TVET CERTIFICATE IV in TOURISM

Controlling reservations or operations using a computerized system

TORRS401 Control reservations or operations using a computerized system

Competence

Credits: 4

Learning hours:40

Sector: Hospitality and Tourism

Sub-sector: Tourism

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Purpose statement

This module describes the performance outcomes, skills and knowledge required to prepare for customer's arrival, welcome customers, identify their request and directing to appropriate personnel until departure. It covers the application of specialized product knowledge to provide reception services.

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	documents to reduce waste and negative environmental impacts.	

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Learning Unit 1: Access and manipulate information system

LO1.1. Access and interpret system displays

Content/Topic 1: Introduction to the computer reservation systems (CRS)

1. **Definition**

   a. **Computer reservation system or central reservation system**

Computer reservation systems, or **central reservation systems** (**CRS**), are computerized systems used to store and retrieve information and conduct transactions related to air travel, hotels, car rental, or other activities.

CRS is a computerized reservation software used to maintain the hotel information, room inventory and rates, to manage the reservation and process. A CRS provides hotel room rates and availability for many different distribution channels such as the GDS and others.

It is an application with various functionalities to manage a hotel's distribution /and bookings. We can also call it **a database distribution system**, since the CRS of a hotel transfers data to the distribution channels. This way, hotels are able to reach travelers and travel managers on a global scale. Bookings are made via multiple sources such as travel agencies on the hotel's own website, and all reservations sources will appear in the system via interfaces.

Its main functions are **administration of room allocations (of single properties and hotel chains)** as well as **control and monitoring of rates and availability in the distribution channels**.

A CRS is beneficial for a hotel because it allows reservations to be checked and booked with a simple search. It also allows revenue managers or front office managers to easy adjust the prices corresponding to demand for multiple distribution channels and platforms at the same time.

   b. **Global Distribution System (GDS)**

A **global distribution system** (GDS) is a computerised **network system** owned or operated by a company that enables transactions between travel industry service providers, mainly airlines, hotels, car rental companies, and travel agencies.

GDS allows users to book hotel rooms, rental cars, airline tickets as well as other activities and tours. They also provide access to railway reservations and bus reservations in some markets, although these are not always integrated with the main system. These are also used to relay computerized information for users in the hotel industry, making reservation and ensuring that the hotel is not overbooked.

2. Benefits of and barriers to using a computerised reservations system

Computerised reservation systems have become an essential part of any hospitality and tourism organisation. It is a necessary tool to store and access a wide range of information that can be easily accessed by a range of people in any location.

The use of computerised reservation systems describes a key sales and operational function for a diverse range of domestic and international tourism and hospitality products and services and applies to the full range of industry sectors.

These industry sectors use a diverse range of computerised systems to manage reservations, operations and sales administration functions, so the system will vary depending upon the organisation and industry sector.

The range and complexity of products and services and the particular reservations or operations system will vary according to the industry sector.

i. Benefits of a computerised reservation system

Benefits of using a CRS include:

a. Speedier processing of requests and bookings, ticketing and quotations

b. Integration with web-based/online booking systems

c. Allowing multiple uses and multiple sites

d. Preserving privacy and confidentiality through passwords, operator only designations and system administrator status

e. Allowing pre-set limits/allocations/changes, such as dates, times, maximum room numbers, maximum bookings to be programmed into the system.

ii. **Barriers of a computerised reservation system**

Barriers of a CRS include:

a. Cost of initial establishment
b. Training of staff
c. System breakdowns and malfunctions
d. Need for system back-ups, system maintenance and system updates
e. Discrepancies occurring between properties operating a manual reservation system and the computerized reservations system
f. Operational staff tends to focus on the screen/system as opposed to being customer focused.

It is quite clear to see that there are many reasons why many hospitality and tourism organisations will use a CRS system to help them manage their businesses.

Content/Topic 2: Types of reservation software

a. Central reservation system (CRS)

A hotel reservation system, also known as a central reservation system (CRS) is a computerized system that stores and distributes information of a hotel, resort, or other lodging facilities.

A central reservation system is a tool to reach the Global Distribution System as well as internet distribution systems from one single system. A CRS assists hotel managers in managing their online marketing and sales, allowing them to upload their rates and availabilities to be seen by sales channels that are using the CRS. Sales channels may include conventional travel agencies as well as online travel agencies.

Hotel software is designed for all areas of hotel operation including:

- Property management
- Accounting
- Internet / GDS reservations
- Central reservations
- Reception
- Point of Sale (POS)
- Spa, club and golf management
- Guest management
- Inventory management
- Yield / revenue management.

Small hotel software is available for properties with less than 100 rooms and focuses on basic front and back office functions or reservations and guest management.

One of the major types of hotel software used by the hotel industry is hotel property management software (PMS). PMS is a comprehensive software package that manages all aspects of hotel operations, which has front desk, and back office modules that handle reservations, guest profile/folio, reporting, night auditing, and housekeeping, accounting, payroll and asset and inventory management.

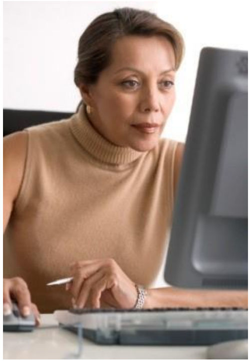
For reservations, there are two types of hotel software:

- A CRS (central reservation system)
- An IBE (Internet booking engine) - an IBE allows guests to remotely make reservations accessing the hotel's website.

Hotel reservation systems will also have reservation software capability that allows guests to make reservations using a GDS service. A CRS books reservation for multiple properties.

Hospitality management software includes sales and catering software, which will have a POS module to manage, and track sales from restaurants, lounge/bar, and room service. Event management is another important module of hospitality management software. Event management modules manage group/convention sales, room booking, function and layout.

Many hotel property management software, hotel reservation system software, hotel accounting software, hotel front desk software, and hospitality software companies provide free hotel software downloads for evaluation to help hotels select the best hotel software package that meets their operational needs.



i. Modules in a hospitality CRS

Modules in a CRS include:

- Reservations
- Profiles
- Groups and blocks
- Rate and inventory control
- Administration
- Reporting
- Global distribution interface
- PMS interface.

ii. Common CRS information

Information commonly stored in a CRS includes

- Room types
- Rate plans architecture
- Room rates and conditions - guarantee, deposit, customized cancellation rules, minimum length of stay, maximum length of stay, closed to arrival, arrival not allowed, departure not allowed
- Room inventories
- Generic hotel information - address, phone number, fax number

- Distribution content - descriptions, amenities, pictures, videos and local attractions are stored in the CRS or in a content management system
- Reservation information
- Nearby IATA cities and airports.

b. Tourism systems

The Global Distribution System (GDS) is an e-commerce tool introduced by airlines to facilitate the booking of flights.

By definition a GDS is a computerised reservation system (CRS) in that it enables, for example, travel agencies to place bookings with travel suppliers and their booking systems via a worldwide distribution network.

There are four major Global Distribution Systems:

- Amadeus
- Galileo
- Sabre
- Worldspan – merged with Galileo in late 2006.

Content/Topic 3: Procedures on the system operations

Most computerised reservation systems are able to perform many diverse functions and in reality, many operators are not fully aware or skilled in being able to use these systems for the greatest possible advantage.

Many operators will need to undertake some level of training to be able to successfully and efficiently manoeuvre between system screens and displays.

This section will identify some of the key screens and displays that are commonly found in hospitality and tourism systems.

Ways of accessing system displays

Every system is different and the user manual should be consulted to identify what applies to each system. That said system displays are usually accessed by:

- Clicking on the appropriate **icon on a tool bar or menu**
- Keying in a prescribed sequence of keystrokes – such as '<Alt> M'.

Most system areas will also include one or more sub-menus or drop-down menus that need to be navigated and completed, checked or ticked in order to access the desired area, manipulate the desired information or produce the required report or printout.

Movement between screens can occur by clicking on an 'Exit' or 'Back' icon or by selecting an alternative or the next icon in the procedural sequence.

In some cases, screens may have 'left' or 'right' arrows and you will need to click on these to expose more of the targeted display.

For example, a 'normal' room allocation display may show a 7-day period and the left and right arrows will enable previous and future dates to be displayed.

In other instances, such as when dealing with transaction, scrolling down the page is a common option to allow you to access more information or statistics.

Some screens will also contain boxes within the display where horizontal (up and down) and vertical (left and right) scrolling allows full access to further fields of information, that includes the blank spaces where you are able to or required to input information.

For example, in the guest reservations screen you may be required to arrow up or down/left or right to fully access and insert information into all booking detail fields.

Yet again, where there are various field of information, the system may not allow you to leave a screen until certain fields have been completed. A prompt will appear to assist you, highlighting the areas that must be populated.

For example, the system is unlikely to allow you to finalise a reservation if you have not populated the 'Arrival date' or 'Departure date' fields, or if you have entered a prior date, such as entering 04/05/2012 when you are in the year 2013.

In addition, some systems will generate a 'box' that is superimposed on the screen for some purposes. For instance, using the previous room allocation example, a box may appear when a room change is required asking specific questions and giving a choice of further actions, such as 'OK', 'Continue' or 'Cancel'.

In many cases this serves to allow you to re-think and confirm the entries you have just made:

- Is the new room the right one?
- Is the guest identified actually the one who wants the room change?
- Have you moved them from the right room?

In most cases movement between fields in a display is achieved by using the mouse to click on the required field, drop-down menu or icon.

Other methods of moving between displays or continuing an entry that has been started – include:

- Clicking on (for example) on-screen prompts such as 'Yes' or 'No', 'Continue', 'OK', 'Print', 'Apply', 'Screen' or 'Update' as appropriate for the function you want to process
- Clicking on an option between two or more choices and then pressing <Enter>
- Entering the first letter of a name, command or transaction type and pressing <Enter> or entering the entire name etc. and pressing <Enter>
- Selecting, ticking or checking a circle or square.

Some systems will take you to a 'read only' screen that allows you to view the information that has already been inputted but will not allow you to add, delete or modify it.

These 'read only' fields are usually differentiated from fields where information may be inputted by their colour: read only fields may be a grey or yellow in colour, whereas fields that may be populated or amended are usually white.

‘Read only’ areas may be ‘active’ fields for those who have ‘Administrator’ access to the system – meaning that, for example, only a supervisor, owner or manager can change these fields.

