

HotSoft 8

Quick User Guide

October 2015



HOISTGROUP

hospitality innovations.

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Introduction

HotSoft 8 is a property management system that enables users, primarily hotel staff, to manage daily operations, control bookings and manage daily finances.

This quick user guide will provide a basic introduction and overview of HotSoft's main functions and features. It will outline the key components of the software, providing basic navigation, setup instructions and information for carrying out basic processes.

Please note: This document is only a supplementary quick guide. If further information is required for any section, please refer to the HotSoft help system.

Getting Started

To get started, follow the steps listed below:

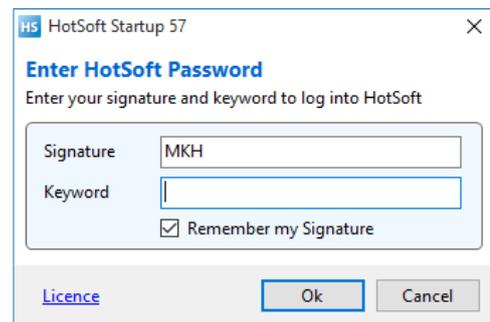
1. Launch the software by double-clicking the HotSoft 8 shortcut or selecting the HotSoft icon and pressing the **Enter** key.

The HotSoft launch window will appear and a pop-up window will ask for the user's login details.

2. Enter the required login details: a signature and a keyword (password) and click **Ok** to continue.

The required login will be the details provided by the HotSoft dealer. If you do not have a login, please consult your site's front office manager or systems administrator.

The default signature will be 'MKH' for 'Master Key Holder' and the keyword is blank.



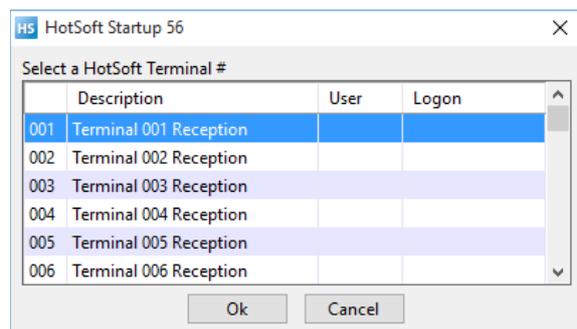
Please note: The user will only have 60 seconds to enter their details, after this time the session will expire and the pop-up window will close down.

3. The next step will be to select an available terminal or the terminal that is assigned to the computer that the user has logged in with.

The terminal selection window is shown to the right:

Any terminals that are already in use will be highlighted in yellow and the window will display the name of the user who has logged in.

After selecting the required terminal, click **Ok** to continue.



	Description	User	Logon
001	Terminal 001 Reception		
002	Terminal 002 Reception		
003	Terminal 003 Reception		
004	Terminal 004 Reception		
005	Terminal 005 Reception		
006	Terminal 006 Reception		

4. If the login was successful the Access Bar will open. This will be documented in the next section.

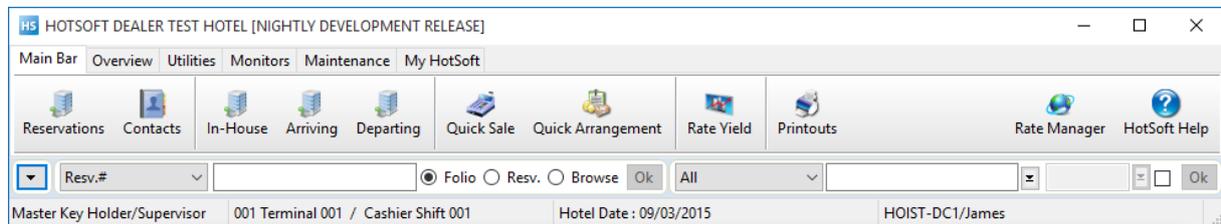
Navigation

The home screen, known as the HotSoft access bar, is the first window to open when the user logs into HotSoft.

HotSoft Access Bar

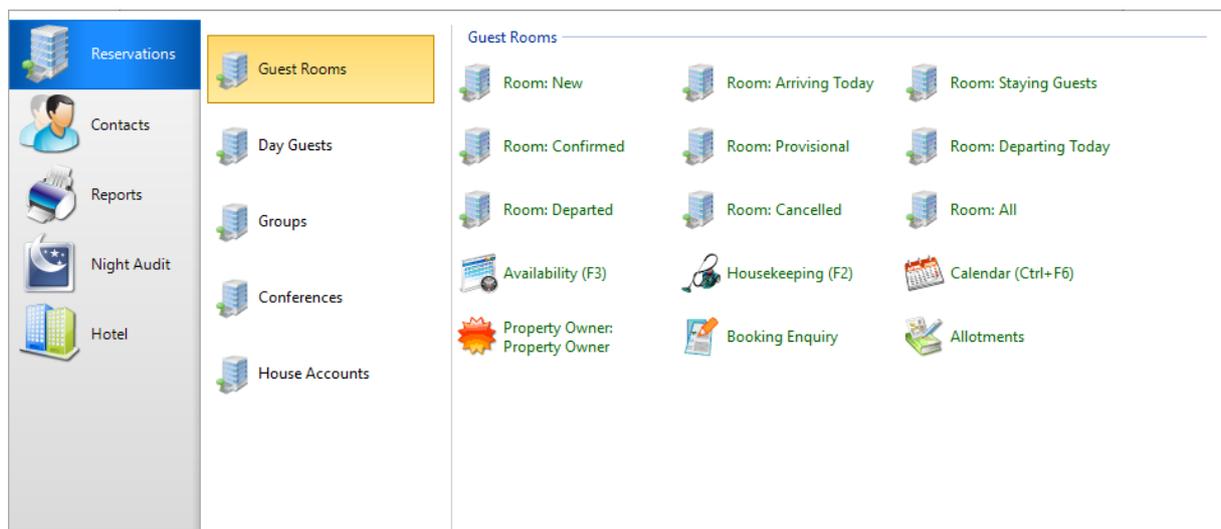
This is where the user can access all of the HotSoft tabs and browse screens.

The name of the hotel site will be displayed on the top of the bar, the user name, terminal number, cashier shift, hotel date and database will be displayed along the bottom.



Program Menu

If it is configured, the Program Menu will appear beneath the Access Bar, displaying buttons which provide quick links to useful browse screens and windows. See below:



To enable the Program Menu, right click on the access bar and click the 'Program Menu' in the Context drop-down menu. This can be configured in the 'Customize' section.

The Access Bar contains five tabs; Main Bar, Overview, Utilities, Monitors and Maintenance. Each of these tabs contains the buttons to access the various areas of HotSoft.

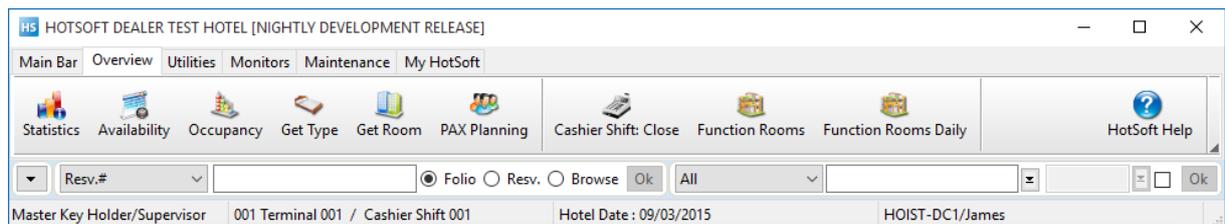
Main Bar

This is the default bar that appears when the Access Bar is launched. It displays button links to the most frequently used browse screens such as Reservations, Contacts and Printouts.



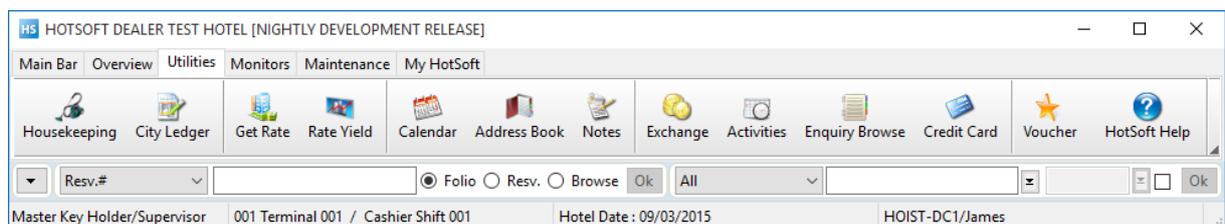
Overview

The Overview bar displays links to all of the windows which provide overviews of statistics, room availability, occupancy and PAX planning.



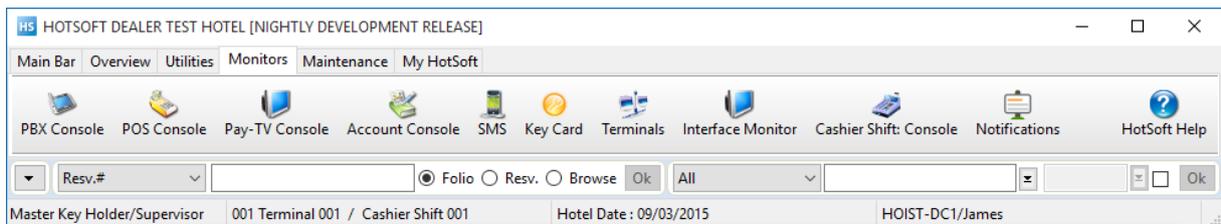
Utilities

This bar contains buttons to the utility-related functions and screens such as housekeeping.



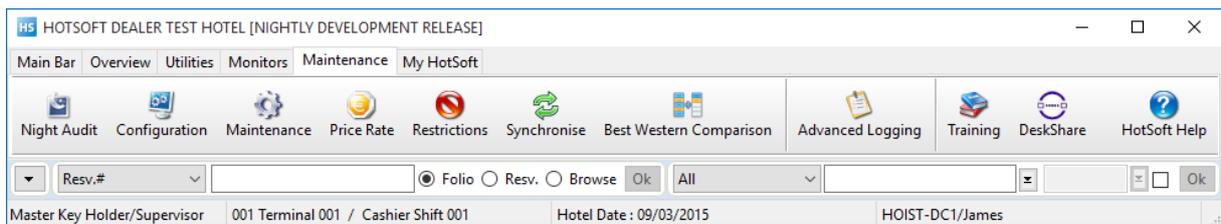
Monitors

The Monitors bar offers buttons to various monitors and interfaces and notifications.



Maintenance

The Maintenance bar contains links to browse screens and windows which relate to HotSoft maintenance, configuration and other settings.

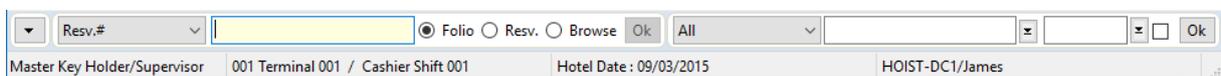


Search Bar

The search bar can be found underneath the tab buttons on the access bar. This can be used as a standard search bar or for an advanced search.

Standard Search

The standard search bar is the panel that appears by default on the access bar. See below:

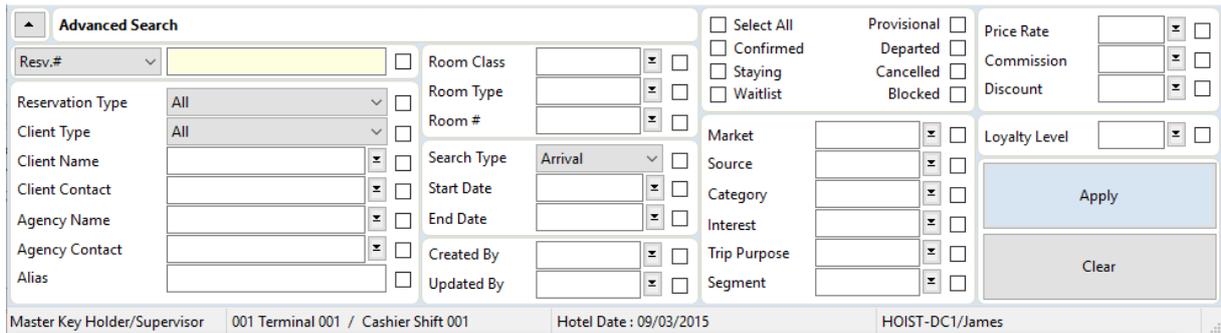


This tool can be used to perform a search within HotSoft for a specific reservation number (Resv.#), room number (Room #), CRS number (CRS #), and invoice or membership numbers.

The user can also search for a specific client or business or specific date using the other drop-down menus and clicking **Ok**.

Advanced Search

By clicking the drop-down menu arrow on the far right of the screen, the user can open the advanced search panel. See below:

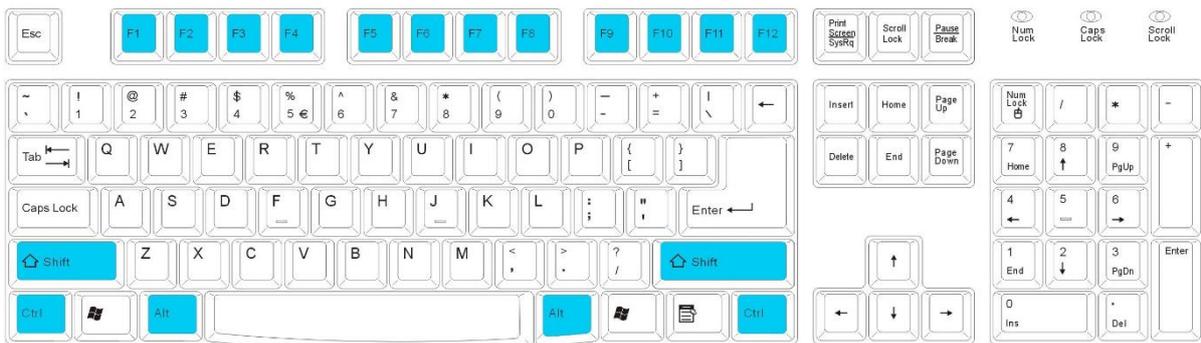


While the standard search is used to access a folio or reservation directly, the advanced search can be used to search for a number of reservations so results will always be returned in the Reservations browse screen.

