



Republic of Rwanda
Ministry of Education



RQF LEVEL 5

Property Management System



FRONT OFFICE AND HOUSEKEEPING OPERATIONS

GENMS501

**PROPERTY
MANAGEMENT SYSTEM**

TRAINEE'S MANUAL

April 2025



Republic of Rwanda
Ministry of Education



PROPERTY MANAGEMENT SYSTEM



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LIST OF ABBREVIATIONS AND ACRONYMS

ARR: Average Room Rate

CBET: Competence Base Education and Training

FOC - Free of Charge (services provided without cost)

FOM: Front Office Manager

GOPPAR: Gross Operating Profit per Available Room

LRA - Last Room Available (rate)

PMS: Property Management System

PPE: Personal Protective Equipment

REVPAR: Revenue per Available Room

RQF: Rwanda Qualification Framework

RTB: Rwanda TVET Board

TVET: Technical and Vocational Education and Training

VIP: Very Important Person

CRM: Customer Relationship Management

CCTV: Closed-Circuit Television

POS: Point of Sale

RFID: Radio-Frequency Identification

AI: Artificial Intelligence

OTA: Online Travel Agency

POE: Power over Ethernet

NAS: Network-Attached Storage

IT: Information Technology

IoT: Internet of Things

2FA: Two-Factor Authentication

RBAC: Role-Based Access Control

ID: Identification

KPIs: Key Performance Indicators

ADR: Average Daily Rate

SLAs: Service Level Agreements

MICE: Meetings, Incentives, Conferences, and Exhibitions

INTRODUCTION

This trainee's manual encompasses all necessary skills, knowledge and attitudes required to **apply property management system**. Students undertaking this module shall be exposed to practical activities that will develop and nurture their competences. The writing process of this training manual embraced competency-based education and training (CBET) philosophy by providing practical opportunities reflecting real life situations.

The trainee's manual is subdivided into units, each unit has got various topics, you will start with a self-assessment exercise to help you rate yourself on the level of skills, knowledge and attitudes about the unit.

A discovery activity is followed to help you discover what you already know about the unit.

After these activities, you will learn more about the topics by doing different activities by reading the required knowledge, techniques, steps, procedures and other requirements under the key facts section, you may also get assistance from the trainer. The activities in this training manual are prepared such that they give opportunities to students to work individually and in groups.

After going through all activities, you shall undertake progressive assessments known as formative and finally conclude with your self-reflection to identify your strengths, weaknesses and areas for improvement.

Do not forget to read the point to remember the section which provides the overall key points and takeaways of the unit.

Module Units:

Unit 1: Prepare all necessities for using PM

Unit 2: Handle room division activities using PMS

Unit 3: Prepare hotel revenue reports using PMS

UNIT 1: PREPARE ALL NECESSITIES FOR USING PMS



Unit summary

This unit provides the knowledge, skills, and attitudes necessary for preparing all essentials for using PMS. It includes Identification of tools, materials and equipment and checking operational condition.

Self-Assessment: Unit 1

1. Look at the unit illustration above and answers the questions below:
 - a. What does the illustration show?
 - b. What do you think will be topics to be covered under this unit based on the illustration?
2. Fill out the below self-assessment. Think about yourself: do you think you can do this? How well? Read the statements across the top. Assess your level of knowledge, skills and attitudes under this unit.
 - a. There is no right or wrong way to answer this assessment. It is for your own reference and self-reflection on the knowledge, skills and attitudes acquired during the learning process
 - b. Think about yourself: do you think you have the knowledge, skills or attitudes to do the task? How well?
 - c. Read the statements across the top. Put a check in a column that best represents your level of knowledge, skills and attitudes.
3. At the end of this unit, you will assess yourself again.

My experience	I don't	I know	I have some	I have a lot	I am
Knowledge, skills and attitudes	have any experience doing this.	a little about this.	experience doing this.	of experience with this.	confident in my ability to do this.
Explain PMS					
Discuss the historical background to PMS					
Define PMS keys terms					
Explain the impact of PMS in hotel					

My experience	I don't	I know	I have some	I have a lot	I am
Knowledge, skills and attitudes	have any experience doing this.	a little about this.	experience doing this.	of experience with this.	confident in my ability to do this.
Identify types of PMS Subscription Models					
Select tools used in application of PMS					
Select materials used in application of PMS					
Select equipment used in application of PMS					



Key Competencies:

Knowledge	Skills	Attitudes
1. Explain PMS	1. Select tools used in application of PMS	1. Be proactive in identifying what features of the PMS will be required.
2. Discuss the historical background to PMS	2. Select materials used in application of PMS	2. Be Open to Change
3. Define PMS keys terms	3. Check core functionalities	3. Pay attention to detail in all PMS-related tasks
4. Explain the impact of PMS in hotel	4. Select equipment used in application of PMS	
5. Identify types of PMS Subscription Models	5. Verify cost and pricing structures	
	6. Establish a clear timeline for each step of the PMS preparation	



Discovery activity:



Task 1

A Property Management System (PMS) software solution oversees and manages properties effectively as a front desk manager at a hotel; using the PMS to manage guest check-ins, billing, and communication between hotel departments answer the following questions.

1. Discuss the historical background of PMS.
2. Explain the impact of PMS on hotel management.
3. Identify materials tools and equipment used for PMS.
4. Describe tools and equipment which are essential for PMS.
5. Discuss the challenges and limitations of PMS.
6. Role of CRM Tools in PMS

Topic 1.1: Identification of tools, materials and equipment



Activity 1: Problem Solving



Task 2:

You are a property management system ⁱⁱ(PMS) supervisor at a hotel, responsible for overseeing the daily operations of the PMS to ensure smooth reservation, check-in, check-out, and billing processes. Your tasks include identifying the tools, software, and hardware required for efficient property management. You must also ensure that the system is properly maintained, secure, and used effectively by staff to enhance guest experience and operational efficiency.



