guest with credit card surcharge:

- 1. From the OPERA Cloud menu, select Front Desk, and then select In House.
- 2. Search for and open the reservation.
- 3. Click I Want To ... and then select Billing.
- Select the guest room which requires the payment.
- Click Post Payment.
- 6. Click the **Payment** Method drop-down and select the relevant Payment Type the guest has presented, and do not add any card information into OPERA Cloud.
- 7. **Apply Surcharge**: Select to apply a credit card surcharge (available when the Credit Card Transaction Surcharge OPERA Control is active).



If you are using the Automated Credit Card Surcharge feature in OPERA, the CP Payment type does not add the surcharge. If you need a surcharge to be added, refer to the above steps for details

8. Enter the payment **Amount** to be charged and click **Apply Payment**. This activates the payment device.



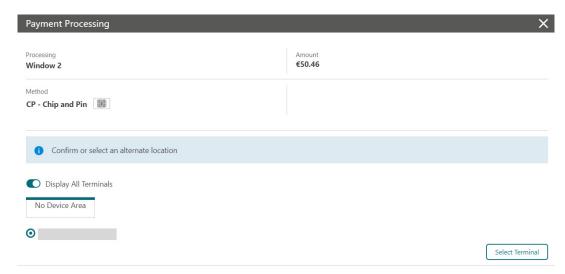




If you are accessing the Payment device for the first time after Chip and Pin installation, a panel appears to select a Credit Card Terminal (the pin pad terminal mapping is previously completed by the OPI Installer).

9. Select a terminal to be activated for this transaction.

Once the terminal is selected, it will be saved for future use until the application or browser cache is cleared. The payment device will alert the customer to present the card. After guest inserts / swipes a card, if transaction is successful, a Token, Card Type, Expiration, and last 4 digits of the card number is returned to OPERA.



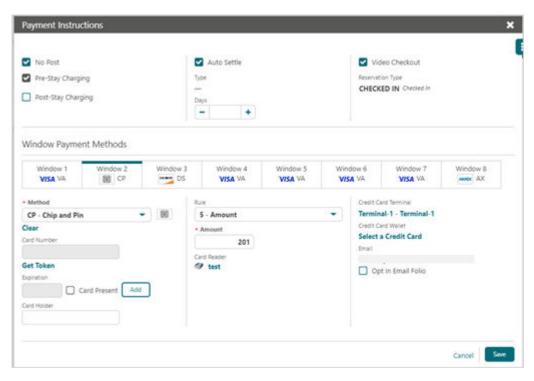
10. The Payment details are automatically updated in OPERA Cloud.

Adding Alternate Credit Card for Incidentals: After Check-In (through Chip & Pin)

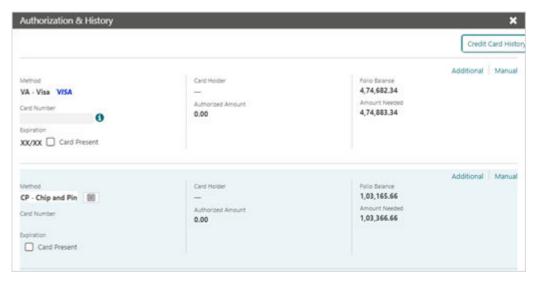
To add an alternate credit card to a guests profile after Check-In:

- From the OPERA Cloud menu, select Front Desk, and then select In House.
- 2. Search for and open the reservation.
- 3. Click I Want To...and select Payment Instructions.
- 4. Click Window 2.
- 5. Select Payment Type as CP-Chip and Pin and the Authorization Rule as needed.
- Click OK to save.





7. Click the vertical ellipsis and select Credit Card Authorization.

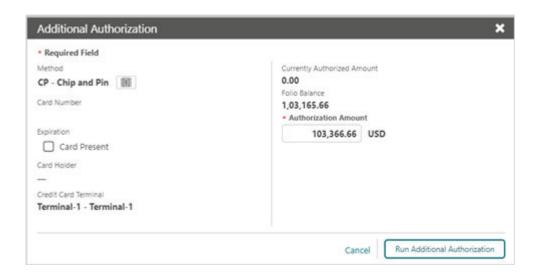


- Select the alternate payment (in this case CP) from the Window 2 and select Additional option.
- Verify the Additional Authorization Amount to be authorized and click Run Additional Authorization to activate the Payment Terminal for Chip & Pin.



Follow the prompts on the Payment Terminal Device to complete the transaction.





6

Check Out

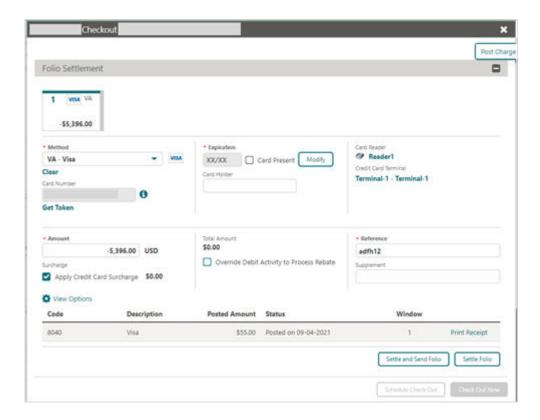
Settlement

To process a check out and settle guest charges:

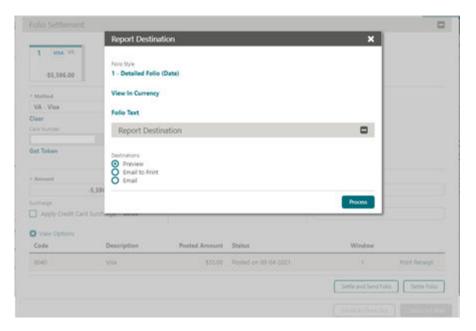
- 1. From the OPERA Cloud menu, select Front Desk, and then select In House.
- 2. Search for and open the reservation.
- 3. Click I Want To... and select Check Out.
 - a. Select the Cashier ID.
 - b. Enter PIN to proceed.
 - c. Click Login

The Folio Settlement confirmation screen appears.

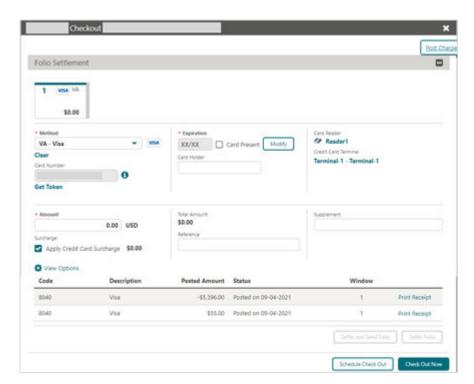
- 4. Verify the card information on file:
 - a. If replacing the main card with a new card, update the payment method, verify the amount, and click **Settle and Send Folio**. This step triggers the Payment device.
 - **b.** If using the same card on file, proceed with the below steps.
- 5. Verify the Amount to be settled and click Settle and Send Folio.



6. Select the **Destination** option for the folio, and then click **Process** to view the report.



Click Check Out Now.



8. The guest is checked out successfully. To review the guest's reservation information, click Go to Reservation.

Pay Only

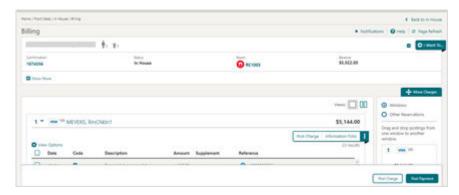
To process the pay only payment:



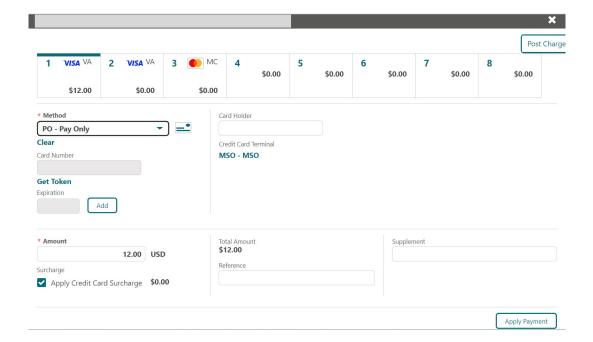
- 1. From the OPERA Cloud menu, select Front Desk, and then select In House.
- 2. Search for and open the reservation.
- 3. Click I Want To... and select Billing.
- 4. Enter your credentials if requested.
 - a. Select the Cashier ID.
 - **b.** Enter **PIN** to proceed.
 - c. Click Login.

The Billing Information screen appears.

5. Click Post Payment.

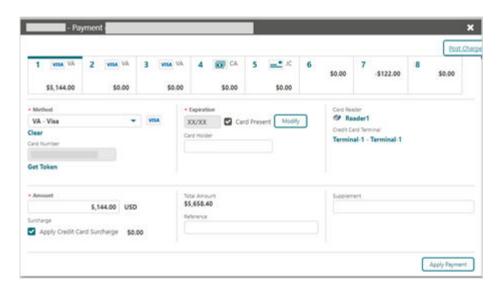


- Select the Payment Method as Pay Only.
 - a. If the card is present or the card number need to be entered on the device, verify the amount, and click **Apply Payment**. This will activate the device for card entry.
 - b. If the card number and expiry are available, then enter the Credit Card Number and the Expiration Date in MMYY format.

