

***Strata***<sup>®</sup> *DK*  
Digital Business Telephone Systems

**Hospitality Management Information  
System (HMIS)  
User Guide**

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*Chapter 2 - Features*

# Introduction

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This guide provides hotel/motel management and staff members with operating instructions for Toshiba's Strata DK Hospitality Management Information System (HMIS). It is written assuming that you are familiar with operating a PC, mouse, and Microsoft® Windows® 95 software.

## Organization

This guide is divided as follows:

- ♦ **Chapter 1 – Grand Tour** provides an overview of the HMIS features, main screen, tabs, buttons and screen navigation.
- ♦ **Chapter 2 – Features** gives step-by-step instructions on using HMIS's many features.

# Conventions

| Conventions       | Description  |
|-------------------|--|
| <b>Note</b>       | Elaborates specific items or references other information. Within some tables, general notes apply to the entire table and numbered notes apply to specific items.   |
| <b>Important!</b> | <i>Calls attention to important instructions or information.</i>   |
| <b>CAUTION!</b>   | <b>Advises you that hardware, software applications, or data could be damaged if the instructions are not followed closely.</b>  |
| <b>WARNING!</b>   | <b>Alerts you when the given task could cause personal injury or death</b>   |
| [DN]              | Represents any Directory Number button, also known as an extension or intercom number.   |
| [PDN]             | Represents any Primary Directory Number button (the extension number for the telephone).   |
| [SDN]             | Represents any Secondary appearance of a PDN. A PDN which appears on another telephone is considered an SDN.   |
| [PhDN]            | Represents any Phantom Directory Number button (an additional DN).   |
| <b>Arial Bold</b> | Represents telephone buttons.  |
| <b>Courier</b>    | Shows a computer keyboard entry or screen display.   |
| “Type”            | Indicates entry of a string of text.   |
| “Press”           | Indicates entry of a single key. For example: Type <b>prog</b> then press <b>Enter</b> .   |
| Plus (+)          | Shows a multiple PC keyboard or phone button entry. Entries without spaces between them show a simultaneous entry. Example: <b>Esc + Enter</b> . Entries with spaces between them show a sequential entry. Example: <b># + 5</b> . |

| Conventions   | Description  |
|---------------|--|
| Tilde (~)     | Means “through.” Example: 350 ~ 640 Hz frequency range.  |
| ➤             | Denotes the step in a one-step procedure.  |
| ➤             | Denotes a procedure.   |
| See Figure 10 | Grey words within the printed text denote cross-references. In the electronic version of this document (Strata DK Library CD-ROM or FYI Internet download), cross-references appear in blue hypertext. |

## Action/Response Table

1. *Actions* you perform appear in this column. They can consist of either a single step or a series of numbered steps.
2. When the action you perform results in a screen, menu, dialog box, etc., the example to the right displays.

The *immediate response to the action* performed appears in this column. Additional notes and comments are also included.



## **Related Documents/Media**

The following documents and CD-ROMS can be used to reference further information about the Strata DK systems.

- ♦ **Hospitality Management Information System (HMIS) General Description** – provides an overall view of the system hardware, software, applications and features.
- ♦ **Strata DK HMIS CD-ROM** – contains a copy of all HMIS documentation/ bulletins and enables you to view, print, navigate and search publications.
- ♦ **Strata DK Library CD-ROM** – contains a copy of all Strata DK documentation, including HMIS, and enables you to view, print, navigate and search publications.

The Toshiba Strata DK Hospitality Management Information System (HMIS) is a Personal Computer (PC)-based solution that meets the specific operational needs of small- to medium-sized hotels/motels.

HMIS tightly integrates with the Strata DK telephone (Release 3.1 or higher) and the Strata Voice Processing Systems, providing a complete and fully integrated hospitality package.

The HMIS PC is dedicated to running the HMIS program and functions as the front desk terminal. Other programs *should not* be installed and run on the HMIS PC. In applications requiring multiple front desk terminals, HMIS PC workstations can be networked together to share a common database.

## Features

HMIS provides all the standard features needed by a hotel/motel facility while providing many advanced features. The following is a list of some of the main features available:

- ♦ **Automatic Wake-up** – Guests can request an automatic wake-up call for any time. The HMIS notifies the front desk of any unsuccessful wake-up attempts.

- ♦ **Call Forwarding** – If the Strategy Voice Processing System is installed, guest room telephones are automatically set to Call Forward Busy/No Answer (CFBNA) to Strategy. The guest can request that calls be blocked and all calls forwarded to voice mail.
- ♦ **Check-in** – Information previously entered from the reservation automatically appears on the check-in screen when the guest registers. Both walk-in guests and guests with reservations can be easily registered. The automatic check-in capability turns the room telephone on at check-in.
- ♦ **Check-out with Billing** – By selecting the room and clicking on a Check-Out button on the Main screen, the guest's bill is displayed at the front desk. A printed bill can be produced by simply clicking on a screen button. Clicking the Payment Received button, automatically clears the account, turns the room telephone off, clears the guest's messages, and designates the room for required maid service.
- ♦ **Consolidated Billing** – All charges incurred during the guest's stay are incorporated into one bill at check-out. This includes room rental, taxes, telephone charges, room service, movies and any other miscellaneous charges. Billing statements can be customized.
- ♦ **Do Not Disturb (DND) Call Blocking** – If a guest wishes to avoid room-to-room calls (e.g., calls made at late night hours), the front desk can enable/disable a Call Blocking feature. The feature can be set on an individual room basis and a list of rooms using the feature can be viewed from the front desk by using the Browse Window.
- ♦ **Guest Directory** – Complete guest information can be displayed at the front desk HMIS PC or printed in a report.
- ♦ **Guest Messaging** – Guest messages can be entered into the HMIS PC at the front desk and displayed or printed at any time. Multiple messages can be stored in the text field. If the Strategy Voice Processing System is installed, the HMIS can assign voice mailboxes to guests to use during their stay.
- ♦ **Liquid Crystal Display (LCD) Name Display** – HMIS automatically displays the registered guest's name on the LCD of administrative telephones at the front desk, room service, and other service locations when the guest calls.

- ♦ **Outgoing Call Restriction** – Call restriction controls the type of outgoing calls the guest is permitted to make and is also used for vacant room call restriction. Telephone class of service or restriction levels can be individually set for each guest room. Room telephone settings include enabling long distance or local and toll free use, or restricting the telephone to in-house calls only.
- ♦ **Remote Maintenance** – Technical support staff can perform on-line support and remote HMIS software upgrades, using Symantec™ pcANYWHERE™ software and the HMIS Server PC's internal modem.
- ♦ **Reports** – Seven reports can be run at any time by staff members. The report subjects include Uncleared Outgoing Phone Calls Made, All Active Balance Statements, Hotel Guest List, Maid Activity Report, Reservations List, Morning Check Out List, and Consolidated Detail Night Audit Report.
- ♦ **Reservations** – Reservations can be entered up to 20 years in advance. Reservation information is automatically displayed on the Main screen when the guest checks in.
- ♦ **Room Swap** – If a guest needs to change rooms, this is easily accomplished by selecting their room record and pressing the Swap Room button. All of the guest room information is transferred to the new room record automatically.

## Main Screen

All screens and pop-up dialog boxes are accessed from the Main screen (shown in the next page). It displays reservation/check-in and room setup information gathered automatically by HMIS from other screens. Entries made on the Main screen itself are minimal and are concentrated in the Customer Detail Window and the Function Tab dialog boxes.

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**Customer Detail Window**  
(alternates with Browse Window)

**Customer Detail**

Company: XYZ Company, Inc. Company Phone: 714-555-3000

Home Address: 16666 Main Street Home Phone: 714-555-3700

City: Woodland State: CA Zip: 93421 Country: USA

Auto Make/Model: Auto Tag #:  Vip Status # Adults: 1 # Children: 0

Comments

**Check-in/out Buttons**

| Room # | Ext # | Room Type | Title | First   | MI | Last | Handicap?                | Wakeup?                     |
|--------|-------|-----------|-------|---------|----|------|--------------------------|-----------------------------|
| 203    | 203   | Suite     |       | Richard |    | Lee  | <input type="checkbox"/> | <input type="checkbox"/> PM |

Check-In: Reserve from 09/19/97  
Check-Out: until 09/20/97

Check-In: 09/19/97 10:56 teu  
Check-Out:

**Room Rate(s)**

|                | Rate   | Nights |
|----------------|--------|--------|
| Daily          | 100.00 | 1      |
| Weekend        | 110.00 | 0      |
| Holiday/Season | 120.00 | 0      |
| Special        | 90.00  | 0      |

Discount %: 0.00 Manual   
Conf #: 778AGW071549

**Browse Window**

All Rooms 6 Available  Rooms Requiring Cleanup  Swap Room  
 Occupied Rooms Only  Rooms with CFAC Enabled  
 Check-Out/Renewal Rooms Only  Rooms With Pending Check-In

| Rm # | Ext # | Rsrv? | Status  | Last Name | Res From | Res Until | HC | Port |
|------|-------|-------|---------|-----------|----------|-----------|----|------|
| 200  | 200   | OK    | StaOvr  | Fellows   | 09/19/97 | 09/20/97  | No | 000  |
| 201  | 201   | OK    | StaOvr  | Harding   | 09/19/97 | 09/20/97  | No | 001  |
| 202  | 202   |       |         |           |          |           |    | 002  |
| 203  | 203   | OK    | StaOvr  | Lee       | 09/19/97 | 09/20/97  | No | 003  |
| 204  | 204   | OK    | StaOvr  | Brown     | 09/17/97 | 09/20/97  | No | 004  |
| 205  | 205   | OK    | StaOvr  | Randolph  | 09/18/97 | 09/21/97  | No | 005  |
| 206  | 206   | OK    | StaOvr  | James     | 09/19/97 | 09/20/97  | No | 006  |
| 207  | 207   |       |         |           |          |           |    | 007  |
| 208  | 208   | Yes   | Pending | Downing   | 09/21/97 | 09/24/97  |    | 008  |

**Function Tabs**

Control/Status | Messages | Restrict/Accommodate | Phone Calls | Billed Services | FOP

Enable CFAC | Change Phone Service | Phone Service: Enabled Local/LD  
Forwarding Immediate: Disabled  
Maid Service: Completed  
Auto-Wakeup Polling: Disabled

Enable CFBNA | Toggle Maid Service

Save | Detail | Reports | Setup | Cancel | Reserve | Exit

**Browse Window**

**Displays Customer Detail Window**

**Reports Database Settings**

**Reservations**

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## Main Screen Fields

Information displayed in the following fields is for the guest/room highlighted in the Browse Window. For guests who have not checked in and have a Pending reservation, only the Room #, Ext #, Room Type and Room Rate fields display information.

| Field                | Description   |
|----------------------|---|
| <b>Room #</b>        | (Display only) Room number.   |
| <b>Ext #</b>         | (Display only) Telephone extension number.  |
| <b>Room Type</b>     | (Display only) Type of room (e.g., single, double, suite).  |
| <b>Title</b>         | (Optional) Primary guest's title. You can enter a title (max. seven-digits) or select one of the options from the drop-down menu. The options are: Mr., Ms., Mrs., Miss, Dr.  |
| <b>First/MI/Last</b> | Primary guest's name. Entered during reservation or check in (walk-in guest). After registration, the names can be changed by clicking on the appropriate field, entering the name and clicking Save.   |
| <b>Handicap?</b>     | If the box is checked, it indicates the guest has a handicap that requires special accommodations (see <a href="#">"Handicapped Guest" on Page 102</a> ).   |
| <b>Wakeup?</b>       | If the box is checked, it indicates the guest wants a wake-up call. The field below displays the time set for the call. To cancel a wake-up call, simply click on this field to remove the check mark.<br><br>See <a href="#">"Automatic Wake-up Calls" on Page 22</a> for complete instructions on using this field. |
| <b>Reserve from</b>  | (Display only) Date guest checked in.   |
| <b>Reserve until</b> | Date guest is expected to check out. This date can be changed to extend a guest's stay. See <a href="#">"Guest Extends Stay" on Page 69</a> for instructions.   |
| <b>Check-In/Out</b>  | (Display only) Date/time guest checked in. Also includes initials of clerk.   |

| <b>Field</b>      | <b>Description</b>  |
|-------------------|---|
| <b>Room Rates</b> | Standard rates for the room (i.e., daily, weekend, holiday/seasonal, and special). HMIS automatically calculates the number of nights at daily and weekend rates. See <a href="#">“Room Rates” on Page 99</a> for additional information.   |
| <b>Discount %</b> | <p>Applicable room discount. Displays 0.00 if no discount is applicable.</p> <p>Discounts entered in the Reservation/Check-in screens, display in this field after the guest checks in (see <a href="#">“Room Rate Discounts” on Page 98</a>).</p> <p>You can also enter a discount by clicking on this field and entering a percent (up to two decimal places). If you enter a whole number, HMIS adds the decimal and zero fills the two spaces (e.g., 5 becomes 5.00).</p> |
| <b>Manual</b>     | Checking this field enables you to access the Nights field under Room Rate(s) in order to bill a guest’s stay at holiday/seasonal or special rates. See <a href="#">“Change Room Rate to Holiday/Seasonal or Special Rate” on Page 100</a> for instructions.  |
| <b>Conf #</b>     | <p>(Display only) HMIS automatically adds this confirmation number during the reservation/check-in (walk-in) process. The number is 12-digits long and consists of the Julian calendar date, employee ID and time the reservation was made or the walk-in guest was checked in. For example, 778AGW130155 represents:</p> <p>778: Julian calendar date<br/>AGWEmployee ID who made reservation/check-in<br/>1301:1:01 p.m.<br/>55: 55 seconds.</p>                            |

## Main Screen Buttons

The HMIS Main screen provides button access to the functions and menus required to run the hospitality facilities.

| Button               | Description   |
|----------------------|---|
| <b>Check-In</b>      | <p>Enables you to check in a guest.</p> <p>Displays the Check-in screen for checking in a walk-in guest. An Available Room Selection pop-up dialog box provides a list of rooms from which to choose.</p> <p>To check in a guest with a pending reservation, highlight the reservation in the Browse Window and click on this button.</p> <p>See <a href="#">“Check in Guest” on Page 41</a> for details.</p>   |
| <b>Check-Out</b>     | <p>Enables you to check out a guest.</p> <p>By highlighting a guest’s name in the Browse Window and clicking on this button, front desk staff can check-out and view/print the guest’s consolidated billing statement.</p> <p>Clicking on the Payment Received button on the Billing Statement screen clears the account and the database of guest information, sets the Maid Service to “Required” and the telephone service to “outgoing call restriction.”</p> <p>See <a href="#">“Check Out Guest with Billing” on Page 48</a> for details.</p> |
| <b>Save</b>          | <p>Saves changes or additions to guest’s room record.</p>   |
| <b>Browse/Detail</b> | <p>See <a href="#">“Browse/Customer Detail Windows” on Page 9</a> for a description of this button.</p>   |
| <b>Reports</b>       | <p>Displays the Report Menu screen.</p> <p>This screen enables authorized personnel to view/print up to seven reports: Hotel Guest List, Maid Activity Report, Reservation List, Uncleared Outgoing Phone Calls Made, All Active Balance Statements, Morning Check Out List, and Consolidated Detail Night Audit Report.</p> <p>See <a href="#">“Reports” on Page 75</a> for detailed information.</p>  |

| <b>Button</b>  | <b>Description</b>  |
|----------------|---|
| <b>Setup</b>   | <p>Displays the Setup Menu screen.</p> <p>This screen enables authorized personnel (HMIS access levels 11~20) to access a group of six setup screens which must be completed before HMIS can be used. The screens consist of: Master Room Setup and AutoGen screens for room record entries, Company for entry of company information (name, address, etc.), Employee Codes for entry of staff names/category/employee ID, Settings for telephone/tax settings, and Statement for customizing the billing statement format.</p> <p>Personnel with assigned access levels of 0~10 are allowed access only to the Master Room Setup screen.</p> |
| <b>Cancel</b>  | <p>Cancels pending room reservation highlighted in Browse Window.</p>   |
| <b>Reserve</b> | <p>Displays the Reservation screen.</p> <p>This screen enables the front desk clerk to make guest reservations. An Available Room Selection pop-up dialog box provides a list of rooms from which to choose. See <a href="#">“Reservations” on Page 87</a> for details.</p>   |
| <b>Exit</b>    | <p>Closes the Main screen and exits the program.</p>  |

## Browse/Customer Detail Windows

Two windows are displayed on the Main screen – Browse and Customer Detail. A button at the bottom of the Main screen enables you to toggle between them.

The following is a brief description of the windows. Full details of each are explained in [Chapter 2 – Features](#).

| Button        | Description   |
|---------------|---|
| <b>Browse</b> | <p>Replaces the Customer Detail section of the Main screen with a Browse Window.</p> <p>The window enables you to display a listing of: all rooms, occupied rooms only, rooms requiring check-out/renewal or cleanup, rooms with DND enabled/disabled or CFBNA/CFAC enabled and rooms with pending check in (see <a href="#">“Browse Window” on Page 33</a> for details).</p>   |
| <b>Detail</b> | <p>Replaces the Browse Window section of the Main screen with a Customer Detail Window.</p> <p>The window enables you to enter the guest’s address, auto make/model/license number, number of people in party (adults, children), guest’s company affiliation/company telephone number and a comments section for any comments/notes.</p> <p>Entries made on the Reservation/Check-in screens automatically display on this screen after guest checks in.</p> <p>See <a href="#">“Customer Detail Window” on Page 55</a> for details.</p> |

# Function Tab Dialog Boxes

Dialog boxes are provided in the bottom half of the Main screen (see figure below). The boxes enable you, on a per-room basis, to enter guest or room information during the guest’s stay and view the data, whenever necessary.