Task3

1. Discuss the historical background of PMS
2. Explain the impact of PMS on hotel management
3. Identify materials tools and equipment used for PMS
4. Describe tools and equipment which are essential for PMS?
5. Discuss the challenges and limitations of PMS?
6. Explain the impacts of PMS in hotel manageⁱⁱⁱment?
7. What challenges and limitations are associated with PMS?
8. What are the primary functions of a Property Management System?

Key Facts 1.1: Identification of tools, materials and equipment

- **Historical background to PMS**

- ✓ **Definitions of key terms**

- ✚ **Property Management System (PMS)**

- ^{iv}Software used to manage hotel operations like guest check-ins, reservations, billing, and room assignments.

- ✚ **Reservation Management:**

- Handles booking, modifying, and canceling reservations while tracking room availability.

- ✚ **Front Desk Operations:**

- Involves check-in/check-out, guest communication, and payment handling.

- ✚ **Guest Folio:**

- A record of all financial transactions related to a guest's stay.

- ✚ **Room Assignment:**

- The process of assigning rooms to guests based on availability and preferences.

- ✚ **Check-In/Check-Out:**

- Check-in** is registering guests, and **check-out** is settling bills when guests leave.

- ✚ **Point of Sale (POS) System:**

- Manages sales transactions for hotel services like food and beverages, integrated with the PMS.

- ✚ **Housekeeping Management:**

- Tracks room status (e.g., clean or dirty) to ensure efficient room turnover.

- ✓ **Origins of PMS**

- ✚ **1970s – Early Days:**

- Hotels started using basic computer systems to help with reservations, guest check-ins, and billing instead of doing it by hand.

1980s – First Computer Systems:

Larger hotels began using computers for tasks like guest registration and billing.

1990s – More Features Added:

PMS systems included more tools like housekeeping management and accounting, allowing hotel departments to communicate in real time.

2000s – Cloud-Based Systems:

Cloud-based PMS systems were introduced, making it cheaper and easier for smaller hotels to use the technology.

2010s and Beyond – Integration & AI:

PMS systems started connecting with other tools (like POS and booking systems) and using artificial intelligence (AI) to improve guest services and hotel revenue.

✓ **Technological Milestones in PMS Development**

1970s – First Computerized PMS:

Early systems automated check-ins, reservations, and billing, replacing manual processes in large hotels.

1980s – More Functions Added:

PMS systems included room assignments, inventory, and financial reporting, streamlining hotel operations.

1990s – Networked Systems:

PMS systems connected different hotel departments, enabling real-time communication and better coordination.

2000s – Cloud-Based Solutions:

Cloud technology made PMS more affordable and accessible, allowing smaller hotels to use flexible, scalable systems.

2010s – Mobile and Integration:

PMS systems became mobile-friendly and integrated with booking engines, POS, and CRM systems for improved guest experiences.

2020s – AI and Data Analytics:

AI and analytics were added to optimize pricing, predict guest behavior, and improve decision-making.

✓ **Adoption of PMS in the Hospitality Industry**

1970s-1980s – Early Adoption:

Large hotel chains adopted PMS to automate tasks like reservations and billing, though the systems were costly and complex.

1990s – Wider Adoption:

PMS became more affordable, allowing mid-range hotels to use them for room assignments, inventory, and financial management.

2000s – Cloud-Based Systems:

Cloud PMS made the technology accessible to smaller hotels with lower costs and better flexibility.

2010s – Mobile & Integration:

Mobile-friendly PMS and integration with booking engines, POS, and CRM systems enhanced guest experience and efficiency.

2020s – AI & Automation:

PMS now includes AI and automation for pricing, decision-making, and personalized services, widely adopted across all hotel sizes.

● **Impact of PMS in hotel management**

✓ **Streamlining Operations through PMS**

PMS automates key hotel tasks such as:

 **Check-ins and check-outs** – Speeding up the guest arrival and departure process.

 **Room assignments** – Automatically managing room availability and guest preferences.

 **Billing and payments** – Simplifying invoicing and reducing errors.

 **Housekeeping** – Updating room status in real-time for better coordination.

✓ **Enhancing Guest Experience**

PMS improves guest satisfaction by:

 **Personalizing services** – Tracking guest preferences for tailored experiences.

- ✚ **Faster check-ins/outs** – Reducing wait times and streamlining guest arrival and departure.
- ✚ **Real-time updates** – Allowing guests to receive immediate updates on room status or service requests.
- ✚ **Seamless communication** – Enhancing coordination between hotel staff to meet guest needs quickly.

✓ **Data Management and Analytics in Decision-Making**

PMS helps in:

- ✚ **Collecting data** – Storing guest preferences, booking patterns, and financial data.
- ✚ **Analyzing trends** – Identifying patterns in guest behavior, occupancy, and revenue.
- ✚ **Informed decisions** – Using data to set pricing, manage inventory, and improve services.
- ✚ **Optimizing performance** – Helping managers make data-driven decisions to boost profitability and guest satisfaction.

✓ **Challenges and Limitations of PMS**

PMS can face issues such as:

- ✚ **High costs** – Initial setup and ongoing maintenance can be expensive, especially for smaller hotels.
- ✚ **Technical issues** – System downtime or glitches can disrupt operations and guest services.
- ✚ **Complex integration** – Linking PMS with other hotel systems (like POS, booking engines) can be difficult.
- ✚ **Training needs** – Staff must be trained to effectively use the system, which can be time-consuming.
- ✚ **Data security** – Storing sensitive guest data requires strong security measures to prevent breaches.