Shortcuts

There are a number of hotkeys and shortcuts that speed up the navigation within HotSoft.

The primary hotkeys, which include the function keys **F1** to **F12** used in combination with **Shift**, **Alt** and **Ctrl**, are highlighted in blue in the keyboard diagram below:



Hotkeys

The primary hotkeys are documented in the table below:

		Shift	Control	Alt
F1	Help			Pause
F2	Housekeeping	Quick Sale		
F3	Availability	Property Overview	Statistics	Free Room Types
F4	Occupancy	Advanced Logging	Free Guest Rooms	Log Out
F5	Reservations/Folios	City Ledger	PAX Planning	Free Allotments
F6	Notes	Address Book	Calendar	
F7	Contact Manager			
F8		Price Rate	Exchange Rates	PBX Console
F9		Rate Yield	Terminals	
F10	Save		Activity Browse	POS Console
F11	Function Rooms	Quick Arrangement	Calendar Rates	Function Rooms Daily
F12	Printouts	Voucher	Credit Card Transactions	Key Encoder

Other Shortcuts

These are other shortcuts for commonly-used buttons that appear throughout HotSoft.

Icon	Function	Shortcut Key(s)
	New	Insert (Ins)
	Delete	Delete (Del)
	Edit	Enter
	Find	Ctrl+F
	Save	F10
	Query	Alt+Q
	Print	F12
	Send SMS	Ctrl+R
	Check-In/Out	Ctrl+Enter

Help (F1) Access

The user can access the HotSoft help system from any browse screen or pop-up window that displays the 'Help' icon (pictured below) or by pressing the **F1** hotkey.



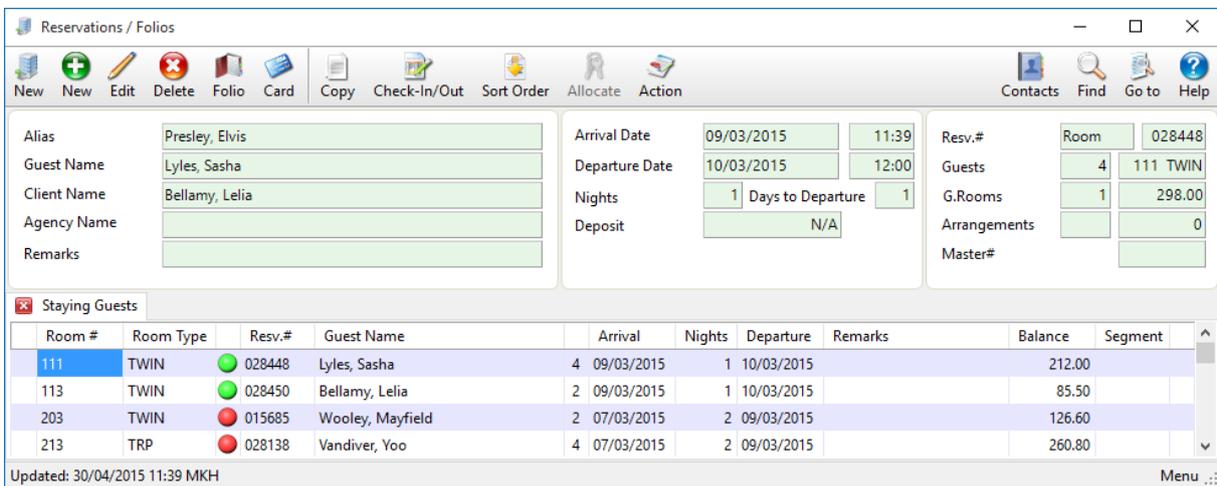
The help button will link from the individual screen to the equivalent documentation page within the help system.

Reservations

The Reservations / Folios browse screen can be accessed by pressing the **F5** hotkey or clicking the **Reservations, In-House, Arriving** or **Departing** buttons on the Main Bar.



Reservations or **F5** will open the browse screen displaying Staying Guests by default or displaying the same tabs that were open when it was last open.



Reservations / Folios

Alias: Presley, Elvis
 Guest Name: Lyles, Sasha
 Client Name: Bellamy, Lelia
 Agency Name:
 Remarks:

Arrival Date: 09/03/2015 11:39
 Departure Date: 10/03/2015 12:00
 Nights: 1 Days to Departure: 1
 Deposit: N/A

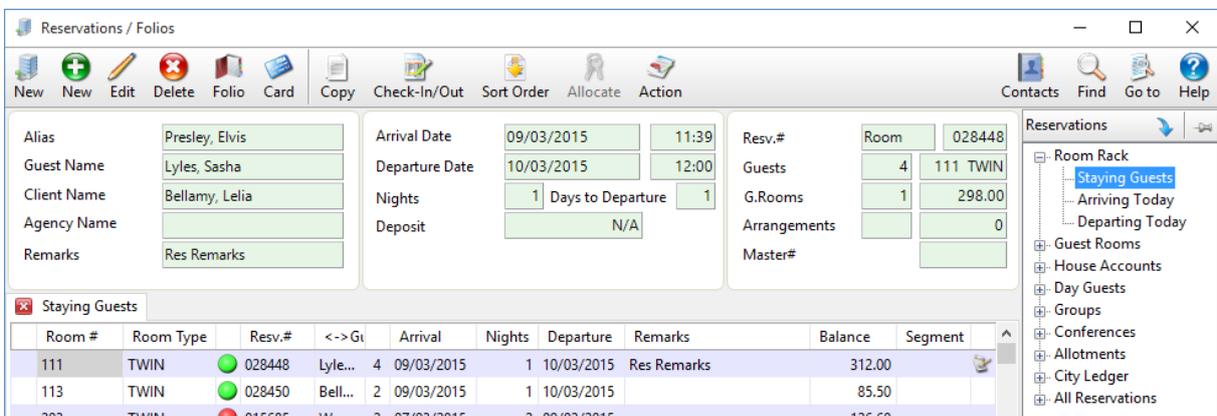
Resv.#: 028448
 Room: 111 TWIN
 Guests: 4
 G.Rooms: 1 298.00
 Arrangements: 0
 Master#:

Room #	Room Type	Resv.#	Guest Name	Arrival	Nights	Departure	Remarks	Balance	Segment
111	TWIN	028448	Lyles, Sasha	4 09/03/2015	1	10/03/2015		212.00	
113	TWIN	028450	Bellamy, Lelia	2 09/03/2015	1	10/03/2015		85.50	
203	TWIN	015685	Wooley, Mayfield	2 07/03/2015	2	09/03/2015		126.60	
213	TRP	028138	Vandiver, Yoo	4 07/03/2015	2	09/03/2015		260.80	

Updated: 30/04/2015 11:39 MKH

In-House will open the browse screen will all Staying Guests, **Arriving** will show all guest Arriving Today, and **Departing** will show all guests Departing Today.

A quick way to view all staying guests, arriving today or departing today is to press the **F5** hotkey when the **Reservations / Folios** screen is open. This will open the Reservation Menu panel on the right side of the screen. Then double-click or press **Enter** on the required reservation type.



Reservations / Folios

Alias: Presley, Elvis
 Guest Name: Lyles, Sasha
 Client Name: Bellamy, Lelia
 Agency Name:
 Remarks: Res Remarks

Arrival Date: 09/03/2015 11:39
 Departure Date: 10/03/2015 12:00
 Nights: 1 Days to Departure: 1
 Deposit: N/A

Resv.#: 028448
 Room: 111 TWIN
 Guests: 4
 G.Rooms: 1 298.00
 Arrangements: 0
 Master#:

Reservations

- Room Rack
 - Staying Guests
 - Arriving Today
 - Departing Today
 - Guest Rooms
 - House Accounts
 - Day Guests
 - Groups
 - Conferences
 - Allotments
 - City Ledger
 - All Reservations

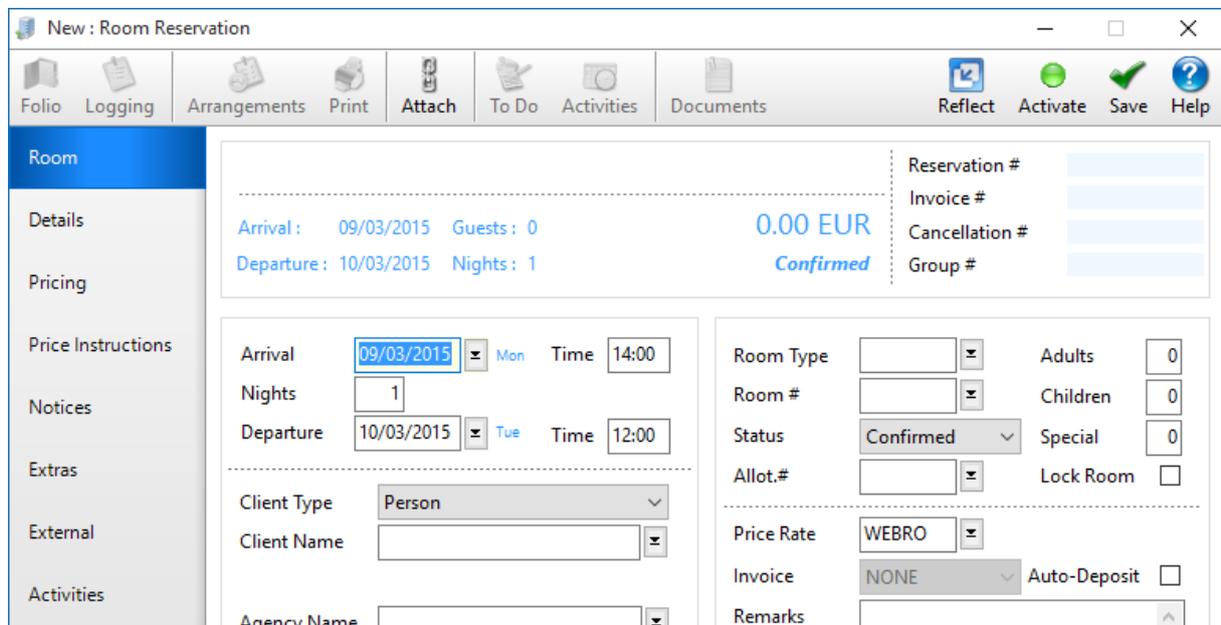
Room #	Room Type	Resv.#	<->G	Arrival	Nights	Departure	Remarks	Balance	Segment
111	TWIN	028448	Lyle...	4 09/03/2015	1	10/03/2015	Res Remarks	312.00	
113	TWIN	028450	Bell...	2 09/03/2015	1	10/03/2015		85.50	
203	TWIN	015685	Wn...	2 07/03/2015	2	09/03/2015		126.60	

The buttons along the tool bar can be used to perform the following actions:

Button (Hotkey)	Description
 New	This will allow the user to choose which kind of reservation they want to create. E.g. Room Reservation, Day Guest, Group, Blocked etc.
 New (Ins)	This new button will create a new reservation of the same type as the tab that is open.
 Delete (Del)	The delete button can be used to cancel a reservation.
 Edit	The edit button allow the user to make changes to the reservation.
 Folio (Space)	This will open the folio for the selected or current reservation.
 Copy	This will copy the selected reservation.
 Check-In/Out	This can be used to check a guest in or out.

New Reservation

When creating a new reservation, the window displayed below will appear. The user must fill a certain number of mandatory fields before the reservation can be activated or saved.



The screenshot shows a software window titled "New : Room Reservation". The window has a toolbar at the top with icons for Folio, Logging, Arrangements, Print, Attach, To Do, Activities, Documents, Reflect, Activate, Save, and Help. On the left side, there is a vertical navigation menu with tabs: Room (selected), Details, Pricing, Price Instructions, Notices, Extras, External, and Activities. The main content area is divided into several sections:

- Summary:** Displays "Arrival: 09/03/2015", "Guests: 0", "Departure: 10/03/2015", "Nights: 1", and a price of "0.00 EUR Confirmed".
- Reservation Details:** Includes fields for "Reservation #", "Invoice #", "Cancellation #", and "Group #".
- Arrival/Departure:** Fields for "Arrival" (09/03/2015, Mon, 14:00), "Nights" (1), "Departure" (10/03/2015, Tue, 12:00).
- Room Information:** Fields for "Room Type", "Room #", "Status" (Confirmed), "Allot.#", "Adults" (0), "Children" (0), "Special" (0), and "Lock Room" (checkbox).
- Client Information:** Fields for "Client Type" (Person), "Client Name", and "Agency Name".
- Other Fields:** "Price Rate" (WEBRO), "Invoice" (NONE), "Auto-Deposit" (checkbox), and "Remarks".

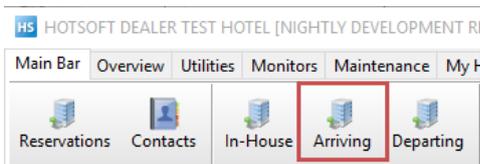
The Reservation is divided into a nine tabs. The Room tab is where most of the mandatory information will need to be entered.

Please note: Mandatory fields can be configured in the Configuration section. To find and enable the fields, search for 'mandatory' under Global Settings.