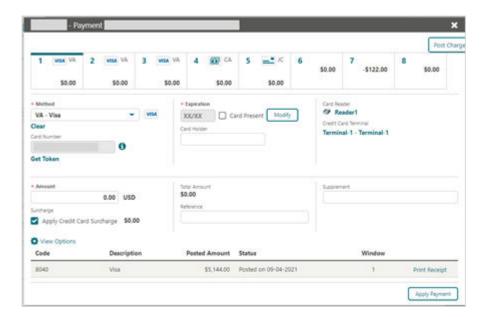




7. Tab or click out of the field and the request to exchange the card number for a token is initiated.



8. Upon successful response, verify the Amount to be settled and click **Apply Payment**.





7

Other Transactions

Delayed Charges

Delayed Charges are payments that need to be processed for a guest that is not in house. This can be **No Show Fee**, **Late Charge**, or **Mini Bar Charge**. Payments for these charges can be processed:

- · Using the tokenised card on file
- Using a MOTO card transaction
- 1. From the OPERA Cloud menu, select **Front Desk**, then select **Departures**.
- 2. Enter search criteria, then click **Search**.
- Select the checked out reservation in the search result, then click I Want To... and select Go To > Billing.
- 4. Click Reinstate Reservation.

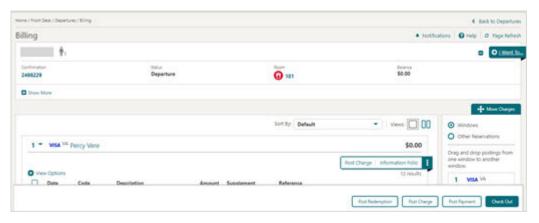


Or

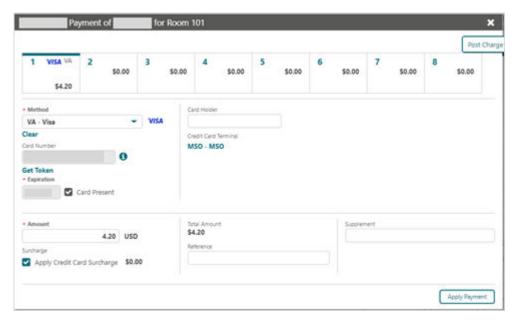
- 5. If the Open folio functionality is active and in use, there is no need to reinstate the reservation you can post a charge and payment. Go to step 7.
- 6. Click Reinstate.



Select Post Charge if you need to post a new charge or skip this step if the charge already exists.



- 8. Click Post Payment.
- 9. The tokenised card on file will pop-up as the Payment type with the final due amount.



- 10. If a new card is provided for the additional charges, then manually enter the Card Number and Expiry dates. See Credit Card Guarantee through the OPERA Cloud Application (Manual Entry— OPERA Pay) section for details.
- 11. Click **Apply Payment** to activate the Payment device.

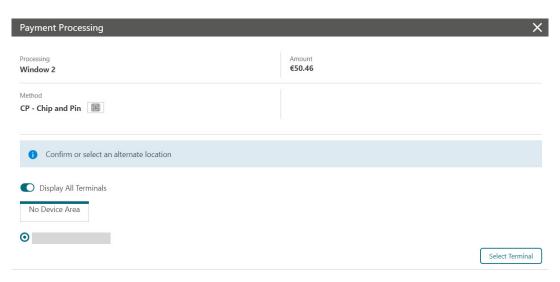


If you are accessing the Payment device for the first time after Chip and Pin installation, a panel appears to select a Payment Terminal (the pin pad terminal mapping is previously completed by the OPI Installer).

12. Select a terminal to be activated for this transaction.

Once the terminal is selected, it will be saved for future use until the application or browser cache is cleared. The payment device will alert the customer to present the card. After guest inserts / swipes a card, if transaction is successful, a Token, Card Type, Expiration, and last 4 digits of the card number is returned to OPERA.





13. The Payment details are automatically updated in OPERA Cloud.

Refunds

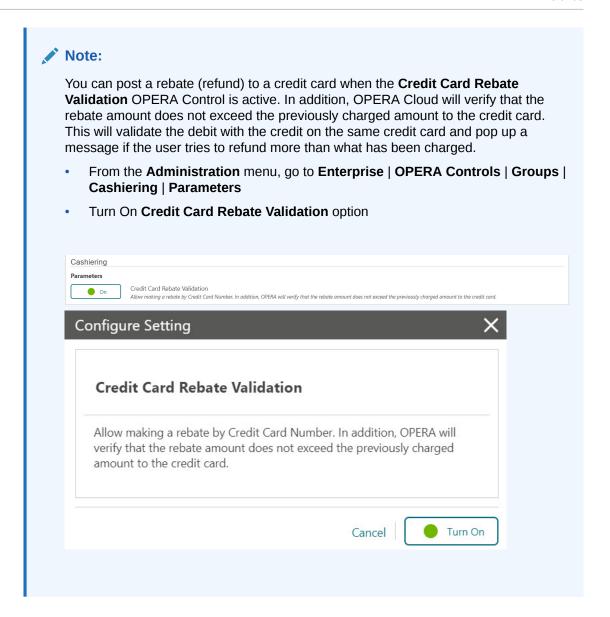


- For 'post check-out' processing, the guest should Go To > Billing and click
 Reinstate Reservation to initiate the refund process.
- Reinstate Reservation is not needed if the Open folio functionality is active and in use.

Refund on existing card on file

The Refund feature is supported by OPI and OPERA Cloud. A refund is a transaction that can be performed any time to credit funds back to the card holder. The refund amount can be different from the payment amount that was initially processed.





- From the OPERA Cloud menu, select Front Desk and then select In-House.
- Enter search criteria and click **Search**. Select the reservation from the search results, click **I Want To** . . . and select **Billing**.
- On the Manage Billing screen, click Post Payment, select the payment method, and provide the credit card details, enter the negative payment amount, and click Apply Payment.

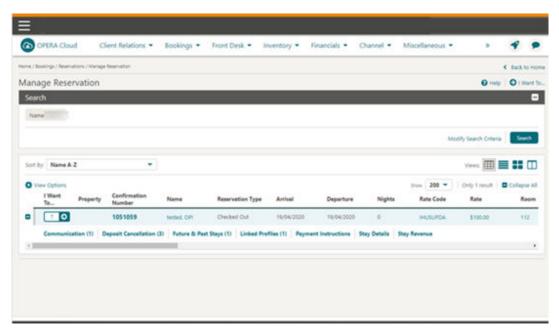
Following two conditions should be met to process the refund:

- Refund feature needs to be activated by the Payment Service Provider.
- OPERA Cloud users need privileges to process the negative payments.

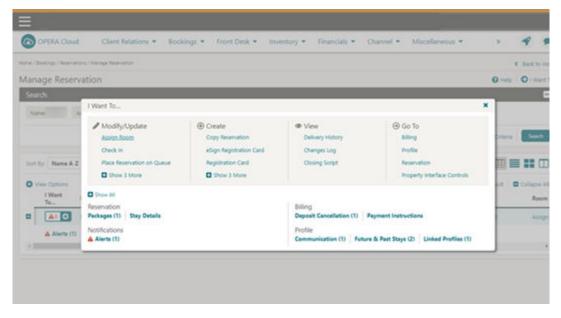
To process a refund on existing card on file:

- From the OPERA Cloud menu, select Front Desk and then select In House.
- 2. Search for and open the reservation.



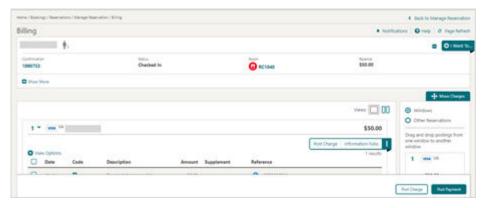


- 3. Click I Want To... .
- Select Billing.

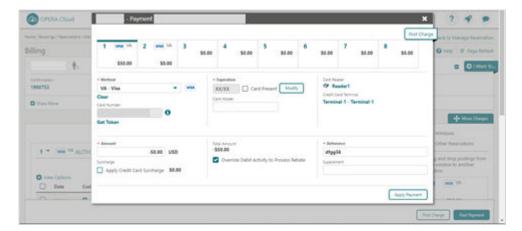


- 5. Enter your credentials if requested.
- 6. Select Post Payment.

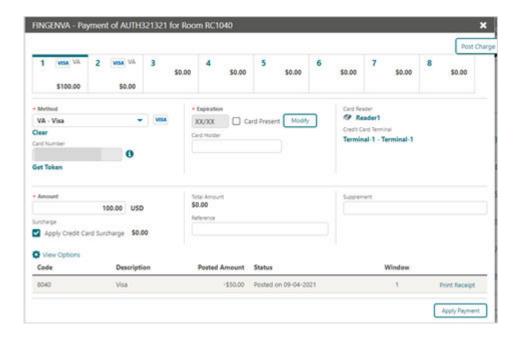




- 7. Enter negative amount in the **Amount** field.
- 8. Provide **Reference** details, if any. This field is mandatory for refunds in OPERA Cloud.
- 9. Click Apply Payment.



10. The payment is processed and applied to the reservation as shown in the image below.





Refund to a new card

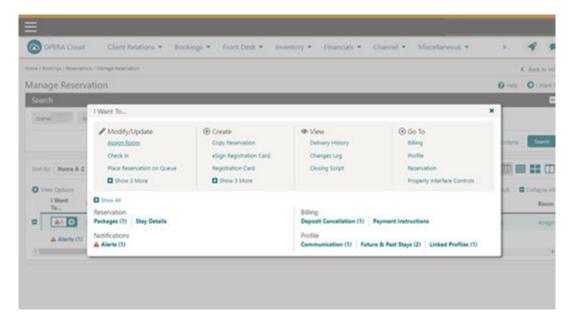
Refund can be made at any time from the billing screen using a new card that is presented.

Note:

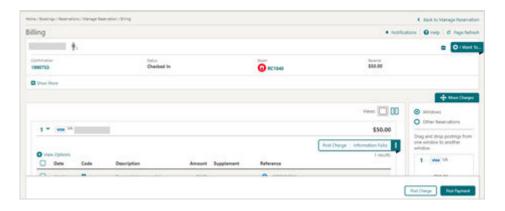
You will not be able to process a refund to a new card with no debit activity if the OPERA Control **Credit Card Rebate Validation** is active within the property.