● **Tools used in application of PMS**

✓ **Reservation and Booking Management Tools:**

Online Booking Engines:

- **Purpose:** Integrate with the PMS to manage direct bookings made through the hotel's website.
- **Features:** Real-time room availability, instant confirmations, and secure payment gateways.
- **Example:** Booking Suite

Channel Managers:

- **Purpose:** Distribute room inventory across multiple online travel agencies (OTAs) such as Expedia, Booking.com, and Agoda while ensuring synchronization of availability and rates.
- **Features:** Rate updates, centralized inventory control, and prevention of double bookings.
- **Examples:** Site Minder, Cloud beds.

Central Reservation Systems (CRS):

- **Purpose:** Manage room reservations across a hotel chain or multiple properties.
- **Features:** Real-time updates, group reservations, and advanced analytics.
- **Examples:** Amadeus CRS, Pegasus CRS.

Mobile Reservation Apps:

- **Purpose:** Allow guests to make reservations through mobile devices for greater convenience.
- **Features:** User-friendly interfaces, personalized offers, and push notifications for promotions.
- **Examples:** Hotelogix Mobile App, RoomKeyPMS.

Call Centre Booking Tools:

- **Purpose:** Facilitate bookings over the phone and integrate the information into the PMS.
- **Features:** Voice support, real-time updates, and payment integration.
- **Examples:** VoIP-based systems like RingCentral integrated with PMS.

Revenue Management Tools (for Reservations):

- **Purpose:** Optimize pricing strategies to maximize revenue based on demand forecasting and market trends.
- **Features:** Dynamic pricing, rate analysis, and yield management.

Guest Relationship Management (GRM) Tools:

- **Purpose:** Track guest preferences and booking history to offer tailored services and promotions.
- **Features:** Loyalty program integration, personalized communication, and upselling opportunities.
- **Examples:** Salesforce CRM, Stay Touch.

✓ **How They Support Operations**

These tools enhance the operational efficiency of PMS by:

-  Ensuring real-time updates across all booking platforms.
-  Reducing the risk of errors such as double bookings or rate discrepancies.
-  Providing insightful data for better decision-making and customer engagement.
-  Streamlining guest interactions, leading to improved satisfaction and loyalty.

✓ **Customer Relationship Management (CRM) Tools**

Overview of CRM in Hospitality

Customer Relationship Management (CRM) tools are integrated into modern Property Management Systems (PMS) to enhance guest experiences and build lasting relationships. In a hospitality setting, CRM tools focus on managing guest interactions, personalizing services, and leveraging guest data to foster loyalty and repeat business.

● **Role of CRM Tools in PMS**

CRM tools within a PMS serve to:

- ✓ **Centralize Guest Information:** Collect and store guest details, including preferences, booking history, feedback, and special requests.
- ✓ **Personalize Guest Experiences:** Enable the hotel to tailor services, such as room preferences, dining choices, or celebration packages.

- ✓ **Enhance Communication:** Automate guest communication through pre-arrival emails, promotions, and post-stay surveys.
- ✓ **Boost Guest Retention:** Leverage loyalty programs to reward frequent guests and encourage repeat visits.
- **Key Features of CRM Tools in PMS**
 - ✓ **Guest Profiles:** Maintain detailed records, such as name, contact information, preferences, and stay history.
 - ✓ **Automated Marketing:** Send targeted promotions or offers based on guest behaviour and preferences.
 - ✓ **Feedback Management:** Collect and analyse guest feedback to identify areas of improvement.
 - ✓ **Integration with Booking Channels:** Ensure a seamless flow of guest data from direct bookings, OTAs, and GDS platforms.
 - ✓ **Analytics and Reporting:** Provide insights into guest trends, preferences, and revenue contributions.
- **Benefits of Using CRM Tools in PMS**
 - ✓ **Improved Guest Satisfaction:** Personalized services make guests feel valued.
 - ✓ **Operational Efficiency:** Streamlined processes for managing guest needs and communication.
 - ✓ **Increased Revenue:** Upselling and cross-selling opportunities based on guest preferences.
 - ✓ **Enhanced Loyalty:** Programs and incentives encourage repeat stays and word-of-mouth recommendations.
 - ✓ **Data-Driven Decisions:** Informed strategies based on guest behaviour and feedback.
- **Practical Use Cases in Hotels**
 - ✓ **Pre-Arrival Communication:** Sending welcome emails and reminders about hotel services or amenities.
 - ✓ **On-Site Personalization:** Noting repeat guest preferences, such as a favorite room type or dining option.

- ✓ **Post-Stay Engagement:** Requesting reviews and offering discounts for future bookings.
- ✓ **Loyalty Program Management:** Tracking rewards points and offering tier-based benefits.
- **Challenges of CRM Tools in PMS**
 - ✓ **Data Privacy and Security:** Protecting guest information to comply with regulations like GDPR.
 - ✓ **Staff Training:** Ensuring employees know how to use CRM features effectively.
 - ✓ **Integration Issues:** Maintaining compatibility with other systems and platforms.
 - ✓ **Data Accuracy:** Preventing duplication or errors in guest profiles.
- **Revenue Management Tools**
 - ✓ **Overview of Revenue Management in Hospitality**

Revenue Management involves strategic pricing and inventory control to maximize revenue and profitability. In hotels, it focuses on selling the right room to the right customer at the right time, for the right price. Revenue Management Tools within a PMS are designed to optimize pricing strategies, forecast demand, and enhance decision-making.
- **Role of Revenue Management Tools in PMS**
 - ✓ Revenue Management Tools in a PMS help:
 - ✓ **Dynamic Pricing:** Adjust room rates in real time based on demand, competition, and market trends.
 - 📊 **Demand Forecasting:** Predict future occupancy levels using historical data and market analysis.
 - 📊 **Inventory Management:** Allocate room availability across various distribution channels effectively.
 - 📊 **Data-Driven Decisions:** Use analytics to create optimal pricing strategies and marketing campaigns.
 - 📊 **Maximize Revenue:** Balance occupancy levels with average daily rate (ADR) to achieve higher RevPAR (Revenue Per Available Room).
 - ✓ **Key Features of Revenue Management Tools in PMS**

- ✚ **Rate Optimization:** Automated adjustments based on demand, seasonality, and competitor pricing.
- ✚ **Forecasting Models:** Predict guest booking patterns and peak seasons to plan strategies.
- ✚ **Channel Management Integration:** Sync with OTAs, direct bookings, and GDS to avoid overbookings or rate disparities.
- ✚ **Performance Metrics:** Track KPIs such as ADR, RevPAR, occupancy rate, and gross operating profit per available room (GOPPAR).
- ✚ **Group and Event Management:** Provide customized pricing for group bookings or events based on profitability analysis.