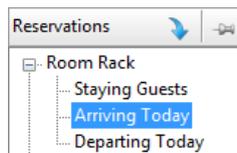
At a minimum, the user will need to input the following: arrival date and time, departure date and time, client type, client name, room type, the number of adults and children, a price rate and a market.

Check-In

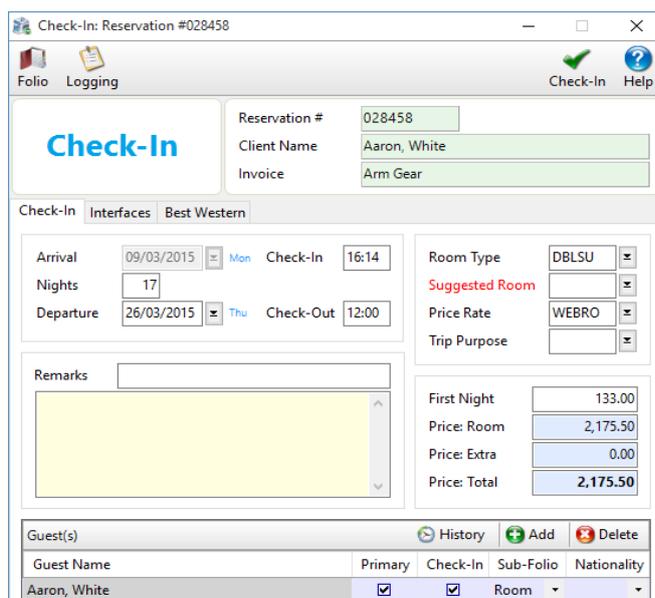
To check-in a guest, open the list of guests who are Arriving Today. This can be accessed by clicking the **Arriving** button on the Main Bar.



Alternatively, open the **Reservations / Folios** screen and left-click on Menu in the bottom right corner. Open the Room Rack drop-down and double-click on **Arriving Today**.



This will open a list of all arriving guests in the lower panel, select the guest you want to check-in and click the **Check-In/Out** button on the top toolbar. This will open the Check-In pop-up window below:



The screenshot shows a 'Check-In: Reservation #028458' window. It has a toolbar with 'Folio', 'Logging', 'Check-In', and 'Help'. The main area contains the following information:

- Reservation #: 028458
- Client Name: Aaron, White
- Invoice: Arm Gear

Below this is a 'Check-In' section with the following details:

- Arrival: 09/03/2015 (Mon) Check-In: 16:14
- Nights: 17
- Departure: 26/03/2015 (Thu) Check-Out: 12:00
- Room Type: DBLSU
- Suggested Room: [Empty]
- Price Rate: WEBRO
- Trip Purpose: [Empty]
- Remarks: [Empty text area]
- First Night: 133.00
- Price: Room: 2,175.50
- Price: Extra: 0.00
- Price: Total: 2,175.50

At the bottom, there is a 'Guest(s)' table:

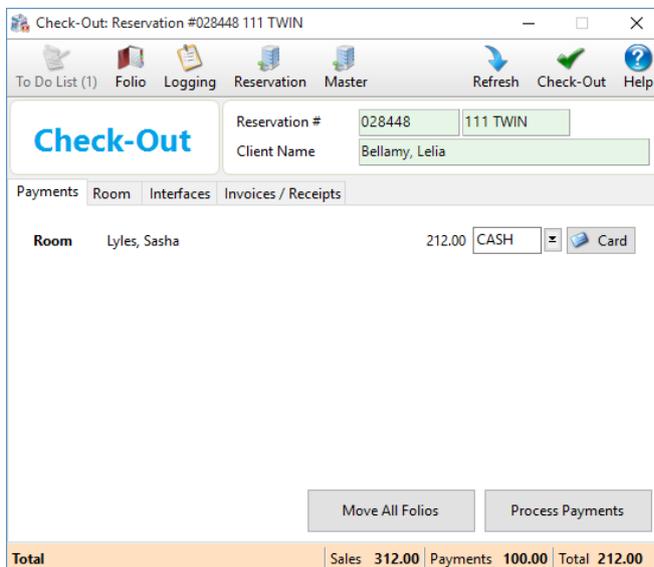
Guest Name	Primary	Check-In	Sub-Folio	Nationality
Aaron, White	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Room	

If a room has not already been allocated to the reservation, the Suggest Room field will be highlighted in red. Click on the drop-down to find a suitable room for the guest. During the check-in process, it is also possible to add and remove additional guests and to change the departure date and time.

To complete the check-in, click the **Check-In** button or press the **F10** hotkey.

Check-Out

A check-out is performed using the same **Check-In/Out** button but normally by selecting a guest from the Departing Today list. This can be found on the Main Bar or by searching the Room Rack.

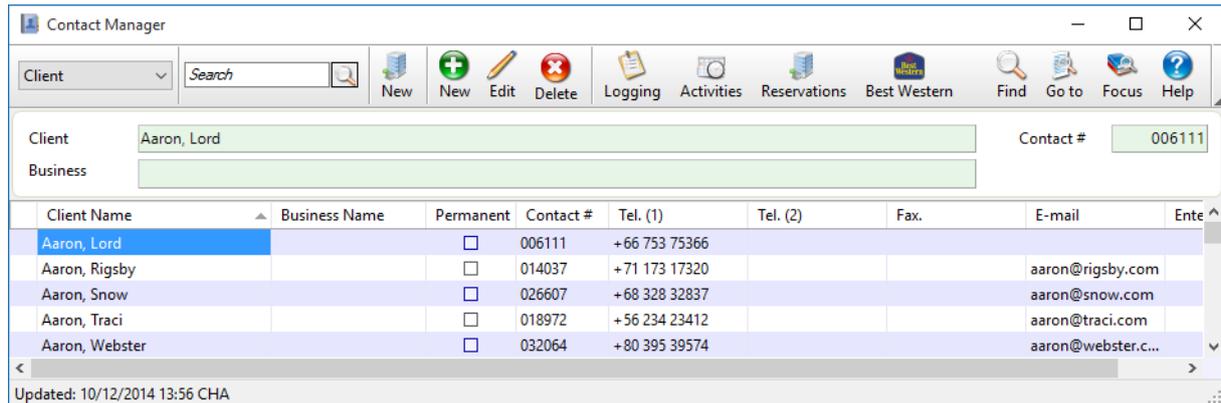


The pop-up screen above will open. The user can either **Process Payments** and take payment from the guest or **Move All Folios** to another guest (if part of a group or a company that is paying etc.).

When there is no outstanding balance, the user can click **Check-Out** to close the reservation.

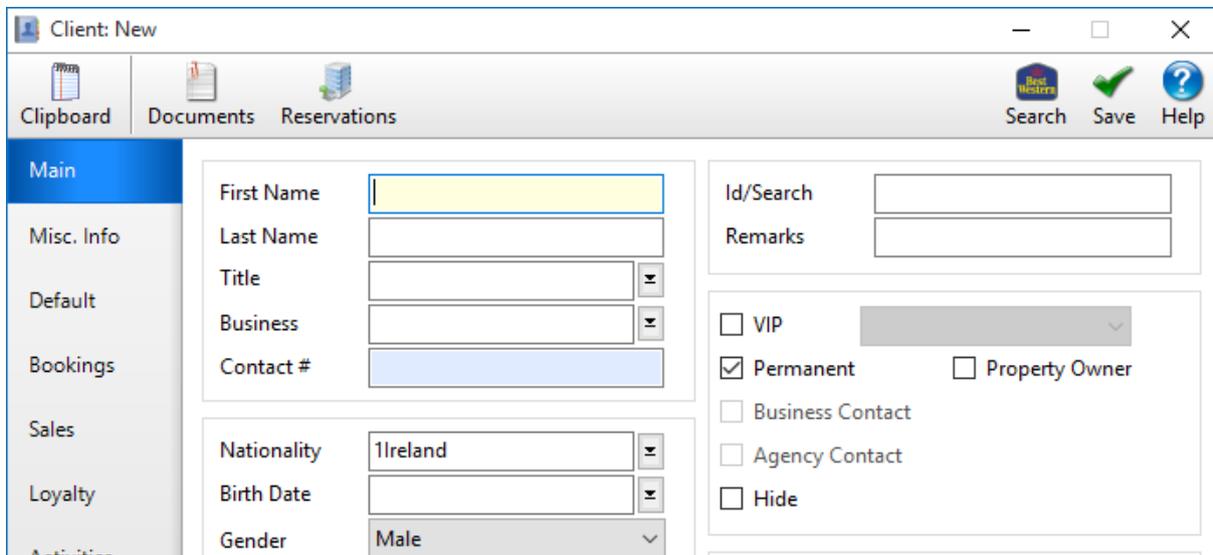
Contact Manager

The Contact Manager browse screen, which can be accessed using the **F7** hotkey, is where the user can look up previous guests and create new guest contacts.



New Contact

Click the  **New** button to create a new contact. This opens the Client card window (below):



The screenshot shows the 'Client: New' form window. It has a sidebar with navigation options: Main, Misc. Info, Default, Bookings, Sales, Loyalty, and Activities. The main form contains several input fields and checkboxes:

- First Name (highlighted in yellow)
- Last Name
- Title (dropdown menu)
- Business (dropdown menu)
- Contact #
- Nationality (dropdown menu, set to '1Ireland')
- Birth Date (dropdown menu)
- Gender (dropdown menu, set to 'Male')
- Id/Search
- Remarks
- VIP
- Permanent
- Property Owner
- Business Contact
- Agency Contact
- Hide

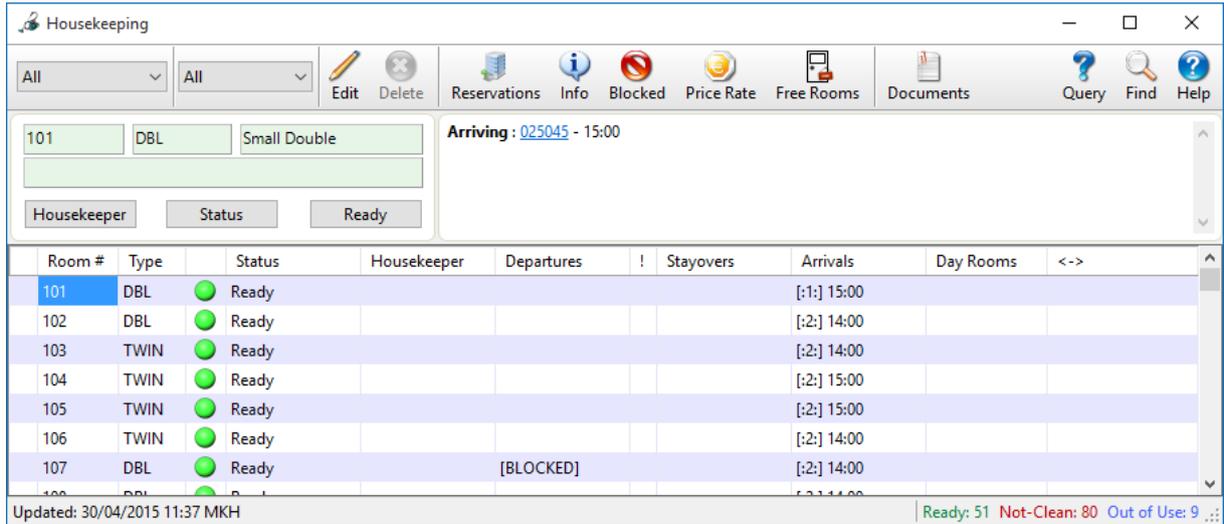
Client cards are usually created when the reservation is made or at the time of check-in.

The HotSoft user can fill in the various fields for the guest's name, address, a business they come from, as well as their contact details.

Certain fields like nationality and gender can be pre-defined in Configuration. The 'User Fields' are also configurable.

Housekeeping

The housekeeping window, accessible with the **F2** hotkey, is where the user can manage cleaning staff and the cleaning of rooms.



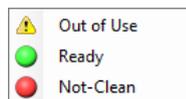
Room #	Type	Status	Housekeeper	Departures	Stayovers	Arrivals	Day Rooms
101	DBL	Ready				[1:1] 15:00	
102	DBL	Ready				[2:1] 14:00	
103	TWIN	Ready				[2:1] 14:00	
104	TWIN	Ready				[2:1] 15:00	
105	TWIN	Ready				[2:1] 15:00	
106	TWIN	Ready				[2:1] 14:00	
107	DBL	Ready		[BLOCKED]		[2:1] 14:00	

The cleaning status is indicated in the Status column. Statuses include: Ready, Out of Use or Not-Clean.

It is possible to tag a room by double clicking in the far left column. To tag multiple rooms hold Ctrl or Shift and click on the required rooms.

Room #	Type	Status
107	DBL	Ready
108	DBL	Ready
109	TWIN	Ready
110	TWIN	Ready

After tagging the required rooms, it is possible to set the status of these tagged rooms by clicking the **Status** button or allocate them to a housekeeper by clicking the **Housekeeper** button.