To process the refund to a new card:

- 1. From the OPERA Cloud menu, select Front Desk and then select In House.
- 2. Search for and open the reservation.
- 3. Click I Want To....
- Select Billing.

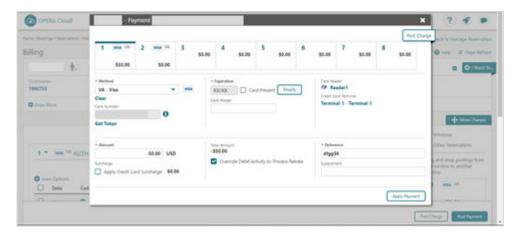


- 5. Enter your credentials if requested.
- Select Post Payment.





- Select the Window where the refund should be processed and select the Pay Only/Direct Settlement payment Method.
- 8. Enter negative amount in the **Amount** field.
- 9. Provide **Reference** details, if any. This field is mandatory for refunds in OPERA Cloud.
- 10. Click Apply Payment. This will initiate the device to enter the card data.



11. The payment is processed and applied to the reservation.

Post It

Post it enables you to post articles to rooms, such as mini bar items, to in-house reservation accounts. It also allows you to settle charges immediately without a room number.

To perform post it:

 From the OPERA Cloud menu, select Financials, select Cashiering, and then select Post It.

The Post It screen appears.

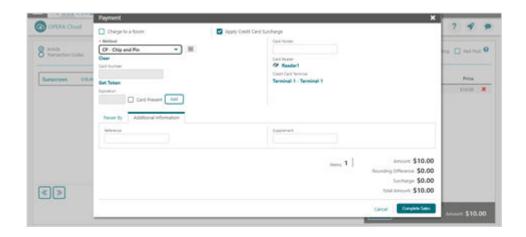
Select the articles that are configured for Post It.

When you select an article, that article and its price (and associated taxes) appear in the posting window as shown in the image below.



3. Click **Pay** and select the **Method** of payment as one of the credit card payment types or as (Chip and Pin) and no need to enter any card data.



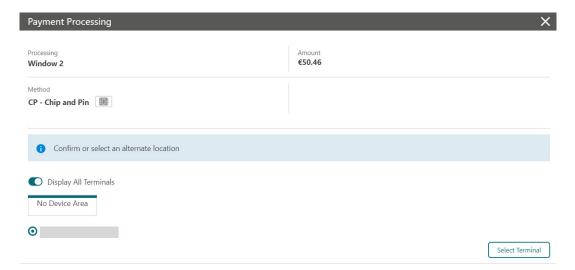


Note:

If you are accessing the Payment device for the first time after Chip and Pin installation, a panel appears to select a Credit Card Terminal (the pin pad terminal mapping is previously completed by the OPI Installer).

4. Select a terminal to be activated for this transaction.

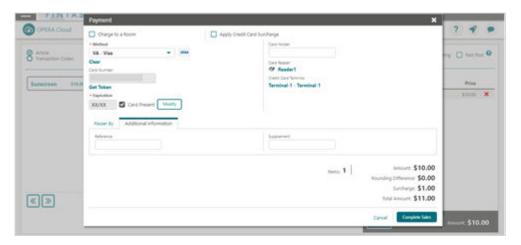
Once the terminal is selected, it will be saved for future use until the application or browser cache is cleared.



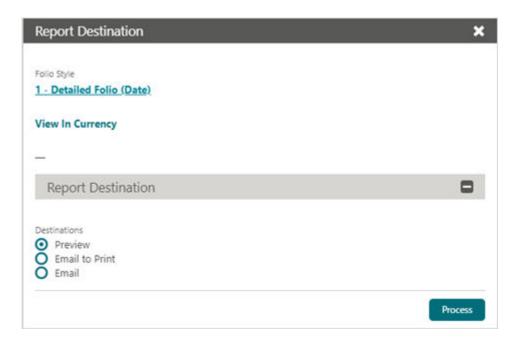
5. Click **Complete Sales** to run the transaction (authorization followed by sale, or just a sale) to activate the Payment Device.

The Payment device will alert the customer to present the card. After the guest inserts/ swipes a card, if the transaction is successful, a Token, Card Type, Expiration, and the last 4 digits of the card number is returned to OPERA Cloud.





6. The Report Destination window appears to print the Post It Folio.



7. Click **Process** to print the payment receipt for Post It Folio.

Declined or Failed transactions

There are many reasons why a transaction may decline. This can be due to insufficient funds, the card is reported lost/stolen, or a loss in connection to the bank.

For a declined transaction, you will see a "**Failed**" status response in OPERA Cloud with a Decline response error.

If you are not sure why customers card has been declined, you need to contact your Payment Service Provider for details.

Authorizations Reversals

OPERA Cloud and OPI Cloud support Pre-Authorization Reversals. This is an automated electronic reversal message sent to the Payment Service Provider to release the pre-authorization.

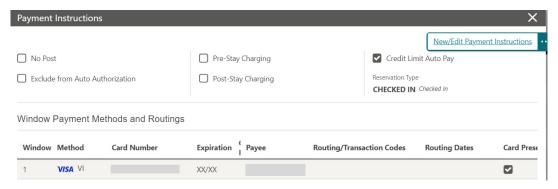
OPERA Cloud does this automatically if these two conditions apply:

- A pre-authorization exists
- 2. The main card type is replaced with a new card.

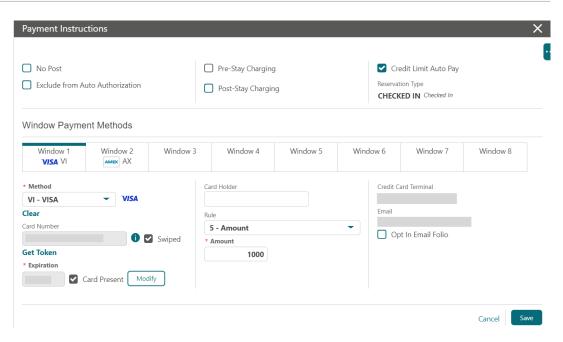
For example, if the authorization on Check-In was processed to a Visa and the payment on Check Out was through Master Card, then change the payment method to MC and OPERA Cloud will automatically send out the authorization reversal request for the Visa card.

To perform authorization reversals:

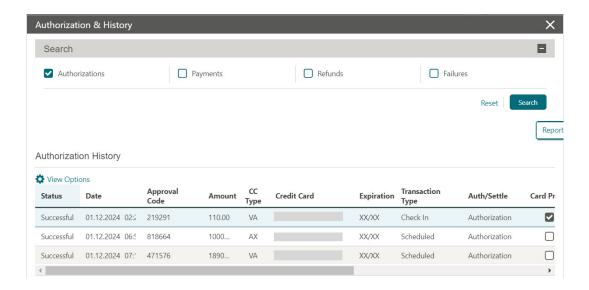
- From the OPERA Cloud menu, select Bookings, select Reservations, and then clickManage Reservation.
- 2. Search for and open the reservation.
- 3. Click I Want To... and select Payment Instructions.
- 4. Click New/Edit Payment Instructions.



- 5. Click the payment Method drop-down and select the payment type of your choice.
- 6. Enter the Credit Card Number.
- 7. Enter the **Expiration** date in MMYY format.
- 8. The new Token is received and the authorization on the previous card is released.
- 9. Click Save.



10. To view the successful Authorization reversal, go to **Credit Card History** from the Payment Instructions screen.



8

Prepaid Cards

Prepaid Cards allow you to view and manage the details of a stored value or gift card. You can view the card transactions, issue the card, reload (top-up) the card, or redeem the card balance.

The prepaid card feature enables you to:

- Activate/Issue a Prepaid card
- Re-load a Prepaid card
- Redeem a Prepaid card Balance
- Balance Inquiry

Note:

- Prepaid Cards functionality requires an active SVS Interface configured in Property Interfaces under the Interfaces menu option in Administration menu.
- You can access OPERA Cloud and activate the prepaid card parameter for a new property. Once the parameter is active, all prepaid card transactions are supported by OPI Cloud Service via service-to-service communication. See Activating Prepaid Card Functionality for more information.

Activating/Issuing Prepaid Card

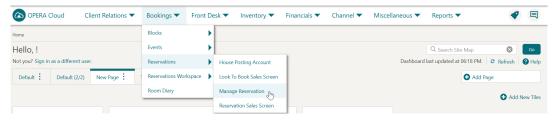
You can activate or issue transaction for a prepaid card or a stored value card (SVC). This option allows you to activate or issue the card and add a value to the card as per the amount given.

You can activate or issue a prepaid card either from the **Reservation** Information or **Billing** screen.



Only you can activate or issue a prepaid card once the guest has checked in successfully.

 From the OPERA Cloud menu, select Bookings, select Reservations, and then click Manage Reservation.



- Search for and open the reservation.
- 3. Click Prepaid Card details link.

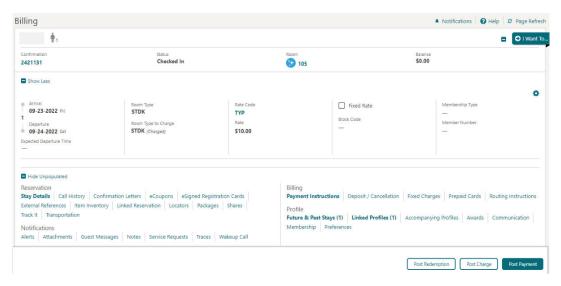
Or

Click I Want To... and then select Billing.

Enter your credentials if requested.

- a. Select the Cashier ID.
- b. Enter PIN to proceed.
- c. Click Login.

The Billing Information screen appears.