✓ **Benefits of Using Revenue Management Tools in PMS**

- ✚ **Increased Profitability:** Maximizes revenue by aligning pricing with market demand.
- ✚ **Enhanced Forecast Accuracy:** Improves planning for staffing, inventory, and marketing.
- ✚ **Operational Efficiency:** Reduces manual intervention with automated pricing and reporting.
- ✚ **Market Competitiveness:** Keeps the hotel competitive by adjusting rates dynamically.
- ✚ **Improved Guest Experience:** Balances pricing strategies with customer value perception.

✓ **Practical Use Cases in Hotels**

- ✚ **High-Demand Periods:** Raising room rates during peak seasons or special events (e.g., holidays, conferences).
- ✚ **Last-Minute Discounts:** Offering reduced rates to fill unsold rooms close to check-in dates.
- ✚ **Promotional Packages:** Creating bundles that include meals, spa services, or tickets to local attractions.
- ✚ **Competitive Benchmarking:** Monitoring competitor rates and adjusting pricing accordingly.

✚ **Overbooking Management:** Planning overbookings based on historical no-show rates to avoid revenue loss.

✓ **Challenges of Revenue Management Tools in PMS**

✚ **Data Accuracy:** Ensuring reliable data for effective decision-making.

✚ **Market Volatility:** Adjusting to sudden changes in demand, such as economic shifts or pandemics.

✚ **Integration Issues:** Aligning tools with other systems like booking engines and CRM.

✚ **Staff Expertise:** Training staff to understand and implement complex revenue strategies.

✚ **Ethical Considerations:** Avoiding guest dissatisfaction due to perceived overpricing.

● **Materials used in application of PMS**

✓ **Software**

Property Management System (PMS) software integrates and automates key hotel operations such as reservations, billing, housekeeping, and guest management. Its application requires specific materials, including software components, hardware infrastructure, and supportive resources, to function effectively.

Categories of Materials

✓ **Software Components**

✚ **Core PMS Software**

- Handles reservations, room assignments, billing, and guest check-ins/check-outs.
- Example: Opera PMS, Cloud beds, or Room Raccoon.

✚ **Integrated Modules**

- **Customer Relationship Management (CRM):** Manages guest profiles, preferences, and loyalty programs.
- **Channel Management:** Synchronizes room availability across OTAs (Booking.com, Expedia) and GDS platforms.
- **Housekeeping Module:** Tracks room cleaning status and schedules.

- **Revenue Management:** Optimizes room pricing and availability based on demand and competition.

Third-Party Software

- **Point of Sale (POS):** Manages transactions from hotel outlets like restaurants or spas.
- **Accounting Software:** Handles financial data, audits, and reporting.
- **Cloud Storage Solutions:** For secure and scalable data access.

✓ **Hardware Components**

Computers and Devices

- Desktop systems for front desk operations.
- Tablets or mobile devices for housekeeping and room service updates.

Servers

- **On-Premises:** For large-scale operations needing local control.
- **Cloud Servers:** Enable remote access, scalability, and minimal physical infrastructure.

Networking Tools

- High-speed internet to ensure smooth data transfer between PMS and other systems.
- Secure Wi-Fi for operational use.

Peripheral Devices

- Printers for invoices and reports.
- Scanners for document verification (e.g., guest ID).
- Credit card readers and keycard encoders for secure payments and room access.

✓ **Resources and Support**

Data and Templates

- **Guest Data:** Profiles, booking history, and feedback records.
- **Customizable Templates:** For invoices, confirmations, and reports.

Maintenance and Security

- Regular software updates to fix bugs and enhance features.
- Backup systems to prevent data loss.

- Cybersecurity tools to protect guest and operational data.

Training and User Guides

- User manuals for step-by-step instructions.
- Interactive training sessions to familiarize staff with PMS functionalities.

Benefits of Proper Application

- **Efficiency:** Automates routine tasks and reduces manual errors.
- **Enhanced Guest Experience:** Personalizes services and improves communication.
- **Revenue Optimization:** Uses data-driven strategies to maximize profitability.
- **Scalability:** Cloud-based systems adapt to growing business needs.

Challenges in Applying PMS Materials

- **Cost:** High initial investment in hardware and software.
- **Integration Issues:** Ensuring compatibility among different systems.
- **Staff Training:** Resistance to new technology or lack of skills.
- **Data Security Risks:** Protecting sensitive information from breaches.

✓ **Internet connection**

The application of Property Management System (PMS) software in the hospitality industry requires various materials to ensure effective operation and integration. These materials include software components, supporting hardware, and other essential resources.

✓ **Software Materials**

 **Reservation Management:** Allows hotels to manage bookings, cancellations, and modifications in real-time.

 **Billing and Payment Systems:** Processes transactions, generates invoices, and integrates with financial software.

 **Housekeeping Modules:** Tracks room cleaning schedules and communicates updates to the front desk.

 **Channel Management Integration:** Synchronizes room rates and inventory across multiple booking platforms.

✚ **Customer Relationship Management (CRM):** Stores guest profiles, preferences, and loyalty program details.

✓ **Hardware Materials**

✚ **Computers and Laptops:** For administrative tasks such as reservations, billing, and reporting.