Availability

The Availability is one of the Overview screens and can be accessed from the Overview bar or by pressing the **F3** hotkey. It is a quick way for the user to view the number of available rooms of different types for a particular date or period of time

Availability																			
2 Weeks		For Sale		Price List Standard Rates		New Info Description Booking Enquiry				Restrictions Reflect Help									
Room	Type	W11 Mar 2015							W12 Mar 2015							W13 Mar			
Beds	Class	Mon 9	Tue 10	Wed 11	Thu 12	Fri 13	Sat 14	Sun 15	Mon 16	Tue 17	Wed 18	Thu 19	Fri 20	Sat 21	Sun 22				
DBL	27	13	12	16	13	1	0	8	-28	-21	-20	19	3	9	18				
DBLE	11	0	-1	1	7	0	0	6	-4	-4	-5	5	-2	-8	10				
DBLS	10	4	6	7	4	1	-4	6	6	6	9	7	6	2	5				
DBLSU	2	-1	0	1	0	-1	-1	0	0	1	1	1	0	-1	0				
SGL	4	3	4	4	4	4	1	2	-10	-10	-11	4	4	4	4				
TRP	1	0	0	1	1	1	0	-1	-5	-4	-4	1	-1	-1	1				
TRPE	2	1	2	2	2	2	0	2	1	1	1	2	1	1	2				
TWIN	46	12	24	39	42	3	0	42	22	21	23	46	9	1	45				
TWINE	37	9	30	36	35	19	0	33	22	24	26	35	26	4	33				
For Sale		41	77	107	108	30	-4	98	4	14	20	120	46	11	118				
Arrivals		74	29	9	14	91	59	23	111	11	7	8	82	52	12				
Departures		18	65	39	15	13	25	125	17	21	13	108	8	17	119				
Find Home <D <W <M <		Sep 15		Oct 15		Nov 15		Dec 15		Jan 16		Feb 16		Mar 16		Apr 16		>M >W >D >	

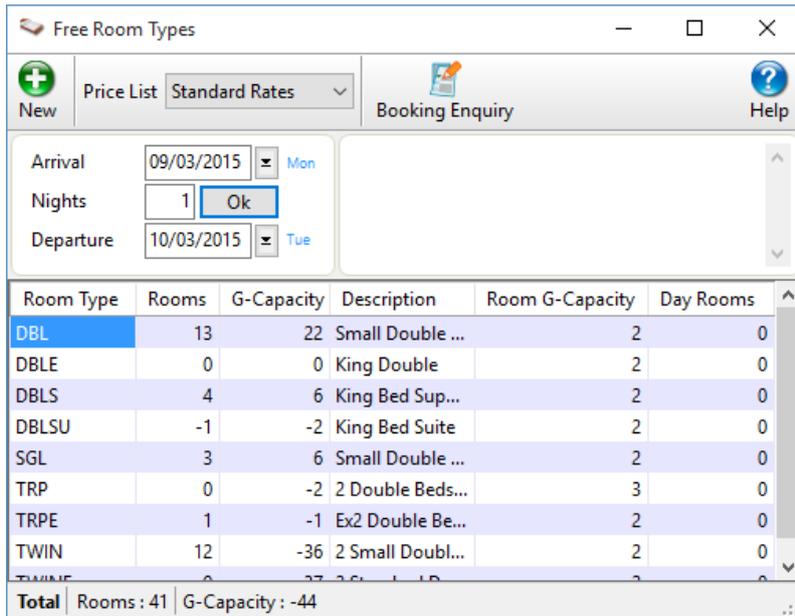
4	Black – indicates the number of available rooms (e.g. 4 rooms available)
-1	Red – indicates an overbooking for this room type (e.g. -1 = overbooked by 1 guest)
3	Blue – indicates the number of reservations for this room type on the waiting list.

There are a number of actions that can be performed from this window. These include:

Button (Hotkey)	Description
 New	This new button will create a new reservation of the selected room type.
 Info	This will open the active reservations in the Reservations browse for the selected room types.
 Description	This opens the Rooms Types screen, providing a description of the selected room type.
 Booking Enquiry	This will open the Enquiry Browse screen.
 Restrictions	This opens a panel displaying any restrictions (For more info see the online help).
 Reflections	This will open any windows which are configured to reflect Availability. (For more info see the online help).

Free Room Types

Another easy way to view available rooms by room type is to use the Free Room Types window. This can be accessed using the **Alt+F3** hotkeys.



The screenshot shows the 'Free Room Types' window with the following details:

- Price List: Standard Rates
- Arrival: 09/03/2015 (Mon)
- Nights: 1
- Departure: 10/03/2015 (Tue)

Room Type	Rooms	G-Capacity	Description	Room G-Capacity	Day Rooms
DBL	13	22	Small Double ...	2	0
DBLE	0	0	King Double	2	0
DBLS	4	6	King Bed Sup...	2	0
DBLSU	-1	-2	King Bed Suite	2	0
SGL	3	6	Small Double ...	2	0
TRP	0	-2	2 Double Beds...	3	0
TRPE	1	-1	Ex2 Double Be...	2	0
TWIN	12	-36	2 Small Doubl...	2	0
TWINP	0	27	2 Small Doubl...	2	0
Total	Rooms : 41	G-Capacity : -44			

Change the arrival and departure dates to see the free room types for a specific date range.

The Rooms column displays the number of available rooms for the date range.

The G-Capacity column displays the total guest capacity for each room type for the data range.

The Room G-Capacity displays the guest capacity of a single room of the related room type.

The total number of rooms and the total G-capacity is displayed in the bottom left corner.

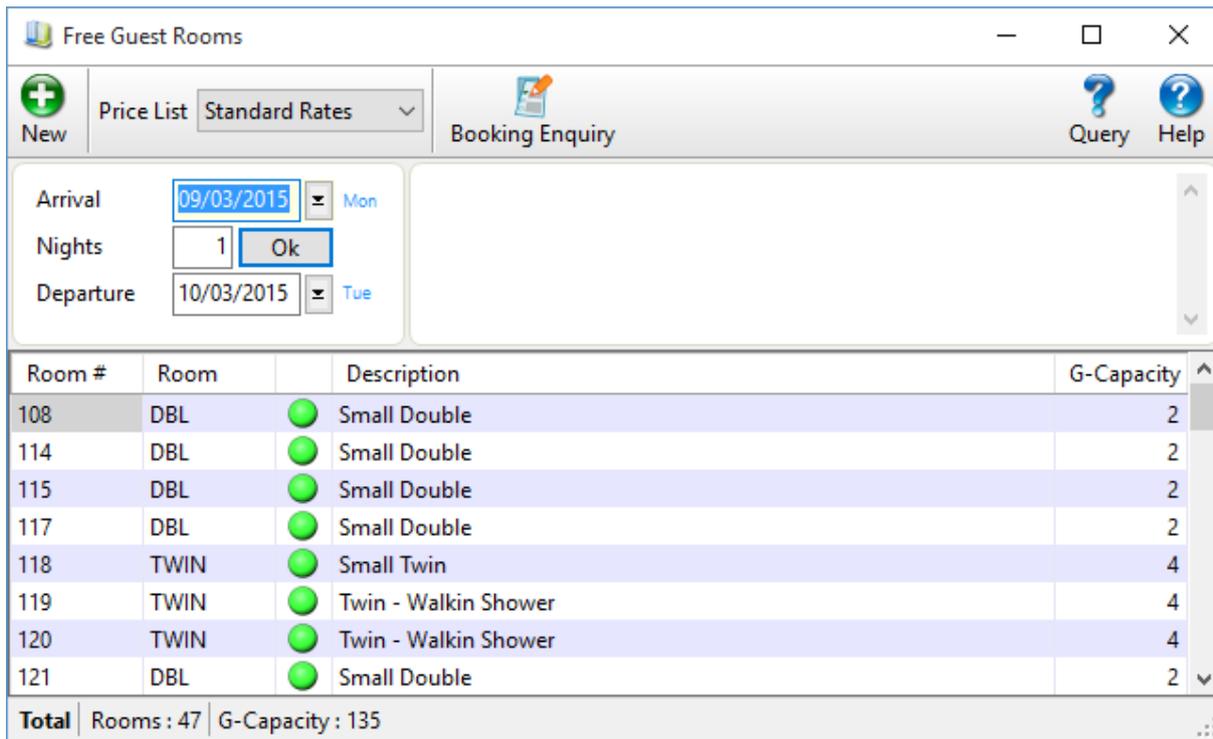
Any notes will be displayed in the top right corner.



New can be used to create a new room reservation for the selected room type.

Free Guest Rooms

An easy way to view the number of available rooms within a date range is using the Free Guest Rooms window. This can be accessed using the **Ctrl+F4** hotkey.



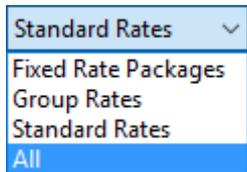
The screenshot shows the 'Free Guest Rooms' window with the following details:

- Price List:** Standard Rates
- Arrival:** 09/03/2015 (Mon)
- Nights:** 1
- Departure:** 10/03/2015 (Tue)

Room #	Room	Description	G-Capacity
108	DBL	Small Double	2
114	DBL	Small Double	2
115	DBL	Small Double	2
117	DBL	Small Double	2
118	TWIN	Small Twin	4
119	TWIN	Twin - Walkin Shower	4
120	TWIN	Twin - Walkin Shower	4
121	DBL	Small Double	2

Total Rooms : 47 | G-Capacity : 135

The date range can be altered by changing the Arrival, Nights or Departure fields. The user can also search by specific types of price rate using the Price List drop-down menu:



The Price List drop-down menu shows the following options:

- Standard Rates
- Fixed Rate Packages
- Group Rates
- Standard Rates
- All

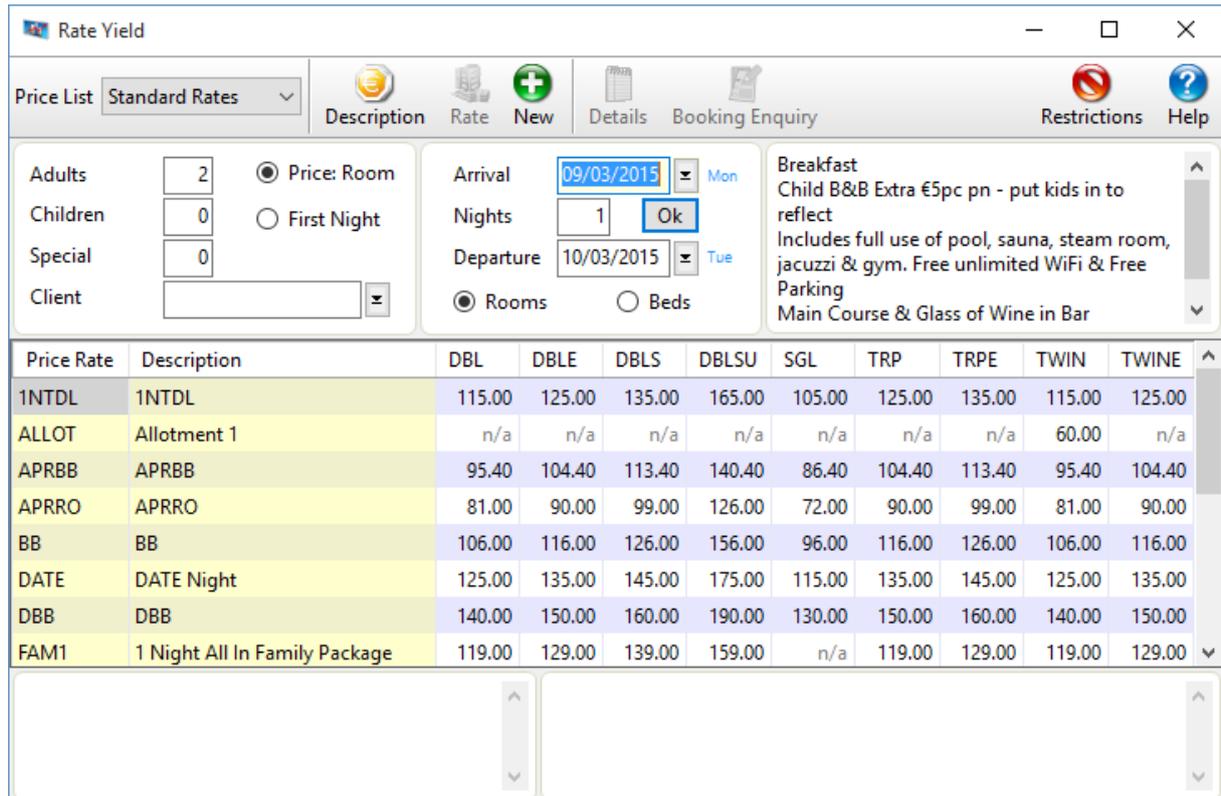
The Room # column displays the available rooms for the date range provided. The G-Capacity displays the total guest capacity of each room for the date range provided. The total number of free rooms and guest capacity for the dates provided is displayed bottom-left. Notes on the current room are displayed in the top right-hand corner.

The user can create a new Reservation by using the **New** button or a Booking Enquiry by clicking the **Booking Enquiry** button. See the next section for more information.

Please note: Any negative figures in the window indicate rooms that are overbooked.

Rate Yield

The Rate Yield where HotSoft users can calculate a price for all of their room types and price rates. This can be launched by clicking the Rate Yield button on the Main Bar or pressing **Shift+F9**.



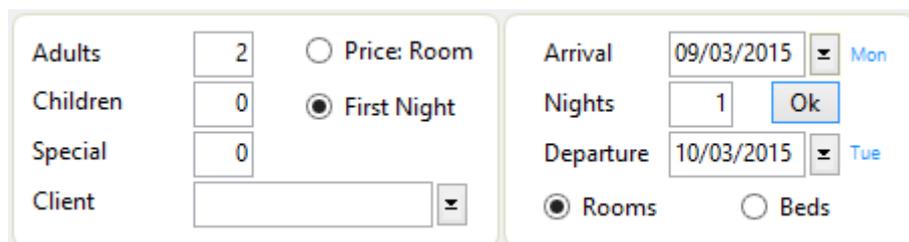
The screenshot shows the 'Rate Yield' application window. At the top, there's a 'Price List' dropdown set to 'Standard Rates'. Below this are navigation buttons: Description, Rate, New, Details, and Booking Enquiry. On the right, there are 'Restrictions' and 'Help' buttons. The search filters include: Adults (2), Children (0), Special (0), Client (empty), and radio buttons for 'Price: Room' (selected) and 'First Night'. The arrival date is 09/03/2015 (Monday) and the departure is 10/03/2015 (Tuesday), with 1 night. There are radio buttons for 'Rooms' (selected) and 'Beds'. A 'Breakfast' section on the right lists: 'Child B&B Extra €5pc pn - put kids in to reflect', 'Includes full use of pool, sauna, steam room, jacuzzi & gym. Free unlimited WiFi & Free Parking', and 'Main Course & Glass of Wine in Bar'. Below the filters is a table of price rates.