To use the boxes, you must highlight a room in the Browse Window and click on one of the tabs. The following is a list of tabs with a brief description. Full details of each are explained in [Chapter 2 – Features](#).

| Tab                   | Description  |
|-----------------------|--|
| <b>Control/Status</b> | <p>Manually controls and displays:</p> <ul style="list-style-type: none"> <li>◆ Telephone service (see <a href="#">“Change Phone Service” on Page 40</a> for details)</li> <li>◆ Call forwarding (see <a href="#">“Call Forwarding” on Page 35</a> for details)</li> <li>◆ DND (see <a href="#">“Do Not Disturb Call Blocking” on Page 62</a> for details)</li> <li>◆ Maid service (see <a href="#">“Maid Service Status” on Page 71</a> for details)</li> </ul> <p>Also displays the status (enabled/disabled) of the Auto-wakeup Polling feature (see <a href="#">“Automatic Wake-up Calls” on Page 22</a> for details).</p> <p>At check-out, HMIS automatically turns off the room telephone by activating the vacant room “outgoing call restriction” and sets the Maid Service to “Required.”</p> |

| Tab                         | Description  |
|-----------------------------|--|
| <b>Messages</b>             | <p>Enables entry of messages and logs wake-up call attempts for each room.</p> <p>Messages can be printed at any time and may remain in the database until the Clear Msgs/Wakeup Logs button is selected or the guest checks out. A log of wake-up calls is also displayed and can be cleared with the same button. See <a href="#">“Guest Messaging” on Page 66</a> for details.</p>                              |
| <b>Restrict/Accommodate</b> | <p>Displays amenities (cable, TV, etc.) and special accommodations (baby crib, etc.).</p> <p>The information in the two-left columns of the dialog box is taken from the Master Room Setup/AutoGen screens when the room is recorded into the database. The right column is available for additional accommodations.</p> <p>See <a href="#">“Special Restrictions/Accommodations” on Page 102</a> for details.</p> |
| <b>Phone Calls</b>          | <p>Displays telephone calls/charges. At check-out, the telephone charges are included on the guest’s consolidated bill and the telephone call data is automatically cleared from the screen.</p> <p>See <a href="#">“Change Phone Service” on Page 40</a> for details.</p>   |
| <b>Billed Services</b>      | <p>Enables entry of billed service charges for room service, movies, etc., to the guest’s account and displays all entries during the guest’s stay.</p> <p>At check-out, all charges are posted to the guest’s bill. Upon payment, the charges are automatically cleared from the room record.</p> <p>See <a href="#">“Billed Services” on Page 30</a> for details.</p>  |
| <b>FOP</b>                  | <p>Registers and displays Form of Payment (FOP) that is being used by the guest (cash, check or credit card) and any deposits/payments made (e.g., room deposit).</p> <p>At check-out, all deposits/payments are posted to the guest’s bill and the screen is automatically cleared of any information.</p> <p>See <a href="#">“Deposit/Payment” on Page 56</a> for details.</p>                                   |

## Screen Navigation

The table below shows you how to use the screen and keyboard to navigate within the HMIS application.

| Button/Key  | Description  |
|---|--|
|  | Returns to the Main screen from any screen in the program. |
| <b>Enter</b> or <b>Tab</b>  | Moves the cursor to the next field on the screen.          |
| <b>Shift+Tab</b>  | Moves the cursor to the previous field on the screen.      |
| ↑↓  | Scrolls the cursor through lists.                          |
| <b>Home</b>   | Takes the cursor back to beginning of the field.           |
| <b>End</b>  | Takes the cursor to the end of the field.                  |

## Employee ID Code/Password

Employees are assigned a unique three-digit Employee ID code, password, and access level (entered at system setup by management) which is required for accessing and using the HMIS. Upon entering the system, you must enter the Employee ID code (User Name) and password. Once in the HMIS application, the screens you can access depend upon the access level assigned to you.

This chapter contains instructions for using HMIS and its features. Features appear in alphabetical order and contain field descriptions for all screens and pop-up dialog boxes.

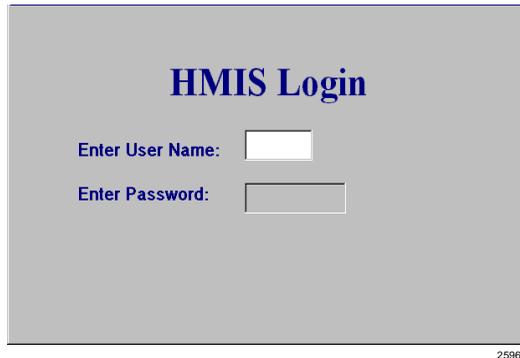
**Important!** *Management must set up the databases and standard telephone settings (e.g., rates, taxes, etc.) before normal operations can begin.*

## Access HMIS

**Important!** *These procedures for logging on and off are provided only in case you accidentally close the Main screen. The Main screen must be displayed at all times. Under no circumstances should you ever deliberately close the program.*

### Logging On

1. Click Start, Programs, then HMISWS icon.

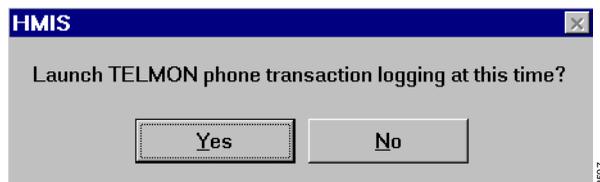


2. Type your User Name and press **Enter**.
3. Type your password and press **Enter**.

The Main screen displays.

**Important!** *If the HMIS was rebooted, the following screens display before the Main screen.*

The Transaction Monitor Program (TelMon) launch pop-up window displays.



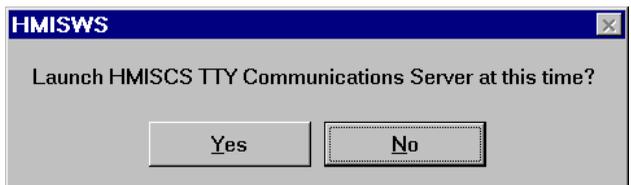
4. Click Yes.

**Important!** *TelMon must always be running on the server to capture telephone call data from the Strata DK SMDR port.*

This displays: .

It is placed on the desktop taskbar to keep the program running minimized in the background.

The HMISCS TTY Communications Server launch pop-up window displays.



**Important!** *The TTY Communications Server communicates directly with the Strata DK system and must always be running.*

## Features

### Additional Text Comments

5. Click Yes.

A **Strata Hospitalit...** is placed on the desktop taskbar. This keeps the communications server running minimized in the background.

The Main screen displays.

## Logging Off

1. From the Main screen, click Exit.



2. Click Yes.

## Additional Text Comments

Three windows provide areas for additional comments: Details Window, Customer Detail Window, and Master Room Setup Window.

### Details Window

Comments can be typed into the Details Window when:

- ♦ Making a reservation – Comments entered in this screen when making a reservation automatically remain in this screen when the guest registers. See [“Make Reservations” on Page 88](#) and [“Details Window” on Page 61](#) for instructions.
- ♦ Check in – Comments entered/displayed in this screen at registration become a part of the guest record and are automatically displayed in the Customer Detail Window (Main screen) after check in. See [“Check in Guest” on Page 41](#) and [“Details Window” on Page 61](#) for instructions.

## Customer Detail Window

Comments can be typed into the Customer Detail Window anytime during the guest's stay. Any comments entered in this screen are automatically deleted when the guest checks out. To manually delete an entry, highlight it and press **Delete**.

1. Highlight the room in the Browse Window.
2. Click Detail.

The screenshot shows a 'Customer Detail' window with the following fields and values:

| Company   |            | Company Phone                       |          |            |
|---|------------|-------------------------------------|----------|------------|
| XYZ Company, Inc.   |            | 714-555-3000                        |          |            |
| Home Address  |            | Home Phone                          |          |            |
| 16666 Main Street   |            | 714-555-3700                        |          |            |
| City  | State      | Zip                                 | Country  |            |
| Woodland  | CA         | 93421                               | USA      |            |
| Auto Make/Model   | Auto Tag # | <input type="checkbox"/> Vip Status | # Adults | # Children |
|   |            |                                     | 1        | 0          |
| Comments  |            |                                     |          |            |
| <div style="border: 1px solid gray; height: 20px;"></div> |            |                                     |          |            |

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3. Type the text in the Comments section.
4. Click Save.

Text automatically wraps around as you enter it. The Comments section can be scrolled to view the entire entry.

## Features

### Additional Text Comments

## Master Room Setup Window

Comments can be typed into the Master Room Setup window at anytime. Any comments entered in this screen must be manually deleted. To delete a comment, highlight the comment and press **Delete**.

1. Click Setup.

Master Room Setup

Room Number: 204 Extension: 204 Port#: 204 Room Type: Single Building: Main

Sub-Extension Port# (Modem Line): 0

Rates: 90.00 100.00 110.00 80.00  
Daily Weekend Holiday Special

Checked Selections:

- Suite
- Cable TV
- Movie Channel Box
- No Smoking Restriction
- Unavailable Due to Repairs
- More Than One Bed Available

Floor: 2 # Double Beds: 0 # Single Beds: 2 Rooms: 1

Comments/Lost and Found

New Record Delete Record

WakeUp Retry Count: 0

Save Main Screen

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2. From the drop-down menu, select the room number.
3. Type the text in the Comments/Lost and Found section.
4. Click Save.

The information about the room (room rates, amenities, etc.) displays on the screen.

Text automatically wraps around as you enter it. The Comments section can be scrolled to view the entire entry.

# Assigned Rooms Screen

The Assigned Rooms screen (shown below) displays a list of all occupied and reserved rooms for a specified date range. This feature enables you to cancel reservations or check-in pending reservation guests.

Each listing consists of the following information: room number and status, reservation dates, guest's last name, confirmation number, and weekly room rate. Click on any column heading to sort the screen by subject (e.g., room number, room status, etc.).

**Assigned Rooms**

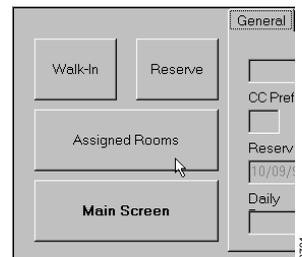
| Room # | Status     | From     | Until    | Last, First       | Conf #       | Rate   |
|--------|------------|----------|----------|-------------------|--------------|--------|
| 202    | Checked In | 09/22/97 | 09/23/97 | Johnson, Randy    | 778AGW104212 | 100.00 |
| 203    | Checked In | 09/22/97 | 09/23/97 | Doolittle, Margie | 778AGW104353 | 100.00 |
| 204    | Checked In | 09/22/97 | 09/23/97 | Harris, Lee       | 778AGW105437 | 100.00 |
| 205    | Checked In | 09/22/97 | 09/23/97 | Pham, Charles     | 778AGW105457 | 100.00 |
| 206    | Checked In | 09/22/97 | 09/23/97 | Jones, Bill       | 778AGW105515 | 100.00 |
| 207    | Checked In | 09/22/97 | 09/23/97 | Wright, Connie    | 778AGW105533 | 100.00 |

Buttons: Cancel, Check-In, Okay

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The screen can be accessed:

- ♦ Automatically during the reservation process.
- ♦ From Check-in/Reservation screens by clicking on the Assigned Rooms button (upper left corner of the screen – shown at right).



## Features

### Assigned Rooms Screen

## Assigned Rooms Screen Fields (Display Only)

| Field             | Description   |
|-------------------|---|
| <b>Room #</b>     | Room number.  |
| <b>Status</b>     | Status of room (see <a href="#">"Room Status" on Page 100</a> for an explanation of room status designations).  |
| <b>From</b>       | Reservation start date.   |
| <b>Until</b>      | Reservation end date.   |
| <b>Last/First</b> | Primary guest's last, first names.  |
| <b>Conf #</b>     | HMIS automatically adds this number during the reservation/check-in (walk-in) process. The number is 12-digits long and consists of the Julian calendar date, employee ID and time the reservation was made or the walk-in guest was checked in. For example, 778AGW130155 represents:<br><br>778:            Julian calendar date<br><br>AGW            Employee ID who made reservation/check-in<br><br>1301:           1:01 p.m.<br><br>55:             55 seconds |
| <b>Rate</b>       | Room rate.  |

## Cancel Reservation

|  |   |
|--|---|
| <ol style="list-style-type: none"><li>1. From the Main screen, click Reserve.</li><li>2. Click Cancel in the calendar portion of the screen.</li><li>3. Click Assigned Rooms in the upper-left corner.</li></ol> | <p>The Reservation screen displays.</p><br><br><br><br><br><br><br><br><br><br><p>The calendar displays. You need to select a range of dates for the reservation(s) you want to view.</p> |
|--|---|

4. Select a start date on the calendar. Click Assigned Check-in Date.
5. Select an end date on the calendar. Click Assigned Check-out Date.
6. Highlight the reservation.
7. Click Cancel.

You can scroll the calendar (months/years) by clicking the scroll buttons (◀ ▶). If you check the wrong date, click Clear Settings to start over.

The Assigned Rooms screen displays with the listing of all occupied and reserved rooms for the range of dates you entered.

This screen can be sorted by any of the columns. Click on the column head you want to search (e.g., guest's last name).



8. Click Yes.
9. Click OK.

## Check in Pending-Reservation Guest

1. From the Main screen, click Check-In.
2. Click Assigned Rooms in the upper-left corner.

The Check-in screen displays.

The calendar displays. You need to select a range of dates for the reservation you want to view.

## Features

### *Automatic Telephone Activation*

3. Select a start date on the calendar. Click Assigned Check-in Date.
4. Select an end date on the calendar. Click Assigned Check-out Date.
5. Highlight the Pending Reservation.
6. Click Check-In.

You can scroll the calendar (months/years) by clicking the scroll buttons (◀ ▶). If you check the wrong date, click Clear Settings to start over.

The Assigned Rooms screen displays with the listing of all occupied and reserved rooms for the range of dates you entered.

This screen can be sorted by any of the columns. Click on the column head you want to search (last name, etc.).

The Main screen displays with the checked-in guest highlighted in the Browse Window.

## Automatic Telephone Activation

This feature turns on the room telephone at check-in. HMIS automatically removes outgoing call restriction and enables local and long distance calling through Least Cost Routing (LCR). It also automatically sets CFBNA to a designated extension/location or the Strategy Voice Processing System.

Upon a guest request, the front desk staff can also manually change these room telephone settings by using the Control/Status Tab screen (see [“Change Phone Service” on Page 40](#) for more details).

## Automatic Wake-up Calls

This feature provides for a single automatic guest wake-up call at a specified time. When the guest requests this service, the front desk enters the request into the Main screen.

HMIS initiates the wake-up call by automatically calling the operator/attendant who can announce the wake-up call to the guest. Or, by integrating an external device, a digitally recorded message, tone, silence or music can be played (music/message source required).

If a wake-up call has not been completed within 15 minutes of the requested time (due to no answer or high wake-up call traffic), an Overdue Wake-up Call Warning is displayed, with an audible beep, on the Main screen of all terminals listing past-due and unsuccessful attempts.

## Prior to Setting Wake-up Calls

**Important!** For the Automatic Wake-up feature to work, the Call Forward–All Calls (CFAC)/DND Call Blocking features must be disabled and the Auto-wakeup Polling feature enabled.

1. From the Main screen, click Control/Status tab.
2. Check the Forwarding setting. If the setting reads Enabled, click Disable DND.

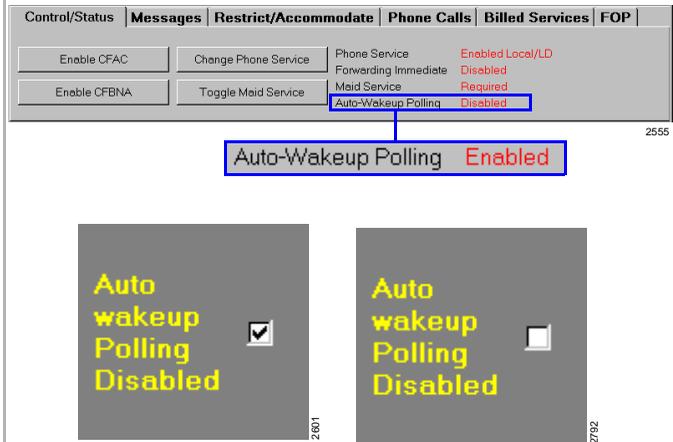
...or if Strategy is installed, check the Forwarding Immediate setting. If the setting reads Enabled, click Enable CFBNA.



## Features

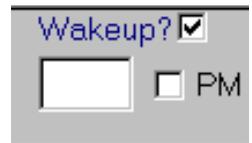
### Automatic Wake-up Calls

3. Check the Auto-Wakeup Polling setting. If the status reads Disabled, click Setup at the bottom of the Main screen.
4. From the right-hand corner of the Setup Utility screen, click Auto Wakeup Polling Disabled to deselect (uncheck) it.

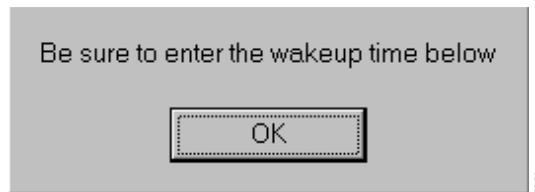


## Set an Automatic Wake-up Call

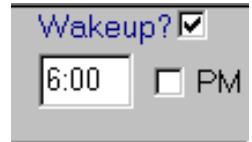
1. From the Main screen, highlight the room in the Browse Window.
2. Click Wakeup? (right top corner of the Main screen).



A pop-up dialog box (shown below) displays as a reminder to enter the time.

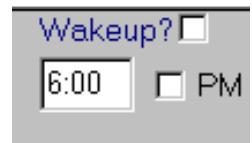


3. Click OK. Type the time in HH:MM format.
4. Check PM, if applicable.



## Cancel an Automatic Wake-up Call

1. From the Main screen, highlight the room in the Browse Window.
2. Click Wakeup? (right top corner of the Main screen) to deselect (uncheck) it.



**Note** The time does not have to be deleted to cancel the auto wake-up call.

## Handle Unanswered/Overdue Wake-up Calls

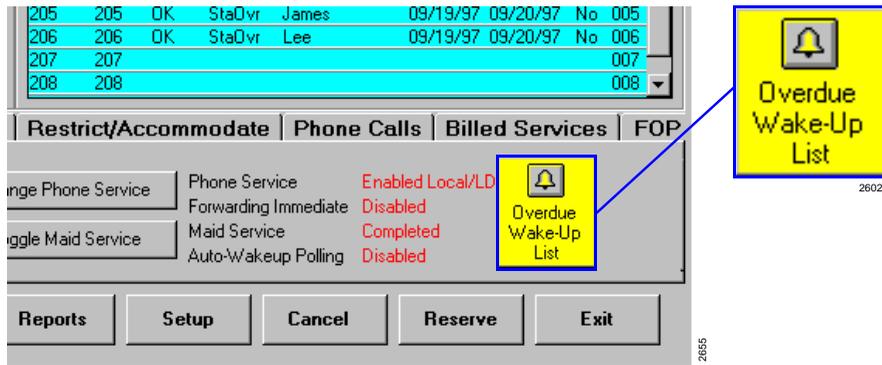
HMIS rings the room a designated number of times (set in Setup Utility). If it is busy/no answer, the system goes on to the next wake-up call.

If the system cannot reach the room within 15 minutes or the maximum number of retries (whichever comes first), the HMIS PC server/workstation screen at the front desk emits an audible beep and an Overdue Wake-up List button displays (shown below).

## Features

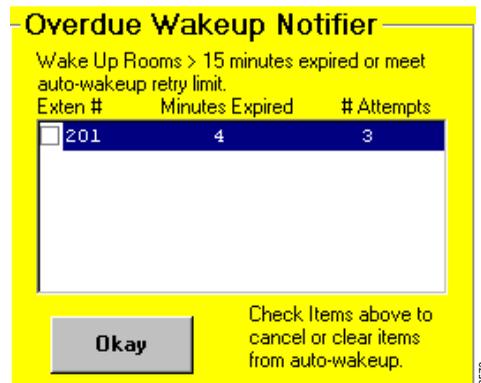
### Automatic Wake-up Calls

By clicking the Overdue Wake-up List button, a screen pop-up box displays with a list of unsuccessful wake-up call attempts. The button remains on the screen for 60 minutes as a reminder or until all wake-up call listings are cleared (checked) from the box.



1. From the Main screen, click Overdue Wake-up List.

The Overdue Wakeup Notifier displays (shown below) with a list of unsuccessful wake-up call attempts. The front desk must now attempt to make the wake-up call to the room.



2. After you have made the wake-up call, click (check) the box next to the room extension number.
3. When finished making wake-up calls, click OK.

This marks the wake-up call for deletion from the list.

If all wake-up calls were made and checked, the Overdue list and button disappear from the Main screen.