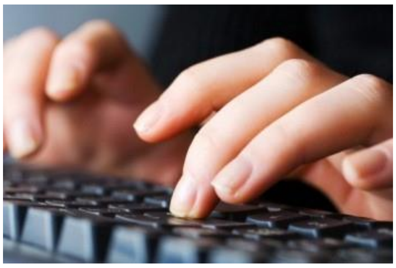
Content/Topic 4: Interpret the screens and displays available within a computerised reservations system

The interpretation of the displayed information bases on the **animations** and **icons** that are I traduced in the computer system.

i. Interpret the screens and displays

Whilst the above describes a number of examples relating to interpreting and accessing screens and displays, each system will be different and require different steps or keys to access different screens and displays.

Regardless of the CRS system used it is important for users to be competent in being able to interpret the screens and displays relating to:



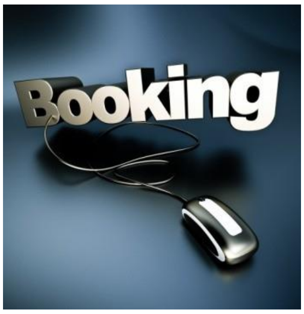
- Identifying menus and sub-menus
- Identifying information fields
- Identifying drop-down menus
- Identifying self-populating fields
- Identifying multiple choice fields
- Identifying mandatory fields
- Identifying character limitations within information fields
- Using the toolbar menu and using keystrokes to access fields and menus
- Differentiating between levels of authorization and access
- Creating and using passwords and User Identification to access screens and data
- Using system-specific techniques to move between fields and screens.

ii. Interpreting system displays.

Once more, you must refer to the manual for your system in order to identify and interpret the displays that your system provides.

In essence, interpretation of system displays means that you need to know and understand the characteristics of your system so that you can read and action information.

For example, you must become conversant with the meaning, function and explanation of:



- **Prompts** – what impact will clicking on 'OK' really have?
- **Buttons/Tabs** – what will happen if you click on 'Screen' or 'Cancel'?
- **Options** – when should you select 'Yes' or 'No'? Can you undo these choices?
- **Abbreviations** – what does 'C' mean? 'Closed' or 'Clean? Is 'AR' accounts receivable or arrival?
- **Acronyms** – 'F&B' is pretty straightforward but what does 'MLOS' stand for?
- **Questions** – what other information is changed or updated when you answer 'Yes' to

'Are you sure you want to modify this booking?'

- **Information fields** – what sort of text-based written information is typically entered in these areas?
- **Dates** – does the system use a 02/04/07 format or the DDMMYYYY (Day, Month, Year) format? Does it matter which is used?

iii. In-house interpretations of displays

In order to customise a system to the demands and requirements of an individual property, various designations are able to be defined in a way that supports the operation of each venue.

This allows different establishments to describe and define certain fields with meanings and data, such as:

- Dates
- Prices
- Room types
- Room numbers
- Packages. particular to their operational needs.

Further, systems may have codes to depict various pieces of information such as:

- Different revenue stream – which will usually in some way relate to codes presented on guest accounts
- Guest type
- Marketing information that the property seeks to capture for market research purposes
- Payment methods
- Booking source.

You will also need to become familiar with in-house abbreviations of words and the identification of staff members from their initials. For instance, in fields such as 'reservation taken by .....'

LO 1.2. Use all system features to access a range of information

- **Content/Topic 1: Procedures to use all system features**

1. Range of information that can be found in the system displays

In the computer reservation system, there can be displayed much information such as:

a. costs of any tourism product or service, such as tours, hotels and rental cars
b. airfares
c. airport taxes
d. availability of products or services
e. size of vehicles
f. touring inclusions
g. product information
h. product rules
i. payment requirements
j. health
k. customs and immigration
l. general industry information

2. Investigation of information contained within the computerised reservations system

Before actual reservations can be taken, it is important that CRS operators are competent in not only the functions associated with the CRS but also in being able to access and interpret information which is contained within.

As can be seen when taking reservations or undertaking any activity on a CRS being able to locate, identify, interpret, use or provide information to tailor and improve guest service in a timely manner is essential.

a. Investigating information

Investigate information may include:

- Applying access codes
- Interpreting and using on-screen prompts to determine required information – these may include prompts such as 'Yes', 'No', 'OK', 'Continue?', 'Apply', 'Update?', 'Edit' and 'Print'
- Interpreting and applying on-screen abbreviations, acronyms and options

- Using navigation tools such as buttons and tabs
- Applying correct date formats within the system
- Adhering to system protocols and field size limitations
- Completing required fields
- Describing the field and menu links available between screens.

b. Use all system features to access a range of information

It seems that most CRS have features such as various reports, functions and capabilities that are never used or nor used to their full potential.

Many operators use only a small portion of the screens and options available. Some will even resort to hand-written work rather than fully use the system's abilities.

There are often elements of the old manual reservations system running in parallel with many CRS operations.

The limited use of the system can be traced back to the predictable and repetitive nature of the work performed by receptionists.

Typically, a receptionist with responsibility for bookings will repeatedly be involved in:

- Checking for room availability on the required dates
- Entering the guest and reservation details
- Varying the booking as required
- Checking the guest in
- Posting charges to guest folios
- Preparing and presenting guest accounts
- Accepting payment
- Checking the guest out.

However, in addition to these basic functions, your CRS will have the ability to perform many more tasks. Again, your User manual should be referred to for the specifics that apply to your system.

Because the notes in later sections will focus on reservations, this section will describe the other functions that hospitality front office CRS could be expected to provide. The examples are intended to be indicative and not exhaustive.

c. Examples of information that can be accessed

The information that can be accessed through your CRS is limited to either information that you have entered, that someone else has entered or information available through the integration of your CRS with another system.

Also, the nature of the information will depend on the type of user. For example, the information contained in a CRS used by an airline, ticketing agency or travel agent will differ substantially from the nature of information contained in a CRS at a travel information centre or an accommodation-based hospitality outlet.

In terms of a front office CRS in the hospitality industry, the following range of information may typically be provided for and accessed:

- **Back of house**

Folio clearance

This is essentially a front office 'housekeeping' function as it allows all guest account information that is over a specified age e.g. one month, to be deleted thereby freeing up system space and removing unnecessary folios.

Your system may also allow you to nominate an alternative period for this activity by entering a 'period start' and 'period finish' date.

This feature is an example of one that often remains unused in many properties. Check the situation in your workplace and identify who has authority to run this function, when it is done, why it is done and what information is removed.

- **Night audit**

This is a management function performed at the end of each day or before the start of the next day's trading, usually during the night shift, to post charges and reconcile and audit accounts.

The CRS will automatically change the date and prepare the system to generate a number of reports as required by the property.

Room charge update

This allows daily posting of room charges to guest accounts on an individual basis before the night audit for the day in question.

This function can usually be used as often as required throughout the day to post accommodation charges so as to facilitate early or unexpected departures where, for instance, the property elects to impose a day use charge for the extra stay, internal auditing requirements or management requirements.

Rooming rebuild/Calendar update/Diary reconstruction

This feature allows the system to be re-arranged and rebuilt after certain changes have been made to reservations such as:

- Changes to lengths of stay
- Changes to arrival and departure dates for guests
- Re-allocation of actual room numbers as opposed to room types
- Room blocks.

This function re-constructs the 'database', fixing any irregularities, such as a designated guest arriving on two consecutive dates or days, a double booking being roomed in a single room, conflicts with room allocation and errors with room availability, so that they align with new information.

This procedure ensures that all system information about a specific reservation is matched accurately across the system and helps prevent unintended over-bookings, double-bookings of the one room and confusion relating to room allocation.

This function involves the processing of a great deal of information and can take quite a deal of time. For this reason, it is usually run during night shift and commonly run after the night audit as the night audit figures and reports traditionally take precedence over rebuilds.

Those undertaking this function must be sure they have backed up relevant data, as executing this function may delete certain data once the re-build has been completed.

Transaction summary

This enables an overview of revenue broken down into revenue sections, sub-sections, departments, streams for the last period that is from the time of the previous transaction summary to now.

Options include setting specific alternative dates for this report.

In some cases the screen will re-set to zero balances when the summary screen is printed so care must be taken to ensure you have the authority to do this, or that suitable back-up has been done.

This summary may be restricted to management only, or it can be used by reception staff to assist in trial balances, folio reconciliation and banking.

Internal management reports

Different systems allow for the generation of a variety of reports to meet a range of sales and operational needs.

Night audit information

At the end of each day, usually during the night shift, a night audit will be conducted. Using a CRS this process is essentially automatic given that all necessary postings have been made.

The User manual for your system will prescribe the exact actions and their sequence, in order to conduct the night audit: senior staff or management are usually responsible for night audit procedures.

The following is an indicative list of actions that may be taken with a CRS in order to run a night audit:

- **Check arrivals** – to ensure there are no pending late arrivals which will require posting of accommodation charges
- **Check departures** – to ensure all 'check out' guests have, in fact, departed and have not decided to extend their stay perhaps without informing us

- **Check house status** – this involves printing out a list of bookings for the day plus a list of current in-house guests and reconciling the two
- **Conduct the actual night audit** - an audit is a daily review of guest accounts and financial transactions and a front office audit is called a 'night audit' because the audit itself is performed during the night shift, as that is traditionally the quietest time in terms of guest traffic through the front office, and because most of the revenue earning outlets (restaurant, bar, etc.) are closed

- The main purpose of the night audit is to check and verify the accuracy of accounting records against departmental transaction reports
- It double-checks that monies from an outlet are correctly recorded against that outlet and that other financial transactions are accurate and truly reflect the operation of the property for the day in question
- It also requires a thorough check of all postings for the day, to check that the right charges have been posted against the correct guest account. Errors in posting may mean that charges go unpaid, posted to the wrong account), or that charges are made for the right amount but for the wrong goods or service
- Print reports – each property will vary as to the daily reports it generates but common ones include Housekeeping Report, Occupancy Report and Revenue Report
- Print an Arrivals List for the next day – complete with Registration Slips to speed up guest check-in.

Note that many variations exist in relation to what information is required by management of a property. Some properties will generate a dozen reports while others will produce only two or three.

Learning Unit 2: Create and process reservations

L.O.2.1. Check required booking availability according to system functions and requirements

Content/Topic 1: Checking availability of required bookings according to System functions and requirements

1. **Functions that can be performed on a computerised reservations system**

a. Introduction

The range of functions that can be performed by a computerised reservation system is the greatest advantage and reason for their popularity, use and necessity by hospitality and tourism businesses, regardless of size and style of operation.