✚ **Tablets or Mobile Devices:** Used by housekeeping staff for real-time updates.

✚ **Printers and Scanners:** For producing guest invoices and scanning documents like IDs.

✚ **Keycard Encoders:** For programming room access cards.

✚ **Point-of-Sale (POS) Devices:** Integrated with PMS to handle transactions from hotel outlets.

✓ **Supporting Resources**

✚ **Cloud Storage:** Ensures secure, remote data access and backup.

✚ **Training Modules:** Provides staff with the knowledge to use PMS efficiently.

✚ **Cybersecurity Tools:** Protects sensitive guest and operational data from breaches.

✚ **Vendor Support:** Offers technical assistance for troubleshooting and updates.

✓ **Equipment used in application of PMS**

✚ **Hardware Components**

The **hardware components of a Property Management System (PMS)** refer to the physical devices and equipment required to support the operation and functionality of the system. These components interact with the PMS software, enabling the management of various tasks such as reservations, billing, housekeeping, and guest services. The hardware serves as the foundation for data input, processing, communication, and output, ensuring efficient and reliable system performance.

✓ **Key Hardware Components in PMS**

✚ **Server**

- Central system storing all PMS software and data.
- Can be on-premises or cloud-based.

- Handles property-wide operations like reservations, billing, and guest management.

Workstations

- Desktop computers or laptops for staff use.
- Located at front desks, administrative offices, or back-of-house areas.
- Access PMS software for daily tasks like check-ins, reporting, and billing.

Keycard Encoder

- Device that programs key cards for guest room access.
- Syncs with the PMS to assign room keys during check-in.
- Works with electronic door locks for added security.

Point-of-Sale (POS) Terminals

- Hardware for processing payments in restaurants, bars, or spas.
- Often touchscreen-enabled with built-in card readers.
- Integrated with the PMS for centralized billing.

Printers and Scanners

- Printers: Used for receipts, invoices, and guest registration cards.
- Scanners: Capture guest ID documents and digitize them for PMS storage.

Electronic Door Locks

- Guest room locks operated via keycards or mobile apps.
- Linked to the PMS for secure access and tracking.

Network Infrastructure

- Routers, switches, and access points ensure communication between devices.
- Provides internet connectivity for PMS and guest services.

Guest Self-Service Kiosks

- Standalone touchscreens for check-in/out or information retrieval.
- Reduces front desk workload and speeds up guest processes.

Mobile Devices

- Smartphones or tablets for staff.
- Enable housekeeping updates, maintenance requests, or room service tasks directly via the PMS.

Telephony Systems

- Integrated phones connected to the PMS.
- Used for wake-up calls, room service orders, or internal communication.

Backup Power

- UPS and generators ensure PMS stays operational during power outages.
- Prevents data loss and service disruptions.

Security Systems

- Cameras and access control systems integrated with the PMS.
- Monitor property activity and ensure guest safety.

Data Storage Devices

- External hard drives or NAS for data backups.
- Essential for securing property and guest data

Networking Equipment

- **Networking equipment in a Property Management System (PMS)** refers to the hardware devices and infrastructure used to establish, maintain, and secure data communication between the various components of the PMS. These devices ensure seamless connectivity for the exchange of information between servers, workstations, mobile devices, and guest services, both within the property and with external systems such as cloud services or booking platforms.

Core Networking Hardware

- **Routers:** Direct data traffic between internal property networks and external systems (e.g., online booking platforms).
- **Switches:** Enable communication between multiple wired devices, such as workstations, servers, and printers.
- **Wireless Access Points (WAPs):** Provide Wi-Fi coverage for guest services and internal operations (e.g., mobile check-ins).

Security-Driven Equipment

- **Firewalls:** Protect the PMS network from cyberattacks by filtering incoming and outgoing traffic.

- **VPN Appliances:** Allow secure remote access for authorized personnel managing the PMS offsite.

Data Distribution Tools

- **Load Balancers:** Optimize data flow by distributing incoming requests (like online bookings) evenly across servers.
- **Power over Ethernet (PoE) Switches:** Provide simultaneous power and data transfer for lightweight networking devices like security cameras or IP phones.

Guest-Specific Networking Equipment

- **Guest Wi-Fi Portals:** Isolate guest internet access from operational networks for security.
- **IoT Gateways:** Manage smart devices in rooms (e.g., automated lighting or climate control).

Monitoring and Storage

- **Network Monitoring Tools:** Hardware that tracks real-time network performance, ensuring uptime and quick troubleshooting.
- **NAS (Network Attached Storage):** Provides centralized storage for operational backups and logs.

Purpose and Importance of Networking Equipment in PMS

- **Facilitates Communication:** Ensures seamless data flow between property systems (reservations, billing, room assignments).
- **Enhances Efficiency:** Provides stable connections for critical operations like check-ins/check-outs and payment processing.
- **Strengthens Security:** Protects sensitive guest and operational data through controlled network access.
- **Supports Mobility:** Enables staff to use wireless devices for real-time updates and guest service delivery.
- **Improves Guest Experience:** Offers high-speed internet and smart room integrations for convenience.

Peripheral Devices

Peripheral devices are external hardware components that connect to the core PMS infrastructure, enhancing its functionality by facilitating input, output, and additional operational features. These devices support staff in managing property operations and improve guest experiences through efficient service delivery.

• **Key Peripheral Devices in PMS**

1. Input Devices

These devices allow data entry into the PMS for processing and record-keeping.

- **Keyboards and Mice:** Standard tools for interacting with PMS software at workstations.
- **Barcode Scanners:** Used to scan inventory items or guest IDs for check-in/out or service tracking.
- **Touchscreens:** Found in kiosks or POS systems for intuitive user interaction.
- **Signature Pads:** Capture digital signatures for receipts or registration forms.
- **ID Card Scanners:** Digitize guest ID documents during check-ins.