5. Click Prepaid Card details link.



6. Click Issue Card.

The Prepaid Cards screen appears. Complete the following:

- a. Prepaid Card Interface: Select the prepaid card interface from the list.
- b. Card Number: Enter the gift card number.
- **c. Name/First Name**: Default the primary profile linked to the reservation.



- d. Amount: Enter the issue amount.
- e. Payment Options:
 - Post Amount to Room: Select the post issue amount to guest folio (reservation account).



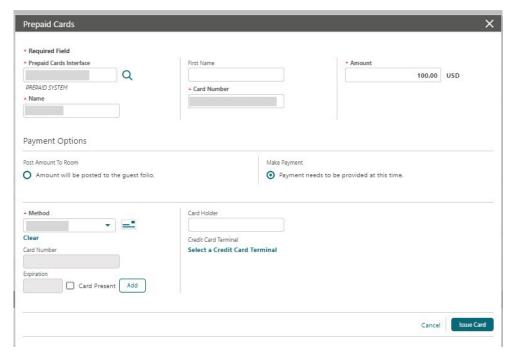
This option is available only once the guest is checked in.

Or

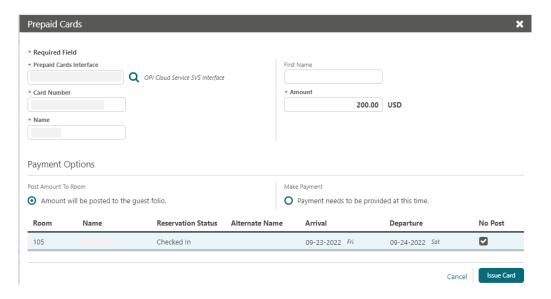
- ii. **Make Payment**: Select the payment needs to be provided at this time. This option requires payment for the gift card at the time the card is issued.
 - i. **Method**: Select a payment method from the list.

You can enter credit card details manually through OPERA Pay. See Credit Card Guarantee through the OPERA Cloud Application (Manual Entry—OPERA Pay) for more information.

- ii. Card Number: Enter credit card number.
- iii. Expiration: Enter credit card expiry date.



Click Issue Card.



Reloading (Top-up) Prepaid Card

You can reload transaction for a prepaid card or a SVC. This option allows you to add funds to the prepaid card.

You can reload a prepaid card either from the **Reservation** Information or **Billing** screen.



You can reload a prepaid card once it is issued.

- From the OPERA Cloud menu, select Bookings, select Reservations, and then click Manage Reservation.
- 2. Search for and open the reservation.
- 3. Click Prepaid Card details link.

Or

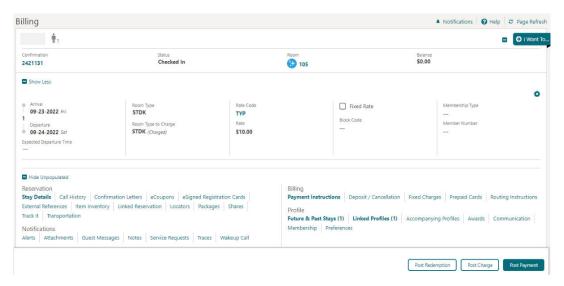
Click I Want To... and then select Billing.

Enter your credentials if requested.

- a. Select the Cashier ID.
- **b.** Enter **PIN** to proceed.
- c. Click Login.

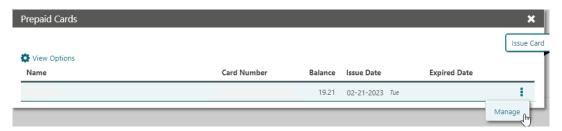
The Billing Information screen appears.





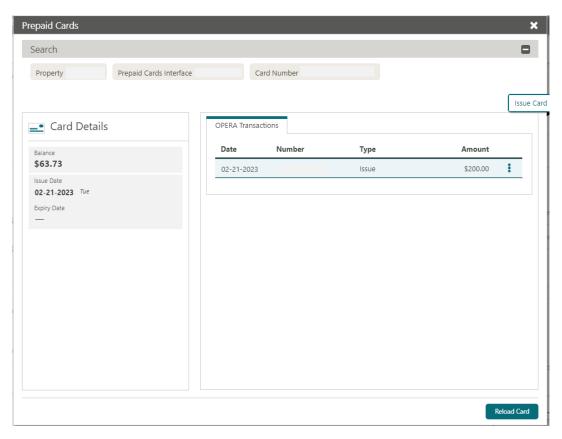
5. Click **Prepaid Card** details link.

The Prepaid Cards screen appears.



6. Select a card, click the vertical ellipsis, and click Manage.

The Prepaid Card information screen with card details, including card balance, appears in the left-side panel; card transaction details are in the right-side panel.



7. Click Reload Card.

The Reload Prepaid Card screen appears.

- a. Amount: Enter the reload amount.
- b. Payment Options:
 - Post Amount to Room: Select Amount will be posted to the guest folio option to post the payment to the guest account.

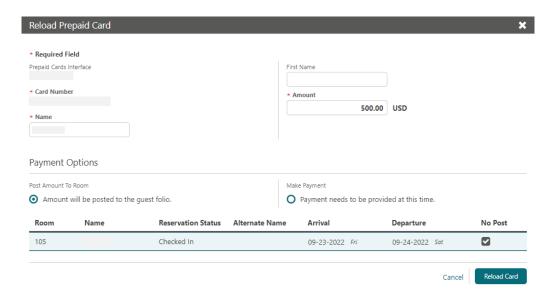
Or

- ii. Make Payment: Select the Payment needs to be provided at this time option to pay for the prepaid card reload at the time of reload.
 - i. **Method**: Select a payment method from the list.

You can enter credit card details manually through OPERA Pay. See Credit Card Guarantee through the OPERA Cloud Application (Manual Entry—OPERA Pay)for more information.

- ii. Card Number: Enter credit card number.
- iii. Expiration: Enter credit card expiry date.
- c. Click Reload Card.





Redeem Prepaid Cards

You can enter a redemption amount equal to or lower than the card balance and not exceeding the folio balance.

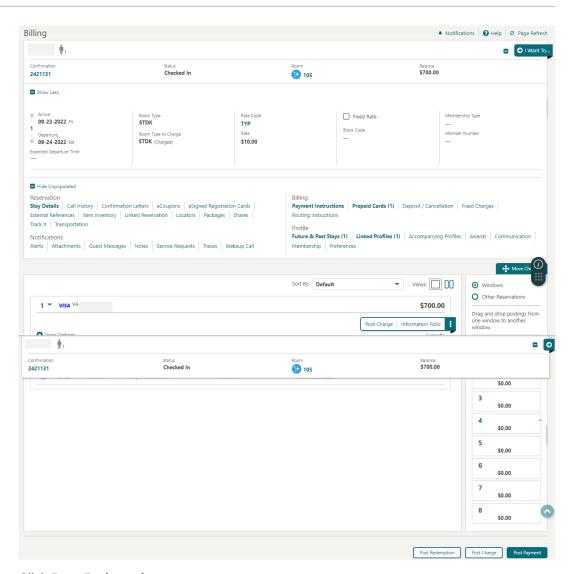
- From the OPERA Cloud menu, select Bookings, select Reservations, and then click Manage Reservation.
- 2. Search for and open the reservation.
- Click I Want To... and then select Billing.

Enter your credentials if requested.

- a. Select the Cashier ID.
- b. Enter PIN to proceed.
- c. Click Login.

The Billing Information screen appears.





4. Click Post Redemption.

The Payment Information screen appears.

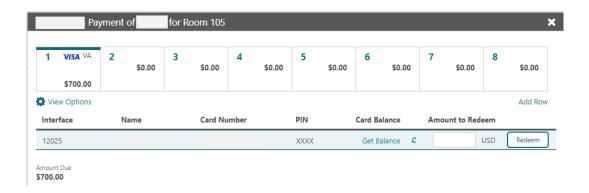
- a. Select the billing window to post redemption.
- b. Select a card from the list.
 - i. Click **Get Balance** to request card balance from vendor.
 - ii. **Amount to Redeem**. Enter the amount to redeem on the prepaid card and post as payment towards settlement; amount cannot be greater than card balance.
 - iii. Click Redeem.

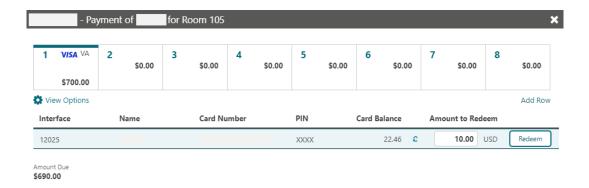
Or

- c. Click Add Row to add a card to the reservation.
 - i. Name. Enter name on card.
 - ii. Card Number. Enter the card number.
 - iii. PIN. Enter card PIN (if required).
 - iv. Click **Get Balance** to request card balance from vendor.



- v. **Amount to Redeem**. Enter the amount to redeem on the prepaid card and post as payment towards settlement; amount cannot be greater than card balance.
- vi. Click Redeem.





Payment(s) will be posted to the selected billing window.

Balance Inquiry

You can inquire for the balance of a prepaid card or store value card from the vendor.

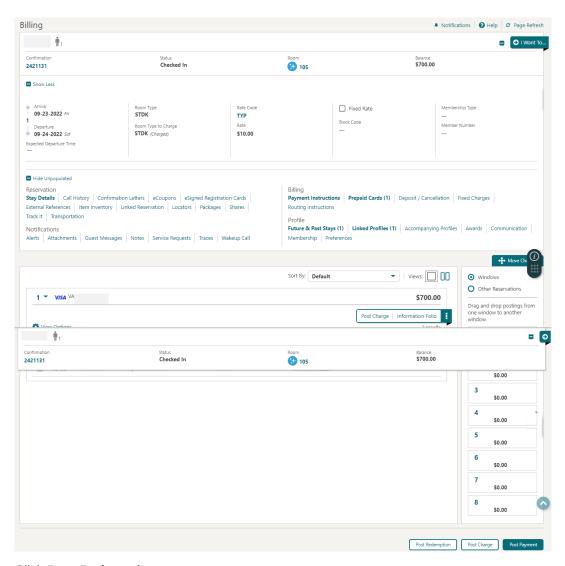
- From the OPERA Cloud menu, select Bookings, select Reservations, and then click Manage Reservation.
- 2. Search for and open the reservation.
- 3. Click I Want To... and then select Billing.