If all wake-up calls were not made, the Overdue Wake-up List button remains on the Main screen for 60 minutes as a reminder. If you click on the button a second time, the overdue list displays minus any calls which were made (and checked) the first time.

## View Room Wake-up Call Log

1. From the Main screen, highlight the room in the Browse Window.
2. Click Messages Tab.

| Control/Status        |       | Messages | Restrict/Accommo |           |
|-----------------------|-------|----------|------------------|-----------|
| Wake Up Log           |       |          | Date             | Time      |
| 9/15/97               | 13:28 | Try# 1   |                  |           |
| 9/15/97               | 13:28 | Try# 2   |                  |           |
| 9/15/97               | 13:29 | Try# 3   |                  |           |
| Clear Msgs/Wakup Logs |       |          | Add              | New Messa |

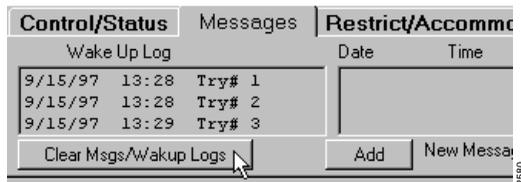
## Features

### Available Room Selection Screen

## Clear Room Wake-up Log

**Note** Room Wake-up Logs are automatically cleared by HMIS when a guest checks out.

1. From the Main screen, highlight the room in the Browse Window.
2. Click Messages Tab.



3. Click Clear Msgs/Wakeup Logs.

**Important!** *This also clears all messages from the room record.*

## Available Room Selection Screen

The Available Room Selection screen (shown on the next page) automatically displays during the check-in (walk-in guest) or reservation processes and cannot be accessed directly. The screen displays the current room selection information and is used to reserve a room or check in a walk-in guest.

The screen can be sorted by any column heading (click on the heading). See “[Check in Walk-in Guest](#)” on Page 42 and “[Make Reservations](#)” on Page 88 for instructions on accessing and using this screen.

| Available Room Selection |     |    |    |       |           |        |       |      |       |        |         |         |         |          |
|--------------------------|-----|----|----|-------|-----------|--------|-------|------|-------|--------|---------|---------|---------|----------|
| Room #                   | Ste | NS | NA | Clean | Type      | # Dble | # Sng | Room | Floor | Daily  | Weekend | Holiday | Special | Building |
| 200 *                    | Y   | N  | N  | N     | Suite     | 2      | 0     | 2    | 1     | 100.00 | 110.00  | 120.00  | 90.00   | Main     |
| 201 *                    | Y   | N  | N  | Y     | Suite     | 2      | 0     | 2    | 1     | 100.00 | 110.00  | 120.00  | 90.00   | Main     |
| 202                      | Y   | N  | N  | Y     | Suite     | 2      | 0     | 2    | 1     | 100.00 | 110.00  | 120.00  | 90.00   | Main     |
| 204                      | Y   | N  | N  | N     | Suite     | 2      | 0     | 2    | 1     | 100.00 | 110.00  | 120.00  | 90.00   | Main     |
| 205                      | Y   | N  | N  | N     | WaterView | 2      | 1     | 2    | 1     | 150.00 | 160.00  | 170.00  | 100.00  | Main     |
| 206                      | Y   | N  | N  | N     | WaterView | 2      | 1     | 2    | 1     | 150.00 | 160.00  | 170.00  | 100.00  | Main     |
| 207                      | Y   | N  | N  | N     | WaterView | 2      | 1     | 2    | 1     | 150.00 | 160.00  | 170.00  | 100.00  | Main     |
| 208                      | Y   | N  | N  | N     | Poolside  | 1      | 2     | 1    | 2     | 120.00 | 130.00  | 150.00  | 90.00   | Main     |

\* Denotes room is currently occupied

Assign Cancel

Rooms that are currently occupied are noted with an \* and a note appears in the lower left-hand corner of the screen.

### Available Room Selection Screen Fields (Display Only)

| Field       | Description   |
|-------------|---|
| Room #      | Room number. An asterisk (*) in this column denotes the room is currently occupied. |
| Ste (Suite) | Is the room a suite? Y/N  |
| NS          | Is there a no-smoking restriction? Y/N  |
| NA          | Is the room unavailable due to repairs? Y/N   |
| Clean       | Has the room been cleaned? Y/N  |
| Type        | Room type (i.e., poolside, double, single).   |
| #Dble/#Sng  | Number of double or single beds in the room(s).                                     |
| Room        | Number of rooms.  |
| Floor       | Floor number.   |

## Features

### Billed Services

| Field   | Description   |
|---|---|
| <b>Rates (Daily, Weekend, Holiday, Special)</b> | Daily, weekend, holiday (seasonal), and special room rates. |
| <b>Building</b>                                 | Location of room in the complex (i.e., main, building #2).  |

## Billed Services

Billed service charges for room service, movies, etc., are entered to the guest account using the Billed Services Tab (shown below) on the Main screen.

| Control/Status   | Messages      | Restrict/Accommodate | Phone Calls | Billed Services | FOP       |        |
|------------------|---------------|----------------------|-------------|-----------------|-----------|--------|
| Service Category | Charges       | Service Date         | Time        | Description     | Okay      | Delete |
| Room Services    | 20            | 9/6/97               | 15:54:30    | Dinner          |           |        |
| Delete Category  | Room Services | 30.00                | 9/5/97      | 15:53           | Dinner    |        |
|                  | Movie Rental  | 4.00                 | 9/5/97      | 15:53           |           |        |
|                  | Room Services | 15.00                | 9/6/97      | 15:54           | Breakfast |        |

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The Service Category field enables you to store new categories in a drop-down menu for future use. The field can also be used to delete an outdated category.

All charges entered on this screen are posted to the guest's bill. Upon payment and check out, the charges are cleared from the room.

## Billed Services Tab Fields

| Field                    | Description  |
|--------------------------|--|
| <b>Service Category</b>  | Describes the type of service rendered (e.g., room service, movie rental). Up to 15 alphanumeric characters.                           |
| <b>Charges</b>           | Charges for service rendered. HMIS converts any numbers to whole dollars if you do not enter a decimal/cents (e.g., 35 becomes 35.00). |
| <b>Service Date/Time</b> | HMIS automatically enters the current date and time. You can write over the entries, if you wish.                                      |
| <b>Description</b>       | Description of service rendered (up to 15 digits).   |

## Add a Service Category

1. From the Main screen, click Billed Services.
2. Enter the new service category.
3. Press **Enter**.

The Billed Services Tab screen displays [Chapter 2 – Features](#).



4. Click Yes.

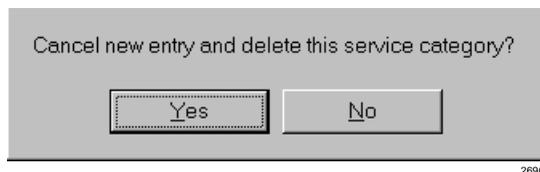
HMIS adds the category to the drop-down menu for future use.

To add another category, repeat Steps 2~4.

## Delete a Service Category

1. From the Main screen, click Billed Services.
2. Select a service category from the drop-down menu.
3. Click Delete Category.

The Billed Services Tab screen displays see [Page 30](#).



## Features

### *Billed Services*

4. Click Yes.

The service category is deleted, but no charges previously entered against the category are deleted from any of the rooms.

To delete previous charges, you must use the [Delete a Service Charge on Page 33](#) procedure on [Page 33](#).

## Add a Service Charge

1. From the Main screen, highlight the room in the Browse Window.

2. Click Billed Services.

The Billed Services Tab screen displays see [Page 30](#).

3. Enter the Service Category.

If the category already exists, you can select the category from the drop-down menu.

If the service category is new, you are asked if you want to save the category and add it to the drop-down menu for future use. Click Yes/No.

4. Enter the charges.

If you do not enter decimal/cents, HMIS converts the amount to whole dollars.

5. Enter the description of the charges (up to 15 digits).

6. Click OK.

The information is displayed in the window. Upon check out, each entry is printed on the guest's consolidated bill under "Billed Services" and cleared from the room record.

## Delete a Service Charge

1. From the Main screen, highlight the room in the Browse Window.
2. Click Billed Services.
3. Highlight the charge and click Delete.

The Billed Services Tab screen displays see [Page 30](#).

**Important!** *You are not asked to confirm the deletion, so be careful what you delete.*

## Browse Window

The Browse/Detail buttons at the bottom of the Main screen provide a toggle feature between the Browse and Customer Detail Windows. The Browse Window (shown below) enables you to search the HMIS database quickly and easily. The front desk clerk can browse room availability or status (i.e., list of all rooms, occupied rooms). When the Occupied Rooms Only option is selected, the window displays the entire hotel guest list. The Browse function is very useful during the check-in or check-out processes for locating guest reservations/room listings.

**Number of Rooms Available**

The screenshot shows the 'Browse Window' interface. At the top, there are radio buttons for search filters: 'All Rooms' (selected), 'Occupied Rooms Only', and 'Check-Out/Renewal Rooms Only'. To the right are radio buttons for room types: 'Rooms Requiring Cleanup', 'Rooms with CFAC Enabled', and 'Rooms With Pending Check-In'. A 'Swap Room' button is located on the right side. A box displays '6 Available'. Below these are columns for 'Rm #', 'Ext #', 'Rsrv?', 'Status', 'Last Name', 'Res From', 'Res Until', 'HC', and 'Port'. A table lists room details for rooms 200 through 208. A 'Sort Selections' label points to the filter options, and a 'Room Listings' label points to the table. A 'Swap Button' label points to the 'Swap Room' button.

| Rm # | Ext # | Rsrv? | Status  | Last Name | Res From | Res Until | HC | Port |
|------|-------|-------|---------|-----------|----------|-----------|----|------|
| 200  | 200   | OK    | StaOvr  | Fellows   | 09/19/97 | 09/20/97  | No | 000  |
| 201  | 201   | OK    | StaOvr  | Harding   | 09/19/97 | 09/20/97  | No | 001  |
| 202  | 202   |       |         |           |          |           |    | 002  |
| 203  | 203   | Yes   | Pending | Brown     | 09/20/97 | 09/21/97  | No | 003  |
| 204  | 204   | OK    | StaOvr  | Randolph  | 09/20/97 | 09/21/97  | No | 004  |
| 205  | 205   | OK    | StaOvr  | James     | 09/19/97 | 09/20/97  | No | 005  |
| 206  | 206   | OK    | StaOvr  | Lee       | 09/19/97 | 09/20/97  | No | 006  |
| 207  | 207   |       |         |           |          |           |    | 007  |
| 208  | 208   |       |         |           |          |           |    | 008  |

## Sort the Browse Window

- Click on column heading (e.g., Last Name) to sort by column subjects  
...or click one of these six sort options (located at top of window):
  - ✦ **All Rooms** – A complete list of rooms. Designates occupied rooms and rooms with pending and expired reservations.
  - ✦ **Occupied Rooms Only** – A list of rooms with checked-in guests.
  - ✦ **Rooms Requiring Check-out/Renewal** – Rooms that have been reserved to the current day and the guests are going to stay over or be checked out.
  - ✦ **Rooms Requiring Cleanup** – Rooms that require maid service.
  - ✦ **Rooms with DND Enabled** (Strategy not installed) – A room that is in DND mode is in a state of call blocking. Calls to that room are forwarded to the front desk. The front desk can call the room, if it is an emergency; otherwise, the front desk takes a message.
  - ✦ **Rooms with CFAC Enabled** (with Strategy installed) – A room in a state of CFAC. Calls automatically go to voice mail. In case of an emergency, the front desk can highlight the room and click Enable CFBNA and call or transfer a call to the room.
  - ✦ **Rooms with Pending Check-in** – Guest is scheduled to check in on current date.

## Swap Button

This button activates the swap/change room feature. HMIS automatically switches the guest information to the new room record. See [“Room Change \(Swap\)” on Page 97](#) for details.

## Number of Rooms Available

HMIS automatically calculates the number of rooms available at the current date/time. This figure is instantly updated when a guest checks out or reservations are entered into the database.

## Browse Window Fields (Display Only)

All of the fields are automatically filled in by HMIS from the information entered in other screens (reservation/check-in screen, etc.).

| Field            | Description   |
|------------------|---|
| <b>Rm #</b>      | Room number.  |
| <b>Ext #</b>     | Extension number.   |
| <b>Rsrv?</b>     | Yes: A reservation is pending.<br><br>OK: A reservation was made and the guest has checked in or the guest is a walk-in guest.<br><br>Late: Guest did not check in. |
| <b>Status</b>    | The status of the room (see <a href="#">"Room Status" on Page 100</a> for explanations of room status).   |
| <b>Last Name</b> | Primary guest's last name.  |
| <b>Res From</b>  | Check-in date set at time of reservation or date walk-in guest checked in.  |
| <b>Res Until</b> | Check-out date set at time of reservation or check in.  |
| <b>HC</b>        | Is the guest handicapped? No or Yes. Defaults to No.  |
| <b>Port</b>      | Port number for telephone hook-up.  |

## Call Forwarding

If the Strategy Voice Processing System is installed, guest room telephones are automatically set to CFBNA calls to Strategy. The guest can request that calls be blocked and all calls forwarded to voice mail.

## Features

### Call Forwarding

CFAC can be enabled/disabled on an individual room basis from the front desk terminal using the Control/Status Tab screen (shown below).



The call forwarding status for the room is:

- ♦ Enabled – CFAC is enabled and all calls forward to Strategy.
- ♦ Disabled – CFAC is disabled and only CFBNA calls forward to Strategy.

Guests can still contact other guests in CFAC mode by placing the call through the system attendant or front desk staff. In case of an emergency, the front desk can highlight the room in the Browse Window, click Enable CFBNA and call or transfer a call to a room. Calls can also be transferred using standard Strata DK override capabilities.

Using the Browse Window, an on-screen display of all rooms/stations that are in CFAC mode is available. If the Strategy Voice Processing System is not installed, you can use the DND Call Blocking feature to block incoming calls (see [“Do Not Disturb Call Blocking” on Page 62](#)).

## Enable CFAC/CFBNA

1. From the Browse Window, highlight the room listing.
2. Click Control/Status Tab.
3. Click Enable CFAC  
...or Enable CFBNA.
4. Click Save.

The Control/Status Tab screen displays see [Page 35](#).

If you selected Enable CFAC, the Forwarding Immediate status reads Enabled. All calls forward to the Strategy message box assigned to the room. The room can be called only by the front desk telephone (designated in the VM/DND Forward Port # on the Settings screen), or by the front desk clerk clicking Enable CFBNA.

If you selected Enable CFBNA, the Forwarding Immediate status reads Disabled. All calls are directed to the room telephone. If the telephone is busy or no answer is received, the call forwards to the Strategy message box assigned to the room.

## Change Guest Information

You can edit information for guests that have checked in or have a pending reservation. Information includes misspelled name, phone numbers, credit card numbers, etc.

### Change Guest Information for Checked-in Guest

---

1. From the Browse Window, highlight the room listing.
2. From the Main screen, function tab screen, or Customer Detail Window, double-click on the field you want to change. Enter the information.
3. Click Save.

You can change information on the Main screen (name, title, room rates, discount, Reserve Until date, etc.), any of the function tab screens (FOP, Restrict/ Accommodate, etc.), or the Customer Detail Window. See the individual screens for detailed information on screen fields.

## Change Guest Information on Pending Reservation

1. From the Assigned Rooms screen, highlight the pending reservation.
2. From the General Window, double-click on the field you want to change. Enter the information.
3. Click Save.
4. Click Details Window tab.
5. Double-click on the field you want to change. Enter the information.
6. Click Save.
7. From the Assigned Rooms screen, click OK.

General Details

First: Jenice, MI: Riderman, Last: Riderman, Conf #: 110497155810

CC Prefix: 5555555555, Credit Card #: 5555555555, Exp Date: 11/98, Room #: 112

Reserv From: 11/04/97, Until: 11/19/97, Date: 11/4/97, Time: 15:58, Clerk: Sup

Daily: 120.00, Wk End Rate: 130.00, Discount %: 0.00

| Room # | Status     | From     | Until    | Last, First        | Conf #       | Rate   |
|--------|------------|----------|----------|--------------------|--------------|--------|
| 100    | Checked In | 11/04/97 | 11/08/97 | Buchanan, Ronald   | 778AGW095641 | 100.00 |
| 101    | Reserved   | 11/11/97 | 11/14/97 | Fields, Sammy      | 778AGW125703 | 100.00 |
| 104    | Reserved   | 11/06/97 | 11/12/97 | Milford, Henry     | 778AGW125634 | 100.00 |
| 104    | Reserved   | 11/07/97 | 11/14/97 | Feldman, Danny     | 778AGW160934 | 100.00 |
| 105    | Reserved   | 11/05/97 | 11/10/97 | Marston, Dorothy   | 778AGW152254 | 100.00 |
| 108    | Reserved   | 11/06/97 | 11/08/97 | Menley, Trevor     | 778AGW153202 | 100.00 |
| 110    | Checked In | 11/04/97 | 11/06/97 | Ridgeway, Jonathon | 778AGW155022 | 100.00 |
| 111    | Checked In | 11/04/97 | 11/07/97 | Brown, Randolph    | 778AGW155719 | 100.00 |
| 112    | Pending    | 11/04/97 | 11/19/97 | Riderman, Jenice   | 778AGW155810 | 100.00 |

Buttons: Cancel, Check-In, Okay, Save

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Details

Home Phone: 714-555-3000, Business Phone: 714-555-3700, Num Children: 1, Num Adults: 2

Travel Agent Code: , Group or Block: , % Commission: , Secured:  Pre-Paid Vouchers: 0.00, VIP Status:

Comment:

Buttons: Save

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## Change Phone Service

Using the Control/Status Tab screen (shown below), the front desk clerk can manually set the telephone service for each room. Telephone settings include turning the telephone service off and enabling in-house calls only, or turning the telephone service on and enabling either local and long distance (no restrictions apply) or local and toll free use only.



The telephone service status for a room is:

- ♦ Enabled Local/LD (long distance) – unlimited calling and 911 calls
- ♦ Enable Local – local, toll-free, and 911 calls
- ♦ Disabled – in-house and 911 calls

### Manually Change Phone Service Status

1. From the Browse Window, highlight the room listing.
2. Click Control/Status Tab.

The Control/Status Tab screen displays (shown above).

3. Click Change Phone Service.

A pop-up box displays:



4. Click Yes to enable long distance and local usage  
...or No to disable long distance usage.

No further messages appear and the Phone Service status on the screen reads Enable Local/LD.

A pop-up box displays:



5. Click Yes to enable local and toll-free usage  
...or No to enable in-house calls only.

The Phone Service status on the screen reads Enable Local.

The Phone Service status on the screen reads Disabled.

## Check in Guest

Guests, with or without reservations, are checked in using the Check-in screen (shown below). During the check-in process, the following items are automatically performed by HMIS:

- ♦ The room telephone is turned on.
- ♦ LCD name is reset to the primary guest's name.

## Features

### Check in Guest

- ◆ If the Strategy Voice Processing System is installed, guest room telephones are set to CFBNA to Strategy.