Price Rate	Description	DBL	DBLE	DBLS	DBLSU	SGL	TRP	TRPE	TWIN	TWINE
1NTDL	1NTDL	115.00	125.00	135.00	165.00	105.00	125.00	135.00	115.00	125.00
ALLOT	Allotment 1	n/a	60.00	n/a						
APRBB	APRBB	95.40	104.40	113.40	140.40	86.40	104.40	113.40	95.40	104.40
APPRO	APPRO	81.00	90.00	99.00	126.00	72.00	90.00	99.00	81.00	90.00
BB	BB	106.00	116.00	126.00	156.00	96.00	116.00	126.00	106.00	116.00
DATE	DATE Night	125.00	135.00	145.00	175.00	115.00	135.00	145.00	125.00	135.00
DBB	DBB	140.00	150.00	160.00	190.00	130.00	150.00	160.00	140.00	150.00
FAM1	1 Night All In Family Package	119.00	129.00	139.00	159.00	n/a	119.00	129.00	119.00	129.00

This can be used as a primary booking screen by hotels who are concerned with price and negotiating price deals with their customers. Smaller hotels may find it more convenient to use the Occupancy screen.

After selecting the required price list from the drop-down menu in the top left of the screen, the user can use the panel below to filter which price rates are available to the guest.

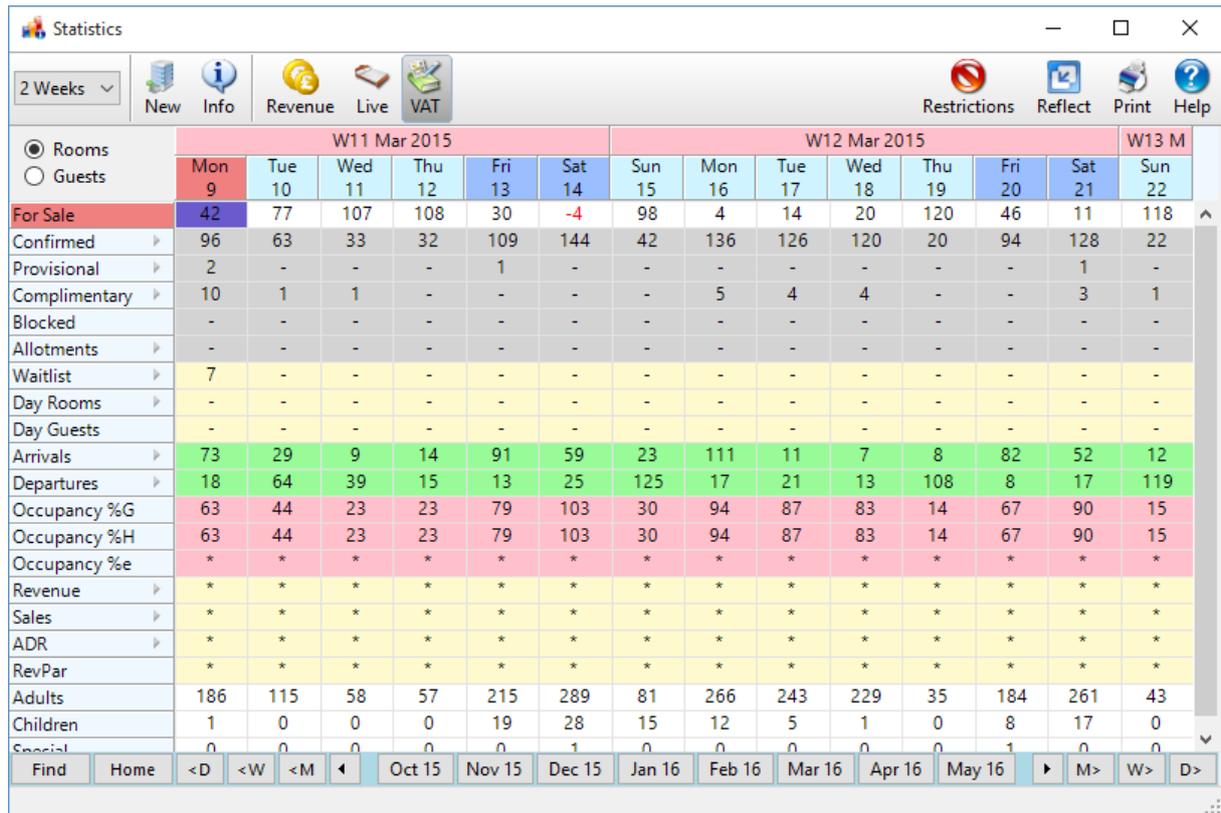
To narrow down the search, the user can fill in the fields in the two panels:



This image shows a close-up of the search filter panels. The left panel contains: Adults (2), Children (0), Special (0), Client (empty), and radio buttons for 'Price: Room' (unselected) and 'First Night' (selected). The right panel contains: Arrival (09/03/2015, Monday), Nights (1), Departure (10/03/2015, Tuesday), and radio buttons for 'Rooms' (selected) and 'Beds' (unselected).

Statistics

The Statistics window provides a detailed breakdown of the booking statistics. You can see how availability and reservations etc. by rooms or guests. Statistics can be viewed displaying one to four weeks at a time.



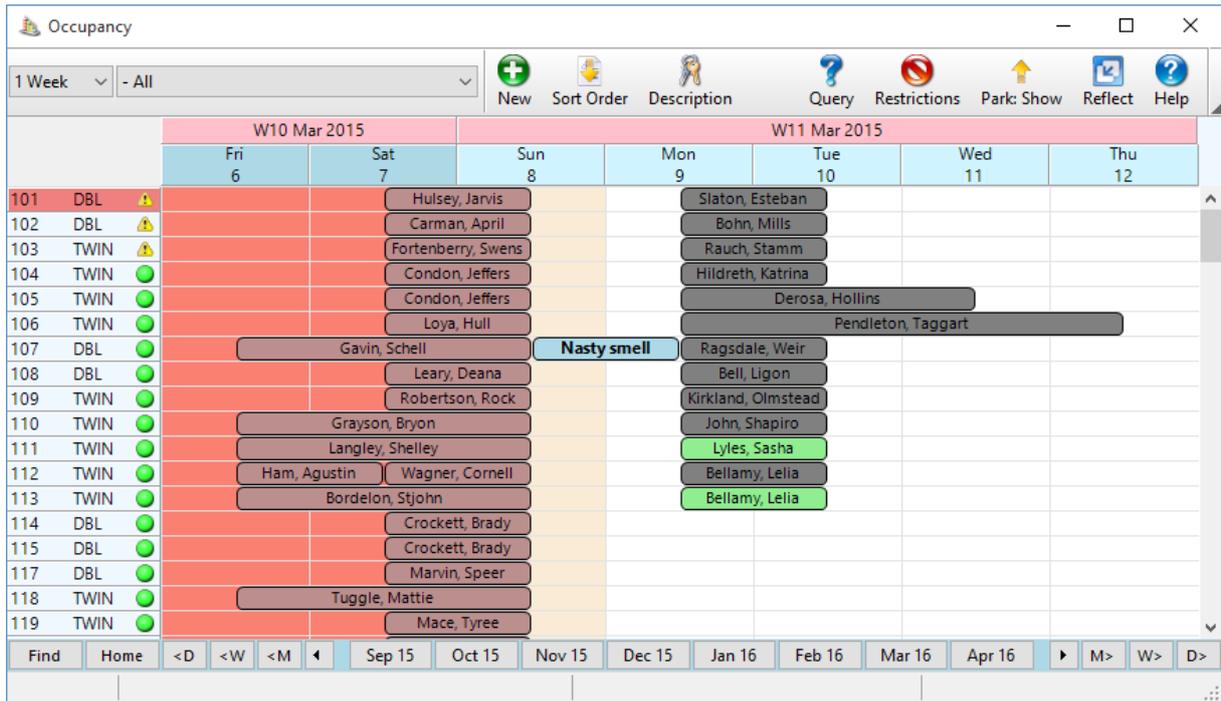
		W11 Mar 2015						W12 Mar 2015						W13 M	
		Mon 9	Tue 10	Wed 11	Thu 12	Fri 13	Sat 14	Sun 15	Mon 16	Tue 17	Wed 18	Thu 19	Fri 20	Sat 21	Sun 22
<input checked="" type="radio"/> Rooms	For Sale	42	77	107	108	30	-4	98	4	14	20	120	46	11	118
<input type="radio"/> Guests	Confirmed	96	63	33	32	109	144	42	136	126	120	20	94	128	22
	Provisional	2	-	-	-	1	-	-	-	-	-	-	-	1	-
	Complimentary	10	1	1	-	-	-	-	5	4	4	-	-	3	1
	Blocked	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Allotments	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Waitlist	7	-	-	-	-	-	-	-	-	-	-	-	-	-
	Day Rooms	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Day Guests	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Arrivals	73	29	9	14	91	59	23	111	11	7	8	82	52	12
	Departures	18	64	39	15	13	25	125	17	21	13	108	8	17	119
	Occupancy %G	63	44	23	23	79	103	30	94	87	83	14	67	90	15
	Occupancy %H	63	44	23	23	79	103	30	94	87	83	14	67	90	15
	Occupancy %e	*	*	*	*	*	*	*	*	*	*	*	*	*	*
	Revenue	*	*	*	*	*	*	*	*	*	*	*	*	*	*
	Sales	*	*	*	*	*	*	*	*	*	*	*	*	*	*
	ADR	*	*	*	*	*	*	*	*	*	*	*	*	*	*
	RevPar	*	*	*	*	*	*	*	*	*	*	*	*	*	*
	Adults	186	115	58	57	215	289	81	266	243	229	35	184	261	43
	Children	1	0	0	0	19	28	15	12	5	1	0	8	17	0
	Special	0	0	0	0	0	1	0	0	0	0	0	1	0	0

The user is able to navigate through different days or dates using the <D <W <M or M> W> D> buttons.

It is possible to create a new reservation from this screen by clicking the **New** button.

Occupancy

Occupancy can be used to view the HotSoft’s occupancy for up to four weeks at a time. This browse screen can be accessed from the Overview tab or by pressing the **F4** hotkey.



This window displays the past, present and forecasted occupancy of each room. Each coloured block indicates a reservation. The colour of the block reflects the reservation status:

	Colour	Description
Boyd,	Red	Checked out
Blalock,	Green	Staying
Rou	Grey	Confirmed
Kirkland,	Yellow	Provisional
Nasty s	Blue	Blocked
Bell, Ligo	Pink	Waitlist

The drop-down menus in the top left corner can be used to switch the view between one, two, three and four weeks’ worth of reservations. The room type drop-down shows ‘-All’ by default.

Occupancy		
1 Week	- All	
	- All	
	DBL - Small Double Bed	
	DBLE - King Double	
	DBLS - King Bed Superior	
101	DBL	DBLSU- King Bed Suite
102	DBL	SGL - Small Double Bed
103	TWIN	TRP - 2 Double Beds & 1 Single Bed
104	TWIN	TRPE - Ex2 Double Beds & 1 Single Bed
105	TWIN	TWIN - 2 Small Double Beds
		TWINE- 2 Standard Double Beds

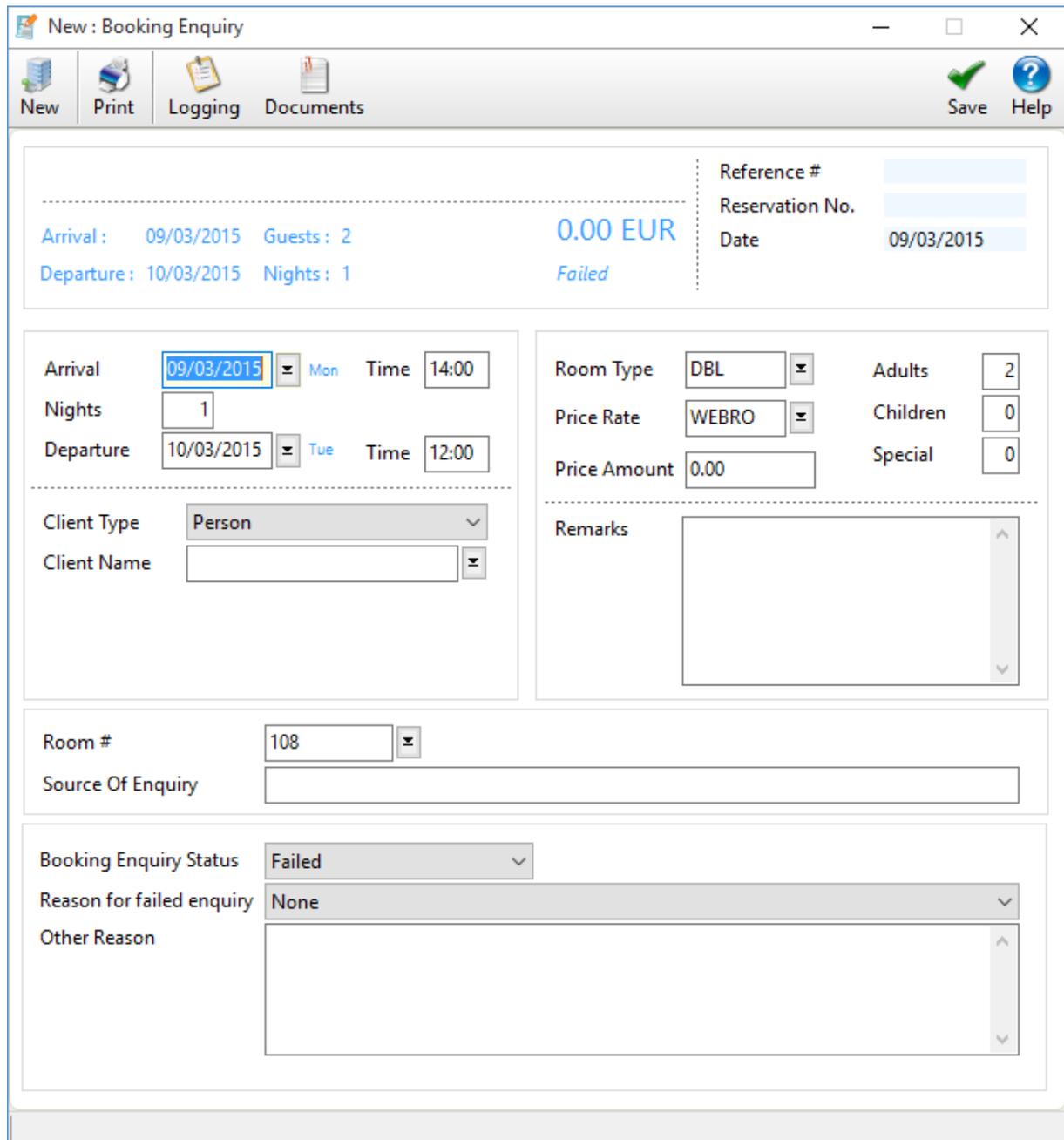
The user can scroll through different days, weeks and months using the directional arrows on the bottom. <D <W <M can be used to scroll back, M> W> D> can be used to scroll forward.