2. Output Devices

These devices generate physical or digital outputs from the PMS for staff or guest use.

- **Printers:**
 - **Receipt Printers:** Print invoices, receipts, or booking confirmations.
 - **Document Printers:** Generate reports, guest registration forms, or contracts.
- **Display Screens:**
 - Monitors for staff workstations.
 - Guest-facing displays in kiosks or lobby areas for self-service information.
- **Speakers/Audio Systems:** Provide announcements or audio notifications linked to PMS alerts.

3. Storage Devices

Devices for data backup and secure information storage.

- **External Hard Drives:** Store backups of guest records, financial data, and operational logs.
- **USB Drives:** Transfer data between systems or locations.
- **Network Attached Storage (NAS):** Centralized data storage accessible across the property.

4. Communication Devices

Support communication between guests and staff or between PMS components.

- **Telephony Systems:** Integrated with PMS to manage guest calls, room-to-room communication, and wake-up calls.
- **Intercom Systems:** Facilitate direct communication within the property.

Category of tools, equipment and materials	Tools, equipment and materials	Image	Use of the tools and equipment
Property Management System (PMS)	Computers		Used to run PMS software, store data, and manage guest information and reservations.
	POS Terminals		Used to process guest payments, manage transactions, and generate receipts.
	Check-in Kiosks		Self-service stations for guests to check in and get room information and keys.

Category of tools, equipment and materials	Tools, equipment and materials	Image	Use of the tools and equipment
	Key Card Issuers		Used to issue and manage guest room key cards for security and room access.
Communication Tools	Telephones		Used for communication between hotel departments and with guests.
	Radios/Walkie-Talkie		Used for real-time communication between hotel staff, especially for housekeeping.
Security Equipment	RFID Key Card Readers		Used for secure access to guest rooms and hotel areas.
	CCTV Cameras		Used for surveillance and ensuring security in the hotel premises.



Activity 2: Guided Practice



Task 6:

Visit a nearest hotel where the Property Management System (PMS) software is installed. Use the computers to identification of tools, materials and equipment, observe Technological Milestones in PMS Development and analyse the challenges and Limitations of PMS.



Activity 3: Application



Task 7:

Visit a nearby hotel's front office. Identify tools, materials, and equipment used for enhancing Guest Experience, reservation and Booking Management Tools, Equipment used in application of PMS and Materials used in application of PMS.

Topic 1.2: Checking operational condition



Activity 1: Problem Solving



Task 5:

You are a PMS supervisor at a hotel, ensuring smooth reservation, check-in, check-out, and billing processes. You are the one to check the operational condition for PMS. Show your understanding about checking the operational condition by answering the following

1. Describe the types of PMS subscription models
2. Describe the Cost and Pricing Structures
3. Identify evaluation and selection criteria of PMS Subscription Models
4. Explain the evolution of PMS Technology

Key Facts 1.2: Checking operational condition

- **Types of PMS subscription models**

- ✓ **Cloud-Based Subscription**

A PMS hosted on the cloud, accessed via the internet. This subscription typically involves recurring payments (monthly or annually).

- ✓ **On-Premise Subscription**

The PMS is installed on the hotel's internal servers and managed by the hotel's IT team. This model may involve a one-time license fee or annual payments.

- ✓ **Pay-Per-Use Subscription**

Hotels pay based on usage, such as the number of rooms managed or bookings made. This model is often used for smaller or seasonal operations.

- ✓ **Freemium Subscription**

A basic version of the PMS is available for free, with optional paid upgrades for additional features or advanced functionality.

✓ **Enterprise Subscription**

A subscription for large hotel chains or businesses with multiple properties, offering advanced features for managing multiple locations.

● **Cost and Pricing Structures**

✓ **Cloud-Based Subscription**

Cost: Typically, a recurring monthly or annual fee. The price depends on the number of users, features, and scale of the operation.

✚ **Pricing Factors:**

- Number of rooms managed.
- Add-on features such as integrations, reporting tools, and customer support.
- Tiered pricing based on service levels (e.g., basic, premium).

✓ **On-Premise Subscription**

Cost: Usually a one-time licensing fee, followed by annual maintenance or update fees.

✚ **Pricing Factors:**

- Initial setup cost for installation and hardware.
- Ongoing support, updates, and hardware maintenance.
- The scale of the operation and customization requirements.

✓ **Pay-Per-Use Subscription**

Cost: Charges are based on actual usage, such as number of bookings or rooms managed.

✚ **Pricing Factors:**

- Volume of transactions (e.g., number of check-ins/check-outs, bookings).
- Seasonal variations and business volume fluctuations.
- Potential minimum usage requirements.

✓ **Freemium Subscription**

Cost: Basic version is free, with optional paid upgrades for additional features.

 Pricing Factors:

- Advanced features such as reporting, integrations, or premium support.
- Scale of the hotel (e.g., larger hotels may need more advanced functionalities).

✓ **Enterprise Subscription**

Cost: Custom pricing based on the number of properties and advanced features needed.

 Pricing Factors:

- Number of locations to be managed.
- Customization, integrations, and dedicated support requirements.
- Enterprise-level service agreements and SLAs (Service Level Agreements).

● **Evaluation and Selection criteria of PMS Subscription Models**

✓ **Cloud-Based Subscription**

 Evaluation Criteria:

- Cost-effectiveness for small to medium-sized hotels.
- Flexibility for scaling and adding features.
- Security and data backup features.

 Selection Factors:

- Reliability and uptime guarantees.
- Integration with existing systems (e.g., booking engines, payment gateways).
- Customer support quality.

✓ **On-Premise Subscription**

 Evaluation Criteria:

- High initial cost but lower long-term maintenance fees.
- Control over data security and customization.
- Requires in-house IT support.

 Selection Factors:

- Ability to customize the system to specific needs.