General/Detail Windows

Reservation Dates

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
|    | 1  | 2  | 3  | 4  | 5  | 6  |
| 7  | 8  | 9  | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 |    |    |    |    |

## Check in Walk-in Guest

**Note** If a Pending Reservation is highlighted when you click Check-In in this procedure, HMIS displays a pop-up box asking you to confirm the check in of the guest with the reservation. Click No and highlight an empty or occupied room.

1. From the Main screen, click Check-In.
2. Click Walk-In.

The Check-in screen displays see [Page 41](#).

The Reservation Date calendar displays with the current date highlighted.

3. Click expected check-out date on the calendar.

You can scroll the calendar (months/years) by clicking the scroll buttons (◀ ▶).

**Note** If you check the wrong date, click Clear Settings to start over.

4. Click Assigned Check-Out Date.

The Available Room Selection screen displays. All available rooms are listed by room number. An asterisk appears next to any room that is currently occupied. (See [“Available Room Selection Screen” on Page 28](#) for field descriptions.)

| Available Room Selection |      |    |    |       |           |        |       |      |       |        |         |         |         |          |
|--------------------------|------|----|----|-------|-----------|--------|-------|------|-------|--------|---------|---------|---------|----------|
| Room #                   | Site | NS | NA | Clean | Type      | # Dble | # Sng | Room | Floor | Daily  | Weekend | Holiday | Special | Building |
| 200                      | Y    | N  | N  | N     | Suite     | 2      | 0     | 2    | 1     | 100.00 | 110.00  | 120.00  | 90.00   | Main     |
| 201                      | Y    | N  | N  | Y     | Suite     | 2      | 0     | 2    | 1     | 100.00 | 110.00  | 120.00  | 90.00   | Main     |
| 202                      | Y    | N  | N  | Y     | Suite     | 2      | 0     | 2    | 1     | 100.00 | 110.00  | 120.00  | 90.00   | Main     |
| 204                      | Y    | N  | N  | N     | Suite     | 2      | 0     | 2    | 1     | 100.00 | 110.00  | 120.00  | 90.00   | Main     |
| 205                      | Y    | N  | N  | N     | WaterView | 2      | 1     | 2    | 1     | 150.00 | 160.00  | 170.00  | 100.00  | Main     |
| 206                      | Y    | N  | N  | N     | WaterView | 2      | 1     | 2    | 1     | 150.00 | 160.00  | 170.00  | 100.00  | Main     |
| 207                      | Y    | N  | N  | N     | WaterView | 2      | 1     | 2    | 1     | 150.00 | 160.00  | 170.00  | 100.00  | Main     |
| 208                      | Y    | N  | N  | N     | Poolside  | 1      | 2     | 1    | 2     | 120.00 | 130.00  | 150.00  | 90.00   | Main     |

\* Denotes room is currently occupied

Assign      Cancel

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5. Highlight the desired room.

**Note** Clicking Cancel on this screen stops the check-in process.

## Features

### Check in Guest

6. In the General Window at the top of the Check-in screen, type the guest's name and credit card information.

| First                               |               | MI         | Last     |          | Conf #       |  |
|-------------------------------------|---------------|------------|----------|----------|--------------|--|
| Joseph                              |               |            | Wright   |          | 778AGW125311 |  |
| CC Prefix                           | Credit Card # |            |          | Exp Date | Room #       |  |
|                                     |               |            |          |          | 131          |  |
| Reserv From                         | Until         | Date       | Time     | Clerk    |              |  |
| 09/17/97                            | 09/20/97      | 9/17/97    | 12:53:11 | sup      |              |  |
| Daily                               | Wk End Rate   | Discount % |          |          |              |  |
| 100.00                              | 105.00        |            |          |          |              |  |
| <input type="button" value="Save"/> |               |            |          |          |              |  |

2605

(See “General Window” on Page 64 for field descriptions.)

7. (Optional) If the basic room rate does not apply, double-click on the Daily and/or Wk. End Rate fields and enter the applicable rate.
8. (Optional) If a room discount applies, enter a discount (X.XX format) in the Discount % field.

For example, if the discount is 5-1/2%, enter 5.50. If you enter a whole number, HMIS adds the decimal and zero fills the two spaces (e.g., 5 becomes 5.00).

9. Click the Details Tab.  
Enter the applicable information.

(See [“Details Window” on Page 61](#) for field descriptions.)

10. In the Available Room Selection screen, click Assign

The guest is checked in and the Main screen displays.

...or click Cancel.

The check-in process is cancelled and no room assignment is made.

11. (Optional) Click Detail at the bottom of the Main screen. Enter or change any information. Click Save.

(See [“Customer Detail Window” on Page 55](#) for field descriptions.)

## Features

### Check in Guest

- Go to “Optional Check-in Requirements” on Page 47.

**Note** The automatic check-in capability turns the room telephone on at check-in.

## Check in Pending Reservation Guest

- From the Browse Window, click Room with Pending Check-In option. Highlight the guest's name/room listing.

The screenshot shows a window titled "Browse Window" with a table of reservations. The table has columns: Rm #, Ext #, Rsrv?, Status, Last Name, Res From, Res Until, HC, and Port. The row for room 209, extension 209, reserved by Leslie, is highlighted. Below the table are tabs for "Restrict/Accommodate", "Phone Calls", "Billed Services", and "FOP". Under "Phone Calls", there are options for "Phone Service" (Enabled Local/LD), "Forwarding Immediate" (Disabled), and "Auto-Wakeup Polling" (Disabled). At the bottom are buttons for "Reports", "Setup", "Cancel", "Reserve", and "Exit".

| Rm # | Ext # | Rsrv? | Status  | Last Name | Res From | Res Until | HC  | Port |
|------|-------|-------|---------|-----------|----------|-----------|-----|------|
| 200  | 200   | Yes   | Pending | Johnson   | 09/19/97 | 09/20/97  | 000 |      |
| 201  | 201   | Yes   | Pending | Lloyd     | 09/19/97 | 09/20/97  | 001 |      |
| 205  | 205   | Yes   | Pending | Miller    | 09/21/97 | 09/22/97  | 005 |      |
| 207  | 207   | Yes   | Pending | Smith     | 09/20/97 | 09/21/97  | 007 |      |
| 209  | 209   | Yes   | Pending | Leslie    | 09/17/97 | 09/19/97  | 009 |      |

You can sort this Window by clicking on any column heading (e.g., guest's last name).

- Click Check-In (upper-left corner of Main screen).

The dialog box contains the text: "Are you sure you want to check-in this 'Pending' reservation?" and two buttons: "Yes" and "No".

- Click Yes.

The Pending reservation disappears from the Browse Window.

4. From the Browse Window, click All Rooms option.
5. Highlight the room listing for the guest you checked in.
6. (Optional) Click Detail (lower portion of Main screen). Enter or change any information. Click Save.

The room records display.

Guest and room information (name, confirmation number, room number, reservation dates, rate, credit card number and expiration date) entered when the reservation was made automatically appear on the Main screen.

The screenshot shows a 'Customer Detail' window with the following fields and values:

|                   |            |                                     |                     |
|-------------------|------------|-------------------------------------|---------------------|
| Company           |            | Company Phone                       |                     |
| XYZ Company, Inc. |            | 714-555-3000                        |                     |
| Home Address      |            | Home Phone                          |                     |
| 16666 Main Street |            | 714-555-3700                        |                     |
| City              | State      | Zip                                 | Country             |
| Woodland          | CA         | 93421                               | USA                 |
| Auto Make/Model   | Auto Tag # | <input type="checkbox"/> Vlp Status | # Adults # Children |
|                   |            |                                     | 1 0                 |
| Comments          |            |                                     |                     |
| 2550              |            |                                     |                     |

(See “[Customer Detail Window](#)” on Page 55 for field descriptions.)

7. Go to “[Optional Check-in Requirements](#)” on Page 47.

**Note** The automatic check-in capability turns the room telephone on at check-in.

## Optional Check-in Requirements

**Does the guest require any special accommodations? If yes,**

1. Click Restrict/Accommodate Tab.
2. Check any requirements (e.g., baby crib, wheel chair).

## Features

### *Check Out Guest with Billing*

3. Click Save.

#### **Is the guest handicapped, therefore having special requirements? If yes,**

- Check the Handicap box at the top of the Main screen. Click Save.

#### **If this is a cash paying guest, does he/she need to make telephone calls that will require charges? If yes,**

The guest needs to make a deposit. See [“Deposit/Payment” on Page 56](#) for instructions on recording the deposit in the room record.

#### **Does the guest require a wake-up call? If yes,**

Follow the instructions in [“Automatic Wake-up Calls” on Page 22](#) to set an automatic wake-up call.

#### **Should the room be billed at Holiday, Seasonal or Special Rates? If yes,**

Follow the instructions in [“Change Room Rate to Holiday/Seasonal or Special Rate” on Page 100](#) to change the rates.

## Check Out Guest with Billing

During the check-out process, the following items are automatically performed by HMIS:

- ♦ All messages and wake-up logs are cleared.
- ♦ Maid Service is set to Required.
- ♦ Phone Service is set to outgoing call restriction.
- ♦ LCD name is reset to Room Number only.
- ♦ Voice mailbox is reset (if Stratagy is installed).

In addition, a Morning Check Out List Report can be printed at any time (see [“Reports” on Page 75](#)). The report lists all rooms expected to check out on the current date. The listing includes room number, extension, guest name, check-in/out dates and number of adults/children in the party.

## Check Out Guest

1. From the Browse Window, highlight the guest's name/room.
2. (Optional) If the guest's stay should be calculated using holiday/seasonal or special rates, click Manual. Enter the correct number of nights for the appropriate rate(s). Click Save.

HMIS calculates the guest's stay at daily and weekend rates. If the guest's stay includes a holiday or should be billed at seasonal or special rates, you must change the number of nights listed in the Nights field.

| Room Rate(s)     |              |  |
|------------------|--------------|--|
|                  | Rate         | Nights                                     |
| Daily            | 110.00       | 2  |
| Weekend          | 120.00       | 1  |
| Holiday/Seasonal | 130.00       | 0  |
| Special          | 90.00        | 0  |
| Discount %       | 0.00         | Manual <input checked="" type="checkbox"/> |
| Conf #           | 778AGW082015 |  |

3. (Optional) If a room discount applies, type a discount (X.XX format) in the Discount % field. Click Save.

For example, if the discount is 5-1/2%, enter 5.50 in the Discount % field. If you enter a whole number, HMIS adds the decimal and zero fills the two spaces (e.g., 5 becomes 5.00).



5. Scroll the screen until the Net Statement Balance displays. Inform the guest of the balance owed.
6. Click Payment Received.

The guest's bill includes all charges they incurred during their stay. This includes room rental, state and local tax, telephone charges, and other billed service charges.

Telephone charges are automatically calculated, using SMDR data and billing rates defined by the user in the Setup Utility.

If the guest requests to see the statement, you can click Print Bill for a copy.



HMIS automatically posts the balance paid to the room record and shows the payment as "checkout" under the Credits and Payments portion of the statement.

A copy of the statement automatically prints with a balance of \$0.00. See ["Sample Consolidated Bill" on Page 52](#).

7. Click OK.

The Main screen displays. The room assignment has been cleared from the Browse and Assigned Rooms Windows.

**Note** If you need a copy of the billing statement after checking out the guest, see ["Reprinting Processed Billing Statements" on Page 86](#) for instructions.

## Features

*Check Out Guest with Billing*

### **Sample Consolidated Bill**

This is only a sample of a guest bill that would be printed during the guest check-out process. The billing statement you print may vary in layout, depending on what your management has set up. Callouts have been added to explain the main portions of a standard bill.

|   |   |                          |                     |
|---|---|--------------------------|---------------------|
|   | TSD SUITES                                |                          |                     |
| ① | 9740 IRVINE BLVD.                         |                          |                     |
|   | IRVINE, CA 92713                          |                          |                     |
|   | PHONE: (714) 555-3700 FAX: (714) 555-6798 |                          |                     |
|   | TUESDAY, JANUARY 21, 1998 3:40:44 PM      |                          |                     |
|   | CUSTOMER ROOM NO. 107 EXTENSION NO: 107   |                          |                     |
|   | HOWARD FELDMAN                            |                          |                     |
| ② | REF: XYZ COMPANY, INC. 714-587-3701       |                          |                     |
|   | 30 MAIN STREET                            |                          |                     |
|   | ANYWHERE, CA 92714 USA                    |                          |                     |
|   | 714-888-8979                              |                          |                     |
|   | CONFIRMATION NO: 778AGW124251             |                          |                     |
| ③ | CREDIT CARD NO: 0123456789 10/98          |                          |                     |
| ④ | BASE RATE DESCRIPTION                     | PER NIGHT                | # NIGHTS            |
|   | DAILY                                     | 120.00                   | 2                   |
|   | TOTAL BASE ROOMCHARGE:                    |                          | 240.00              |
|   | DATE(S):                                  |                          | 10/21/97 - 10/23/97 |
| ⑤ | PHONE BILLING:                            |                          | (NONE)              |
|   | BILLED SERVICES:                          |                          |                     |
| ⑥ | MOVIES                                    | 10/21/97 15:35 RENTAL    | 5.00                |
|   | ROOM SERVICE                              | 10/21/97 15:35 BREAKFAST | 20.00               |
|   | ROOM SERVICES                             | 10/21/97 15:35 DINNER    | 30.00               |
|   |   | TOTAL SERVICES:          | 55.00               |
|   | PRE-TAX CHARGES:                          |                          | 295.00              |
| ⑦ | LOCAL AND STATE TAXES:                    |                          | 14.75               |
|   | TOTAL CHARGES:                            |                          | 309.75              |
| ⑧ | CREDITS AND PAYMENTS:                     |                          | 309.75              |
|   | **** PRIOR PAYMENT CREDIT ACTIVITY ****   |                          |                     |
|   | 10/21/97 15:40 CR HF                      | PAYMENT                  | 120.00              |
|   | 10/23/97 11:15 CR HF                      | CHECKOUT                 | 189.75              |
| ⑨ | NET STATEMENT BALANCE:                    |                          | \$0.00              |

## Features

### *Check Out Guest with Billing*

#### Callouts

- ① Company Information — Hotel/motel name, address, telephone and fax numbers, and day/date/time bill was printed. Information is entered into the Company screen in System Setup.
- ② Guest Information — Guest name, company affiliation, work telephone number, and home address and telephone number. Information entered into Details Window on Reservation/Check-in screens or Customer Detail Window on Main screen.
- ③ Credit Card Information — Credit card number and expiration date. The Print Credit Card number on Statement option must be selected on the Settings screen in System Setup for this to print.
- ④ Hotel Information — Base room rate, # nights, reservation dates. Information entered into Reservation or Check-in screens.
- ⑤ Phone Billing — Number and type of calls, charges. Automatically entered by HMIS into the Phone Calls Tab screen (Main screen) during guest's stay in the hotel/motel.
- ⑥ Billed Services — Room service, movies, etc. Entered into the Billed Services Tab screen on the Main screen during the guest's stay.
- ⑦ Tax Information — Local, state or special taxes. Rates entered into the Settings screen in System Setup.
- ⑧ Credits or Payments — Entered into the FOP Tab screen on the Main screen during the guest's stay.
- ⑨ Net Statement Balance — Automatically calculated by HMIS. By clicking Payment Received on the Billing Statement screen, HMIS automatically credits the final payment and prints the billing statement with a Net Statement Balance of \$0.00.

## Customer Detail Window

The Detail button at the bottom of the Main screen provides a toggle feature between the Browse and Customer Detail Windows (shown below). Any information previously entered on the Check-in or Reservation screens (i.e., home telephone, business telephone, or number of adults/children in party) automatically appears on this screen.

The screenshot shows a window titled "Customer Detail" with the following fields and values:

- Company:** XYZ Company, Inc.
- Company Phone:** 714-555-3000
- Home Address:** 16666 Main Street
- Home Phone:** 714-555-3700
- City:** Woodland
- State:** CA
- Zip:** 93421
- Country:** USA
- Auto Make/Model:** (empty)
- Auto Tag #:** (empty)
- Vip Status:**
- # Adults:** 1
- # Children:** 0
- Comments:** (empty text area with scroll arrows)

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## Customer Detail Window Fields

| Field                      | Description  |
|----------------------------|--|
| <b>Company</b>             | The name of the company the guest represents.  |
| <b>Company Phone</b>       | The guest's company telephone number. Area code must be included in the format (XXX-XXX-XXXX). HMIS automatically adds the dashes for you. |
| <b>Home Address</b>        | Guest's home address (i.e., street address, city, state, zip, country).  |
| <b>Home Phone</b>          | Guest's home telephone number. Area code must be included in the format (XXX-XXX-XXXX). HMIS automatically adds the dashes for you.        |
| <b>Auto Make/Model</b>     | Make/Model of guest's car.   |
| <b>Auto Tag #</b>          | License plate number of guest's car.   |
| <b># Adults/# Children</b> | Number of adults/children in party.  |
| <b>Comments</b>            | Any pertinent comments.  |

## Features

### Deposit/Payment

## Add or Change Registered Guest Information

**Note** You cannot use this screen to add or change a guest with a Pending reservation.

1. From the Browse Window, highlight the room listing.
2. At bottom of the Main screen, click Detail.
3. Enter or change any information on the screen.
4. At the bottom of the Main screen, click Save.

The Customer Detail Window displays see [Page 55](#).

## Deposit/Payment

Using the FOP Tab screen (shown below), you can enter the form (cash, check or credit card), amount and type of the deposit/payment.

Deposits/payments may be made for room or phone deposits. They are credited to the guest's account and are deducted automatically from the guest's billing statement.

| Control/Status   | Messages   | Restrict/Accommodate | Phone Calls | Billed Services                            | FOP   |
|--|--|----------------------|-------------|--|---|
| Initial FOP<br><input type="radio"/> Cash<br><input checked="" type="radio"/> Credit Card<br><input type="radio"/> Check | CC Prefix <input type="text" value="AX"/> Exp Date <input type="text" value="9-99"/> |                      |             |  |   |
| Act. # <input type="text" value="12345678901234567890"/>   |  |                      |             |  |   |
| Drivers License # <input type="text"/>   | State <input type="text"/>   |                      |             |  |   |
|  |  |                      |             | <input type="button" value="New Deposit"/> | Total Deposits: <input type="text" value="100.00"/> |

| Date     | Time  | FOP | Payee | Ref     | Amount |
|----------|-------|-----|-------|---------|--------|
| 09/20/97 | 11:15 | CA  | GP    | Payment | 100.00 |

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## Cash Deposit for Telephone Charges

If the guest is a cash paying customer, a deposit must be made and entered into this screen to enable calls that require charges (e.g., long distance, international calls). HMIS records the deposit on this screen and the Phone Calls Tab screen.

As calls are made, the telephone charges are deducted from the deposit on the Phone Calls Tab screen. When the deposit balance reaches zero, telephone status is automatically changed to restrict any calls requiring charges. For additional information, see [“Phone Call Records” on Page 72](#).