This section will explore some of the key functions commonly performed computerised reservation systems.

b. The diversity of CRS functions

There are many computerised reservation systems (CRS) in use today and while they all provide similar functions, menus, sub-menus, options, reports, statistics and accounting facilities the individual programs are all unique.

This means that the specific operational aspects of each CRS will differ for each separate system including:

- The way you log on
- The terminology used
- The classifications provided for
- How you enter guest information
- Move between screens
- Create new files
- Manipulate information
- Modify and retrieve bookings
- Print accounts and reports.

In addition, there will also be system variations in Hot Keys, defaults, abbreviations, information descriptors and acceptable responses to prompts and question boxes.

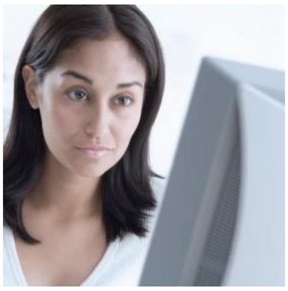
c. Functions performed on a central reservations system

Functions that can be performed on a computerized reservations system will vary considerably depending on the system in use and the other systems to which it is interfaced, but may include:

- Interrogating and amending existing data

- Making reservations, including group, individual, corporate, in-house, commission basis

- Amending reservations, such as extending or changing dates, altering flights, changing room numbers
- Determining vacancies and current level of availability, including tickets, seats, rooms
- Recording customer details
- Recording special request details



- Creating internal and management reports
- Generating client histories and preferences
- Generating mailing lists
- Creating marketing information
- Preparing limited accounting statements.

i. Hospitality CRS information

Naturally, the range of menus and information contained within a hospitality CRS system will differ to that of tourism CRS. Following is a list of information and functions that are common amongst hospitality CRS software systems.

❖ **Reservations**

- Individual, group, shared, and multi-rate reservations
- Add, change, and cancel bookings including multiple legs

- Standard, package, negotiated, and group rates (via on screen button)
- Multi-Currency rate displays
- Sell messages dynamically linked to CRO office, property, rate or allotment code
- Geographical and regional single or multi-property search

- Property details including pictures, raster maps, rate and room type lists, nearby attractions, and point of interest information
- Links to external context databases to provide in-depth property, rate, and room details
- List of room types and rate codes
- List of rate availability strategies and restrictions
- User definable products by rate code
- Waitlist capabilities
- Quote rates system set up initial and secondary rates per property, per day
- Query system for reservation action items
- Intuitive, logical sales process flow.

❖ **Profiles**

- Individual guest, groups, corporate, source, travel agency, and wholesales profiles
- Multiple address and phone number capability for each profile
- Membership or club numbers and tracking
- Comparison and merging of profiles

- Notation for special commissions for client, agent, or source

- Relationship linking
- Unlimited credit card numbers
- Outstanding history statistics for past and future stays
- Profile protection
- Profile privacy
- Nightly process to identify duplicate profiles and merge them automatically.

❖ **Groups and blocks**

- Groups room control
- Room inventory allotments with cut-off date or days
- Elastic room limits to be sold out of general inventory beyond block

- Tour series (recurring group stays)
- Super Group Blocks -single group staying at multiple properties
- Multiple rate assignments for shoulder dates
- Blocks fully integrated with selling screen
- Rooming list.

❖ **Rate and inventory control**

- Single and Multi-Property availability display
- Unlimited room classes and room types
- Multi-level inventory control by room class and room type
- Strategic overbooking levels
- Unlimited number of rate plans

- Detailed rate availability display
- Rates in multiple currencies

- Rates confirmed in multiple currencies
- Flexible package price calculations
- Negotiated Rates
- Versatile tax calculations
- Chain cross sell capability with schedule

- Supports generic room types
- Room and rate management and restrictions
- Ability to open/close room types by rate code, property, room class, etc.
- Central interface to yield systems and ability to update the properties with yield information via the Two-Way Interface (where supported)
- Best available rates
- Rates based on rates
- Rate seasons
- Unlimited number of guarantees, deposit, and cancellation policies, by property.

❖ Administration

- Transaction activity by agent and Customer Relation Officer
- User definable Global Messaging display
- On-line, written, or faxed confirmations
- Multiple Chain (brand) definition

- Brochure requests and on-line customer surveys
- Extensive revenue and forecasting reporting
- Security controls
- Multiple time zone support
- User definable Closing Script
- Configurable Profile, Booking, and Display Information Screen layout
- Multi-tiered source of business tracking
- Multiple configurations to support regrets and denials.

❖ **Reporting**

The CRS reporting system provides a number of standard reports. Additional reports can be created using the integrated report generator by your IT Specialist. System reports may be generated automatically and may be run daily, weekly, monthly, yearly or manually upon request. Reports include:

- Expected Arrivals
- Reservation
- Property Forecast
- Total Booking Activity
- Stay Activity
- Monthly Booking Activity Summary
- Daily Booking Activity Summary
- Property Detail
- Property Detail - Room and Rate Information
- Agent Activity
- Automatic Allotment Release
- Delivery Queue Purge.

ii. Tourism CRS information

A major benefit of using a CRS in the travel industry is that the system not only allows a reservation to be made but also enables the user to access a deal of information relating to the service in question.

For example, where the details have been entered, a CRS user can access information and relay it to the customer or guest about:

- **Costs** – of any product or service including tourism products such as tours, hotels and rental cars which may address options, packages, deals, special offers and how they may change at different times or dates
- **Airfares** – full flight details including departure times, flight times, aircraft configuration, aircraft type
- **Airport taxes** – who they apply to, when they apply, how much they are and whether they are included or are 'extras'
- **Availability of products or services** – including information such as minimum stay seasonal fluctuations, peak and low times
- **Vehicle details** – useful when hiring a vehicle; details about engine capacity, seating capacity, options, rear or front-wheel drive, whether or not a special licence is required
- **Touring inclusions** – describing the 'side' trips, cruises, transfers, meals, upgrades, visits and experiences that a tour includes in the price
- **Product information** – extensive detail about a wide range of products and services on offer
- **Product rules** – such as deposits required, when deposits must be paid, limitations that apply to deals or packages
- **Payment requirements** – explaining the type of payment, when it is required, refund conditions

- **Health recommendations and pre-requisites** – some bookings, such as for action holidays, require a certain level of health or fitness for those wishing to participate
- **Customs and immigrations** – detailing the items that must be declared, the legal movement of items between states or countries and the requirements and limitations that apply to passports, visas and permits
- **General industry information** – which can be almost anything such as comparative time zones, currency issues, destination weather, tourist attractions, 'no-go' zones.

2. Role of reservations

The reservations department is a vital link in any hotel operation and whilst each department of the hotel is important, the reservations area is where guests have their first contact with an organisation and therefore make their first impressions.

The way they are treated may be the reason why a potential customer chooses to stay in one hotel over another.

Whilst the role of internet websites has resulted in many customers searching for information and making bookings on-line, the role of reservations still remains important for many reasons.

Before we look at how reservations managers can monitor the services within their department, it is a good idea to gain an understanding of the department and the different roles within reservations.

The primary role of reservations is to sell hotel rooms or packages. There are a number of activities that help facilitate this aim.

These are identified below in a brief summary; however, help to outline the main aims of the reservations department.

a. Providing relevant information

This involves providing accurate information that the potential customer may want. This information may relate to:

- Hotel facilities and services
- Room types
- Room rates
- Rate inclusions
- Packages
- Local attractions
- Location
- Transportation options
- Check in and out times
- Methods of payment.

b. Encouraging the sale

Encouraging the potential customer to make a booking involves:

- Using effective communication skills
- Using sales techniques
- Asking for the sale.

c. Making the booking

This process includes:

- Identifying dates
- Identifying type of room or package
- Recording personal information of customer
- Determining and processing method of payment
- Sending confirmation of reservation.

Note: Whilst it would be ideal to be able to sell every room at the highest possible price, it is not realistic. For many hotels, room nights are sold to a variety of guest types. These different types of customers have different needs, travel at different times and have different price expectations.

The role of the reservation manager is to find the 'right mix' of guest types to achieve the highest possible of sold rooms, not just on one particular night, but on a consistent basis.

Each organization will have their traditional periods of high and low demand, each with their own challenges.

When times are quiet, a manager will rely on large groups, corporate customers and other customers paying lower rates, through promotions or packages, to help fill rooms.

When times are busy, the manager must try to fill the hotel whilst:

- Not overbooking the hotel
- Generating higher room rates
- Keeping the above-mentioned customers on lower rates happy.

Just because the hotel is near full, does it mean you can turn away business that you rely on in quieter months. As mentioned, it is a balancing act.

Therefore, managers must develop strategies when handling inventory when times are busy.

3. Importance of checking reservation availability

All booking requests must be checked on the system before they are accepted. Whilst in most cases hotels or other hospitality and tourism businesses will try to find a way to ensure a reservation can be taken, at times however this is not possible.

Given that there is a set amount of hotel rooms or flight seats available, these must be managed in a way in which not only looks after the interests of the organisation but hopefully to the greatest number of customers.

As an example, at times reservations may not be able to be accepted because:

- Some guests may have priority over others – because of their status in terms of loyalty, being repeat or influential guests etc.
- The policy of the property in relation to over-booking.

This section will explore the different impacts on reservation availability in more detail.

4. Methods of booking

Requests for bookings can come via the following mediums:

- Telephone
- Fax
- Internet
- Face-to-face walk-in enquiries
- Mail.

5. Sources of bookings

These bookings may come from:

- System referrals from other properties in the chain
- Travel agents
- Tour operators
- Airlines
- Family and friends of the guests
- The guest themselves
- Businesses

- Groups – such as sporting or common interest groups.

It is important that all initial contacts enquiring about a reservation are regarded as 'requests for a booking'. It must never be assumed we can meet the request and accommodate the persons because:

- We may not have any rooms
- We may not have the type of room sought
- We may not be able to supply a rate asked for
- We may not be able to provide accommodation for the duration being sought.

All this combines to make the first rule of accepting a booking to 'check the availability of the required booking'.