Alternatively the user can click the button for the required month they wish to view the occupancy for.

It is possible to create a new reservation, as with the Availability window, by clicking the **New** button and dragging a reservation block for the required dates.

Booking Enquiry

The Booking Enquiry screen is where the user can take the potential customers reservation requirements, either by phone or from an online enquiry, and input them into HotSoft system.



New : Booking Enquiry

New Print Logging Documents Save Help

Arrival: 09/03/2015 Guests: 2
Departure: 10/03/2015 Nights: 1

0.00 EUR
Failed

Reference #
Reservation No.
Date: 09/03/2015

Arrival: 09/03/2015 Mon Time: 14:00
Nights: 1
Departure: 10/03/2015 Tue Time: 12:00

Room Type: DBL
Price Rate: WEBRO
Price Amount: 0.00

Adults: 2
Children: 0
Special: 0

Client Type: Person
Client Name:

Remarks:

Room #: 108
Source Of Enquiry:

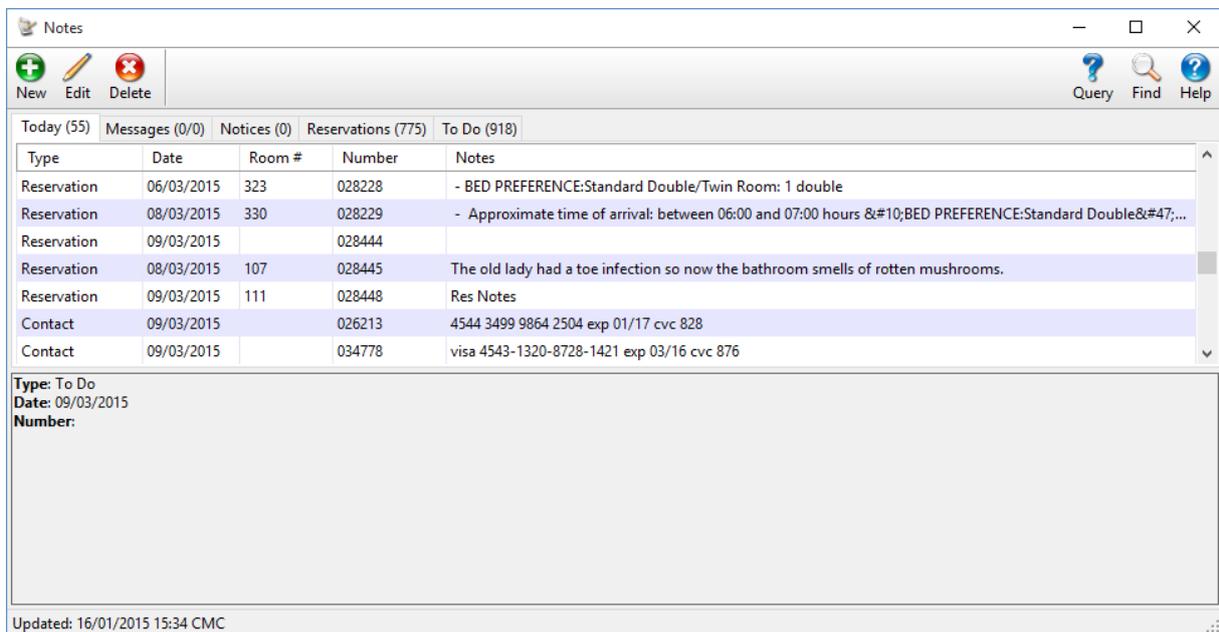
Booking Enquiry Status: Failed
Reason for failed enquiry: None
Other Reason:

The screen comprises of information about the potential client, the length of their stay and the type of room they require. Once entered, the **New** button can be used to create the reservation.

Alternatively, if the caller does not make a reservation, the user can set the Booking Enquiry Status to failure and input the reason for the booking failure.

Notes

Notes are made-up of Messages, Notices, Reservations and To Dos. This window can be accessed using the F6 button.



The screenshot shows a window titled "Notes" with a toolbar containing "New", "Edit", and "Delete" buttons. Below the toolbar are tabs for "Today (55)", "Messages (0/0)", "Notices (0)", "Reservations (775)", and "To Do (918)". The "Today" tab is active, displaying a table with columns: Type, Date, Room #, Number, and Notes. The table contains several rows of reservation and contact data. Below the table is a grey panel for details of the selected note, which currently shows details for a "To Do" item.

Type	Date	Room #	Number	Notes
Reservation	06/03/2015	323	028228	- BED PREFERENCE:Standard Double/Twin Room: 1 double
Reservation	08/03/2015	330	028229	- Approximate time of arrival: between 06:00 and 07:00 hours
BED PREFERENCE:Standard Double/...
Reservation	09/03/2015		028444	
Reservation	08/03/2015	107	028445	The old lady had a toe infection so now the bathroom smells of rotten mushrooms.
Reservation	09/03/2015	111	028448	Res Notes
Contact	09/03/2015		026213	4544 3499 9864 2504 exp 01/17 cvc 828
Contact	09/03/2015		034778	visa 4543-1320-8728-1421 exp 03/16 cvc 876

Type: To Do
Date: 09/03/2015
Number:

Updated: 16/01/2015 15:34 CMC

The first tab on the Notes window is the Today tab which lists all Messages, Notices, Reservations and To Dos relevant to today's date.

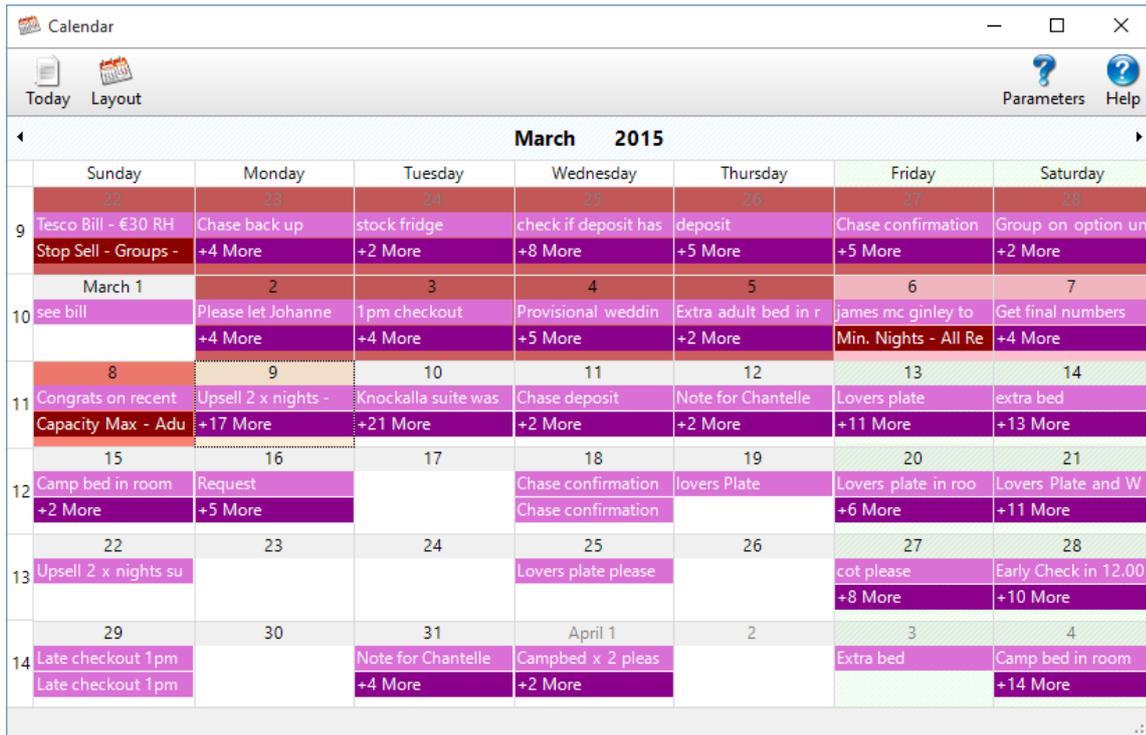
Each tab in the Notes has a number in brackets next to its name indicating how many items are on that tab. The Messages tab is had an additional number which is used to indicate how many of the messages are unread.

The grey panel at the bottom of the window is the detail for the current or selected note.

New notes can be created by using the **New** button.

Calendar

Calendar can be accessed by clicking the button on the Utilities toolbar or by pressing the **Ctrl+F6** hotkey.



The screenshot shows a calendar window titled "Calendar" with a toolbar containing "Today", "Layout", "Parameters", and "Help". The main content area displays a weekly view for March 2015, with columns for Sunday through Saturday. Each day contains reservation details and a "More" count.

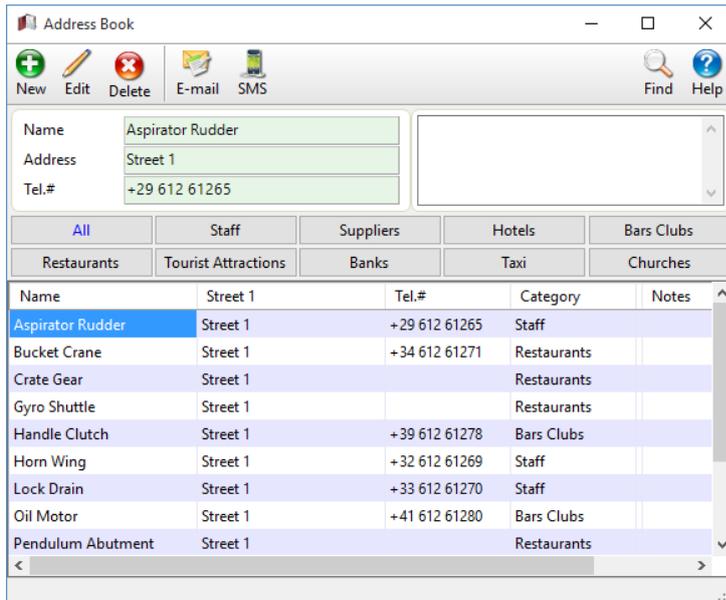
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
9	Tesco Bill - €30 RH Stop Sell - Groups -	Chase back up +4 More	stock fridge +2 More	check if deposit has +8 More	deposit +5 More	Chase confirmation +5 More	Group on option un +2 More
10	March 1 see bill	2 Please let Johanne +4 More	3 1pm checkout +4 More	4 Provisional weddin +5 More	5 Extra adult bed in r +2 More	6 james mc ginley to Min. Nights - All Re	7 Get final numbers +4 More
11	8 Congrats on recent Capacity Max - Adu	9 Upsell 2 x nights - +17 More	10 Knockalla suite was +21 More	11 Chase deposit +2 More	12 Note for Chantelle +2 More	13 Lovers plate +11 More	14 extra bed +13 More
12	15 Camp bed in room +2 More	16 Request +5 More	17	18 Chase confirmation Chase confirmation	19 lovers Plate	20 Lovers plate in roo +6 More	21 Lovers Plate and W +11 More
13	22 Upsell 2 x nights su	23	24	25 Lovers plate please	26	27 cot please +8 More	28 Early Check in 12.00 +10 More
14	29 Late checkout 1pm Late checkout 1pm	30	31 Note for Chantelle +4 More	April 1 Campbed x 2 pleas +2 More	2	3 Extra bed	4 Camp bed in room +14 More

The calendar provides multiple views, allowing the user to see reservations on that day (today), for the week, for the month, multiple weeks or for the year. By default it will display the system date (today's date).

Clicking **Layout** will open the drop-down menu with the different options: Week, Month, Multi-Week, Year and Year Planner.