## FOP Tab Fields

| Field                          | Description  |
|--------------------------------|--|
| <b>Cash/Credit Card/Check</b>  | Select one. If a credit card was listed at time of reservation/ check-in, credit card is already selected.   |
| <b>CC Prefix</b>               | Up to two digits, alphanumeric. If entered on Reservation/ Check-in screen, the information is displayed here.   |
| <b>Exp Date</b>                | Up to eight digits, alphanumeric. Any format is acceptable (e.g., MM/YY, MM-YY, YY/MM). If entered on Reservation/ Check-in screen, the information is displayed here. |
| <b>Act #</b>                   | Up to 20 digits, alphanumeric. If entered on Reservation/ Check-in screen, the information is displayed here.  |
| <b>Drivers License #/State</b> | Valid driver's license number (20 digits) and state of issue (2 digits).   |

## FOP Tab Fields (Display Only)

The following fields are for display only. HMIS automatically transfers your input from the pop-up dialog boxes when you make a deposit/payment (see [Enter Deposit/Payment on Page 58](#) below).

| Field            | Description                             |
|------------------|---|
| <b>Date/Time</b> | The date/time deposit was made.         |
| <b>FOP</b>       | CA = cash, CR = credit card, CK = check |
| <b>Payee</b>     | Initials of the payee.                  |

## Features

### Deposit/Payment

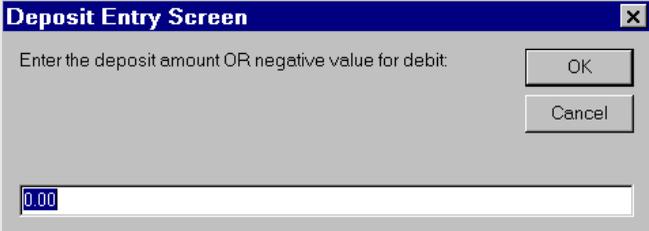
| Field  | Description   |
|--------|---|
| Ref    | Reference code applicable to the deposit (10-digits max., alphanumeric characters). If the form of payment is credit card or check, this field defaults to "Payment." If the form of payment is cash, it defaults to "Phone." |
| Amount | Amount of deposit paid.   |

## Enter Deposit/Payment

1. From the Browse Window, highlight the room listing.
2. Click FOP Tab.
3. In the Initial FOP field, select Cash, Credit Card or Check.
4. (Optional) For check payments, enter the driver's license number/state.
5. Click New Deposit.

The FOP Tab screen displays see [Page 56](#).

If the credit card information was entered during reservation/check-in, Credit Card is already selected and the credit card information displays on this screen.

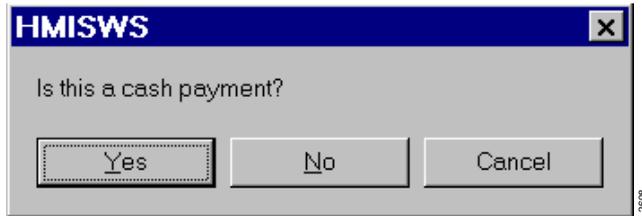


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**Note** Pressing **Esc** anytime prior to [Step 9](#), takes you back to this screen to start over.

6. Type the amount of the deposit. Click OK.

If you do not enter decimal/cents, HMIS converts the amount to whole dollars. Negative figures (e.g., -5.00) can be entered.

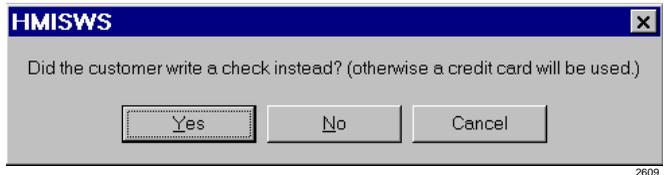


**Note** If you click Cancel in this step or in [Steps 7~9](#), HMIS goes back to the Deposit Entry Screen in [Step 5](#).

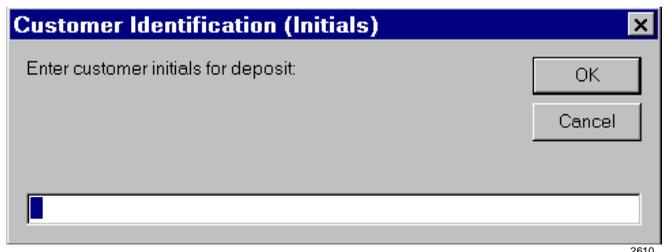
7. Click Yes for a cash deposit  
...or No for check or credit card deposit.

Customer Identification (Initials) screen displays (shown in [Step 8](#)). Go to [Step 9](#).

If you answer No, the screen below displays.



8. Click Yes if the guest is paying by check

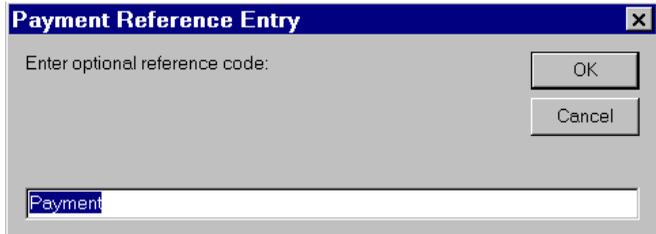


## Features

### Deposit/Payment

- ...or No if the guest is using a credit card.
9. Type the customer's initials as a form of ID. Click OK.
  10. Type a code or ID for the type of payment being made (10-digit alphanumeric)  
  
...or if you do not want a reference code, click Cancel.
  11. If you typed a code in [Step 10](#), click OK.

If you answer No, HMIS automatically charges the credit card for the amount of deposit/payment.



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If the form of payment is credit card or check, this field defaults to "Payment." If the form of payment is cash, it defaults to "Phone."

The entry appears on the FOP Tab screen without a code.

**Important!** *If this is a cash customer making a deposit for telephone calls, you must enter the word Phone in this field. If you do not, the deposit is not credited to the telephone calls and the Phone Calls Tab screen does not show a deposit. The customer is then unable to make any chargeable telephone calls from his/her room.*

The entry appears on the FOP Tab screen. If it is a Phone deposit, it also appears in the Phone Calls Tab screen.

## Change Amount of Deposit

Once a deposit is made, the entry cannot be changed. If it is necessary to change the amount of deposit, you can make a new deposit entry. Deposits can be made for negative amounts and would be reflected on the billing at check-out and subtracted from the Phone Calls Tab screen, if applicable.

## Details Window

The Detail Window (shown below) displays automatically during the check-in and reservation processes or can be accessed from the Assigned Rooms screen at anytime.

The Window enables you to enter guest information which is then displayed on the Customer Detail Window on the Main screen after the guest registers. To view or edit screen information for a pending reservation, see [“Change Guest Information on Pending Reservation” on Page 39](#) for instructions.

## Details Window Fields

| Field                 | Description  |
|-----------------------|--|
| <b>Home Phone</b>     | Guest’s home telephone number. Area code must be included in the format (XXX-XXX-XXXX). HMIS automatically adds the dashes for you.        |
| <b>Business Phone</b> | The guest’s company telephone number. Area code must be included in the format (XXX-XXX-XXXX). HMIS automatically adds the dashes for you. |

## Features

### *Do Not Disturb Call Blocking*

| Field                               | Description  |
|-------------------------------------|--|
| <b>Num Children/<br/>Num Adults</b> | Number of adults/children in party.                        |
| <b>Travel Agent Code</b>            | Travel agent's ID code (max. 10 alphanumeric digits).      |
| <b>Group or Block</b>               | Group or block ID number (max. seven alphanumeric digits). |
| <b>% Commission</b>                 | Travel agent's commission (percentage).                    |
| <b>Secured</b>                      | Billed deposit.  |
| <b>Pre-Paid Vouchers</b>            | Gift certificates.   |
| <b>VIP Status</b>                   | Flag denoting VIP status.                                  |
| <b>Amount</b>                       | Amount of Pre-Paid Voucher.                                |
| <b>Comments</b>                     | Any pertinent comments.                                    |

## Do Not Disturb Call Blocking

When this feature is set, guest room telephones are blocked from receiving calls. This feature is typically used at the guest's request during late night hours to block room-to-room calling or to avoid nuisance calls.

DND can be enabled or disabled on an individual room basis from the front desk terminal, using the Control/Status Tab screen (shown below).



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The call blocking status for the room is:

- ◆ Enabled – Room telephone is in DND mode. All calls ring to the front desk.
- ◆ Disabled – Only forwards calls to the front desk when the room telephone is busy or the guest does not answer.

Guests can still contact other guests with DND enabled by placing the call through the system attendant or front desk staff. In case of an emergency, the front desk can highlight the room and click Disable DND and call or transfer a call to the room. Calls can also be transferred using standard Strata DK override capabilities.

Using the Browse Window, an on-screen display of all rooms/stations that are in DND mode is available. If the Strategy Voice Processing System is installed, all calls can be forwarded to the guest’s voice mailbox and retrieved later by the guest (see “[Call Forwarding](#)” on [Page 35](#)).

## Enable/Disable DND

|   |  |
|---|--|
| <ol style="list-style-type: none"> <li>1. From the Browse Window, highlight the room listing.</li> <li>2. Click Control/Status Tab.</li> <li>3. Click Enable DND</li> </ol> | <p>The Control/Status Tab screen displays see <a href="#">Page 62</a>.</p> <p>The Forwarding status reads Enabled.</p> <p>The room can be called only by the front desk telephone (designated in the VM/DND Forward Port # on the Settings screen), or by the front desk clerk clicking Disable DND.</p> |
| <p>...or Disable DND.</p>   | <p>The Forwarding status reads Disabled. All calls are directed to the room telephone.</p>   |

## Features

FOP (Form of Payment) Tab Screen

# FOP (Form of Payment) Tab Screen

See [“Deposit/Payment” on Page 56](#) for instructions on using the screen.

## General Window

The General Window (shown below) displays automatically during the check-in and reservation processes or can be accessed from the Assigned Rooms screen at anytime.

The Window enables you to enter guest information which is then displayed on the Main screen after the guest registers. To view or edit screen information for a pending reservation, see [“Change Guest Information on Pending Reservation” on Page 39](#) for instructions.

The screenshot shows a 'General' window with the following fields and values:

| First       | MI            | Last       | Conf #       |       |
|-------------|---------------|------------|--------------|-------|
| Joseph      |               | Wright     | 778AGW125311 |       |
| CC Prefix   | Credit Card # | Exp Date   | Room #       |       |
|             |               |            | 131          |       |
| Reserv From | Until         | Date       | Time         | Clerk |
| 09/17/97    | 09/20/97      | 9/17/97    | 12:53:11     | sup   |
| Daily       | Wk End Rate   | Discount % |              |       |
| 100.00      | 105.00        |            | Save         |       |

## General Window Fields

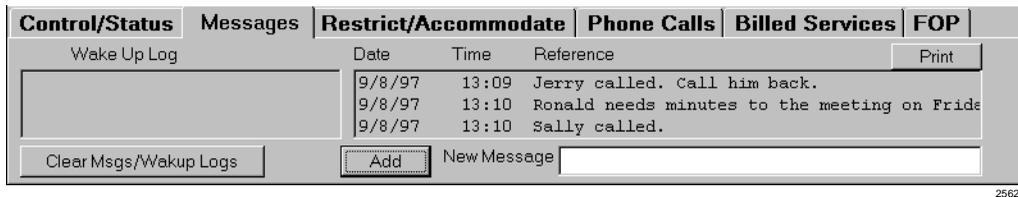
| Field                | Description   |
|----------------------|---|
| <b>First/MI/Last</b> | (Required) The guest's first and last name. The middle initial is optional.             |
| <b>CC Prefix</b>     | Up to two digits, alphanumeric.   |
| <b>Credit Card #</b> | Up to 21 digits, alphanumeric.  |
| <b>Exp Date</b>      | Up to eight digits, alphanumeric. Any format is acceptable (e.g., MM/YY, MM-YY, YY/MM). |
| <b>Discount %</b>    | The discount that applies (e.g., special club membership).                              |

## General Window Fields (Display Only)

| Field               | Description   |
|---------------------|---|
| <b>Conf #</b>       | <p>HMIS automatically adds this number during the reservation/ check-in (walk-in) process. The number is 12-digits long and consists of the Julian calendar date, employee ID and time the reservation was made or the walk-in guest was checked in.</p> <p>For example, 778AGW130155 represents:</p> <p>778: Julian calendar date</p> <p>AGW Employee ID who made reservation/check-in</p> <p>1301: 1:01 p.m.</p> <p>55: 55 seconds.</p> |
| <b>Room #</b>       | <p>HMIS fills in this field from your selection in the Available Room Selection screen.</p>   |
| <b>Reserv From</b>  | <p>HMIS fills in this field from calendar selections.</p>   |
| <b>Until</b>        | <p>HMIS fills in this field from calendar selections.</p>   |
| <b>Date</b>         | <p>HMIS fills in this field with current date.</p>  |
| <b>Time</b>         | <p>HMIS fills in this field with current time.</p>  |
| <b>Clerk</b>        | <p>HMIS fills in this field from the employee user name at log-in time.</p>   |
| <b>Daily</b>        | <p>HMIS fills in this field from your room selection in the Available Room Selection screen.</p>  |
| <b>Wk. End Rate</b> | <p>HMIS fills in this field from your room selection in the Available Room Selection screen.</p>  |

# Guest Messaging

The Messages Tab screen displays (shown below) all messages and wake-up calls for the room. Multiple messages for guests can be entered into the system from the front desk terminal for later display or printing.



**Note** If the Strategy Voice Processing System is installed, guest room telephones are automatically set to route CFBNA calls to designated mailboxes in Strategy.

The guest can request that calls be blocked and all calls forwarded to voice mail. CFAC can be enabled/disabled on an individual room basis from the front desk terminal using the Control/Status Tab screen (see [“Call Forwarding” on Page 35](#) for details).

See *Strategy Voice Processing User Guide* for details on using the system.

## Messages Tab Fields

| Field              | Description   |
|--------------------|---|
| <b>Wake-up Log</b> | Displays the auto wake-up calls made to the room and the results.   |
| <b>Date/Time</b>   | Automatically added by HMIS when message is added.  |
| <b>Reference</b>   | Message typed in New Message field.   |
| <b>New Message</b> | Any message up to 50 alphanumeric characters.   |
|                    | <b>Note</b> When maximum number of characters are entered, the screen displays only a portion of the message but the full message prints. |

## Enter Messages

- |  |  |
|--|--|
| <ol style="list-style-type: none"><li>1. From the Main screen, highlight the room in the Browse Window.</li><li>2. Click Messages Tab.</li><li>3. Type a message (up to 50 alphanumeric characters).</li><li>4. Click Add.</li></ol> | <p>The Messages Tab screen displays see <a href="#">Page 66</a>.</p> <p><b>Note</b> If a long message is entered, the message appears cut-off on the screen; however, the full message prints.</p> <p>The message, time/date stamped, is placed in the window.</p> |
|--|--|

## Print Messages

- |  |  |
|--|--|
| <ol style="list-style-type: none"><li>1. From the Main screen, highlight the room in the Browse Window.</li><li>2. Click Messages Tab.</li><li>3. Click Print.</li></ol> | <p>The Messages Tab screen displays (see <a href="#">Page 66</a>).</p> <p>All messages print on a single page. At the top of the printout, the number of messages, room number, guest's name, and extension number is noted.</p> |
|--|--|

## Clear Messages

---

1. From the Main screen, highlight the room in the Browse Window.
2. Click Messages Tab.
3. Click Clear Msgs/Wakeup Logs.

The Messages Tab screen displays (see [Page 66](#)).

All messages for the room are cleared.

**Important!** *This also clears the records from the Wakeup Log.*

## Guest Name LCD Display

The LCD of administrative telephones at the front desk, room service, and other service locations shows the primary registered guest's last name when the guest calls (LCD name/number display).

The guest's name is automatically entered from the HMIS into the Strata DK telephone system during the check-in registration process and changed back to the room number during the check-out process.

## Length of Stay (Reserve Until Date)

A guest's expected length of stay is entered into the HMIS database using the calendar on the Reservation or Check-in screen. After check in, changes in the guest's plans can be made in HMIS using the following procedures.

### Guest Checks Out Early

No additional entries are required. Check out the guest in the usual manner. HMIS automatically recalculates the room charges using the current date for the Reserve Until date.

## Guest Extends Stay

1. From the Main screen, highlight the room in the Browse Window.
2. Double-click the date in the Reserve until field and type the new date.

If the date conflicts with an upcoming reservation, a pop-up box displays (shown below). The guest will have to swap rooms (see [“Room Change \(Swap\)” on Page 97](#)).



3. Click Save.

## Maid Service Activity

When a maid enters a room to clean, he/she should enter a code into the system using the room telephone. The code consists of a telephone access code + 3-digit Employee ID Code + 4-digit Maid Service Start Code and notifies HMIS that a maid is in the room for the purpose of cleaning. The status of the Maid Service field on the Control/Status Tab screen changes to “Completed.”

Upon finishing the room, the maid enters a second code into the system. The code consists of a telephone access code + 3-digit Employee ID Code + 4-digit Maid Service Complete Code and notifies HMIS that the maid has completed the room cleaning.

**Note** Authorized personnel must enter the employee ID code (Employee ID Code screen) and the Maid Service Start and Complete Codes (Settings screen) in the Setup Utility.

## Features

### *Maid Service Activity*

A Maid Activity Report, can be viewed/printed by authorized personnel, whenever necessary. The report shows maid activity by room and can be printed for a specified range of dates. (See “[Reports](#)” on [Page 75](#).)

## Enter Maid Activity Codes

---

|   |   |
|---|---|
| 1. On start of room cleaning, the maid enters the maid service start code using the telephone dial pad.         | Maid Service field on the Control/Status Tab screen changes from Required to Completed.<br><br>A sample code is: <b>#7+100+*7*7</b> .<br><br>where: <b>#7</b> = Telephone Access Code<br><b>100</b> = Employee ID Code<br><b>*7*7</b> = Maid Service Start Code |
| 2. When room cleaning is finished, the maid enters the maid service complete code using the telephone dial pad. | A sample code is: <b>#7+100+*0*0</b> .<br><br>where: <b>#7</b> = Telephone Access Code<br><b>100</b> = Employee ID Code<br><b>*0*0</b> = Maid Service Complete Code   |

# Maid Service Status

From the front desk HMIS PC, the maid service requirement for a room can be manually changed, using the Control/Status Tab screen (shown below).



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The room status for maid service is:

- ♦ Required – At check-out, rooms are automatically set to Required.
- ♦ Completed – Status changes to completed once the maid has entered a special code at start of the room cleaning (see [“Maid Service Activity” on Page 69](#)).

## Manually Change Maid Service Status

|  |   |
|--|---|
| <ol style="list-style-type: none"> <li>1. With the room highlighted in the Browse Window, click Control/Status.</li> </ol> | <p>The Control/Status Tab screen displays (shown above).</p>          |
| <ol style="list-style-type: none"> <li>2. Click Toggle Maid Service.</li> </ol>  | <p>Maid Service changes from Required to Completed or vice versa.</p> |

## Features

### Phone Call Records

# Phone Call Records

Room telephone charges are displayed on the Phone Calls Tab screen (shown below).

| Control/Status |    | Messages |         |              | Restrict/Accommodate |         |         |         | Phone Calls |          | Billed Services | FOP       |
|----------------|----|----------|---------|--------------|----------------------|---------|---------|---------|-------------|----------|-----------------|-----------|
| Local          | TF | LD       | Foreign | Balance      | AC                   | Phone # | Mode    | Date    | Time        | Duration | Charges         | Clear All |
| 1              | 1  | 1        | 1       | 48.00        | 254                  | 7896523 | LD      | 9/16/97 | 16:11       | 00:02;43 | 1.00            |           |
| Deposit        |    |          |         | Deposit Date | Time                 | 800     | 7896523 | TF      | 9/16/97     | 16:14    | 00:00;46        | 0.00      |
| 50.00          |    | 9/16/97  | 16:15   |              | 011                  | 5632589 | FOR     | 9/16/97 | 16:16       | 00:01;01 | 1.00            |           |

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## Telephone Charges

Telephone charges are automatically calculated, using SMDR data and billing rates defined by authorized personnel. At check-out, the telephone charges are included on the guest's consolidated bill, the telephone call data is cleared from the screen, and HMIS resets the telephone service to outgoing call restriction.