6. Obtaining the basic reservation information

In order to check room availability, you must determine:

- Date of the first night – preferably confirmed by reference to the day of the week
- Date of the last night – also confirmed by reference to the day of the week
- Confirmation of the number of nights the booking is for by using the two dates above
- Type of room sought – double, twin, suite, family room, executive etc
- Name of guest or business seeking accommodation – in some cases such as where a 'Stop' has been put on selling rooms for a certain night, knowing the name of the guest can be useful
- If they are a regular guest the property may have a policy of rooming these people 'at all costs'. They may reserve a number of rooms

especially for these people, or other guests, (even those with confirmed reservations, may be bumped

- In other cases, the system may reveal that this person has been 'blocked' or 'black listed' and must be refused accommodation because of some previous event such as unacceptable behaviour, bad language or failure to pay

- Identification of any other potentially limiting factors – such as smoking or non-smoking, female only floor, internet access, facing east, overlooking the harbour, on the top floor, not near lifts, quiet room.

In some cases, such as bookings via fax, mail or the internet, you may have to contact the person seeking to make the booking to obtain all the necessary information.

People will commonly omit necessary bits of information such as departure date, number of persons, and type of room and there can also be confusion where days and dates do not match.

7. Checking room availability

As a front office receptionist, it is to be expected that your Password and User ID will allow you to access the Front Office/Front-Of-House area of your CRS.

Within this area you will select the 'Room Availability' or 'Rooms' option. This is usually a choice between a 1- or 2-week display.

Where the default setting does not cover the date of the reservation you need, you can either:

- Arrow forward - to the right
- Arrow backward - to the left
- Input a date - in the acceptable format such as DDMMYYY
- Select a date from a drop-down pick-list.

You will then click on 'Enter', 'OK', 'Continue' or 'Apply'-type icon, tab or button.

Depending on the CRS, and if the room type is known, you may be able to choose to view a 'room availability by room type' screen.

These screens function as density charts and can be expected to present:

- Quantities of rooms available on a date-by-date basis
- Availability of day use rooms
- Availability of 'other' rooms - such as conference rooms or function rooms
- Standard rack rate for each room type – note however that this screen usually does not include details about discounts that might apply or packages that are available, although links to this information may be available
- Rooms that are off the board – such as Out-Of-Order rooms

- An indication as to how many people, but not their names or details, have been placed on an internal 'Wait List' for that type of room on the date in question where a 'full house' situation exists
- An indication of both the numbers but, again, not the names or details, that are due to check-in and check-out on that day. This helps to identify the expected guest movement and indicate the possible chances arising of a vacancy arising based on house knowledge of no-shows, early departures, requests for extensions etc.

L.O.2.2: Create new reservations containing accurate customer details and full requirements according to system procedures and features

- **Content/Topic 1: Creating new reservations containing accurate customer details and full requirements**

1. System procedures and features

a. Passwords and user IDs

Before a reservation can start to be taken, the operator must access the system.

In order to protect the integrity of the system from unauthorised access and also to maintain the confidentiality of establishment information and guest details, it is usual for passwords to be used.

Each person has their own dedicated password and may also have a user identification.

Access can be restricted via this password to certain areas of the system.

For example, owners or management will have full access to all areas, a as Administrator for the system, whereas receptionists may be locked out of the 'Reports' and 'System Configuration and Setup areas'.

Passwords commonly require the user to enter their name in a predetermined manner, which may be upper and lower case sensitive, plus their initials or ID, and then their unique 'ID' or 'User' number when they log on.

b. Sequences and protocols

Some systems will require one or more of these steps to be repeated as a means of confirming the authenticity of the operator before log in is granted.

Successful completion of this process allows the individual access to the system at the levels they have been allocated and tracks their usage of the system.

Operators should log out when they finish their shift or go for a break so as to prevent unauthorised access via their password to an 'open' system.

c. Security and privacy SOP's

Establishments may have Standard Operating Procedures (SOPs) in relation to their CRS that require passwords to be changed on a regular basis in order to help maintain security.

For example, you may be required to change your password every 30 days. It should be standard practice:

- Not to reveal your password to anyone
- Not to write your password down anywhere near your terminal
- Not to allow anyone to access the system using your password
- To immediately change your password if you believe it has been compromised and notify management accordingly.

2. Accept and create a reservation on the computerised reservations system

a. Introduction

To create a new reservation, you will need to access the Front Office/Front-Of-House area of the CRS.

Usually, guest information or guest details must be entered before a booking can be made, however where the guest has stayed with you previously their details may already be stored in the system and this information can provide the basis for their new reservation.

Note, though, that people's details change and this must be updated as necessary including telephone numbers, address, married name etc.

A link (tab or icon) from the Guest Details will take you to the Reservation section or screen.

b. Creating new reservations

To make a new reservation you will need to enter or confirm certain information that will vary depending on the type of reservation being process. The information that may be required by the system can include:

- **Date of arrival** – this can usually be manually entered (DDMMYYY format), or selected from a drop-down calendar where relevant days, months and years are highlighted and clicked
- **Date of departure** – see immediately above
- **Estimated Time of Arrival** (ETA) – where applicable you may enter the guest's ETA. This can be useful where they are expected late or are arriving by air, which is frequently unreliable. Some systems will insert an automatic default time

- **Manual times** will be in either a 24-hour clock format (such as 22.30 for 10.30pm) or in the AM/PM format (such as 02:00PM for 2 o'clock in the afternoon)
- **Estimated Time of Departure (ETD**) – this may be a default setting (such as 10:00AM) but can also be manually over-ridden where the guest asks for a late check-out, is a regular guest or where management wishes to extend some privilege
- **Number of nights** – some systems will automatically generate this calculating it from the arrival and departure dates already entered. Alternatively, entering the arrival date and the number of nights will auto generate the date of departure. Receptionists tend to have their own unique way of sequencing these items and it is really a matter of pure preference
- **Room type** – a selection may be made from a pick-list or can be manually entered via abbreviation or code
- **Number of adults and children** – these fields can be entered manually or from a drop box pick-list and some systems will default to 0 children

- Some systems will allow for a 'Baby/Infant' field which can be useful in reminding to ask if a cot is needed. It is usually mandatory to enter a figure in every one of these fields (where no children or babies will be staying, a 0 may be required) before the system will allow you to save or continue, however some systems will let you <Tab> past these fields

- **Package type** – where the booking is part of a package, either sold by property reception staff or sold by other agents, you will need to enter the appropriate package description from a drop-box, code or abbreviation. This is vital as it will impact on the room rate charged to the folio and possibly other charges such as breakfast, other meals, equipment hire and various nominated services.

Some venues let guests know that it would be better value if they took a particular package whilst other establishments will keep quiet about it.

Where the reservation details are contrary to the configured parameters of the package type selected, a prompt will appear when you try to continue, highlighting the area that requires attention.

This can be a source of frustration to guests when reception staff are unable to book them in because of some simple variation from the explicit details of the package, such as trying to reserve 2 adults, 2 children and a baby under a package that specifies only 2 adults and 2 children. The problem is not that you are deliberately trying to be uncooperative but that the system won't allow 5 people to be entered into a package for 4!!

- **Room rate** – the system will populate this field automatically, based on previous information such as number of people, package type, dates and even room number, but again you can manually override the auto rate and insert another rate.

This allows you to take the above reservation with the baby by charging an extra tariff. Rates shown traditionally include GST.

- **Booking taken by** – the person making the booking must enter their name, operator ID, initials or code so that, if there is a query or problem with the booking, people know who to contact
- **Notes/Comments** – the screen will probably contain a space for you to record personal comments, thoughts or suspicions about the booking, to note guest preferences or to capture guest requests.

These notes or comments can be combined into 'Notes/Comments Report' and be incorporated into the Housekeeping report, aligned against the appropriate room number, so that guest needs are catered for.

- **Room number** – allows you to allocate a specific room number for the booking. The system may auto select a suitable room number from those available at the time of booking or you can override it manually or from a drop-box.

Rooms shown as O-O-O for those dates will be barred and many systems will display available room numbers within this section to assist in this.

- **Marketing information** – your CRS will also provide space for you to enter various guest related information. Where this option exists, you will not always have all the necessary accurate information that the system asks for, so often a 'best guess' will have to suffice to allow you to move on.

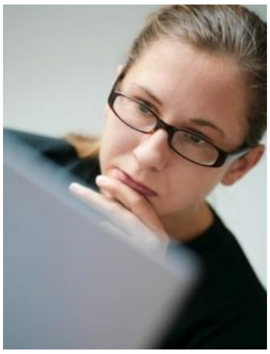
The marketing information may relate to:

- **The source of the booking** - travel agent, chain referral, walk-in
- **Their home location** - overseas, state, town or post code
- **Market segment** - such as tourist, leisure, business, family, government, lay-over, group.

In cases where a booking confirmation has been requested or where it is house policy to send one, completion of the reservation details will enable a system generated confirmation slip to be printed.

Where the reservation is not confirmed and is only regarded as a tentative, provisional or 'subject to' booking, the system may allow you to make an entry or tick a box to indicate this.

Ticking this box or making this entry may prevent a specific room number being entered for the booking, deny access to printing a confirmation slip and may automatically flag the reservation for future follow-up at a later date.



Further, creating a reservation for a guest will automatically create a matching guest account and number. This may need to be accessed prior to guest arrival when an advanced deposit is received and it can be accessed through either the accounting function by guest name or date of arrival or via the numbered reservation generated by the CRS.

Note: when satisfied with the details that have been entered or selected, '**Save**', '**Next**', '**Book**', '**Continue**' or similar must be clicked. The system will auto generate a booking number (which may be used for future easy access to this particular reservation) and the system should show the guest as having not yet arrived.

L.O.2.3. Input all customer details in the format required by the computer system

Content/Topic 1. Completion of all customer details in the format required by the computer system

As mentioned above, this step may need to precede the making of a reservation.

It will depend on the system, the software and the set-up.

Most systems contain prompts to ensure that all the details regarded as 'necessary' by the system are captured and recorded before the system will allow you to finalise the procedure.

To create a new guest or someone who has never stayed with us before, the Front Office/Front-Of-House will be used and a tab such as '**Guest**', '**Guest Details'**, '**New**' or similar will be actioned.

In the appropriate guest details display, you will be required to input information such as:

a. Name

Fields will exist for Surname and a given name together with a Title field such as Mr, Mrs, Ms, Dr, Prof, and Sir Etc.