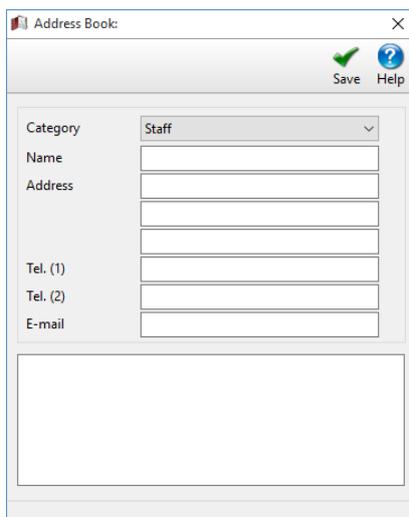
Address Book

The Address Book can be opened from the Utilities tool bar and used to look up the contact details for members of staff, other businesses and suppliers.



The user can create up to nine categories. Example categories are: restaurants, entertainment, hotels, staff numbers, maintenance, transport, tourist attractions, general and shops.

To add a new record the user can use the **New** button or use the **Insert** hotkey. A new window will open where the new address book entry's details can be added.



It is possible to send an SMS or E-mail message to the selected Address Book contact by highlighting their name and clicking the **SMS** or **E-mail** buttons.

Folio

The folio screen is where the user can see all transactions relating to a guest reservation.

Folio: Reservation #028138 - Room #213 TRP

1 [New] [Edit] [Delete] [Check-Out] [Card] [PLU] [Action] [Group] [Deleted] [VAT] [Details] [Logging] [Direct] [Print] [Find] [Help]

Client Name: Abutment Chain Room #: 213 TRP 028138 Master#:
 Guest Name: Vandiver, Yoo Message:
 Visit: 07/03/2015 <2> 09/03/2015
 Status: In-House

Date	Description	Incl VAT	Pak	Sub-Folio	Quantity	Reference	Charge	Links
07/03/2015	Dexters Food IFC	55.50		Room	1	8007339	POS	
07/03/2015	BB	75.00	A:	Room	1		Room	
07/03/2015	B&B, Flexible rate, free cancellation 1 day in adv...	14.00	A	Room	4		Package	
07/03/2015	Child B&B Extra €5pc pn - put kids in to reflect	10.00	A	Room	8		Package	
08/03/2015	Dexters Drink IFC	7.30		Room	1	8007513	POS	
08/03/2015	BB	75.00	A:	BILL4	1		Room	
08/03/2015	B&B, Flexible rate, free cancellation 1 day in adv...	14.00	A	Room	4		Package	
08/03/2015	Child B&B Extra €5pc pn - put kids in to reflect	10.00	A	Room	8		Package	
All						Sales 260.80	Payments 0.00	Total 260.80

Updated: 07/03/2015 20:58 IFM Room: 185.80 BILL1: 0.00 BILL2: 0.00 BILL3: 0.00 BILL4: 75.00 Deposit: 0.00 All: 260.80

Reservations normally have folios associated to them, these are divided into sub-folios where the transactions take place.

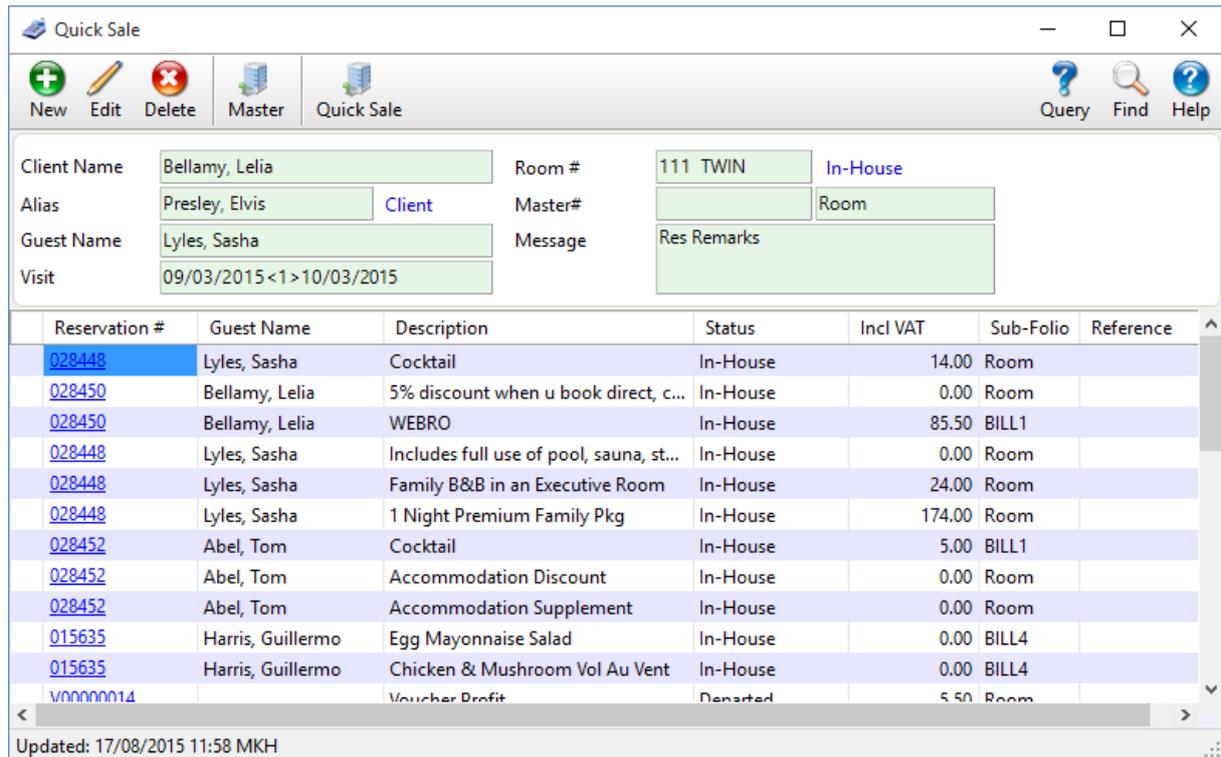
The date of the transaction (sale or payment) is displayed in the second from left column, this is followed by the description of the transaction, then the amount including VAT. A single letter is used to define the package assignment (if there is one), followed by the sub-folio column, which indicates which sub-folio the item has been assigned to.

It is possible to process payments from this screen using the **Card** button and to check out a guest using **Check-Out**.

Quick Sale

The Quick Sale browse lists all sales that have been made since the last closing of the accounts.

It can be opened from the Main Bar or by pressing **Shift+F2**.



The screenshot shows the 'Quick Sale' application window. At the top, there are icons for 'New', 'Edit', 'Delete', 'Master', and 'Quick Sale'. On the right, there are icons for 'Query', 'Find', and 'Help'. Below the icons is a form with the following fields:

- Client Name: Bellamy, Lelia
- Room #: 111 TWIN
- Alias: Presley, Elvis (Client)
- Master#: (empty)
- Guest Name: Lyles, Sasha
- Message: Res Remarks
- Visit: 09/03/2015 <1 > 10/03/2015

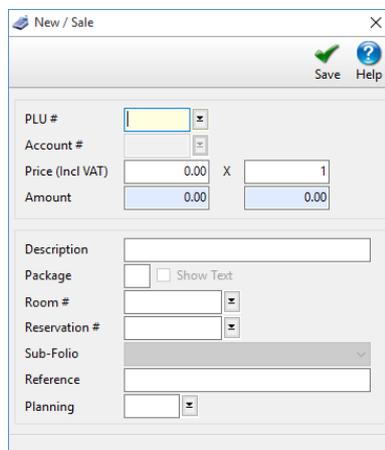
Below the form is a table with the following columns: Reservation #, Guest Name, Description, Status, Incl VAT, Sub-Folio, and Reference. The table contains the following data:

Reservation #	Guest Name	Description	Status	Incl VAT	Sub-Folio	Reference
028448	Lyles, Sasha	Cocktail	In-House	14.00	Room	
028450	Bellamy, Lelia	5% discount when u book direct, c...	In-House	0.00	Room	
028450	Bellamy, Lelia	WEBRO	In-House	85.50	BILL1	
028448	Lyles, Sasha	Includes full use of pool, sauna, st...	In-House	0.00	Room	
028448	Lyles, Sasha	Family B&B in an Executive Room	In-House	24.00	Room	
028448	Lyles, Sasha	1 Night Premium Family Pkg	In-House	174.00	Room	
028452	Abel, Tom	Cocktail	In-House	5.00	BILL1	
028452	Abel, Tom	Accommodation Discount	In-House	0.00	Room	
028452	Abel, Tom	Accommodation Supplement	In-House	0.00	Room	
015635	Harris, Guillermo	Egg Mayonnaise Salad	In-House	0.00	BILL4	
015635	Harris, Guillermo	Chicken & Mushroom Vol Au Vent	In-House	0.00	BILL4	
V00000014		Voucher Profit	Departed	5.50	Room	

At the bottom of the window, it says 'Updated: 17/08/2015 11:58 MKH'.

Click **New** to make a new Quick Sale from this window or press the **Insert** hotkey.

To make a sale, the user should enter the Product #, Price and Reservation # at the very least.



The screenshot shows the 'New / Sale' dialog box. It has a 'Save' button and a 'Help' icon. The fields are:

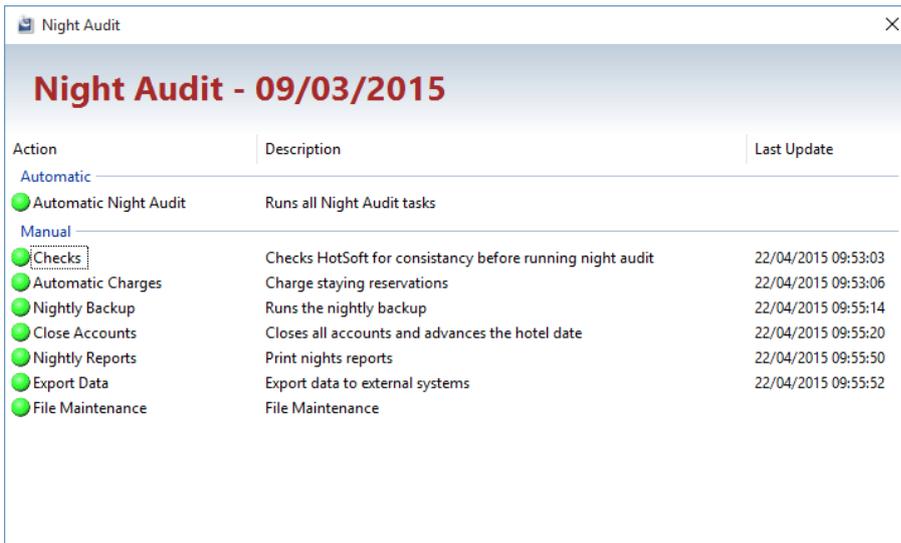
- PLU #: (empty)
- Account #: (empty)
- Price (Incl VAT): 0.00
- Amount: 0.00
- Description: (empty)
- Package: Show Text
- Room #: (empty)
- Reservation #: (empty)
- Sub-Folio: (empty)
- Reference: (empty)
- Planning: (empty)

When the relevant details have been added for the sale, click **Save** to make the sale.

Night Audit

The Night Audit is central to the successful operation of the HotSoft system. It must be carried out to move the system date forward at the end of each day.

The process can be initiated by clicking the Night Audit button on the Maintenance Bar.



Night Audit - 09/03/2015

Action	Description	Last Update
Automatic		
 Automatic Night Audit	Runs all Night Audit tasks	
Manual		
 Checks	Checks HotSoft for consistency before running night audit	22/04/2015 09:53:03
 Automatic Charges	Charge staying reservations	22/04/2015 09:53:06
 Nightly Backup	Runs the nightly backup	22/04/2015 09:55:14
 Close Accounts	Closes all accounts and advances the hotel date	22/04/2015 09:55:20
 Nightly Reports	Print nights reports	22/04/2015 09:55:50
 Export Data	Export data to external systems	22/04/2015 09:55:52
 File Maintenance	File Maintenance	

It can be run as an automatic or a manual process but it will normally require human intervention if there are actions that require attention before it can be completed.

The user can expect to see three icons when running processes throughout the night audit process:

Icon	Meaning	Action
	Successful.	None required
	Warning.	Can continue.
	Failure.	Action required.

Manual Night Audit

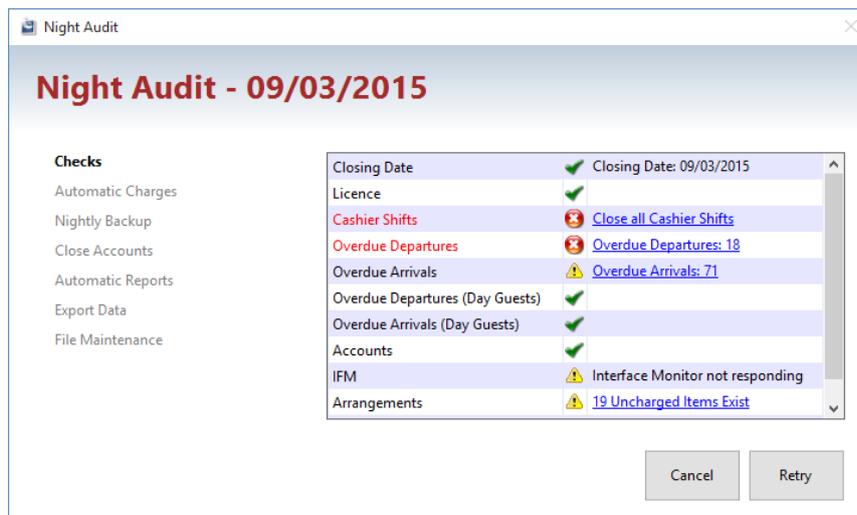
The night audit is divided into seven main processes: Checks, Automatic Charges, Nightly Backup, Close Accounts, Automatic Reports, Export Data and File Maintenance.