**Note** A call is billed when the valid call time (set in zero cost threshold on the Settings screen by authorized personnel) has passed and there is no answer supervision. If a guest lets the telephone ring for more than the set time (default is 42 seconds), a charge is logged. This call may be disputed and can be deleted.

In order for the Phone Calls Tab screen to display calls that do not have charges, the Display Zero-Cost Calls option must be selected on the Settings screen in the Setup Utility.

## Telephone Deposit (Cash Customer)

If the guest is a cash paying customer, a deposit must be made and entered into the FOP Tab screen to enable calls that require charges (e.g., long distance, international calls). Without this deposit, the customer cannot make chargeable calls.

## Restricted/Emergency/Credit Card Calls

Restricted calls attempted from guest room telephones are sent an error tone. Emergency calls (9+911) override all restrictions. Guests can use the "0+" Credit Card Calling feature to *bypass* toll restriction, so that the calls are billed directly to their telephone credit card. This provides flexibility and control of telephone usage.

---

**CAUTION! 0+ dialing also permits person-to-person calls billed back to the room telephone. Hotel Billing Information Center (HOBIC) trunks must be used to prevent this from happening.**

---

## Phone Calls Tab Fields (Display Only)

| Field                     | Description  |
|---------------------------|--|
| <b>Local</b>              | Number of local calls made from the room.  |
| <b>TF (toll free)</b>     | Number of toll-free calls made from the room.  |
| <b>LD (long distance)</b> | Number of long distance calls made from the room.  |
| <b>Foreign</b>            | Number of foreign (international) calls made from the room.  |
| <b>Balance</b>            | <p>Represents a cash paying customer's deposit (shown in Deposit field) minus any phone charges incurred.</p> <p>HMIS adds total telephone charges and subtracts the amount from the deposit. When the monies have been exhausted, HMIS automatically changes the telephone service for the room back to local/toll-free only. If there are also charges for local calls, HMIS turns local access off as well.</p> <p>If the guest is a cash paying customer and plans on making chargeable telephone calls, he/she must make a phone deposit.</p> |
| <b>Deposit</b>            | <p>The deposit is entered into the FOP Tab Screen and registers in both the FOP Tab screen and in this field (see <a href="#">"Deposit/Payment" on Page 56</a> for detailed information).</p> <p>Without a deposit, the guest can not make any calls from the room which require charges. If there are charges for local calls, the room telephone is limited to in-house and 911 calls.</p> <p>If a guest attempts to make a restricted call, the guest room telephone is sent an error tone.</p>   |
| <b>Deposit Date</b>       | Date deposit entered into FOP Tab screen.  |
| <b>Time</b>               | Time deposit entered into FOP Tab screen.  |

## Features

### Phone Call Records

| Field              | Description  |
|--------------------|--|
| AC                 | Area code of number called.  |
| Phone #            | Telephone number called.   |
| Mode               | LD = long distance, LOC = local, TF = toll free, FOR = foreign.  |
| Date/Time/Duration | Date, time and duration of the call.   |
| Charges            | HMIS automatically calculates charges based on the duration of the call and the rate set in the Settings screen (Setup Utility). |

## View Telephone Service Charges

- With the room highlighted in the Browse Window, click Phone Calls. The Phone Calls Tab screen displays see [Page 72](#).

## Delete a Charge

|   |   |
|---|---|
| 1. With the room highlighted in the Browse Window, click Phone Calls. | The Phone Calls Tab screen displays see <a href="#">Page 72</a> . |
| 2. Highlight the charge and click Delete Row.                         | The charge is deleted from the room record.                       |

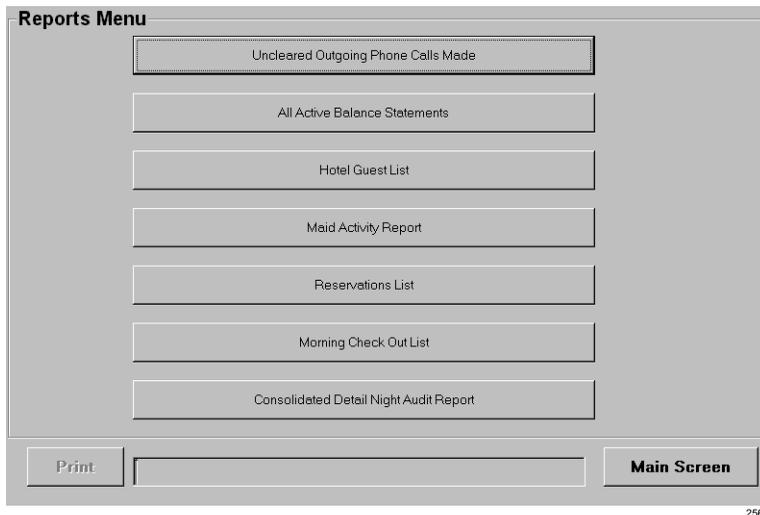
## Clear all Charges

**Note** Upon check-out, all phone charges are automatically cleared.

|   |   |
|---|---|
| 1. With the room highlighted in the Browse Window, click Phone Calls. | The Phone Calls Tab screen displays see <a href="#">Page 72</a> . |
| 2. Click Clear All.   | All charges are deleted from the room record.                     |

# Reports

Reports are generated at the front desk terminal and can be displayed on the screen or printed. By clicking on the Reports button at the bottom of the Main screen, the Reports Menu screen displays (shown below).



The report menu choices consist of:

- ♦ **Uncleared Outgoing Telephone Calls Made** – Printed by the night auditor on a daily basis. The report lists all calls from guests that have not been billed.
- ♦ **All Active Balance Statements** – Printed by the night auditor on a daily basis. The report lists the current net balance for the room and includes room number/extension, guest name, and itemized charges against the room.
- ♦ **Hotel Guest List** – Printed for the front desk on a daily basis. The report lists current guest list and includes room number/extension, room status, guest name, reservation dates, and number of guests (adults/children).
- ♦ **Maid Activity Report** – Printed by a manager, the report lists maid activity for either the current date or a specified date range. Information includes maid ID/name, actions, extension, date and time activity took place.

- ♦ **Reservations List** – Printed for the front desk on a daily basis, usually by the night manager. The report lists reservations for either the current date or a specified date range. Information includes room number, reservation dates, guest name, confirmation number, room rates (daily/weekend) and room status.
- ♦ **Morning Check Out List** – Printed for the front desk on a daily basis, usually by the night manager. The report lists guest's due for check out on the current date. Information includes room number/extension, room status, guest name, reservation dates, and number of guests (adults/children).
- ♦ **Consolidated Detail Night Audit Report** – Printed by the night auditor on a daily basis. The report displays figures for only the date entered. Figures are not cumulative totals for previous day(s). The report lists the current gross and net figures, subtotal and balance owed for each room. Also includes room numbers/ extensions, itemized charges against each room and totals for all rooms.

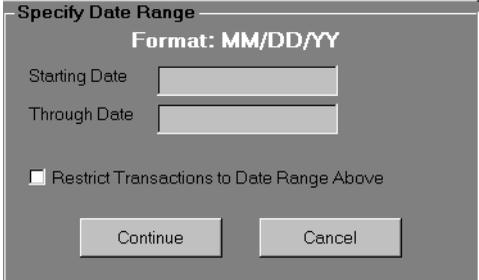
The report shows either all rooms or only the rooms with balances, depending on a selection made by management during system setup.

## View/Print Uncleared Outgoing Telephone Calls Made Report

1. From the Main screen, click Reports.
2. Select the Uncleared Outgoing Telephone Calls Made option.

The Reports Menu displays see [Page 75](#).

A pop-up dialog box appears.



The dialog box is titled "Specify Date Range" and has a dark gray background. At the top, it says "Format: MM/DD/YY". Below this, there are two text input fields: "Starting Date" and "Through Date". Underneath these fields is a checkbox labeled "Restrict Transactions to Date Range Above". At the bottom of the dialog box, there are two buttons: "Continue" and "Cancel".

2614

3. Click Continue

...or Restrict

Transactions to Date  
Range Above and  
type starting/through  
dates. When finished,  
click Continue.

The report displays for the current date only.

The report displays for the dates entered.

11/25/97 11:54:33

UNCLEARED OUTGOING PHONE CALLS MADE

Room: 200 Ext: 200

| ACode   | Phone#  | Mode | Date | Time  | Duration | Charges | Cumulative |
|---------|---------|------|------|-------|----------|---------|------------|
| 5833723 | LOC     |      |      | 11:47 | 00:01:54 | .50     | .50        |
| 714     | 5836757 | LD   |      | 11:50 | 00:02:46 | .80     | 1.30       |
| 011     | 5687896 | FOR  |      | 11:52 | 00:01:36 | 2       | 3.30       |

Room: 207 Ext: 207

| ACode   | Phone# | Mode | Date | Time  | Duration | Charges | Cumulative |
|---------|--------|------|------|-------|----------|---------|------------|
| 2547896 | LOC    |      |      | 11:48 | 00:00:05 | 0       | 0.00       |

Print Reports Menu

2615

4. Click Print.

The report prints.

Report fields include: Room and Extension Numbers, ACode (area code), Phone #, Mode (LOC = local, LD = long distance, FOR = foreign, TF = toll free), date, time, duration, charges, and cumulative (total charges).

## View/Print All Active Balance Statements Report

1. From the Main screen, click Reports.
2. Select the All Active Balance Statements report option.

The Reports Menu displays see [Page 75](#).

The report is displayed:

ROOM BALANCE STATEMENT

1/15/98 8:51:28 AM

ROOM NO: 101 EXTENSION NO: 101  
RALPH MANLEY

CONFIRMATION NO: 829MGR150514

DATE(S): 01/15/98 - 01/16/98

| BASE RATE DESCRIPTION             | PER NIGHT | # NIGHTS |        |
|-----------------------------------|-----------|----------|--------|
| DAILY                             | 90.00     | 1        |        |
| TOTAL BASE ROOM CHARGE:           |           |          | 90.00  |
| PHONE BILLING:                    |           |          | (NONE) |
| SERVICE CHARGES:                  |           |          | (NONE) |
| TOTAL BILLED SERVICES:            |           |          | 0.00   |
| PRE-TAX CHARGES:                  |           |          | 90.00  |
| STATE, LOCAL AND ALL OTHER TAXES: |           |          | .00    |
| TOTAL ROOM CHARGE:                |           |          | 90.00  |

Print Reports Menu

2616

3. Click Print.

The report prints.

The report fields are identical to the items that print on a regular billing statement when a guest checks out.

## View/Print Hotel Guest List Report

1. From the Main screen, click Reports.
2. Select the Hotel Guest List report option.

The Reports Menu displays see [Page 75](#).

The report displays:

| ROOM# | EXT | STATUS | LAST NAME | FIRST NAME | CHECKIN  | UNTIL        | ADULTS | CHILDREN |
|-------|-----|--------|-----------|------------|----------|--------------|--------|----------|
| 100   | 100 | StaOvr | Miller    | Joseph     | 09/11/97 | 09/25/97     | 1      | 0        |
| 101   | 101 | StaOvr | Hooward   | Randy      | 09/11/97 | 09/17/97     | 1      | 0        |
| 102   | 102 | X_Stay | Randolph  | Janet      | 09/11/97 | 09/17/97(+4) | 1      | 0        |
| 103   | 103 | StaOvr | Barnesell | Harry      | 09/15/97 | 09/18/97     | 1      | 0        |
| 104   | 104 | X_Stay | Mitchell  | Paul       | 09/11/97 | 09/17/97(+2) | 1      | 0        |
| 106   | 106 | StaOvr | Williams  | John       | 09/15/97 | 09/17/97     | 1      | 0        |
| 107   | 107 | StaOvr | Walker    | Fred       | 09/15/97 | 09/18/97     | 1      | 0        |
| 108   | 108 | StaOvr | Ridgewell | Jane       | 09/15/97 | 09/17/97     | 2      | 0        |
| 109   | 109 | StaOvr | Pullman   | Jackson    | 09/15/97 | 09/17/97     | 2      | 2        |
| 110   | 110 | StaOvr | Randolph  | Joan       | 09/16/97 | 09/19/97     | 1      | 0        |
| 111   | 111 | StaOvr | Wells     | Sandy      | 09/15/97 | 09/17/97     | 2      | 0        |
| 114   | 114 | X_Stay | Manley    | Gloria     | 09/11/97 | 09/17/97(+5) | 1      | 0        |
| 115   | 115 | StaOvr | Hanley    | George     | 09/15/97 | 09/18/97     | 2      | 0        |
| 118   | 118 | StaOvr | Wright    | Connie     | 09/16/97 | 09/19/97     | 2      | 2        |
| 120   | 120 | StaOvr | Lee       | Howard     | 09/16/97 | 09/20/97     | 2      | 1        |
| 121   | 121 | StaOvr | Williams  | John       | 09/16/97 | 09/17/97     | 2      | 2        |
| 122   | 122 | StaOvr | Miller    | Janet      | 09/16/97 | 09/18/97     | 1      | 0        |
| 123   | 123 | StaOvr | Weisman   | Henry      | 09/16/97 | 09/19/97     | 1      | 0        |
| 124   | 124 | StaOvr | Walker    | Ronald     | 09/16/97 | 09/19/97     | 1      | 0        |
| 125   | 125 | StaOvr | Downing   | Winston    | 09/16/97 | 09/19/97     | 2      | 3        |
| 126   | 126 | StaOvr | Howard    | John       | 09/16/97 | 09/18/97     | 2      | 10       |

2617

3. Click Print.

The report prints.

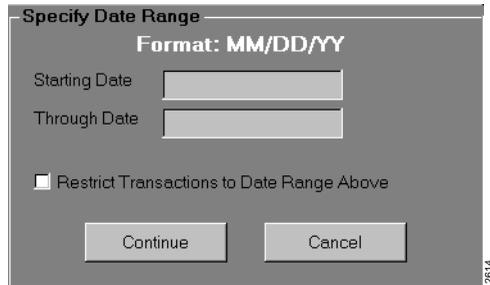
Report fields include: room and extension numbers, status (room), last and first names (of guest), checkin (date), until (date), and number of adults and children in party.

## View/Print Maid Activity Report

1. From the Main screen, click Reports.
2. Select the Maid Activity Report option.

The Reports Menu displays see [Page 75](#).

A pop-up dialog box appears.

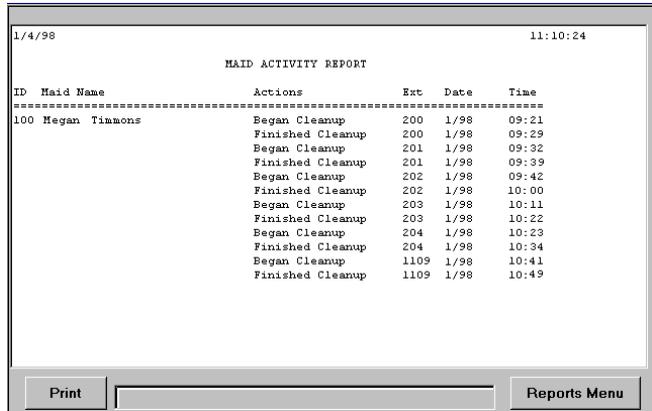


The dialog box is titled "Specify Date Range" and has a "Format: MM/DD/YY" label. It contains two input fields: "Starting Date" and "Through Date". Below these fields is a checkbox labeled "Restrict Transactions to Date Range Above". At the bottom of the dialog are two buttons: "Continue" and "Cancel".

3. Click Continue  
...or Restrict Transactions to Date Range Above and type starting/through dates. When finished, click Continue.

The report is displayed for only the current date.

The report is displayed for the dates entered.



The screen shows a terminal-style report titled "MAID ACTIVITY REPORT" for the date 1/4/98. The report lists activities for a maid named Megan Timmons, including "Began Cleanup" and "Finished Cleanup" with associated extension numbers, dates, and times. At the bottom of the screen are buttons for "Print" and "Reports Menu".

| ID  | Maid Name     | Actions          | Ext  | Date | Time  |
|-----|---------------|------------------|------|------|-------|
| 100 | Megan Timmons | Began Cleanup    | 200  | 1/98 | 09:21 |
|     |               | Finished Cleanup | 200  | 1/98 | 09:29 |
|     |               | Began Cleanup    | 201  | 1/98 | 09:32 |
|     |               | Finished Cleanup | 201  | 1/98 | 09:39 |
|     |               | Began Cleanup    | 202  | 1/98 | 09:42 |
|     |               | Finished Cleanup | 202  | 1/98 | 10:00 |
|     |               | Began Cleanup    | 203  | 1/98 | 10:11 |
|     |               | Finished Cleanup | 203  | 1/98 | 10:22 |
|     |               | Began Cleanup    | 204  | 1/98 | 10:23 |
|     |               | Finished Cleanup | 204  | 1/98 | 10:34 |
|     |               | Began Cleanup    | 1109 | 1/98 | 10:41 |
|     |               | Finished Cleanup | 1109 | 1/98 | 10:49 |

4. Click Print.

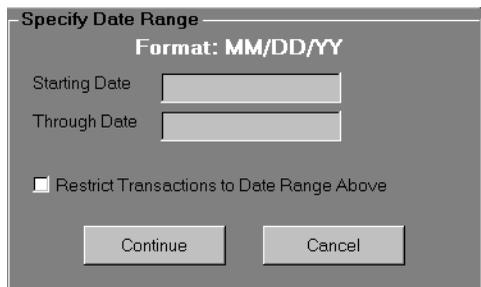
The report prints. Report fields include Maid 3-digit Employee ID, Maid's name, Actions (began or finished cleanup), extension (of room being cleaned), date and time cleanup began and finished.

## View/Print Reservations List Report

1. From the Main screen, click Reports.
2. Select the Reservations List report option.

The Reports Menu displays see [Page 75](#).

A pop-up dialog box appears.



The dialog box is titled "Specify Date Range" and has a subtitle "Format: MM/DD/YY". It contains two input fields: "Starting Date" and "Through Date". Below these fields is a checkbox labeled "Restrict Transactions to Date Range Above". At the bottom of the dialog are two buttons: "Continue" and "Cancel". A small number "2614" is visible in the bottom right corner of the dialog box.

3. Click Continue

The report is displayed for only the current date.

...or Restrict Transactions to Date Range Above and type starting/through dates. When finished, click Continue.