Enter your credentials if requested.

- a. Select the Cashier ID.
- **b.** Enter **PIN** to proceed.
- c. Click Login.

The Billing Information screen appears.





4. Click Post Redemption.

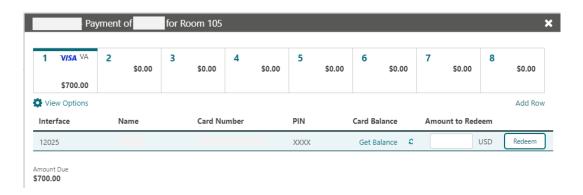
The Payment Information screen appears.

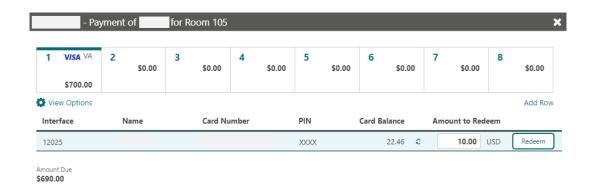
- a. Select the billing window to request the card balance.
- b. Select a card from the list.
 - i. Click Get Balance to request card balance from vendor.

Or

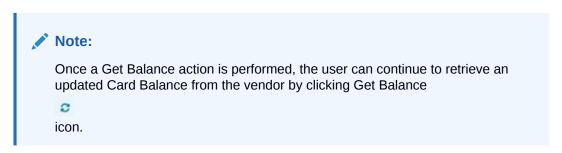
- c. Click Add Row to add a card to the reservation.
 - i. Name. Enter name on card.
 - ii. Card Number. Enter the card number.
 - iii. PIN. Enter card PIN (if required).
 - iv. Click Get Balance to request card balance from vendor.







You can view the balance under **Card Balance** for the selected billing window.



9

Bulk Prepaid Cards

Bulk Prepaid Cards allow you to process multiple records simultaneously when issuing or redeeming Prepaid Cards. You need to activate the **Prepaid Multi Record Processing** parameter for a new property before issuing or redeeming prepaid cards.

The bulk prepaid card feature enables you to:

- Issue bulk Prepaid cards
- Redeem bulk Prepaid cards

Note:

- Prepaid Cards functionality requires an active SVS Interface configured in Property Interfaces under the Interfaces menu option in Administration menu.
- You can access OPERA Cloud and activate the prepaid multi record processing parameter to perform Bulk prepaid card transactions. See Activating Prepaid Card Multi Record Processing for more information.

Activating/Issuing Bulk Prepaid Cards

You can activate or issue transaction for bulk prepaid cards or a stored value cards (SVC). This option allows you to activate or issue multiple cards and add a value to each card as per the amount given.

You can activate or issue a prepaid card either from the Financials—>Cashiering—>Manage Prepaid Cards—>Issue Prepaid Card Information or Front Desk—>In House—>Manage Reservation—>Billing> Prepaid Cards screen.

- 1. From the OPERA Cloud menu, select Front Desk and then select In-House.
- Enter search criteria and click Search. Select the reservation from the search results, click I Want To . . . and select Billing.
- Click Prepaid Card details link.

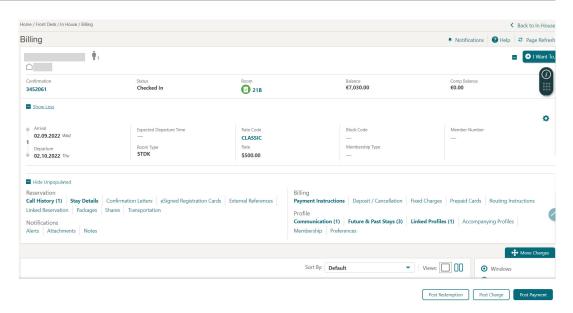
Or

Click I Want To... and then select Billing.

Enter your credentials if requested.

- a. Select the Cashier ID.
- **b.** Enter **PIN** to proceed.
- c. Click Login.

The Billing Information screen appears.



- 5. Click **Prepaid Card** details link.
- Click Issue Card.

The Prepaid Cards screen appears. Complete the following:

- a. Prepaid Card Interface: Select the prepaid card interface from the list.
- b. Name/First Name: Default the primary profile linked to the reservation.
- c. Card Number: Enter the gift card number.
- d. PIN: Enter the pin number.
- e. Amount: Enter the issue amount.
- f. Click

Add Rows

to add multiple cards simultaneously for issuing Prepaid Cards. To add multiple cards, you can repeat steps ${\bf c}$ through ${\bf e}$.

- g. Payment Options:
 - Post Amount to Room: Select the post issue amount to guest folio (reservation account).



This option is available only once the guest is checked in.

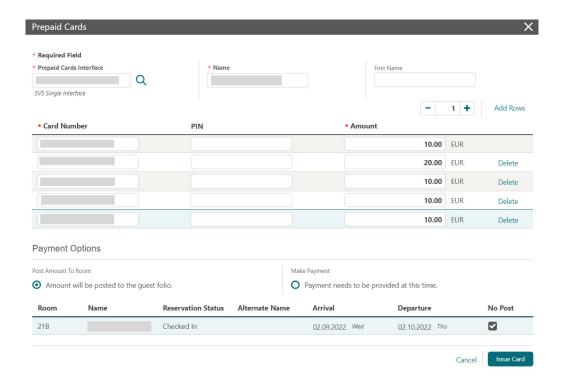
Or

- **Make Payment**: Select the payment needs to be provided at this time. This option requires payment for the gift card at the time the card is issued.
 - Method: Select a payment method from the list.

You can enter credit card details manually through OPERA Pay. See Credit Card Guarantee through the OPERA Cloud Application (Manual Entry—OPERA Pay) for more information.

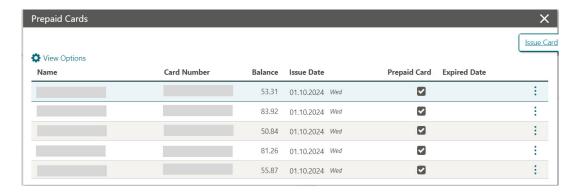
ii. Card Number: Enter credit card number.

- iii. Expiration: Enter credit card expiry date.
- h. Click Issue Card to issue multiple cards.



The **Delete** option allows you to delete specific record.

The issued multiple cards are displayed as shown below.



Redeeming Bulk Prepaid Cards

This option allows you to redeem multiple cards with amounts and balances at a time.

Note:

- Amount to Redeem cannot be greater than the balance amount
- Amount to Redeem cannot be a negative value
- Amount to Redeem cannot be zero
- Total Amount to Redeem cannot be greater than the balance of the folio where the redemption is going to be posted
- 1. From the OPERA Cloud menu, select Front Desk and then select In-House.
- Enter search criteria and click Search. Select the reservation from the search results, click I Want To . . . and select Billing.

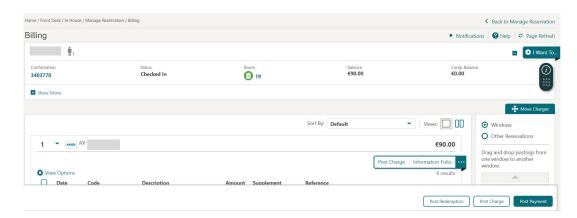
Or

3. Click I Want To... and then select Billing.

Enter your credentials if requested.

- a. Select the Cashier ID.
- **b.** Enter **PIN** to proceed.
- c. Click Login.

The Billing Information screen appears.



Click Post Redemption.

The Payment Information screen appears.

- a. Select the billing window to post redemption.
- b. Select a card from the list.
 - Click Get Balance to request card balance from vendor.
 - ii. **Amount to Redeem**. Enter the amount to redeem on the prepaid card and post as payment towards settlement; amount cannot be greater than card balance.
- To redeem multiple cards, you can repeat steps a through b. Click Redeem.

Or

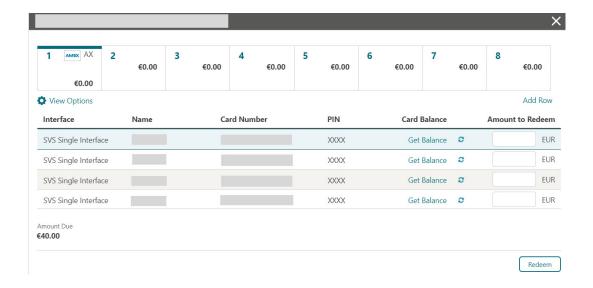


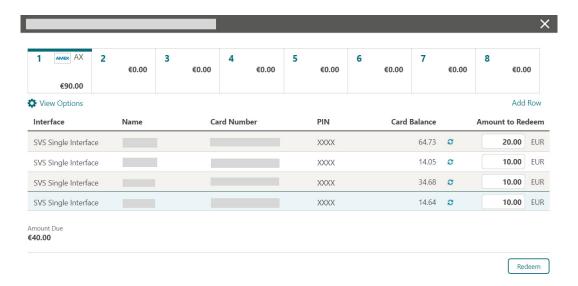
d. Click

Add Rows

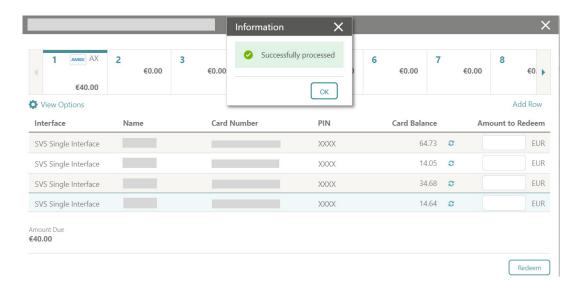
to add multiple cards simultaneously for redeeming Prepaid Cards.