- On-site hardware requirements and space for servers.
- Long-term costs for maintenance and upgrades.

✓ **Pay-Per-Use Subscription**

Evaluation Criteria:

- Ideal for businesses with fluctuating demand or seasonal operations.
- Cost flexibility based on actual usage.
- Limited features compared to other subscription types.

Selection Factors:

- The scale of operations (ideal for small or seasonal businesses).
- Ability to track and manage variable costs effectively.
- Integration with accounting or booking systems.

✓ **Freemium Subscription**

Evaluation Criteria:

- Cost-effective entry point with essential features.
- Potential to upgrade as the business grows.
- Limited functionality in the free version.

Selection Factors:

- Hotel size and need for basic features.
- Growth potential and future need for premium features.
- Ability to upgrade easily without significant disruption.

✓ **Enterprise Subscription**

Evaluation Criteria:

- Customizable and scalable for large operations.
- Advanced multi-property management and reporting tools.
- Higher cost due to added features and customization.

Selection Factors:

- Number of properties and the need for centralized management.
- Budget for long-term investments in software.
- Requirement for specialized support and custom integrations.

- **Updated vision**

- ✓ **Evolution of PMS Technology**

- ✚ **Manual Systems (Pre-1970s)**

- Hotels used paper ledgers for reservations, check-ins, and billing.

- Processes were slow, prone to errors, and labour-intensive.

- **Early Computer Systems (1970s-1980s)**

- Basic PMS software was introduced on standalone computers.

- Limited functions like reservations and billing, with no system integration.

- **Integrated Systems (1990s-2000s)**

- PMS started connecting with other hotel systems (POS, housekeeping, accounting).

- **Multiple terminals could access the PMS within the hotel.**

- **Cloud-Based Systems (2010s-Present)**

- PMS moved online, accessible via the internet with automatic updates.

- Easier integration with third-party services like OTAs and mobile apps.

- **Advanced PMS (Present and Future)**

- AI and machine learning provide personalized guest experiences.

- Mobile check-in, smart room controls, and IoT integration enhance operations.

- Stronger data security to protect guest information.

- ✚ **Future Trends in PMS Technology**

- **Artificial Intelligence (AI) and Machine Learning**

- **Predictive Analytics:** AI will analyse guest preferences to offer personalized recommendations (e.g., room upgrades, amenities).

- **Automation:** Automated responses for common guest inquiries, improving efficiency in customer service.

- **Mobile-First Solutions**

- **Mobile Check-In and Check-Out:** Guests will increasingly use smartphones to complete check-ins, check-outs, and room access without visiting the front desk.
- **Mobile Staff Tools:** Staff can manage housekeeping, maintenance, and guest requests through mobile apps in real time.
- **Internet of Things (IoT) Integration**
 - **Smart Room Controls:** Guests can control lighting, temperature, and entertainment systems via mobile devices or voice commands.
 - **Operational Efficiency:** IoT sensors will monitor equipment (e.g., HVAC systems) to predict maintenance needs and reduce downtime.
- **Cloud and Hybrid PMS Models**
 - **Scalability and Flexibility:** Cloud-based PMS will continue to dominate, but hybrid models will emerge for businesses needing both cloud and local data storage.
 - **Remote Management:** Hotels can manage operations remotely, enabling centralized control of multiple properties.
- **Enhanced Data Security and Privacy**
 - **Advanced Encryption:** Stronger data protection protocols to comply with global data regulations (e.g., GDPR).
 - **Cybersecurity Measures:** AI-powered systems will detect and prevent potential security threats in real time.
- **Integration with External Platforms**
 - **OTA and CRM Integration:** Seamless connections with Online Travel Agencies (OTAs) and Customer Relationship Management (CRM) systems for unified data management.
 - **Payment Gateways:** Faster and more secure payment processing with multiple options, including mobile wallets and cryptocurrencies.
- **Sustainability and Green Technology**

- **Energy Efficiency:** PMS will optimize energy usage by managing smart systems for lighting, heating, and cooling.
 - **Paperless Operations:** Increased use of digital records, e-receipts, and online forms to reduce paper consumption.
- **Voice and Gesture Recognition**
 - **Voice-Activated Services:** Guests can use voice commands for room service, concierge requests, or adjusting room settings.
 - **Touchless Technology:** Gesture-based controls for elevators, room doors, and other hotel services to enhance hygiene and convenience.
- **Future Trends in PMS Technology**
 - ✓ **Artificial Intelligence (AI) and Machine Learning**
 - ✚ **Predictive Guest Insights:** AI will analyse guest preferences to provide personalized recommendations, such as room upgrades or customized services.
 - ✚ **Dynamic Pricing Models:** Machine learning will automatically adjust room rates based on factors like demand, events, and competitor pricing.
 - ✚ **Automated Guest Support:** AI chatbots will handle routine inquiries, reducing staff workload and ensuring 24/7 guest support.
 - ✓ **Mobile-First Solutions**
 - ✚ **Mobile Check-In/Check-Out:** Guests will complete check-ins, check-outs, and room access using smartphones, minimizing front desk queues.
 - ✚ **Mobile Staff Tools:** Staff will use mobile devices to manage housekeeping, maintenance, and guest requests in real time.
 - ✚ **Guest Self-Service Apps:** Enhanced apps will let guests order room service, request amenities, and control room settings remotely.
 - ✓ **Internet of Things (IoT) Integration**
 - ✚ **Smart Room Controls:** Guests will control lighting, temperature, and entertainment systems via mobile apps or voice commands.
 - ✚ **Predictive Maintenance:** IoT sensors will monitor equipment like HVAC systems, alerting staff before breakdowns occur.