The report is displayed for the dates entered.

| Room # | Res From | Through  | Name               | Conf #       | Daily  | WeekEnd | Status     |
|--------|----------|----------|--------------------|--------------|--------|---------|------------|
| 100    | 07/30/97 | 07/31/97 | Martin, Donald     | 778AGW162042 | 100.00 | 105.00  | Expired    |
| 101    | 07/31/97 | 08/04/97 | Farley, Jerry      | 778AGW141556 | 100.00 | 105.00  | Pending    |
| 101    | 08/04/97 | 08/06/97 | Townsend, Roy      | 778AGW091900 | 100.00 | 105.00  | Checked In |
| 101    | 08/11/97 | 08/14/97 | Montana, Harry     | 778AGW141753 | 100.00 | 105.00  | Pending    |
| 102    | 07/31/97 | 08/04/97 | Rider, Mary        | 778AGW141716 | 100.00 | 105.00  | Pending    |
| 103    | 07/30/97 | 07/31/97 | Fox, Judith        | 778AGW162113 | 100.00 | 105.00  | Checked In |
| 105    | 07/31/97 | 08/04/97 | Harvey, Frank      | 778AGW143602 | 100.00 | 105.00  | Checked In |
| 106    | 07/31/97 | 08/06/97 | Lewis, Janet       | 778AGW135326 | 100.00 | 105.00  | Pending    |
| 107    | 07/30/97 | 07/31/97 | Reynolds, Janet    | 778AGW162238 | 100.00 | 105.00  | Expired    |
| 107    | 07/31/97 | 08/01/97 | Simpson, Renee     | 778AGW135843 | 100.00 | 105.00  | Checked In |
| 108    | 07/30/97 | 07/31/97 | Arnold, Harold     | 778AGW162213 | 100.00 | 105.00  | Expired    |
| 108    | 07/31/97 | 07/31/97 | Johnson, Ray       | 778AGW135619 | 100.00 | 105.00  | Checked In |
| 113    | 07/31/97 | 07/31/97 | Wright, Jonathan   | 778AGW143025 | 100.00 | 105.00  | Checked In |
| 116    | 07/31/97 | 07/31/97 | Merriman, Howard   | 778AGW143104 | 100.00 | 105.00  | Checked In |
| 224    | 08/08/97 | 08/11/97 | Hutchinson, Robert | 778AGW141830 | 100.00 | 105.00  | Pending    |

4. Click Print.

The report prints.

Report fields include room number, reservation dates, name (guest), confirmation number, daily and weekend rates for assigned room, status (of reservation).

## View/Print Morning Check Out List Report

1. From the Main screen, click Reports.

The Reports Menu displays see [Page 75](#).

2. Select the Morning Check Out List report option.

The report displays:

| ROOM# | EXT | STATUS | LAST NAME  | FIRST NAME | CHECKIN  | UNTIL    | ADULTS | CHILDREN |
|-------|-----|--------|------------|------------|----------|----------|--------|----------|
| 100   | 100 | StaOvr | Rodman     | John       | 10/24/97 | 10/28/97 | 1      | 0        |
| 104   | 104 | StaOvr | Holliman   | Larry      | 10/24/97 | 10/28/97 | 2      | 1        |
| 106   | 106 | StaOvr | Harrison   | Steven     | 10/24/97 | 10/28/97 | 1      | 0        |
| 107   | 107 | StaOvr | Wrightwood | Marion     | 10/24/97 | 10/28/97 | 1      | 2        |
| 109   | 109 | StaOvr | Downing    | John       | 10/24/97 | 10/28/97 | 1      | 0        |

3. Click Print.

The report prints. Report fields include room and extension numbers, status (room), last and first names (guest), checkin (date), until (date), number of adults and children (in party).

## View/Print Consolidated Detail Night Audit Report

1. From the Main screen, click Reports.
2. Select the Consolidated Detail Night Audit Report.

The Reports Menu displays (see [Page 75](#)).

A pop-up dialog box appears. The screen defaults to the current date.

- 3. Click OK  
...or type a new date  
and click OK.

The report displays for the date entered.

| CONSOLIDATED DETAIL NIGHT AUDIT REPORT<br>FOR 01/30/98 |       |            |               |          |              |               |                 |                  |           |       |
|--|-------|------------|---------------|----------|--------------|---------------|-----------------|------------------|-----------|-------|
| ROOM#  | EXTEN | GROSS ROOM | ROOM DISCOUNT | NET ROOM | CLOSED PHONE | CURRENT PHONE | CLOSED SERVICES | CURRENT SERVICES | SUB TOTAL | TAXES |
| 101  | 101   | 100.00     |               | 100.00   |              |               |                 |                  | 100.00    | 8.0   |
| 102  | 102   | 100.00     |               | 100.00   |              |               |                 |                  | 100.00    | 8.0   |
| 103  | 103   | 100.00     | 5.00          | 95.00    |              |               |                 | 20.00            | 115.00    | 9.2   |
| 104  | 104   | 100.00     |               | 100.00   |              |               |                 |                  | 100.00    | 8.0   |
| TOTALS   |       | 400.00     | 5.00          | 395.00   |              |               |                 | 20.00            | 415.00    | 33.2  |

2992

The screen cannot display the entire report. Use the scroll bar at the bottom of the screen to scroll through the report.

The report does not display cumulative totals. The figures are for only the date entered. A setting made during system setup by management determines whether this report displays all rooms or only rooms with a balance.

- 4. Click Print.

The report prints (see [“Sample Consolidated Detail Night Audit Report”](#) on Page 85).

## Sample Consolidated Detail Night Audit Report

| CONSOLIDATED DETAIL NIGHT AUDIT REPORT   |       |            |               |          |              |               |                 |                  |           |       |                 |                  |               |
|--|-------|------------|---------------|----------|--------------|---------------|-----------------|------------------|-----------|-------|-----------------|------------------|---------------|
| FOR BUSINESS DAY 02/20/98                |       |            |               |          |              |               |                 |                  |           |       |                 |                  |               |
| REPORT GENERATED ON 02/20/98 AT 10:35:37 |       |            |               |          |              |               |                 |                  |           |       |                 |                  |               |
| ROOM#                                    | EXTEN | GROSS ROOM | ROOM DISCOUNT | NET ROOM | CLOSED PHONE | CURRENT PHONE | CLOSED SERVICES | CURRENT SERVICES | SUB TOTAL | TAXES | CLOSED DEPOSITS | CURRENT DEPOSITS | DAILY BALANCE |
| 100                                      | 100   | 90.00      |               | 90.00    |              |               |                 |                  | 90.00     | 7.20  |                 |                  | 97.20         |
| 101                                      | 101   | 90.00      |               | 90.00    |              |               | 55.00           | 25.00            | 170.00    | 13.60 | 50.00           |                  | 133.60        |
| 103                                      | 103   | 90.00      |               | 90.00    |              |               |                 |                  | 90.00     | 7.20  |                 | 100.00           | -2.80         |
| 105                                      | 105   |            |               |          |              |               | 35.00           |                  | 35.00     | 2.80  |                 |                  | 37.80         |
| ROOM#                                    | EXTEN | GROSS ROOM | ROOM DISCOUNT | NET ROOM | CLOSED PHONE | CURRENT PHONE | CLOSED SERVICES | CURRENT SERVICES | SUB TOTAL | TAXES | CLOSED DEPOSITS | CURRENT DEPOSITS | DAILY BALANCE |
| <b>TOTALS</b>                            |       | 270.00     |               | 270.00   |              |               | 90.00           | 25.00            | 385.00    | 30.80 | 50.00           | 100.00           | 265.80        |

3047

## Consolidated Detail Night Audit Report Fields

| Field                   | Description  |
|-------------------------|--|
| <b>Room#/Exten</b>      | Room/Extension Numbers. Depending on the setting in Setup Utility, either all rooms display or only rooms with balances. |
| <b>Gross Room</b>       | Rate per day on room.  |
| <b>Room Discount</b>    | Discount for room rate, if applicable.   |
| <b>Net Room</b>         | Gross Room minus Room Discount.  |
| <b>Closed Phone</b>     | Phone charges paid by guest who checked out.   |
| <b>Current Phone</b>    | Outstanding phone charges for current guest.   |
| <b>Closed Services</b>  | Billed service charges (e.g., room service, etc.) paid by guest who checked out.   |
| <b>Current Services</b> | Outstanding billed services for current guest.   |
| <b>Sub Total</b>        | Total of all previous items listed.  |
| <b>Taxes</b>            | Applicable taxes for room, phone calls, and services.  |
| <b>Closed Deposits</b>  | Deposits made by guest who checked out.  |
| <b>Current Deposits</b> | Deposits made by current guest.  |
| <b>Daily Balance</b>    | Daily total amount (subtotal + taxes minus closed and current deposits).   |

# Reprinting Processed Billing Statements

This feature enables you to reprint a guest's billing statement anytime after check-out. For information on printing the bill at check-out, see [“Check Out Guest with Billing” on Page 48.](#)

## Reprinting the Billing Statement after Guest Checks Out

1. Double-click on the room listing in the Browse Window.

**Note** It does not matter if another guest has checked into the room.

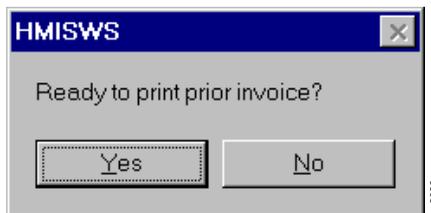
| Customer Name  | From     | Until    |
|----------------|----------|----------|
| Frankel, Mary  | 01/15/98 | 01/17/98 |
| Knolls, Howard | 01/02/98 | 01/05/98 |
| Smith, John    | 01/07/98 | 01/10/98 |

Previous guests are listed alphabetically by their last name.

2. Highlight the customer listing on the screen.

3. Click Print.

A pop-up dialog box asks you to confirm the printing.



4. Click Yes.

The Billing Statement prints and the pop-up boxes are cleared from the Main screen.

## Reservations

Reservations are made using the Reservation screen (shown below). Information entered on this screen is automatically displayed on the Main screen after the guest registers.

## Features

### Reservations

During System Setup, the authorized user can choose between reservation databases that can store 4, 8, 12, 16, or 20 years of reservation records. Guest record information includes name, confirmation number, credit card number/expiration date, room rate, reservation dates, assignment date and time, clerk number, and room number and/or type.

A Reservations List report can be printed at any time (see [“Reports” on Page 75](#)). The report can be run for the current date or a range of dates. It lists room number, extension, reservation dates, guest name, confirmation numbers, room rates and status of reservation.

## Make Reservations

|   |  |
|---|--|
| 1. From the Main screen, click Reserve.   | The Reservation screen displays (see <a href="#">Page 87</a> ).  |
| 2. From the Reservation Date calendar (the current date is highlighted), select a date on the calendar. | You can scroll the calendar (months/years) by clicking the scroll buttons (◀ ▶).<br><br><b>Note</b> If you check the wrong date, click Clear Settings to start over. |
| 3. Click Assigned Check-In Date.  | The date on the calendar turns red.  |
| 4. Click check-out date on the calendar.  |  |

- Click Assigned Check-Out Date.

The Available Room Selection screen displays. All available rooms are listed by room number. An asterisk appears next to any room that is currently occupied. To sort the screen by a specific item, click on the column heading. (See “Available Room Selection Screen” on Page 28 for field descriptions.)

**Available Room Selection**

| Room # | Ste | NS | NA | Clean | Type      | # Dble | # Sng | Room | Floor | Daily  | Weekend | Holiday | Special | Building |
|--------|-----|----|----|-------|-----------|--------|-------|------|-------|--------|---------|---------|---------|----------|
| 200 *  | Y   | N  | N  | N     | Suite     | 2      | 0     | 2    | 1     | 100.00 | 110.00  | 120.00  | 90.00   | Main     |
| 201 *  | Y   | N  | N  | Y     | Suite     | 2      | 0     | 2    | 1     | 100.00 | 110.00  | 120.00  | 90.00   | Main     |
| 202    | Y   | N  | N  | Y     | Suite     | 2      | 0     | 2    | 1     | 100.00 | 110.00  | 120.00  | 90.00   | Main     |
| 204    | Y   | N  | N  | N     | Suite     | 2      | 0     | 2    | 1     | 100.00 | 110.00  | 120.00  | 90.00   | Main     |
| 205    | Y   | N  | N  | N     | WaterView | 2      | 1     | 2    | 1     | 150.00 | 160.00  | 170.00  | 100.00  | Main     |
| 206    | Y   | N  | N  | N     | WaterView | 2      | 1     | 2    | 1     | 150.00 | 160.00  | 170.00  | 100.00  | Main     |
| 207    | Y   | N  | N  | N     | WaterView | 2      | 1     | 2    | 1     | 150.00 | 160.00  | 170.00  | 100.00  | Main     |
| 208    | Y   | N  | N  | N     | Poolside  | 1      | 2     | 1    | 2     | 120.00 | 130.00  | 150.00  | 90.00   | Main     |

\* Denotes room is currently occupied

Assign Cancel

2557

- Highlight the desired room.
- In the General Window at the top of the Reservation screen, type the guest's name and credit card information.

**General**

First MI Last Conf #  
 Joseph Wright 778AGW125311

CC Prefix Credit Card # Exp Date Room #  
 131

Reserv From Until Date Time Clerk  
 09/17/97 09/20/97 9/17/97 12:53:11 sup

Daily Wk End Rate Discount %  
 100.00 105.00

Save

2605

(See “General Window” on Page 64 for detailed field descriptions.)

- (Optional) If the basic room rate does not apply, click on the Daily/Weekend Rate fields and enter the applicable rate.

## Features

### Reservations

- (Optional) If a room discount applies, enter a discount (X.XX format) in the Discount % field.
- Click the Details Tab. Enter the applicable information.

- From the Available Room Selection screen, click Assign.

- Click OK.

For example, if the discount is 5-1/2%, enter 5.50 in the Discount % field. If you enter a whole number, HMIS adds the decimal and zero fills the two spaces (e.g., 5 becomes 5.00).

Details

Home Phone: 714-555-3000 Business Phone: 714-555-3700 Num Children: 1 Num Adults: 2

Travel Agent Code: Group or Block: % Commission: Secured: Pre-Paid Vouchers: Amount: VIP Status:

Comment:

Save

(See “Details Window” on Page 61 for detailed field descriptions.)

The room is reserved. The Assigned Rooms screen appears (shown below) and displays the information on the reservation you have just entered. (See “Assigned Rooms Screen” on Page 19 for detailed field descriptions.)

| Room # | Status     | From     | Until    | Last, First     | Conf #       | Rate   |
|--------|------------|----------|----------|-----------------|--------------|--------|
| 202    | Checked In | 09/22/97 | 09/24/97 | Jones, Michael  | 778AGV104212 | 100.00 |
| 203    | Checked In | 09/22/97 | 09/23/97 | Brown, Randy    | 778AGV104353 | 100.00 |
| 204    | Checked In | 09/22/97 | 09/25/97 | Norris, Steven  | 778AGV105437 | 100.00 |
| 205    | Reserved   | 09/24/97 | 09/26/97 | Moore, Marie    | 778AGV105457 | 100.00 |
| 206    | Checked In | 09/22/97 | 09/23/97 | Johnson, Robert | 778AGV105515 | 100.00 |
| 207    | Pending    | 09/22/97 | 09/23/97 | Stevens, Terry  | 778AGV105533 | 100.00 |

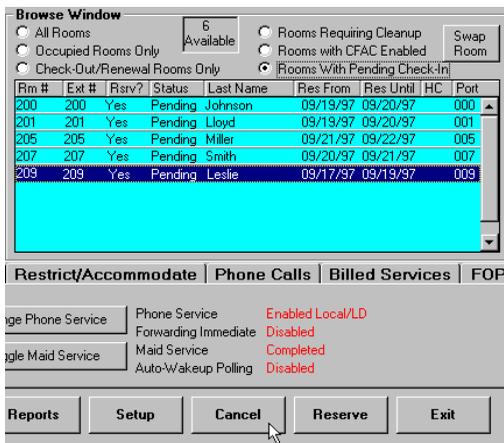
Cancel Check-In Okay

## Cancel Reservations

### Cancel Pending Reservations

Pending reservations are reservations for guests due to check in on the current date. To cancel reservations with a Reserved status, see [“Cancel Reserved or Expired Reservations” on Page 92.](#)

1. From the Browse Window, click Rooms With Pending Check-in.



2. Highlight the room reservation being cancelled.
3. Click Cancel.



4. Click Yes.

The reservation is deleted from the room database and the listing no longer appears on the screen.

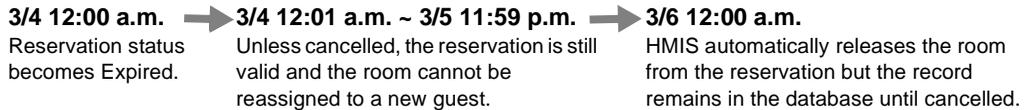
## Cancel Reserved or Expired Reservations

A reservation with a Reserved status is any reservation with a Reservation From date that is at least one day in the future.

An Expired reservation occurs when a guest fails to check in by 12:00 a.m. of the day after the Reservation From date. For example, if a guest scheduled to check in on 10/3 fails to check in by 12:00 a.m. on 10/4, the reservation status is changed to Expired.

If the Expired reservation is not cancelled using this procedure, it remains a valid reservation until 12:00 a.m. of the Reservation Until date, and *cannot* be re-assigned to a walk-in or reservation guest. At 12:00 a.m. on the Reservation Until date, HMIS automatically releases the room from the reservation (deletes it from the Browse Window and adds it to the Available Selection screen) but does not delete the record from the Assigned Rooms screen. You must then delete the Expired Reservation record from the Assigned Rooms screen using this procedure.

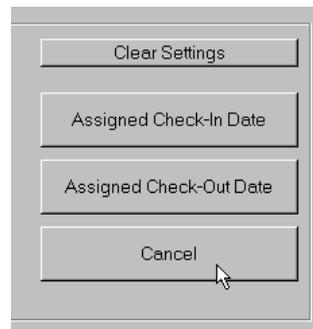
For example: If a guest makes a reservation for 3/3~3/6 and does not check in, the following occurs:



See [“Room Status” on Page 100](#) for more detailed status definitions.

1. From the Main screen, click Reserve.
2. Click Cancel in the lower-right corner.

The Reservation screen displays see [Page 87](#).



3. Click Assigned Rooms in the upper-left corner.
4. Click the check-in date on the calendar.

The calendar displays. You need to select a range of dates for the reservations you want to view.

You can scroll the calendar (months/years) by clicking the scroll buttons (◀ ▶).

**Note** If you check the wrong date, click Clear Settings to start over.

5. Click Assigned Check-In Date.
6. Click check-out date on the calendar.
7. Click Assigned Check-Out Date.

The date on the calendar turns red.

The Assigned Rooms screen displays with the listing of all reservations for the range of dates you entered.

| Room # | Status   | From     | Until    | Last, First       | Conf #       | Rate   |
|--------|----------|----------|----------|-------------------|--------------|--------|
| 202    | Reserved | 09/22/97 | 09/23/97 | Johnson, Randy    | 778AGW104212 | 100.00 |
| 203    | Reserved | 09/22/97 | 09/23/97 | Doolittle, Margie | 778AGW104353 | 100.00 |
| 204    | Reserved | 09/22/97 | 09/23/97 | Harris, Lee       | 778AGW105437 | 100.00 |
| 205    | Reserved | 09/22/97 | 09/23/97 | Pham, Charles     | 778AGW105457 | 100.00 |
| 206    | Reserved | 09/22/97 | 09/23/97 | Jones, Bill       | 778AGW105515 | 100.00 |
| 207    | Expired  | 09/02/97 | 09/03/97 | Wright, Connie    | 778AGW105533 | 100.00 |

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This screen can be sorted by any of the columns. Click on the column head you want to search (e.g., guest's last name).