- i. Name. Enter name on card.
- ii. Card Number. Enter the card number.
- iii. PIN. Enter card PIN (if required).
- iv. Click Get Balance to request card balance from vendor.
- v. Amount to Redeem. Enter the amount to redeem on the prepaid card and post as payment towards settlement; amount cannot be greater than card balance.
- vi. To redeem multiple cards, you can repeat steps i. through v. and click Redeem.





Payment(s) will be posted to the selected billing window. The redeemed multiple cards are displayed as shown below.





10

Pay By Link

The OPI Cloud Service supports Pay By Link functionality. When a hotel guest makes a reservation, OPERA Cloud sends a Pay By Link URL request to the Payment Service Provider through OPI.

- Send a payment link (including URL) to the hotel guest through email
- Check the payment status for the reservation.
- Check Pay By Link payment status during the Payment status check at Check-in and Cancel Reservations.

You need to configure the Pay by link endpoint, activate the below controls, and configure email settings for Pay By Link functionality:

- Updating Core Configuration with PSP Endpoints See Updating Core Configuration with PSP Endpoints for more information.
- Activating Pay By Link functionality See Activating Pay By link Functionality for more information.
- Configuring Advanced Deposit Handling See Configuring Advanced Deposit Handling for more information.
- Configuring Pay By Link Delivery by Email See Configuring Pay By Link Delivery by Email for more information.

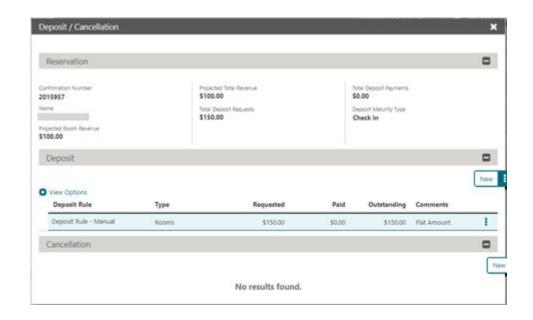
Send Payment Link

The **Send Payment Link** allows you to send the payment link (including URL) to the guest through email.



The Pay By Link option is available only for Reservations in 'Arrival' and 'Reserved' status.

- 1. From the OPERA Cloud menu, select Front Desk, and then select Arrivals.
- 2. Search for and open the reservation.
- 3. Click I Want To... and select Deposit / Cancellation.
- 4. In the Deposit panel, click **New** and complete the following.

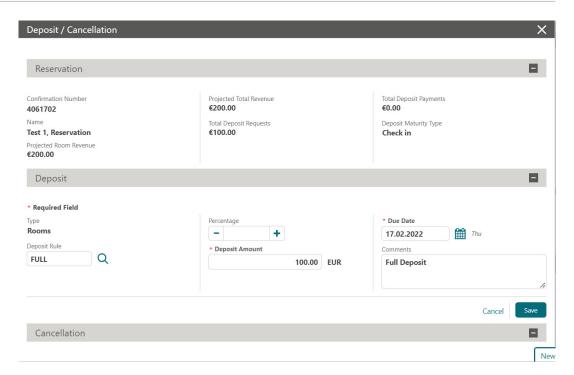


a. Deposit Rule: Select a deposit rule from the list to setup the deposit requirements or manually enter details.



- **b. Percentage**: If a deposit rule was selected a percentage of the rate will populate the field; update as required.
- **c. Deposit Amount**: If a deposit rule was selected a deposit amount will populate to the field; update the deposit amount as required.
- d. **Due Date**: If a deposit rule was selected a due date will populate to the field; update the deposit amount as required.
- e. Comments: Enter any comments applicable.
- 5. Click Save.



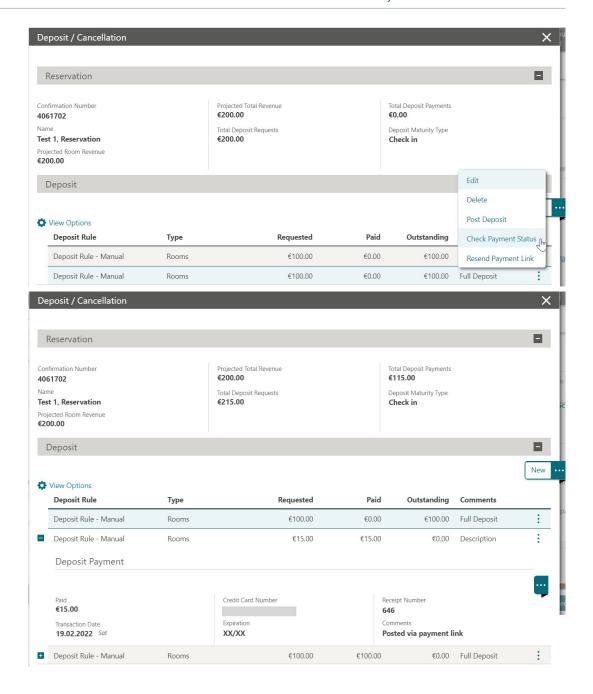


- 6. Click the vertical ellipsis **Actions** menu for the Deposit rule and select **Send Payment Link** to send the PBL request to PSP.
- You can Select Email option to select an email address from the existing list or select New Email to configure new email settings.



- a. Select Pay By Link Email: Select pay by link email from the list. This option is available for Select Email option.
- b. Email Type: Select an email type from the list. This option is available for New Email option.
- c. New Email: Enter an email address. This option is available for New Email option.
- Click Send Payment Link to send the payment request link to the guest.
 - The payment link is successfully sent to the email provided.
- 9. You can check the payment status from the Deposit screen for individual reservation to check whether the Deposit Payment has been paid using the payment link.





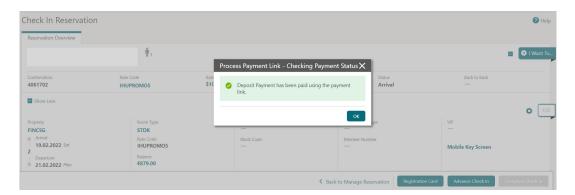
The Resend Payment Link allows you to send pay by link to other users.

Check Payment Status - Check-in Reservation

You can check the payment status at Check-in Reservations. If the PBL payment link is send to the guest, check for the payment status during the Reservation Check-in.

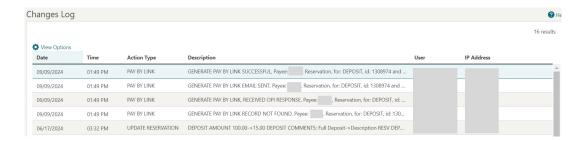
- 1. The process for sending the payment link remains the same. See Send Payment Link and follow the steps 1 through 8 to send the payment request link.
- 2. On the reservation screen, click **Check In**. Payment status check is performed upon landing on the check-in screen and post the deposit payment to the reservation. It checks

the payment status during the Reservation check-in for the reservations waiting for the payment.



View Changes Log

- Click I Want To... and select Changes Log.
- Reservation changes log records the payment status check details.



Check Payment Status - Cancel Reservation

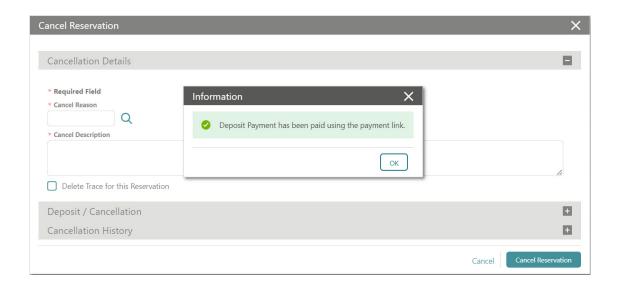
You can check the payment status at Cancel Reservations. If the PBL payment link is send to the guest, check for the payment status during the Reservation Cancellation.

Note:

- You can perform Cancellation only if Cancel with Deposit OPERA Control is active.
- You can process Auto Deposit refund for Credit card payment method reservations only when Auto Deposit Cancellation Refund for Credit cards OPERA Control is active and the reservation is cancelled out side of the cancellation penalty period.
- The process for sending the payment link remains the same. See Send Payment Link and follow the steps 1 through 8 to send the payment request link.
- 2. Click I Want To... and select Cancel Reservation.

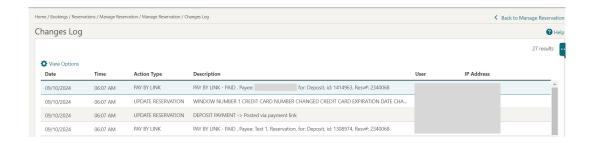
Allows the Payment status check for Cancelled and No show reservations from the Deposit/Cancellation screen. (Incase payee has already made a payment that the

application has not yet received before Cancel/ No show action, you can always check the payment status to ensure the payment has been posted)



View Changes Log

- Click I Want To... and select Changes Log.
- Cancel Reservation changes log records the payment status check details.



11

Review Standard Operating Procedures

Pre-Authorization Rules

- OPERA Cloud provides support for automated Pre-Authorization Rules. You can set the rules as follows:
 - A standard rule across the OPERA Cloud Property.

OR

- A customized pre-authorization rule based on Room Type, Room Class, Rate Code, Rate Category, Reservation Type and Source Code.
- These rules are used upon check-in and control the pre-authorized amount against a guest card upon arrival.

Refer to About Credit Card Authorization Rules for details.