Most systems will provide room for you to enter multiple guest names enabling you to identify all people who are to be roomed in the one room or under the one booking.

b. Name/code/initials of person entering the data

So that others using the system know who to contact if they have a query about the booking.

c. Account type

Most guests pay by cash or credit card but many guests, especially businesses and government bodies, will have been extended credit facilities so they will pay by account.

Other guests may be paying via vouchers, charge back to travel agents or be activating some contra deal, a promotion or complimentary prize or offer.

d. Business name

Where the guest is a company booking, the name for the account is entered here for billing purposes.

e. Addresses

This is where the guest/business residential and where applicable, separate postal addresses are entered.

Most systems will auto insert a suburb or town when the post code is selected.

Pay attention when a guest instructs you to not forward mail including advertising material, offers, accounts, lost and found etc to their residential or other address. They usually have a good reason for requesting this!

f. Method of payment

You may type this in or select from a drop-down list of options.

Where a credit card (CC) is selected, you may be required to select type of card and enter a card number and other card details

g. Discounts

All guests entered into the system have the potential to be classified as receiving one of many discounts that the property may offer such as being a member of an organisation or association, corporate rate, senior's discount, frequent stayer etc.

This said, many guests do not attract any discount but where they do, this is where it is entered. Naturally this discount classification can change over time so it may need to be periodically changed to reflect the guest's status.

The selection of a discount rate will auto adjust the accommodation and 'other' charges, where applicable on the guest's account.

In some systems, the account will show the full rack rate for the room and then, on the next line, display the discount that has been applied. This demonstrates to the guest that they have, in fact, received their allowable discount and shows them how much it was worth.

h. Phone, fax and e-mail details

Fields exist to allow the insertion of phone numbers including home, business and mobile, fax numbers and email addresses.

Again, where the guest instructs that a certain number not be used, such as their private number, this must be respected, regardless of how desperate or urgent the need may appear.

With group bookings, the 'tour leader' may be the only contact number.

i. Vouchers

Where the guest will be using vouchers to settle their account in full or in part, the details of the voucher must be entered here.

Specifically, you must record what expenses the voucher covers and any dollar amounts that apply.

This is an extremely important aspect as many travellers using vouchers are confused about exactly what the voucher entitles them to. There may be language barriers that cause the problem, or there may be guests who are simply 'trying it on' to see what they can get away with.

When these guest's check-in you must ensure you explain and clarify exactly what the voucher covers specifying and giving examples of the items that will need to be paid for as 'extras'.

j. Guest status

Some systems provide an option where properties can describe a guest according to internal interpretations for their own use.

Most guests will default to ‘normal’ or some code (such as A1).

Other guests may be designated as ‘Deny’ or ‘Refuse’ to show they have been black-listed.

Still other guests may be designated as ‘No mail’, ‘Exclude’ or ‘Private’ meaning they are not to be sent any mail of any kind under any circumstances. This is usually as a result of a specific request made by the guest or may be a management decision or system default setting where a guest has not re-visited us after a nominated period such as 1 year.

We must always be mindful of exercising tact and discretion in front office situations and of maintaining guest confidentiality and privacy, regardless of our own personal thoughts!

Note: where information has been entered into ‘Guest details’, there will be no requirement to repeat this information when accessing related screens. It will auto populate in-line with the entries made in guest details, including translocation into reports and system alerts where necessary.

k. Handling special requests

Most establishments are able to cope with a variety of special requests made by customers.

It is part of your product knowledge to know the special requests the property can meet and those that it can’t.

It must be standard practice to never accept a special request unless you are absolutely sure it can be met. If you are unsure, advise the caller you are unsure, and that you will make enquiries and will get back to them.

Accepting a special request that can’t be filled creates extreme disappointment for the guest and leads to a negative reputation for the property.

Examples of special requests

Depending on the services the establishment offers or is able to provide, a special request may include any of the following:

- Disabled room
- Room that has a balcony or outside are where people can smoke
- Cot or high-chair
- Fold-away bed
- Champagne and chocolate on arrival or at nominated times
- Fresh fruit platter in the room
- Flowers
- Room facing the ocean or garden or some other identified aspect
- Interconnecting rooms, usually for families – this are two adjoining rooms where there is a door between the two rooms
- Adjacent rooms – rooms that are next to each other: a common requirement for groups
- A room located away from the lift
- Bed board – a board placed under the mattress: used when a guest has a back problem

- Extra clothes hangers – common request for long-stay guests who will have 'more' clothes
- Glass vases
- Voltage converters (240 to 220 volt) – for overseas guests
- Iron and ironing board – if not already in the room
- Booking in the dining room – guest may specific location in the room

- Special food and beverages – to cater for national taste, medical situations, celebrations, personal preference.

Some requests are charged for and some may be provided free of charge.

The guest must be made aware of what applies for the special request they have asked for. If they have to pay, let them know that and let them know how much is involved.

L.O. 2.4: Retrieve bookings as required, using the format required by the computer system.

- **<u>Content/Topic 1: Reasons for retrieving bookings</u>**

All bookings entered into the system will need to be retrieved at some stage.

Some bookings require more frequent retrieval especially where there are changes to the initial reservation.

If there are no changes to the initial booking, the reservation will still need to be accessed when, or just prior to, the guest's arrival.

Retrieving bookings are done for the following reasons:

a. Confirmation of bookings
b. Cancellation of bookings
c. Updating and amendment of bookings

Once a reservation has been made, you may need to retrieve it so as to:

- Convert a tentative booking into a confirmed one
- Modify the booking in one of many ways as advised by the guest
- Add an advanced deposit
- Cancel a reservation

- Allocate a room
- Effect a room change.

Content/Topic 2: Procedures of retrieving bookings

Bookings can be retrieved by accessing a 'Reservation Update', 'Bookings Maintenance' or similar display within the Front Office/Front-Of-House section.

The following methods generally apply:

- Searching, identifying and clicking on guest name
- Entering the reservation number that the system has auto generated when the booking was entered onto the system
- Entering the room number, where one has been allocated
- Entering the start date of the stay.

The swiftest way is to use the reservation number as it is absolutely unique and will never identify a conflicted booking or two alternative choices. However, this is not always known when a booking needs to be retrieved such as when the guest has rung up and is waiting on the phone but doesn't know their booking number.

Any aspect of a booking may be changed provided the change doesn't cause a conflict between designated system configurations.

Examples of such conflicts may be where a guest seeks to reduce their length of stay at a time where the system requires a longer minimum length of stay, where altering the days of the stay no longer qualify the guest to avail themselves of a discounted package, where adding a child to the room increases the room rate.

Normally, when a guest has registered or checked-in, you can still modify the booking but you will probably be unable to amend their 'date of arrival'.

Some systems will only allow you to access one file at any one time meaning that other screens must be 'saved' or finalised before leaving it for another display.

L.O.2.5: Make accurate updates and amendments to reservations and store as required

- **Content/Topic 1: Requirements for updating and amending bookings**

1. Introduction

Where the guest has requested a change to an existing reservation and we are sure we can accommodate the requested change the details of that alteration must be entered immediately and accurately into the system.

Failure to enter information correctly can result in lost revenue, over-bookings and other service delivery problems.

The attention given to updates and amendments must be the same that applied when entering the initial reservation details.

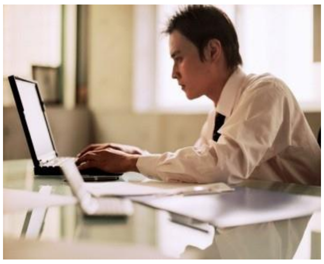
Updating and amending bookings are done while:

- Adding additional customers
- Splitting an existing reservation
- Cancelling a booking
- Changing an itinerary by adding or deleting products or services
- Changing customer names, if permitted
- Cross-referencing multiple bookings
- Entering invoicing, payment, ticketing or voucher details

2. Types of amendments

Amend a reservation will depend on the conditions applicable to the booking, but may include:

- Cancelling the reservation
- Changing the date/s
- Changing times

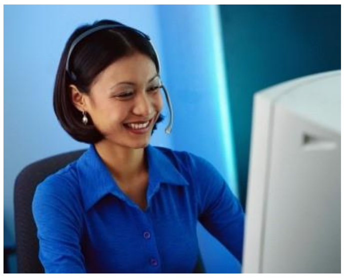


- Changing customer names – this may not be permitted in all situations. For example, terms and conditions of the booking may expressly forbid it
- Changing the number of people
- Adding children or additional customers
- Changing seating arrangements
- Adding special requests
- Seeking a variation in rate
- Splitting a reservation
- Entering a deposit paid
- Changing the itinerary
- Adding/deleting products or services
- Changing customer name
- Entering invoice and payment details
- Entering ticketing and voucher details
- Cross-referencing multiple bookings.

3. Common hospitality amendments

However, given the hospitality nature of this manual, we will concentrate on:

- Converting a tentative booking
- Modifying a booking
- Cancelling a reservation
- Adding an advanced deposit
- Allocating a room
- Effecting a room change. within an accommodation context.



4. Converting a tentative booking

When a tentative booking is confirmed, you will need to convert the provisional booking into a conformed one.

This is usually done simply by un-checking the 'tentative reservation' box: the system will then allow a confirmation slip to be produced and house policy may require the guest to now supply an advanced deposit.

Converting the booking may also generate the guest account, and may allocate an automatically generated room number.

5. Modifying a booking

Modifications to a booking are simple to input but can be difficult to manage from a guest relations perspective. There are many times when the required changes raise system conflicts and present us with problematic situations.

Common modifications required by guests include:

- Variation to date of arrival
- Variation to date of departure
- Variation to length of stay
- Variation in room type
- Request for room rate variation such as asking for a discount of some sort, or asking to be converted to a package that they have become aware of
- Request for an extra room to accommodate family or friends or extra business colleagues who are also attending the same event or conference
- Request to room additional people in the room already booked
- Variation to ETA
- Request for a later check-out.

The processes identified as being necessary to accept a booking must be followed when considering modifications to a booking. That is, you must still check room availability, guest status and comply with all in-house policies. This includes check-out times, maximum number of guests per room, packages terms and conditions, room rates etc.

To modify a booking, select the booking by name, arrival date or booking number and then click on the 'Modify booking', 'Update' or similar button. Next, click on the fields that require change and input the necessary amendments.

The changes made here will, again, flow-on into other related screens.