Please note: Whether running a manual or an automatic night audit, it is recommended to carry out a Checks routine first to see if any actions are required prior to the audit processes being carried out.

Checks

The Checks routine is a predetermined set of steps which help calculate if a night audit will be successful or not (e.g. It cannot be completed if there is an open reservation or a late departure etc.)

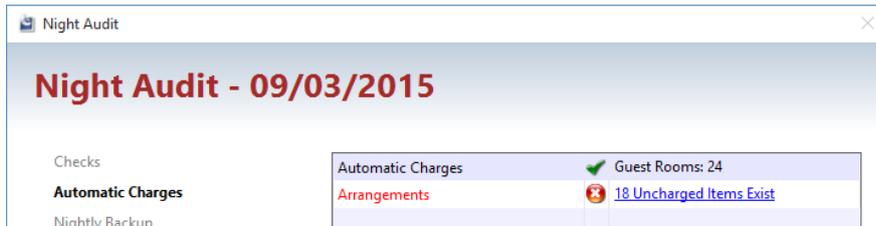
Double-click on **Checks** and when the checks window open, click **Go** to begin:



In the example above, the user needs to close all cashier shifts, check-out the overdue departures before being able to proceed. When this is done the user can click **Retry**.

Automatic Charges

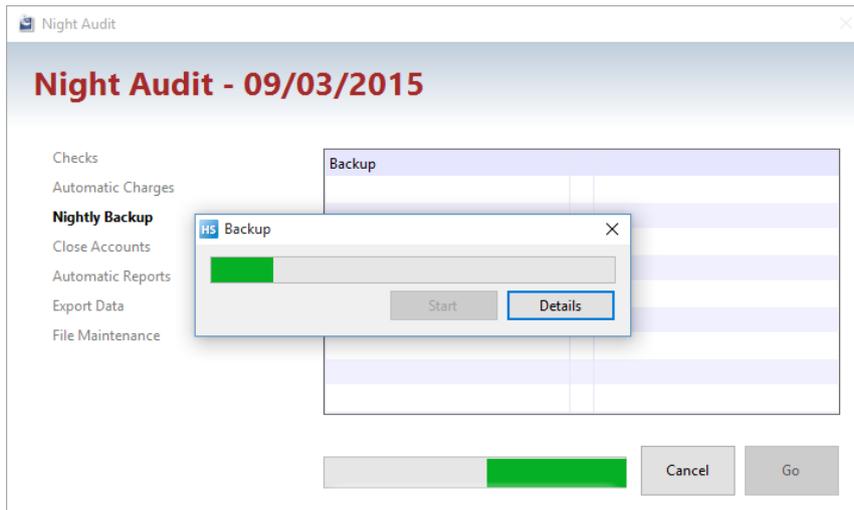
The automatic charges will run up all automatic charges and arrangements for that day.



Again, the user may need to carry out actions to proceed. In this example the user needs to charge for the 18 uncharged items.

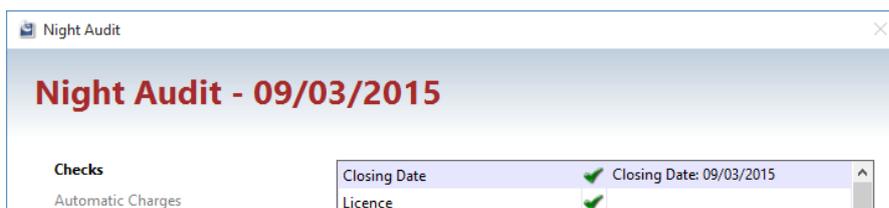
Nightly Backup

This runs the backup procedure. This will make a backup of the HotSoft data and store it in a user-defined backup folder.



Close Accounts

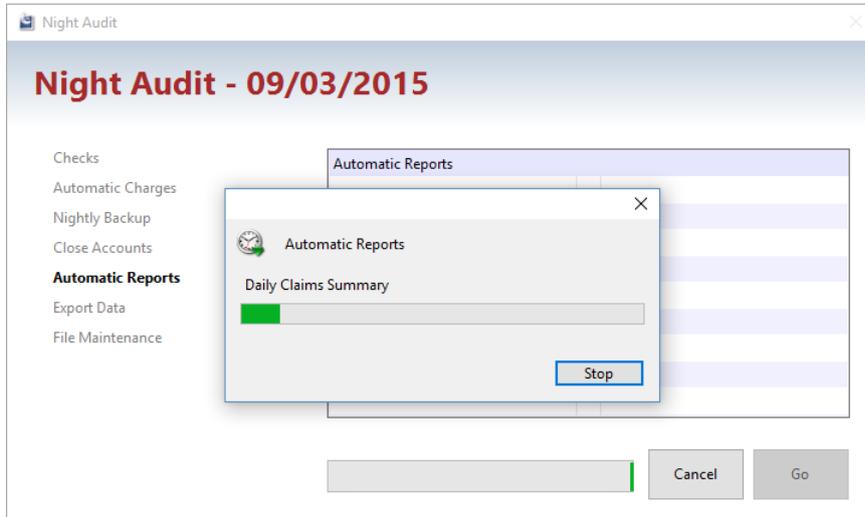
This will close all accounts and will be the time from which the system date is moved forward.



The same checks will be run again and it will run a set of closing commands.

Nightly Reports

After the night audit is done, this process will create a set of reports that will be printed or e-mailed to the user.



To configure the reports, go to **Maintenance > Configuration > Reports**.

Go to the Night Audit tab and define which reports, either system reports or custom reports, will be exported. These can be configured by parameters and can either be printed, exported or emailed in different formats. The user can also configure when the report is sent out e.g. daily, first day of the month etc.

Export Data

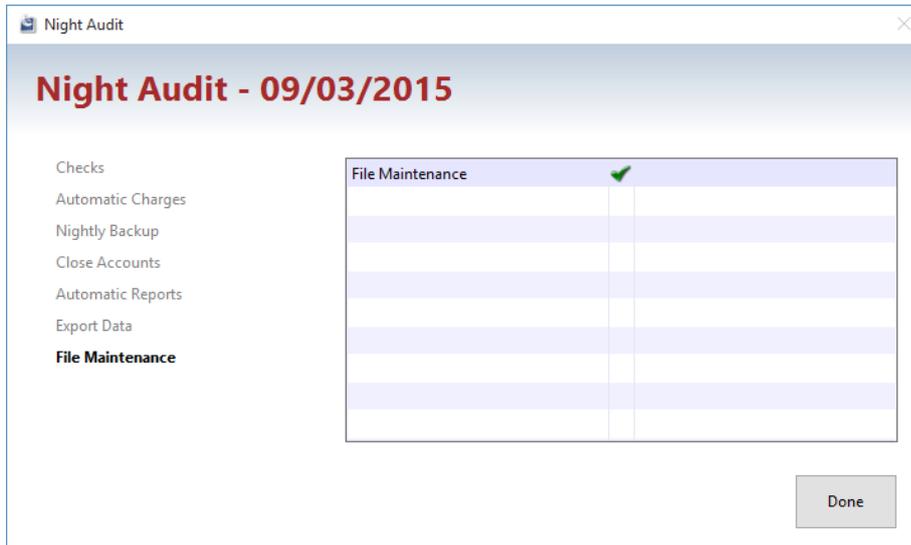
Export data sends a message to the interfaces that the night audit is complete and they can perform their exports.

E.g. Account link - creates files that are exported to the accounting system.



File Maintenance

This process simply carries out internal file maintenance. This might include data purging or re-indexing.



Automatic Night Audit

To run the automatic night audit, simply double-click on the **Automatic Night Audit** to run all of the night audit tasks automatically.

It will run through the various processes (Checks, Automatic Charges, Nightly Backup, Close Accounts, Nightly Reports, Export Data, and File Maintenance) in order, only stopping if manual intervention is required. E.g. an overdue departure, a cashier shift is still open.

If the automatic night audit does stop, the user should take the required action (E.g. extend a guest's stay or close a cashier shift) and click **Retry** to continue the process. It should complete and advance the system date if there are no further actions needed.

Glossary

This section contains a list of definitions for key terms that are used within HotSoft.

A

Access Bar	The access bar is the main menu bar that appears when HotSoft is first launched. It acts as a home screen for navigating to the various browse screens within the program. .
Activity	An activity is something that can be booked by a HotSoft user in order to generate more sales. These might include a courier delivery, room service, newspaper delivery etc.
ADR	Average Daily Rate. This is the average income paid for each occupied room in a given time period.
Allocation	To allocate a room is to "give" a particular room (number) to a reservation.
Allotment	An allotment is a reserved quantity of rooms for a particular client, usually a travel agency or tour operator.

B

Bed Night	A bed night is a hotel industry measure of occupancy. One bed night is one person per bed per night. The total number of bed nights for a month would be the accumulation of nights stayed in each bed.
Bill	A record of sales consumption by an entity. No credit is allowed on bills.
Blocked	Rooms can be blocked if there are in need of repairs, renovation or need to be used for a function.
Blacklisted	A list or register of people who are banned from staying at a site for a particular reason.

C

Cashier Tills	The cashier tills are the cash drawers used to manage shifts. Several terminals can be connected to one till.
Conference	A conference is a group that includes arrangements. For more information see the Conference section.
Context Menu	The Context Menu can be used to customize the look and feel of HotSoft 8. For more information go to Context Menu.
Customize	This allows the user to customize HotSoft to their own preferences in terms of the Program Menu setup, Reflections and Screen Colours. See Customize for more information.

D

Day Room	A day room is a room which is booked by guests who do not stay the night. A day room may have a day price.
Day Guest	A day guest is a guest who makes a day room reservation and is not staying the night at the hotel.

E

Exchange	This is where the user can set their exchanges rates. See the Exchange of the Help for more information.
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F

FDI	Front Desk Identifier - is the individual number used to identify the member of staff working on the front desk.
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Folio	A folio is an itemized bill where all sales and payment transactions show up for each reservation, house account, group or conference master. HotSoft allows a number of sub-folios in each folio.
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G

Group	A group is a reservation that includes a number of room reservations.
Guest Night/ G-Night	The number of guests staying in a room per night. E.g. A reservation of two guests staying in a room for two nights = 4 guest nights.

H

Hotkey	A hotkey is a keyboard shortcut that can be used within HotSoft. They include the function keys (F1 - F12) in combination with Ctrl, Alt and Shift.
Housekeeping	Housekeeping is where the user can view the cleaning status of the rooms on the site and assign cleaning staff to clean specific rooms etc.

I

Invoice	An invoice is a list of services or items that require payment but will be taken as credit and will not be paid for at check-out but rather charged at a later date.
Interest	This is a field that can be filled on a reservation to indicate the interests of the staying guests. E.g. Skiing, golf, tennis, swimming, spa etc.

L

Letter	A letter is a document in which one page per data source record is printed. A letter has neither headers nor footers (except when pasted from Clipboard). Letters are accessible from either within the Printouts, Custom Letters menu or, by choosing the letter option from within a browse list, such as the confirmed Reservations browse.
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M

Master (Group Master)	In HotSoft a group reservation is made up of a group master and sub-reservations. The master can be looked at as the central reservation for the group. The master also includes a folio that can be defined as the centralized group folio.
Method	This field is found in the reservation form and indicates how the booking came to the hotel (fax, telephone, walk-in, etc.) However, the hotel can use this field for a different purpose, for example, how the guests arrived at the hotel (on foot, bicycle, bus, train, private car, taxi, etc.)

N

Night Audit	The night audit is carried out at the end of each day and is used to advance the system date and debit that days charges to the relevant folios. See Night Audit.
Notice	Unlimited length text attached to a reservation, house account, group or conference reservation, room number or address card.

O

Occupancy	A ratio showing the percentage of rooms that are occupied out of the total number rooms. Occupancy calculations can vary depending on which variables are used.
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P

PBX	Private Branch Exchange (PBX) is a telephone system within an enterprise.
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PLU	Product Lookup code.
Printouts	Printouts is where the user can preview, export and print reports and invoices etc.
Program Menu	The Program Menu is an additional interface that appears beneath the Access Bar and can be enabled and configured using the Context Menu.
Provisional	A provisional reservation status means the initial booking has been made but the hotel has yet to take the guest's payment details. Provisional reservations count towards Occupancy but not the financial forecast.

Q

Query	The Query button can be used on certain screens to filter for the required information.
Quick Arrangement	A Quick Arrangement is an action that be created for a reservation such as a product order for a specific room at a set time or date.
Quick Sale	The Quick Sales screen shows all transactions posted since the last closing of accounts.

R

Reflection	Reflections, which can be accessed from Customize, can be used to synchronize Overview screens.
RevPAR	Revenue per available room. This metric is calculated by dividing a hotel's total room revenue by the room count and the number of days in the given period of time.
Remarks	Remarks are used to make free text notes about a reservation, room or guest. I
Report	A report is a document in which one line per data source record is printed. A report will have a report header that will be printed on each page of the document. See the Printouts (F12) screen.
Room Night/ R-Night	The industry term for the number of nights stayed in (a) room(s). The total number of room nights for a month would be the accumulation of all number of nights stayed in each room. E.g. A reservation of two guests staying for one night = one room night.

S

Stayovers	Stayovers are guests who have checked in and will be staying the night at the hotel.
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T

To-Do	A notice that refers to a particular date. A to-do can be viewed as a reminder of something that needs to be done on a particular date.
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V

VIP	Very Important Person (VIP) is used as a flag to mark out if a guest is important. This can be used to have a positive or a negative connotation (e.g. a banned guest). See VIP Status.
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W

Waitlist	The waitlist status is used for potential guests when the hotel is fully booked. They can be placed on a waitlist until there are cancellations.
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X

X	If (X) appears in the title of a report it indicates that VAT is excluded from any values, transactions or sales figures.
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