Appendix

Seeded roles using Shared Security Domain (SSD)

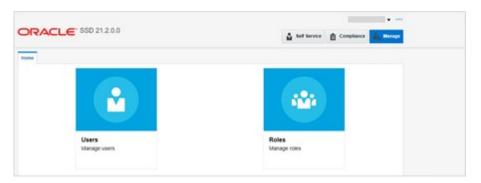
The user roles are seeded using SSD requested by OPERA Cloud users based on their persona and approved (or directly assigned) by the approver.

Manually Adding CCTRANS Role through OIM

The OPERA Admin user will create CCTRANS role using Oracle Identity Management (OIM) manually.

To manually add role through OIM:

- Log in to OPERA Cloud using the URL provided.
- 2. Enter your Admin **User Name** and **Password** in the fields provided.
- From the Side menu, select Identity Management.The Oracle Identity Management screen appears.



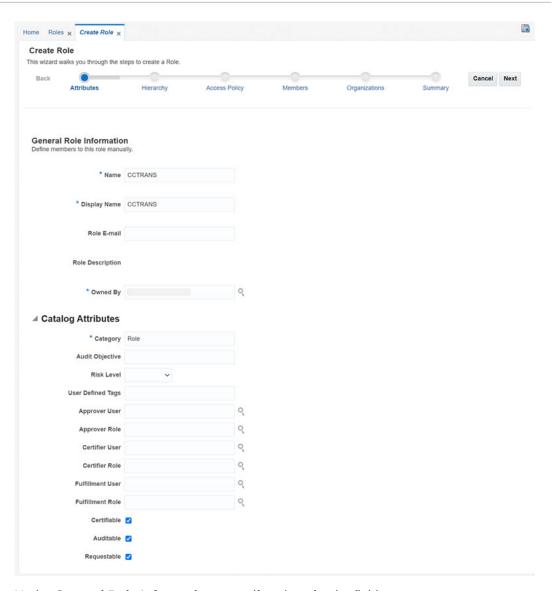
4. Click the **Manage** tab and select the **Roles** tab to manually create a role.

The Role Information screen appears.



5. Click Create.

The Create Role screen appears.



- **6.** Under **General Role Information**, specify values for the fields:
 - a. Name: Enter name of the role.
 - b. **Display Name**: This field is automatically displayed based on the Role Name.
 - c. Role E-mail: Enter email id of the role.
 - d. Role Description: Enter description of the role.
 - e. Owned By: Enter the role owner details. Click



to search and select owner. If a value of the Owned By field is not specified, then it takes the logged-in user as the role owner.

- 7. Under Catalog Attributes, specify values for the attributes.
 - a. Catalog: Enter the Catalog name.
 - b. Audit Objective: Enter the Audit Objective.
 - c. Risk Level: Select Risk level as, High Risk, Medium Risk, or Low Risk.

- d. User Defined Tags: Enter user defined tags.
- e. Approver User:

Click



to select the approver user.

f. Approver Role:

Click



to select the approver role.

g. Certifier User:

Click



to select the certifier user.

h. Certifier Role:

Click



to select the certifier role.

. Fulfillment User:

Click



to select the fulfillment user.

j. Fulfillment Role:

Click



to select the fulfillment role.

- **k. Certifiable**: Select to enable the role to appear in the certification.
- I. Auditable: Select to enable the role to appear in audit.
- m. Requestable: Select to mark the role as Requestable entity.



A role can be created without role hierarchy, associated access policies and role members.

- 8. Click **Next** until you reach Organization page.
- In the Organizations page, you can specify the organizations to which this role will be published.

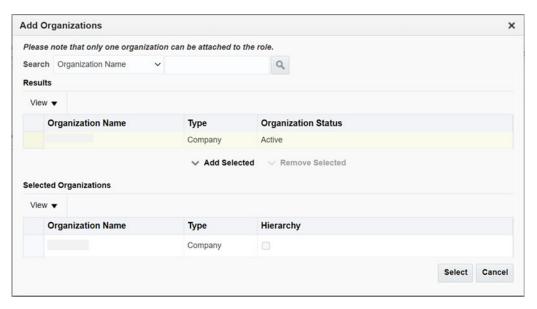
To assign organization:

- a. Click Add Organizations. The search panel appears.
- b. From the list of Organizations, select the required organization and click Add Selected to add it to Selected Organization list.



If you want to deselect any organization from Selected Organization list click **Remove Selected**.

c. Click **Select**. The Organizations tab is displayed with the Organization to which this role will be published.



- d. Click **Next**.The Summary page of the Create Role is displayed. It displays the role summary information of the role that will be created.
- 10. Click Finish. The role is created successfully.

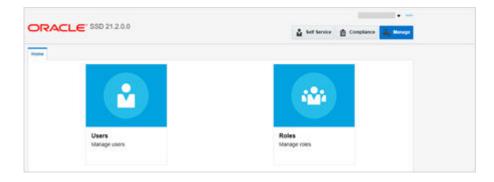
Assigning CCTRANS Role to a User

The OPERA Admin user assigns the CCTRANS role to OPERA Cloud users who can directly access hosted Token exchange form (OPERA Pay) from OPERA Cloud.

To assign CCTRANS role to a user:

- 1. Log in to **OPERA Cloud** using the URL provided.
- 2. Enter your Admin **User Name** and **Password** in the fields provided.
- 3. From the Side Menu, select Identity Management.

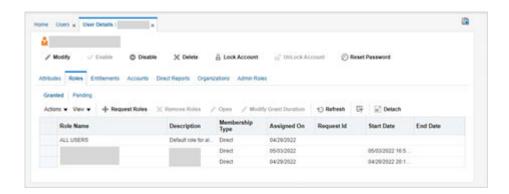
The Oracle Identity Management screen appears.





Click the Manage tab and select the Users tab to assign the role to a user.
 The Users Information screen appears.

5. Select the user that you want to assign the role.

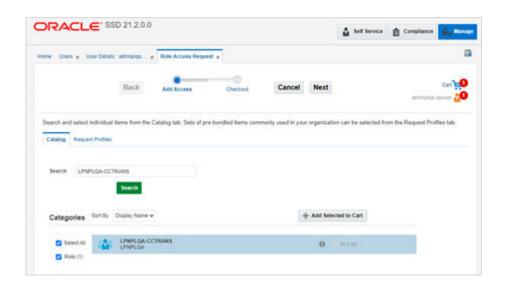


The **Roles** tab appears with the list of roles assigned to the user.

6. Click Request Role.

The Catalog screen appears.

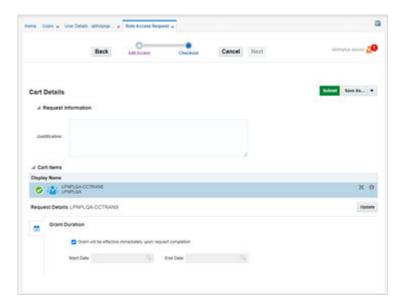
- Click the search icon next to the Catalog field and enter the CCTRANS role and click Search.
- 8. Select the CCTRANS role that you want to assign. Click Add Selected to Cart.



The selected role catalog item is added to the request cart.

9. Click **Next** and then click **Submit** to submit the request.

The role is assigned to the user when an approver approves the request.



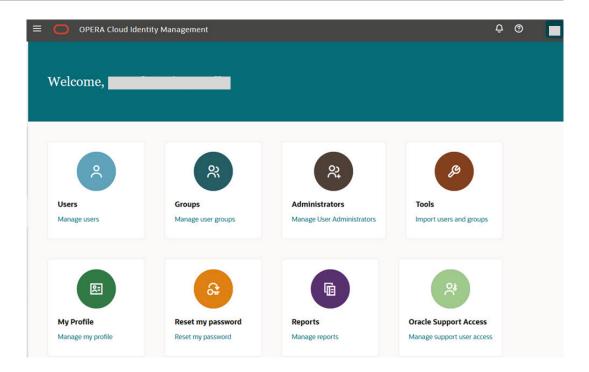
Seeded roles using OPERA Cloud Identity Management

OPERA Cloud Identity Management is a cloud ready identity and access management service for OPERA Cloud. OPERA Cloud Identity Management replaces Shared Security Domain (SSD) as the core identity and access management engine for OPERA Cloud. Identity and Access Management (IAM) Identity Domain is a container for managing users and roles through Oracle Single Sign-On (SSO) configuration to access OPERA Cloud services.

Creating a Group

The Chain Admin or Property Admin user will create a CCTRANS group using OPERA Cloud Identity Management.

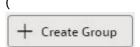
- 1. Log in to OPERA Cloud Identity Management using the URL provided.
- 2. Enter your **User Name** and **Password** in the fields provided.
- Select the Groups tab and click the Manage user groups to create a group.



The Groups Information screen appears.

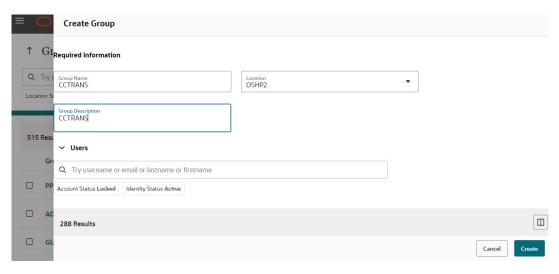


4. Click Create Group



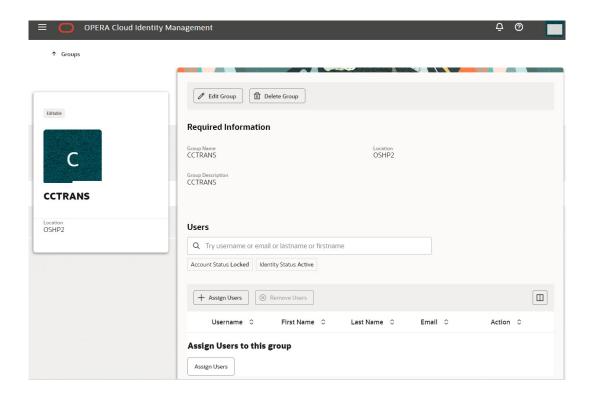
) to create a CCTRANS group.