6. Cancelling a reservation

Where a guest does us the courtesy of notifying us that they would like to cancel a booking allowing us to try to re-sell the room rather than just having it as a no-show, the following procedures will normally apply:

- Access the booking – by reservation number, guest name or start date
- Click on the appropriate button such as 'Remove booking', 'Cancel', 'Delete' or similar
- Print a cancel slip.

Both tentative bookings and confirmed bookings may be cancelled or removed from the system.

Cancelling a reservation puts the room back into the system for sale and also shows that a reservation was made but has been cancelled, when and by whom.

The system will also update guest details, recording the cancellation against the guest's database.

Internal policies and procedures must be followed to ensure the return of any advanced deposits in accordance with any deductions the property may make in-line with their stated terms and conditions. A copy of the cancel slip is commonly mailed out along with the cheque that returns the deposit.

Some properties will include a pro forma letter thanking the guest for informing us of the cancellation, offering future services and ensuring the guest feels welcome and comfortable about making another booking with us.

7. Adding an advanced deposit

A guest account may have been auto-created when the guest details or the reservation were entered. This account will have a unique number, similar to the unique number given to the reservation that will identify it and assist in its retrieval.

Where an advanced deposit is received, the appropriate guest account can thus be accessed through the reservation screen where the folio number will be displayed or by entering the account number directly into the relevant Accounting area of the CRS.

Within this guest account screen, a number of transaction options will have been entered when the system was set-up. Select and click on the appropriate button which will be named 'Advanced deposit' or similar, and then click 'OK', 'Apply' or similar.

Next, select the type of advanced payment method (such as CC, cash, cheque) usually available via a drop-down menu.

When an advanced deposit is received, it should be the first line on the guest's account indicating that the guest is in credit. It is unacceptable for a charge to be the first account entry especially before the guest has even arrived! The cumulative total box should now show that the guest account is in credit by the amount of the advanced deposit received.

The amount of the deposit received must always be checked against house policy and requirements, and appropriate follow-up should be taken where the amount forwarded is less than the amount required.

You will also find that some CRS allow for each guest to be allocated multiple accounts, or to be allocated just one account. It depends on house policy and guest requests as to what method will apply.

Where the guest is allocated just one account, all the transactions including payments and charges will be shown on the one screen or printout. This means that advanced deposits, room charges, meals, disbursements, beverages, equipment hire will all be shown on the one account in date order.

Where the guest has requested or house policy dictates, there can be one account for nothing but accommodation charges, which will record both payments and postings, and other accounts as designated by the system.

For example, there may be a separate folio for food and beverage or another for all 'other charges' and a separate one for 'disbursements'.

This facility can be useful for business guests where head office will pay for their accommodation but the guest is responsible for all other charges incurred.

The system will allow for guests who are sharing a room such as groups who have accepted twin share arrangements, to have individual accounts or multiple folios attached to the same room number.

8. Allocating a room

Allocation of a specific room number to a reservation may be done automatically by the system when the reservation is made, or it can be inserted manually from a drop-down pick-list relating to each different room type offered by the property.

As rooms are allocated, they are automatically removed from room availability for the length of the booking to prevent one room being allocated a number of times for the same date.

Where the guest has already been allocated a specific room number when the reservation was taken it will automatically transfer into the Room Allocation database. For example, the guest may have requested Room 1269 because they have stayed there before and like it, or it has certain positive memories for them.

Room allocation is usually accessed through the
'Guest reservation' screen or the 'Booking Update' screen to a dedicated 'Room allocation' display.

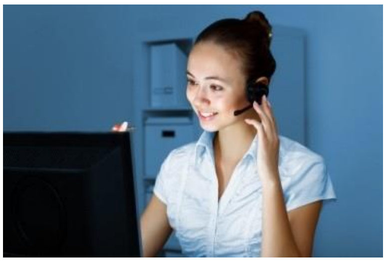
Where you want to allocate a room, the following will generally apply subject to the peculiarities of individual CRS:

- Enter the required start date of the reservation and click 'OK or Enter' – the screen should display the standard range of days from the start date, depicting property rooms and showing those that are off the board, booked rooms and length of stay
- Check visually to ensure the guest has not already been groomed by another front office staff member
- Double-check that the room you intend to allocate is of the required type. Some systems will alert you to a conflict if you try to room the guest in a room type that is not in accord with the reservation details
- Also check that the room you intend to allocate is an appropriate room within the specified room type
- Enter the guest name against the selected room number for the required length of stay using the procedure appropriate for your CRS. Note that where the room allocation screen has been accessed through the guest reservation to auto-input these details. When in the room allocation screen, clicking on a guest, business or company name will lead you to a guest information screen where the guest preferences (and notes/comments) and the guest reservation can be readily accessed: this is useful in ensuring that guest requests and preferences are complied with.

The room allocation screen will also typically contain a range of general information such as:

- Expected arrivals and departures for the start date – which gives an indication of expected activity for that time and may help identify the possibility of early check-outs, no-shows etc

- Number of rooms available and occupied – this will change as different room types are selected, as well as those that are off the board



- Links to other screens – that will explain abbreviations, colour codes etc
- A print facility to print out the screen
- A button to enable a guest room change.

9. Effecting a room change

Guests can request a room change for many reasons. They may not like the room they are in, the colour scheme, facilities, view, size, noise or they may prefer an upgrade or need a downgrade.

Alternatively, the property may need to re-room the guest where they wish to provide a free upgrade perhaps to apologise for some problem or to reward their regular custom, or because there is a problem with the room because it smells or something isn't working.

The guests may wish to extend their stay and we need to re-room them because their current room is promised to someone else.

Room changes are usually effected by accessing the room allocation screen, highlighting the guest involved and checking a 'Re-room', 'Room change' or similar tab.

This will reveal a screen or box that requires you to enter the number of the old room, the new room and various account details to enable the system to update the room rate on their account where this is necessary.

It is important that these details are entered accurately. For instance, if we have upgraded or re-roomed the guest to apologise for some service failure, we don't want to charge the guest for a free upgrade! We will only be making a bad situation, worse.

When all necessary information has been entered click ‘OK’, ‘Apply’ or similar to effect the change.

This will re-designate the room allocation, relevant reservation details, folios and other related screens.

2.6: Download and file any required reservation details

- **Content/Topic 1: Procedures to download and file**

a. Downloading and printing reservation details

It is common practise for a confirmation to be sent to the guest. In today’s age this is normally sent to the guest in electronic format, however at times, where tickets are also sent, reservation details may be printed.

In addition, in-house reasons to print the information exist where:

- There is a query about the booking
- There is a conflict regarding the reservation
- Special requests for a hard copy is made for a certain reason, such as to assist a porter comply with a special request.

The process of downloading reservation details will occur when the appropriate ‘**OK**’, ‘**Enter**’, ‘**Save**’ or ‘**Apply**’ buttons are clicked or when the ‘**Modify**’ tab is clicked after making updates.

In addition, the system may allow the printing of a confirmation slip and cancellation slip.

This is commonly achieved by retrieving the booking, processing the booking or cancellation and them clicking on the ‘**Print**’ button.

b. Ways of filing

Reservation details can be filed by using one of the following orders:

a. Chronological/ Numerical

b. Alphabetical

c. Geographical

d. Activity

e. Arrival date

Learning Unit 3: Send and receive communications

LO 3.1. Create and process accurate communications to colleagues using the required features of the system.

Content/Topic 1: Procedures of creating and processing accurate communication using the computerised reservation system

1. **Introduction**

Any product or service supplier with whom the reservation is being made, such as airline and rental car company and any other organisation departments needing access to reservations or operations information require communication

As can be seen in the previous section a number of reports are commonly prepared, mainly for internal use. These reports are one key type of internal communication, however there are many other types of communication that are required by other departments or individuals within the property who need access to, or have responsibility in relation to reservation information such as food and beverage outlets, housekeeping, accounts, functions etc.

2. **Purpose of internal communications**

Internal communications may relate to:

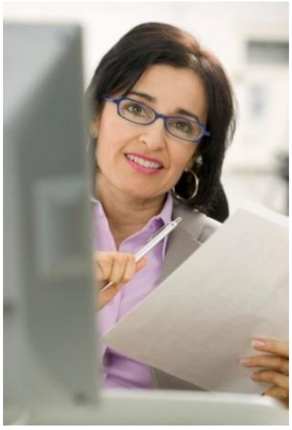
- Providing designated information, data and statistics to other nominated staff who are linked to the system
- Providing system update information to other departments within the enterprise to allow them to plan for changing booking levels

- Ensuring only designated material is available and accessed
- Ensuring currency and accuracy of material
- Requiring confirmation of data sent to others.

3. Accessing internal communication

Within the property, the CRS will need to create communications for various individuals or departments.

These communications are essentially:



- Viewing of the system through password-protected access to nominated screens. This access should be restricted to readonly access so that details cannot be amended and the internal system sabotaged or deliberately corrupted.
- Access by staff to system-generated reports and comments that relate to their operational areas such as housekeeping, sales, food and beverage, room service, maintenance etc.

4. Types of internal communication

Much of the information obtained by reservation staff needs to be passed on to other departments and people so that they can action the requirements of the guest.

Especially important is the need to communicate information that relates to special requests and to changes in booking levels.

This information must be passed on:

- To the relevant department – there is no point in notifying the kitchen about a request for flowers to be placed in a guest room on their arrival
- In a timely fashion – there must be enough time for the relevant department to prepare for and take action on the request

- Comprehensively – all the details of the request together with any relevant background information that could impact on service delivery needs to be communicated.

5. Details for communication

The possible list of things that may need to passed on to other departments is endless, but traditionally they can be seen to be classified as:

- Special requests
- Timing details – for arrival, check-out and internal functions, meals, activities etc
- Special needs – such as wheelchair access, interpreters, dietary and cultural considerations as well as personal and business needs such as secretarial services, access to photocopiers etc
- Payment arrangements – relating to method of payment, timing of payment and the currency to be used
- Entertainment – such as the need for, for example, children electronic games or Play Stations etc

- Information relating to individual customers – while it is true that all guests should be treated as welcome and privileged guests, the reality is that some guests such as VIPs, some special interest groups, media people, travel and accommodation writers, and influential people in society or the industry receive preferential treatment. It is important that all staff know who these people are and where they are so that this service level can be provided
- Details of other services being used – there can be a standard need for all department to know the extent of services that some guests are partaking in. This helps determine service provision as well as providing more insight into the possible needs of the guest. In

addition, knowing that a guest/group is spending well in all areas of the venue tends to make staff better disposed towards them.