8. Highlight the room reservation being cancelled.

## Features

### Reservations

9. Click Cancel.



10. Click Yes.

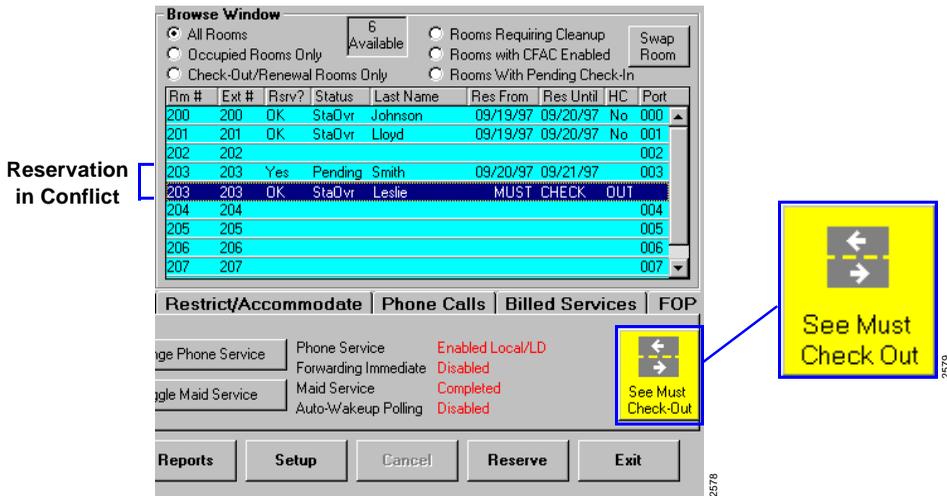
The reservation is deleted from the room database and no longer displays on the Browse Window or Assigned Rooms screen. HMIS adds the room listing to the Available Room Selection screen.

11. Click OK, then Main Screen.

# Reservation Conflict Warning

This feature enables the staff to know when an occupied room is in conflict with a pending reservation.

When the conflict occurs, HMIS displays a screen pop-up box (shown below) in the lower right corner of the Main screen. The Browse Window displays both the room in conflict and the “Pending” reservation for the room. The Reservation From/Until fields for the room in conflict display the message “MUST CHECK OUT.”



## Change Room in Conflict (Room Status is StaOvr)

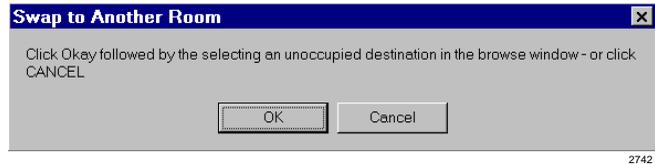
- |   |   |
|---|---|
| <ol style="list-style-type: none"> <li>1. Click See Must Check Out box.</li> <li>2. Click Check-out and follow check-out process</li> </ol> | <p>The occupied room in conflict is highlighted in the Browse Window.</p> <p>See <a href="#">“Check Out Guest with Billing”</a> on Page 48.</p> |
|---|---|

## Features

### Reservation Conflict Warning

...or if the guest wants to stay and change rooms, click Swap Room.

3. Click OK and highlight the new room listing in the Browse Window.



The rooms are swapped and all guest information has transferred to the new room listing.

## Change Room in Conflict (Room Status is X\_Stay)

1. Click See Must Check Out box.
2. Click Check-out and follow check-out process

...or if the guest wants to stay on and change rooms, type the current date in the Reserve until field.

3. Click Save.

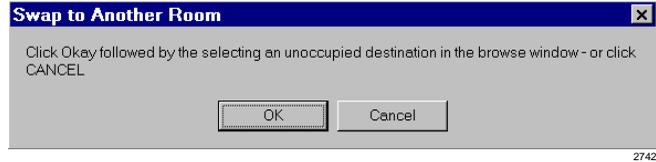
The occupied room in conflict is highlighted in the Browse Window

See [“Check Out Guest with Billing”](#) on Page 48.

| Room #       | Ext #        | Room Type |       |
|--------------|--------------|-----------|-------|
| 106          | 106          | Double    |       |
| Check-In     | Reserve from | 10/24/97  |       |
| Check-Out    | until        | 10/28/97  |       |
|              | Date         | Time      | Class |
| Check-In     | 10/24/97     | 15:07     | sup   |
| Check-Out    |              |           |       |
| Room Rate(s) |              |           |       |
|              | Rate         | Nights    |       |
| Daily        | 120.00       | 7         |       |
| Weekend      | 130.00       | 4         |       |

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4. Click Swap Room.



5. Click OK and highlight the new room listing in the Browse Window.

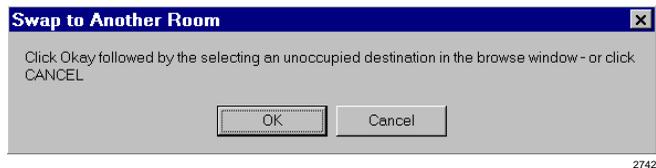
The rooms are swapped and all guest information has transferred to the new room listing.

## Room Change (Swap)

This feature enables the front desk staff to use the previously entered guest information when a guest changes (swaps) rooms. This saves hotel staff time and provides faster service to guests.

### Change (Swap) Rooms

1. From the Browse Window, highlight the current room listing.
2. Click Swap Room.



3. Highlight the new room listing in the Browse Window.

The rooms are swapped and all guest information has transferred to the new room listing.

# Room Rate Discounts

Discounts can be entered on a per guest basis when the guest reserves the room, when a walk-in guest checks in or anytime during the guest's stay.

## Enter Room Discount (Reservation Process)

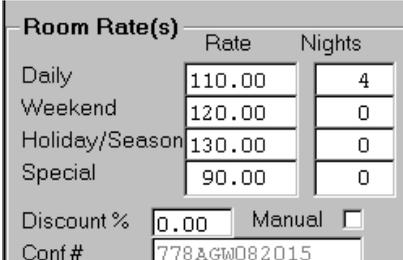
The discount is entered in the General Window during the Reservation process. When the guest checks in, the discount displays on the Main screen. See [“Make Reservations” on Page 88](#) for details on entering the discount.

## Enter Room Discount (Check-in for Walk-in Guest)

The discount is entered in the General Window during the Check-in process of a walk-in guest. The discount displays on the Main screen. See [“Check in Walk-in Guest” on Page 42](#) for details on entering the discount.

## Enter Room Discount after Check-in (Main Screen)

1. From the Browse Window, highlight the room listing.
2. Double-click the Discount % field. Enter the applicable discount in X.XX format.
3. Click Save.



| Room Rate(s)   | Rate   | Nights |
|----------------|--------|--------|
| Daily          | 110.00 | 4      |
| Weekend        | 120.00 | 0      |
| Holiday/Season | 130.00 | 0      |
| Special        | 90.00  | 0      |

Discount %  Manual

Conf #

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For example, 5-1/2% should be entered as 5.50. If you enter a whole number, HMIS adds the decimal and zero fills the two spaces (e.g., 5 becomes 5.00).

# Room Rates

Basic room rates (i.e., daily, weekend, holiday/seasonal, special) are already established for each room by an authorized user, using the Settings screen in System Setup. When you are making a reservation or checking in a guest, the established basic rates display on the screens.

If it should become necessary to change them, you can change them using the General Window during the reservation/check-in processes or on the Main screen prior to check-out.

For information on rate discounts, see [“Room Rate Discounts” on Page 98](#).

## Change Room Rates (Reservation Process)

See [“Make Reservations” on Page 88](#) for instructions on changing the rates.

## Change Room Rates (Check-in Process)

See [“Check in Walk-in Guest” on Page 42](#) for instructions on changing the rates.

## Change Room Rates (During Guest’s Stay)

1. Highlight the room listing in the Browse Window.
2. Double-click the Rate field (i.e., daily, weekend, holiday/season, special). Enter the applicable rate.
3. Click Save.

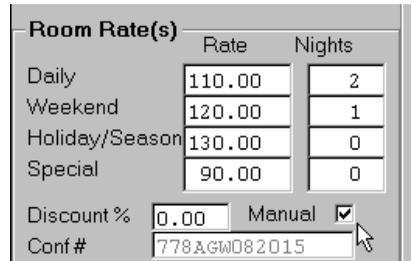
| Room Rate(s)   |              |                                 |
|----------------|--------------|---------------------------------|
|                | Rate         | Nights                          |
| Daily          | 110.00       | 4                               |
| Weekend        | 120.00       | 0                               |
| Holiday/Season | 130.00       | 0                               |
| Special        | 90.00        | 0                               |
| Discount %     | 0.00         | Manual <input type="checkbox"/> |
| Conf #         | 778AGW082015 |                                 |

If you enter a number without decimal/cents, HMIS treats it as a whole number (e.g., 100 becomes 100.00).

## Change Room Rate to Holiday/Seasonal or Special Rate

**Note** HMIS calculates a guest's stay based on daily and weekend rates. If holiday/seasonal or special rates apply, you must change the number of nights using the following procedure.

1. Highlight the room listing in the Browse Window.
2. Click Manual.
3. Click the Nights column for Daily or Weekend Rates and subtract the applicable number of nights.
4. Click the Nights column for Holiday/Season or Special Rates and enter the number of nights you subtracted from the Daily/Weekend Rates.
5. Click Save.



| Room Rate(s)   | Rate   | Nights |
|----------------|--------|--------|
| Daily          | 110.00 | 2      |
| Weekend        | 120.00 | 1      |
| Holiday/Season | 130.00 | 0      |
| Special        | 90.00  | 0      |

Discount %  Manual

Conf #

**Note** Be sure that you account for all nights of the guest's stay. If a mistake is made, a pop-up box at check-out warns you that the number of nights are not calculated correctly.

## Room Status

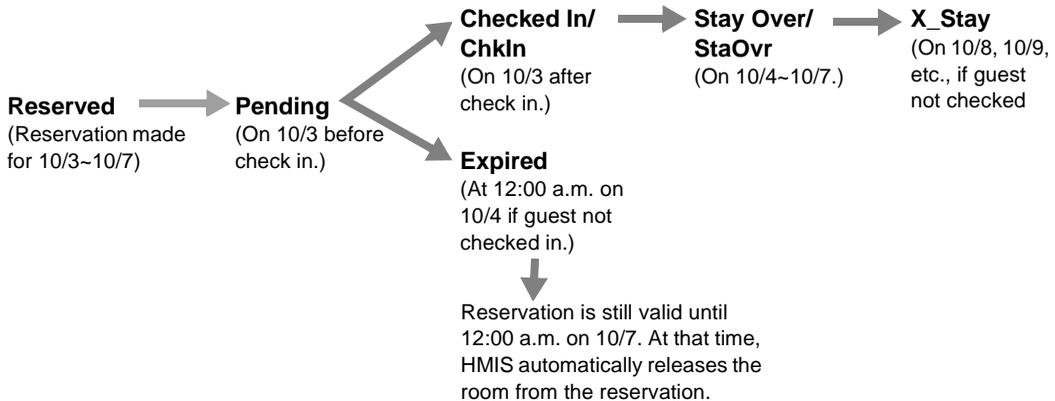
Several of the HMIS screens (e.g., Browse Window) and reports (e.g., Hotel Guest List) display room occupancy status. The status used by HMIS on the screens/reports is:

- ♦ **Reserved** – Reservation in database.
- ♦ **Pending** – Guest is scheduled to check in on current date.
- ♦ **Checked In** or **ChkIn** – Guest checked in on current date.
- ♦ **Expired** – Guest not checked in by 12:00 a.m. on day after the Reserve From date.

If the reservation is not deleted, it remains a valid reservation until 12:00 a.m. of the Reservation Until date. At that time, HMIS automatically releases the room from the reservation by deleting it from the Browse Window and adding it to the Available Room Selection screen. The HMIS does not delete the record from the Assigned Rooms screen (see [“Cancel Reserved or Expired Reservations”](#) on Page 92 for instructions on deleting the reservation record).

- ♦ **Stay Over** or **StaOvr** – Second, third, etc. day of guest’s reservation.
- ♦ **X\_Stay** – Guest staying beyond Reservation Until date.

The following flowchart gives you an example of the progress of a reservation by status in the HMIS application. For the example, the guest has made a reservation for the days of 10/3~10/7.



## Special Restrictions/Accommodations

Besides the many screens that provide text comment sections for restrictions/special accommodations, the HMIS provides two areas on the Main screen to identify the needs of the guest.

The first is the Handicap indicator field at the top right of the screen and the second is the Restrict/Accommodate Tab screen (shown below), accessed by clicking on the Restrict/Accommodate Tab at the bottom of the screen.

| Control/Status             | Messages                            | Restrict/Accommodate       | Phone Calls                         | Billed Services    | FOP                      |
|----------------------------|-------------------------------------|----------------------------|-------------------------------------|--------------------|--------------------------|
| Enable Phone Usage         | <input type="checkbox"/>            | No Smoking Room            | <input type="checkbox"/>            | Baby Crib          | <input type="checkbox"/> |
| Local/Toll Free Calls Only | <input type="checkbox"/>            | Suite                      | <input type="checkbox"/>            | Handicap TDD       | <input type="checkbox"/> |
| Cable TV                   | <input checked="" type="checkbox"/> | More than 1 Bed            | <input checked="" type="checkbox"/> | Wheel Chair        | <input type="checkbox"/> |
| Movie Channel Box          | <input checked="" type="checkbox"/> | Unavailable Due to Repairs | <input type="checkbox"/>            | Strobe Light Phone | <input type="checkbox"/> |
|                            |                                     |                            |                                     | Boat Slip #        | <input type="text"/>     |

(Display Only)

The information in the two-left columns of the dialog box is taken from the Master Room Setup/AutoGen screens when the room is recorded into the database. The right column is available for additional accommodations.

### Handicapped Guest

1. With the room highlighted in the Browse Window, click Handicap? field.
2. Click Detail (bottom of Main screen).
3. Type any applicable information in the comments section of the Customer Detail Window.
4. Click Save.

The field is located in the upper-right corner of the Main screen.

If the guest requires a wheel chair or TDD device for the room telephone, access the Restrict/Accommodate Tab screen.

## Special Accommodations

1. With the room highlighted in the Browse Window, click Restrict/Accommodate.
2. Click the special accommodations that are required.
3. Click Save.

The Restrict/Accommodate Tab screen displays (see [Page 102](#)).

The options are:

- Baby Crib
- Handicap TDD
- Wheel Chair
- Strobe Light Phone
- Boat Slip #

If additional information is required, click Detail and use the Customer Detail Window comments section to enter the information.

## Features

View Hotel/Motel Information

# View Hotel/Motel Information

To view the information available in the HMIS database:

|  |   |
|--|---|
| <b>Active Balance Statements</b>   | <b>Guest Billing</b>  |
| <ol style="list-style-type: none"><li>1. Click Reports.</li><li>2. Click All Active Balance Statements.</li></ol>  | <ol style="list-style-type: none"><li>1. Highlight room in Browse Window.</li><li>2. Click Check-Out.</li></ol>   |
| <b>Assigned Rooms (occupied/reserved)</b>  | <b>Guest Information</b>  |
| <ol style="list-style-type: none"><li>1. From the Check-in screen, click Assigned Rooms.</li><li>2. Select a range of dates (Assigned Check-in Date/Assigned Check-out Date).</li></ol>                                | <ol style="list-style-type: none"><li>1. Highlight room in Browse Window.</li><li>2. Click Detail.</li></ol> <p><b>Note</b> For credit card information, highlight room in Browse Window, then click FOP tab.</p> |
| <b>Available Rooms</b>   | <b>Hotel Guest List</b>   |
| <p>➤ From the Reservation screen, select a range of dates (Assigned Check-in Date/Assigned Check-out Date).</p>  | <ol style="list-style-type: none"><li>1. Click Reports.</li><li>2. Click Hotel Guest List ...or in the Browse Window, click Occupied Rooms Only option.</li></ol>   |
| <b>Billing Statement</b>   | <b>Maid Activity</b>  |
| <ol style="list-style-type: none"><li>1. Highlight room in Browse Window.</li><li>2. Click Check-Out.</li></ol>  | <ol style="list-style-type: none"><li>1. Click Reports.</li><li>2. Click Maid Activity Report.</li></ol>  |
| <b>Check-out List</b>  | <b>Messages</b>   |
| <ol style="list-style-type: none"><li>1. Click Reports.</li><li>2. Click Morning Check-out List ...or from the Browse Window, select Check-out/Renewal Rooms Only option.</li></ol>                                    | <ol style="list-style-type: none"><li>1. Highlight room in Browse Window.</li><li>2. Click Messages tab.</li></ol>  |
| <b>Deposits/Payments</b>   | <b>Number in Party</b>  |
| <ol style="list-style-type: none"><li>1. Highlight room in Browse Window.</li><li>2. Click FOP tab.</li></ol> <p><b>Note</b> For Phone Call Deposits, highlight room in Browse Window, then click Phone Calls tab.</p> | <ol style="list-style-type: none"><li>1. Highlight room in Browse Window.</li><li>2. Click Detail.</li></ol>  |

|   |
|---|
| <b>Occupied Rooms</b>   |
| ➤ In the Browse Window, click Occupied Rooms Only option.   |
| <b>Phone Call Records</b>   |
| <ol style="list-style-type: none"> <li>1. Highlight room in Browse Window.</li> <li>2. Click Phone Calls tab.</li> </ol>                  |
| <b>Phone Service</b>  |
| <ol style="list-style-type: none"> <li>1. Highlight room in Browse Window.</li> <li>2. Click Control/Status tab.</li> </ol>               |
| <b>Reservation List</b>   |
| <ol style="list-style-type: none"> <li>1. Click Reports.</li> <li>2. Click Reservation List.</li> </ol>                                   |
| <b>Room Restrictions/Accommodations</b>   |
| <ol style="list-style-type: none"> <li>1. Highlight the room in the Browse Window.</li> <li>2. Click Restrict/Accommodate tab.</li> </ol> |
| <b>Room Service Charges</b>   |
| <ol style="list-style-type: none"> <li>1. Highlight room in Browse Window.</li> <li>2. Click Billed Services tab.</li> </ol>              |
| <b>Rooms Pending Check-in</b>   |
| ➤ In the Browse Window, click Rooms with Pending Check-in option.   |

|   |
|---|
| <b>Rooms Requiring Check-out/Renewal</b>                                |
| ➤ In the Browse Window, click Rooms Requiring Check-out/Renewal option. |
| <b>Rooms Requiring Cleanup</b>  |
| ➤ In the Browse Window, click Rooms Requiring Cleanup option.           |
| <b>Room Status</b>  |
| ➤ Browse Window.  |
| <b>Rooms with CFAC Enabled</b>  |
| ➤ In the Browse Window, click Rooms with CFAC Enabled option.           |
| <b>Rooms with DND Enabled</b>   |
| ➤ In the Browse Window, click Rooms with DND Enabled option.            |
| <b>Wake-up Call Log</b>   |
| ➤ Highlight room in Browse Window, then click Messages tab.             |

## Features

*View Hotel/Motel Information*

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