The Create Group screen appears.



- 5. Enter the **Group name**.
- 6. Enter the **Group Description** about the group.
- Select or enter the Location manually. For example, Organization code (chain (SH) or property (349).
- 8. Click **Create** to create a group.

The Group profile screen appears.

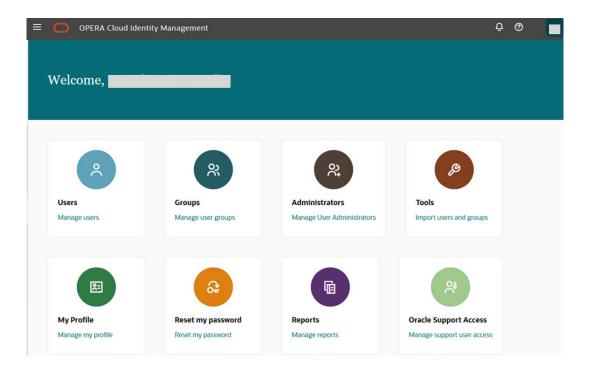


Once the group profile is created, you can assign CCTRANS user to the group. See Assigning a User to CCTRANS Group for assigning user to the group.

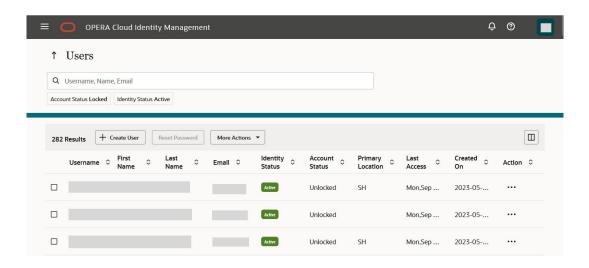
Creating a User

The Chain Admin or Property Admin user will create and manage users and their access to OPERA Cloud services using OPERA Cloud Identity Management.

- 1. Log in to OPERA Cloud Identity Management using the URL provided.
- 2. Enter your User Name and Password in the fields provided.
- 3. Select the **Users** tab and click the **Manage users** to create a user.



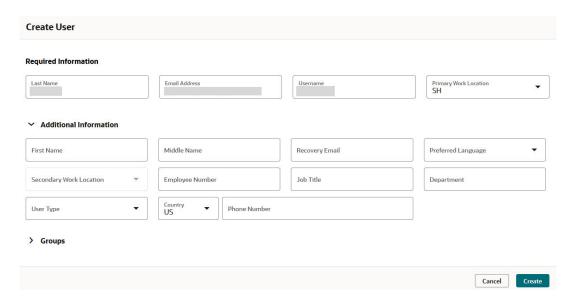
The User Information screen appears.





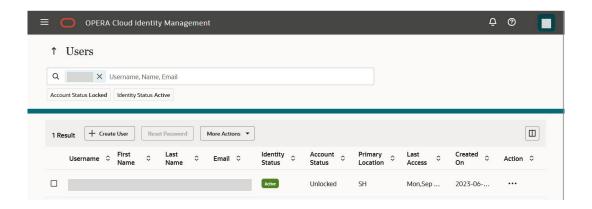
4. Click Create User
(
+ Create User
).

The Create User screen appears.

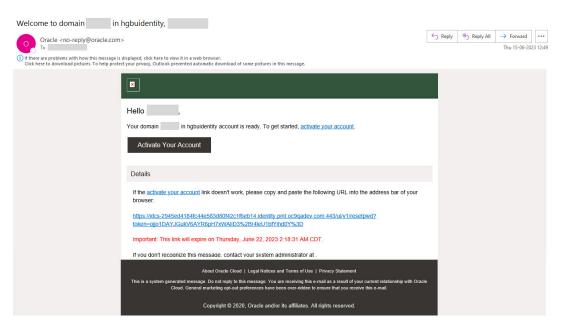


- 5. Under **Required Information**, specify values for the fields:
 - a. Last Name: Enter the last name of the user.
 - b. Email Address: Enter email address of the user.
 - **c. Username**: Enter the username for the user.
 - d. Primary Work Location: Select the primary work location from the drop-down list.
 - e. Additional Information section:
 - i. First Name: Enter the first name of the user.
 - ii. Middle Name: Enter the middle name of the user.
 - iii. Recovery Email: Enter the recovery email of the user.
 - iv. Preferred Language: Select the preferred language of the user.
 - Secondary Work Location: Select the secondary work location from the dropdown list.
 - vi. Employee Number: Enter the employee number of the user.
 - vii. Job Title: Enter the job title of the user.
 - viii. Department: Enter the department of the user.
 - ix. User Type: Select the user type from the drop-down list.
 - x. Country: Select the country from the drop-down list.
 - xi. Phone Number: Enter the phone number.
- Click Create to create a user.



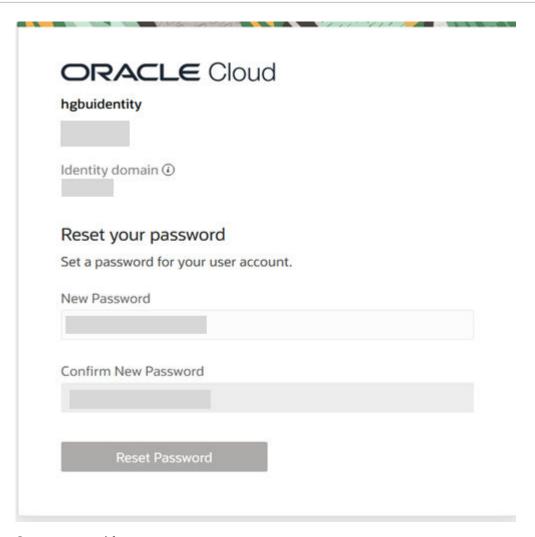


After a user account is created, a welcome invitation is sent to the user, requesting that they activate the account. The new user account must be activated before it can be used. If the user account is not activated after a designated time period, then the administrator can send another invitation to the user to activate the account.



7. Click Activate Your Account to get started.

The Reset Password screen appears.



- 8. Set a password for your user account.
 - a. Enter and confirm New Password.

The user can log into OPERA Cloud Identity Management portal to view the user details.

Once the user is created successfully, you can assign CCTRANS group to a user. See Assigning a User to CCTRANS Group for more information.

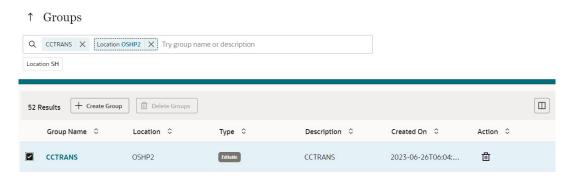
Assigning a User to CCTRANS Group

The Chain Admin or Property Admin user will assign a user to CCTRANS group using OPERA Cloud Identity Management.

- Log in to OPERA Cloud Identity Management using the URL provided.
- 2. Enter your **User Name** and **Password** in the fields provided.
- 3. Select the **Groups** tab and click the **Manage user groups** to assign a user to cctrans group.

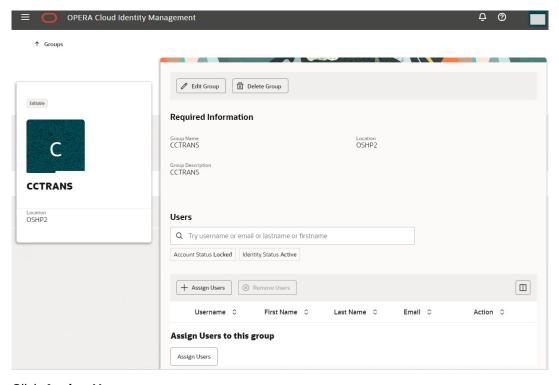
The Group Information screen appears.





- 4. Enter the **Group name**, **Description** or select the **Location** check box. Click **Enter**.
- Select the group name check box and click the CCTRANS group that you want to assign to a user.

The Groups profile screen appears.

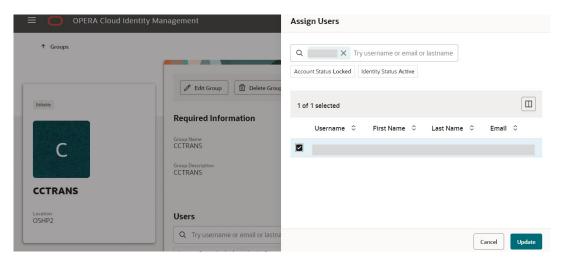


6. Click Assign Users



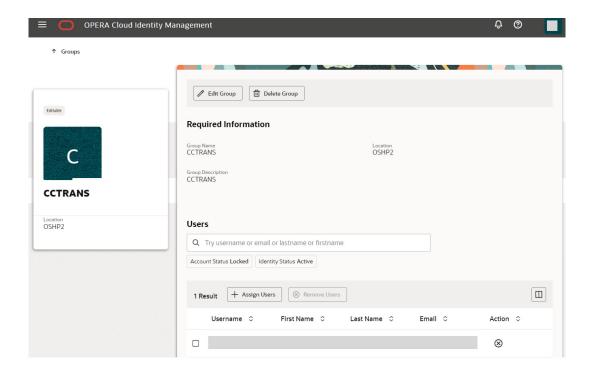
) to assign users to the CCTRANS group.

The Assign Users screen appears.



- 7. Enter the username, email, firstname or lastname. Click Enter.
- 8. Select the **Username** check box that you want to assign to the CCTRANS group.
- Click Update.

The Groups profile screen appears with assigned users.



You have successfully added the user(s) to the group.

Click Assign Users



) to assign additional users to the CCTRANS group.