6. Communicating details to appropriate departments and colleagues

There will be times when colleagues or other departments will need to be informed and kept up-to-date about information regarding particular reservations.

For example, if a large group cancelled, this will effect just about every department.

Occupancy levels will fall and departments will need to adjust staffing levels and purchases downwards.

Similarly, if the establishment receives 2 or 3 large group bookings, all department heads will need to adjust staffing levels and purchases upwards.

The extra bookings mean more guests will be eating breakfast, more rooms to clean, more luggage to carry, etc.

Departments will need to be informed about reservations because they can have the following effects:

a. Housekeeping

They will need to know about special requests and reservation changes so they can make arrangements for:

- Additional beds - commonly fold-up beds may be used where extra numbers are added to an existing booking
- Extra in-room equipment – such as hair dryers, toasters, DVD players
- Provision of turn-down service – where housekeeping staff turn down the bed, close the curtains and perhaps place a chocolate on the pillow
- Extra mini-bar requirements – which may need to be ordered from the central store or bought from external suppliers

- Catering for individual special requests such as extra pillows, blankets, coat hangers, vases, adapters, extra towels, cup, saucers, tea and sugar, etc.

b. Food and beverage

If the establishment is running on high occupancy the guests will usually have breakfast on a daily basis and, sometimes, have dinner on one or more nights.

Some guests may have arranged to hold a function in the establishment.

All this needs to be planned and organised.

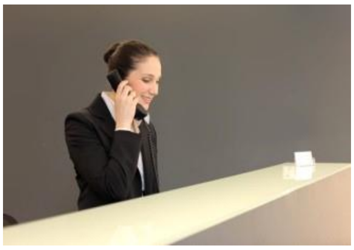
Not only could the breakfast room and dining room be busy, but so might the coffee shop, public and cocktail bars.

High occupancy levels will affect the purchasing officer in the establishment, as they will need to purchase more items, and all staffing levels will need to be increased.

Special attention may also need to be paid to certain food and beverage items requested by the guests for celebratory, dietary or cultural reasons.

Where meal plans exist these also need to be communicated.

c. Front office



High occupancy levels will also affect the front office staffing levels as there may be a need for extra porters to transport luggage to the guest's room.

Extra hours for Concierge may also be considered where large numbers are expected.

If guests are from an overseas country, consideration may be given to ensuring someone with language skills from that country is rostered on in reception at the identified arrival time.

7. Creating general reports for internal use

Information for internal colleagues is simply either a replication or manipulation of details originally entered into the system, predominantly from areas such as guest details and reservations, and the related screens that flow from them.

The system-generated reports are examples of information manipulation in that they simply total or crunch the data and present it as an overview of the information in a format required, and of use to, the property.

Whilst the previous section focused on a range of reports that were more reservation related are commonly prepared, following is a list of generic reports that are commonly produced for the benefit of all departments and are the main types of internal communication sought and distributed within a property.

The reports and statistics mentioned in this section give managers an overview of trade, enable them to track progress, analyse establishment performance, plan for future events and needs, and identify trends.

8. Types of internally used generic reports

a. Arrivals Report

This is an alphabetical listing of guests arriving on a specific day.

b. Departures report

This is an alphabetical listing of guests departing on a specific day.

c. No show report

This is a list of guests who have made a booking but did not show on the day, or who cancelled.

d. Room status report

This is a list giving the status of every guest room – vacant, clean room ready, vacant dirty or out of order.

e. Special requests report

This is a list of guests requesting something special in their room prior to their arrival – cot, champagne, fruit basket.

The report also records the status of the request.

f. Occupancy forecast report

This is usually printed for a month (the next 30 days).

This list is an indication of the occupancy percentage expected for the next month.

This forecast will change according to additional bookings and cancellations.

g. Average room rates report

This indicates total room revenue in one day divided by the number of rooms occupied to establish the average room rate.

h. Multiple or double room occupancy report

This report specifies how many rooms in the establishment had more than one guest in the room.

i. Guest list by name report

This is an alphabetical list of all 'in-house' guests.

j. Guest list by room report

This is a list of all occupied rooms – starting from the lowest room number to the highest, followed by a guest name.

k. Travel Agents' Commission Report

Travel agents are usually entitled to a 10% commission (or some other negotiated percentage) on all accommodation bookings made via their agency.

This report outlines the amounts the establishment owes to a specific travel agent.

Failure to pay the correct commission and pay it promptly may result in that agency referring people to another property.

l. Special packages report

This report details how many packages – and what sort – the establishment has sold for a specific period.

m. Market segment report

This report displays what market the establishment is attracting, such as corporate, industry, family, coach, group, etc.

n. Rooms out of order report

This report lists all rooms that are out of order, the reason for their being 'off the board' and the duration the room will remain in this status.

o. **Daily room revenue summary report**

This report lists the total room revenue for a specific day.

p. Daily revenue summary report

This report outlines establishment revenue for a specific day broken down into departments such as food and beverage, accommodation, functions, room service, etc.

q. Weekly trading summary report

This report outlines the total establishment revenue based on a weekly period, and may compare it to the same week last year.

r. Monthly trading summary

This report outlines the total establishment revenue based on a monthly period, and may compare it to the same month last year.

s. Year-to-date report

This report lists cumulative establishment revenue for a 12-month period.

t. In-house activity report

This is a comprehensive report outlining:

- Rooms occupied

- Expected departures
- Expected stay overs
- Expected arrivals
- Walk ins
- No shows and cancellations
- Rooms available
- Occupancy %
- F.O.C. (Free Of Charge) rooms
- Out of order rooms
- Single occupancy rooms
- Multiple occupancy rooms.

Whilst there a various type of reports that have been identified in the last two sections, many of which are prepared by Night Audit of the Front Office department, it is essential that reservations ensure that any information they compile, input into systems or distribute is accurate.

L.O.3.2: Access and interpret communications from colleagues at the appropriate time

Content/Topic 1: Procedures of accessing and interpreting communication from colleagues

1. Interpreting communications

Whilst the majority of communications will be relatively simple to interpret and understand will be some that present problems or challenges such as:

- Information, advice or communications that arrives in a foreign language

- Rate queries and money-related issues such as commissions and deposits that are couched in other currencies and require a response in that currency
- Requests for interpretation, explanation and applications of industry terminology that others are not familiar with – all industries have their own suite of terms that seemingly exclude outsiders and we are often required to clarify these for individuals and suppliers
- Information provided in coded or abbreviated format (such as 'A404' or 'Class B') and for which we have no suitable or current legend.

It must also be remembered that when dealing with another language or culture, there are many commonly used local terms and expressions that do not translate well or exactly into another language.

Standard operating procedures in interpreting communications should include:

- Only ever commit or promise anything, whether accept a booking, negotiate a rate, extend a stay or vary a term or condition where you are 100% sure of your facts and figures and are certain that doing so falls within your explicit scope of authority
- Always acknowledge an enquiry even if you are unable to immediately provide a response or action it. Let the person know what you are doing and advise them of the reasons for delays. Where possible give them a realistic timeframe within which they can expect a fuller response, or at least another contact from you
- Referring problematic communications to the appropriate person or business for their attention. There will be many times when you won't know the answer to a question, what to do or are unable or unauthorised to make a decision
- Updating information, details or internal protocols on the basis of any advice, complaint or suggestions made by those who communicate

with you. Remember that a complaint is an opportunity to improve our service and helps us to both learn and grow

- Responding at all times as quickly as possible and with honesty, accuracy and customer focus.

Learning Unit 4: Administer sales and operations functions using the system

L.O.4.1: Use the system capabilities to meet the particular sales or operational need.

Content/Topic 1: System capabilities

1. **System capabilities**

The Computerised reservation system is capable to do the following tasks:

- ✓ Sales management functions
- ✓ Operational management functions.

2. **Particular sales or operational need.**

- ➢ Providing destination and specific product information and advice
- ➢ Accessing and interpreting product information
- ➢ Selling tourism products to the customer
- ➢ Preparing quotations
- ➢ Constructing airfares
- ➢ Booking and coordinating a supplier service for the customer
- ➢ Issuing customer travel documentation
- ➢ Issuing crew documentation, e.g. Operational or technical itineraries
- ➢ Issuing air tickets
- ➢ Organizing functions
- ➢ Processing and monitoring meeting or event registrations

- Purchasing promotional products
- Hiring special equipment

L.O. 4.2: Use the system capabilities to manage all required accounting processes that relate to a particular file, customer or reservation

- **Content/Topic 1: Using the system capabilities to manage all required accounting processes**

CRS is used while:

- Processing financial transactions
- Issuing invoices
- Issuing credit notes
- Managing the receipt of customer payments and refunds
- Reconciling all financial transactions
- Managing the application of transaction fees

L.O. 4.3 Produce reports to meet sales and operational needs

Content/Topic 1: Producing different reports using the system

Different reports issued using CRS are:

- Paper-based or electronically transmitted materials
- Specific to a department
- Cover the whole organization
- Relate to sales generated by individual staff members
- Accounting reports
- Sales reports
- Reservation reports

- Cost comparisons for various product suppliers

1. Print reports from the computerised reservations system

i. Introduction

There are many, many ways in which the data and statistics in a CRS can be manipulated, configured and presented. The following is a representative list.

Most reports or the ability to generate and print reports are protected from unauthorised access and an appropriate User ID must be entered, in addition to a recognised password, to activate or access these reports.

Some reports require quite a deal of 'number crunching' and may take quite a while to develop before they can be displayed or printed.

Many reports are generated daily as part of the Night audit process and are printed and distributed to management ready for perusal at the start of the next day.

ii. Types of reports

Depending on the system being used, it is possible that available reports may include:

- Accounting reports
- Sales reports
- Reservation reports.

Reports may be specific to a department or cover the whole organisation.

Sales reports may focus on the overall position for the business or refer to sales generated by individual staff members.

These reports can help to determine the workloads for the next day and the priorities that apply as well as provide information to help management make other operational decisions.

Reports can be used:

- For the purposes of comparing cost from various product suppliers
- Determining usage rates for various product suppliers
- To help negotiate rates
- To determine the currency of information held in the system.

iii. Examples of specific reports

As previously mentioned, the CRS reporting system provides a number of standard reports. Additional reports can be created using the integrated report generator by your IT Specialist. System reports may be generated automatically and may be run daily, weekly, monthly, yearly or manually upon request.

Reports include:

- Expected arrivals
- Reservation
- Property forecast
- total booking activity
- Stay activity
- Monthly booking activity summary
- Daily booking activity summary
- Property detail
- Property detail - room and rate information
- Agent activity
- Automatic allotment release
- Delivery queue purge.

a. Weekly summary

This report provides information on income such as:

- Revenue types - cash, cheques, travellers' cheques, credit card, overseas currency, account, complimentary rooms
- Revenue by room type
- Revenue by guest type
- Revenue by department
- Occupancy - by bed or room.

Commonly a cumulative total option is available which gives a 'Month To Date' (MTD) or 'Year To Date' (YTD) total. Comparison between 'this week this year and this week last year' are also possible.

By changing the 'Week ending' date for a weekly summary, a specific 7-day period other than the current one can be accessed.

b. Advanced deposits received report

Many systems will produce a number of different 'Deposit' reports but they are all essentially variations on a theme.

Essentially the information provided details guests by name and pax who have made a reservation and the date of that booking, and who have paid a deposit including the amount of that deposit, when it was received, and whether it is a full or partial deposit. The report can differentiate between guests who have checked in and those who haven't which can be useful in deciding whether or not to accept any more bookings when the property is approaching a 'full house' situation, and in following-up and processing refunds (or charges) for non-arrivals and late arrivals.

c. Guest folios/accounts report

Depending on the CRS being used, this facility commonly allows for a range of guest accounts reports to be generated.

d. Account balance report

This provides a list and total of all outstanding guest accounts.

It details all guest accounts that have yet to be paid including guests are currently in house by name, room number and individual amount. The report will also highlight any expenditure that is above the set department/house levels for follow-up including a request for payment or part payment or from guest, expected payment method, folio account number and debtor assignation by code.

e. Future summary period statement report

This report combines advanced reservations into a report that shows projected occupancy for the next X days from the date entered, on a day-by-day basis.

This report is thus a predictor of activity within the property such as the dining room, housekeeping, bars, etc and is useful to management in areas such as cash flow management, rostering of staff and the purchasing of stock and food.

f. Guest details report

As the name suggests this provides a full array of all current in-house guest information including name and address, and their folio number to facilitate cross-referencing and ease of access.

The report may list their domestic address plus a business or mailing address for accounts and mail or lost property. The report can be manipulated to produce a report for specific guests – such as those with surnames starting with the letter 'R' or all those between two given letters (such as 'C – L').

g. Guest revisits report

This report prepares a list of all in-house guests including:

- Their names, address and other contact details
- Previous room number or type
- Previous spends by department and amount
- Accumulated spends.

This can assist staff in welcoming those people back to our property, and identify regular visitors whom management may elect to call on personally, or to whom they may wish to extend some courtesy or complimentary service.

h. Occupancy reports

There is much confusion, deceit and misinformation in the accommodation sector about occupancy. It is essential you fully understand exactly what is meant at your workplace when 'occupancy' is discussed. Some properties will use room occupancy as their measurement, while others will use bed occupancy. It is obviously easier to get all rooms full rather to have all beds occupied.

Some properties will include Complimentary rooms in their calculations even though they generate no room revenue, and some properties will exclude Out-Of-Order rooms deeming them to be unsaleable and hence unable to be offered for sale.

All these factors combine to make it difficult for one property to compare their true occupancy levels to those of another property: the real occupancy rates are also often closely guarded secrets and staff are usually required not to discuss issues such as occupancy levels with anyone.

Regardless of which orientation is adopted, it is also a fact that high levels of occupancy do not necessarily translate into optimum room revenues. You can have a fully booked property that has sold all its rooms at 'Specials' rates, to group bookings etc which will generate substantially less revenue than if they had been sold to FITs (Fully Independent Travellers – who are charged at full rack rate).

Nonetheless, and with this in mind, occupancy reports allow the production of lists for a given period that identify:

- **Source of the booking** – such as travel agent, walk-in, referral from member organisation
- **Market segment** – identified usually by codes that represent characteristics such as age, gender, group or individual, business booking or tourist, return visitor

- **Room nights sold** – by day of the week and room type
- **Bed nights sold**
- **Room nights or bed nights still available for the period** – on a daily basis
- **Average spend per room** or **per guest on accommodation** or other in-house purchases (excluding disbursements)
- **Average room rate charged** – by room type and overall
- **Average occupancy** – by whatever method deemed appropriate per day and for the period. This may be compared to same period last year
- **Guest numbers** – per room average and total in-house numbers for the property per day
- **Revenue by revenue department** – daily and totals.

You can enter alternative '**Start**' and **'Finish'** dates in order to generate this report for any given period provided the information has not been deleted manually or by virtue of initiating some other system facility.

In addition, you can further refine the report to suit specific needs by including or excluding certain guest types such as groups, FITs, singles or certain market segments, statistics, ratios or guest-related information.

i. Corporate reports/business reports

Where a large number of companies use the property and management regard them as an important element to track, this report provides an overview of their activity with us between nominated dates. Information provided will include company name, number of nights, number of beds, number of stays, average length of stay, number of guests (adults and children) and various revenue totals.

j. Marketing reports

These reports are growing in importance and their use appears to be expanding as operators seek to gain more and more information about and understanding of their guests with a view to using it to maximise reservations and profit. The marketing report is a good example of how information from other areas, fields and screens can be manipulated and combined into a useful and new display.

The marketing report will display an overview of guests or companies that have stayed at the property in the designated timeframe. It will set out their names, nights stayed, revenue and coded groupings that relate to a specific demographic characteristic such as age, gender, ethnicity, marital status, children, mode of travel to get to the property, residential distance from the property, postcode or country of origin.

This information can be used to target market the property to proven and established guest profiles.

k. Forward reports/future projections

These reports look to the future on a rolling basis for various periods such as 1 month, 3 months, 6 months to analyse advanced bookings, deposits received, occupancy levels, room availability, revenue, check-ins and check-outs on certain days, lengths of stay and method of payment.

This report can help to identify when selling 'stops' need to be considered, when extra promotional activities need to be undertaken and what staffing, purchasing and housekeeping activities may be required.

l. Mailing list report

Using individual guest details this report prepares names and postal details of those who have stayed with us including those who have paid a deposit but have yet to check-in.

The report may be able to be divided into individual guest types so as to prepare separate reports for corporate clients and for families or 'other' guests. These lists are commonly use for follow-up promotions, for market research purposes, to mail out accounts and to return lost property.

The mailing list is a valuable database for any property and should never be deleted without express and specific instructions to do so.

m. Guest requests report

This report provides an overview of all outstanding requests or notes that have been made by guests regarding their stay. Examples of requests are ‘flowers in room’, ‘champagne on arrival’, ‘cot in room please’ or requests for tickets to a show or event.

This list helps to ensure that all requests are actioned and that guest’s expectations are met: there is nothing worse than for a guest to arrange something, either a necessity or a surprise, only to arrive and find it hasn’t been done.

It doesn’t get the stay off to a good start and we always seem to be playing catch up with such a guest, the chances of them returning are small and the chance of them recommending us to anyone are virtually non-existent.

Learning Unit 5: Minimize waste of printed materials

- **L.O. 5.1. Minimize printed materials and maximize electronic transmission and filing of all documents to reduce waste and negative environmental impacts**

To minimize printed materials, the electronic transmission and filing of the organization documents is needed. **Electronic Transmission** means each **document**, instruction, authorization, file, information and any other communication **transmitted**, posted or otherwise made or communicated by e-mail or E-Fax, or otherwise to or from an E-System or other equivalent service.

Content/Topic 1: Ways of transmitting and filing all documents electronically

There many ways to transmit and file documents electronically. Some of them are the following:

a. The use of Document Management System

Documents can be transmitted and filed electronically by using Document Management System (DMS)

A **document management system** (**DMS**) is a system used to receive, track, manage and store documents and reduce paper. Most are capable of keeping a record of the various versions created and modified by different users (history tracking). In the case of the management of digital documents such systems are based on computer programs.

Document management, often referred to as Document Management Systems (DMS), is the use of a computer system and software to store, manage and track electronic documents and electronic images of paper-based information captured through the use of a document scanner.

Document management is how your organization stores, manages and tracks its electronic documents.

Some of the key features in document management include:

- Check-in/check-out and locking, to coordinate the simultaneous editing of a document so one person's changes don't overwrite another's
- Version control, so tabs can be kept on how the current document came to be, and how it differs from the versions that came before
- Roll-back, to "activate" a prior version in case of an error or premature release
- Audit trail, to permit the reconstruction of who did what to a document during the course of its life in the system
- Annotation and Stamps,

b. Use less paper by effectively using computers and other technology

Today's information and communication technologies provide many opportunities for businesses to function with far less paper.

- Electronic mail
- Intranets
- Internet a
- document scanners

These ways can radically reduce paper use, while also saving time and money.

Examples for how to use your computer to eliminate paper:

- Use electronic means to communicate with customers, for press release/media relations
- Use e-mail instead of memos and faxes for inter-office memos, announcing meetings, and targeted communications. Use group e-mail lists to "broadcast" important messages efficiently and inexpensively.
- For editing and reviewing of larger documents, transfer documents on disk or by e-mail rather than sending a printed copy.

- Use electronic communications for directories, forms, bulletins, manuals, reports, and storage when possible (don't print them unless absolutely necessary);
- Develop an Internet web page for frequently requested information.

Content/Topic 2: Advantages of transmitting and filing all documents electronically

The most advantage of filing all documents electronically is the Reduction of printed materials and negative impact on environment. By reducing print waste in your office or business you can save time and money.

In addition, the electronic transmission and filing with document management has the following advantages:

- ✓ Any of your files can be located and retrieved at any time
- ✓ The DMS practically takes care of itself, automatically
- ✓ Automatic electronic filing and archiving
- ✓ Improve your office environment by getting rid of those clunky old filing cabinets
- ✓ Your files are always available, even when the employees responsible for them may not be.
- ✓ Full document history and better version control7. You can add notes and comments to electronic documents just like paper ones
- ✓ With digital document storage, you can get back to focusing on the important things
- ✓ No need to keep your tax consultant waiting for the files they need.
- ✓ Access your files anywhere, anytime

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A. Books

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B. Electronic links

https://en.wikipedia.org/wiki/Document_management_system