-  **Energy Optimization:** Automated energy-saving features will adjust room settings based on occupancy, reducing waste.
- ✓ **Cloud and Hybrid PMS Models**
 -  **Cloud Scalability:** Cloud-based PMS will offer flexible scaling, allowing hotels to adapt to changing business needs quickly.
 -  **Hybrid Solutions:** Hybrid models will combine cloud and on premise storage to ensure access even during internet outages.
 -  **Centralized Management:** Large hotel chains will manage multiple properties through a single cloud-based dashboard.
- ✓ **Enhanced Data Security and Privacy**
 -  **Advanced Encryption:** Stronger encryption methods will ensure guest data remains secure and compliant with global standards.
 -  **Real-Time Threat Detection:** AI-driven security systems will detect and neutralize cyber threats before they cause damage.
 -  **Secure Payment Processing:** PMS will support tokenized payments, enhancing the security of financial transactions.
- ✓ **Integration with External Platforms**
 -  **OTA and Metasearch Integration:** Seamless connections with OTAs and metasearch engines will boost booking efficiency and visibility.
 -  **CRM and Loyalty Programs:** PMS will integrate with CRM systems to deliver personalized loyalty rewards and retention strategies.
 -  **Flexible Payment Gateways:** Support for mobile wallets, contactless payments, and cryptocurrencies will enhance payment flexibility.
- ✓ **Sustainability and Green Technology**
 -  **Energy Management:** PMS will optimize energy usage by automating lighting and temperature adjustments based on occupancy.
 -  **Paperless Operations:** Hotels will adopt digital records, e-receipts, and online forms to reduce paper usage.
 -  **Resource Tracking:** PMS will monitor water and energy consumption, aiding hotels in achieving sustainability goals.
- ✓ **Voice and Gesture Recognition**

-  **Voice-Activated Services:** Guests will use voice commands to request room service, adjust room settings, or seek concierge assistance.
-  **Touchless Technology:** Gesture-based controls for elevators and doors will enhance hygiene and guest convenience.
-  **IoT Voice Integration:** PMS will integrate with smart devices like Alexa or Google Assistant, allowing voice control over room functions.

- **PMS features**

- ✓ **Core Functionalities**

- **Reservation Management**

- Manages room bookings, availability, and inventory in real time.
 - Provides tools for handling individual and group reservations, waitlists, and cancellations.

- **Check-In and Check-Out**

- Streamlines guest registration, room assignment, and key issuance.
 - Offers automated check-in/out options, reducing front desk congestion.

- **Billing and Payment Processing**

- Automatically generates invoices and handles multiple payment methods (cash, credit, mobile payments).
 - Tracks guest folios for room charges, restaurant bills, and other expenses.

- **Housekeeping Management**

- Assigns and tracks housekeeping tasks based on room status (e.g., occupied, vacant, or needs cleaning).
 - Updates room status in real time for efficient turnaround.

- **Reporting and Analytics**

- Generates daily reports on occupancy, revenue, and operational performance.
 - Provides data for forecasting and decision-making.

- ✓ **Advanced Features**

- **Revenue Management**

- ✚ Uses dynamic pricing to optimize room rates based on demand, seasonality, and **competitor** pricing.

- Integrates with third-party tools for advanced revenue forecasting and management.

✚ **Guest Relationship Management (GRM)**

- Tracks guest preferences, stays history, and feedback to deliver personalized services.
- Manages loyalty programs, rewards, and promotions to enhance guest retention.

✚ **Mobile Access and Self-Service**

- Allows guests to check in, check out, and access rooms via mobile apps.
- Enables self-service options for room service, concierge, and requests.

✚ **Point of Sale (POS) Integration**

- Connects with on-site POS systems in restaurants, bars, and spas to automatically update guest folios.
- Tracks revenue from non-room services and integrates with billing.

✚ **Task Automation and Alerts**

- Automates routine tasks like sending booking confirmations, reminders, and post-stay surveys.
- Provides alerts for maintenance needs or guest requests in real time.

✓ **Customization and Integration Options**

✚ **Third-Party Integration**

- Seamlessly integrates with OTAs, channel managers, CRM systems, and payment gateways.
- Connects with marketing tools, email automation, and review management platforms.

✚ **Customizable User Interface**

- Allows hotels to tailor the dashboard and reports based on operational needs.
- Provides role-based access control to ensure staff only see relevant information.

Modular Add-Ons

- Offers optional modules for specific needs such as spa management, event planning, or multi-property management.
- Enables hotels to add or remove features as their needs evolve.

Multi-Language and Multi-Currency Support

- Supports multiple languages and currencies to cater to international guests and staff.
- Automatically converts currency for billing and reporting.

Scalability and Flexibility

- Adapts to different hotel sizes, from small boutique hotels to large chains.
- Supports growth by accommodating additional properties, rooms, or services as needed.

✓ **Steps to Check the Operational Condition of a PMS:**

Access the PMS System:

- **Action:** Log in to the PMS using the hotel's credentials. Ensure that the system is running on the correct version (check for updates if necessary).
- **Check:** Verify if all users can log in without issues and if the user interface is responsive.

Test Reservation Management:

- **Action:** Create, modify, and cancel a test reservation. This includes single and group bookings, ensuring availability is updated in real time.
- **Check:** Ensure that reservations are accurately reflected in the system and inventory is updated immediately.

Verify Check-In and Check-Out Process:

- **Action:** Perform test check-ins and check-outs, including automated options (if available).
- **Check:** Ensure smooth processing of guest check-ins and check-outs, and verify that all charges are correctly applied to guest folios.

Test Billing and Payment Processing:

- **Action:** Process various payment methods (cash, credit card, mobile payment).
- **Check:** Ensure that all payment methods are accepted, charges are applied correctly, and receipts are generated without errors.

Assess Housekeeping Management:

- **Action:** Assign housekeeping tasks based on room status (e.g., occupied, vacant, or needs cleaning).
- **Check:** Ensure housekeeping tasks are updated in real-time and that room status is accurately reflected.

Run Reports and Analytics:

- **Action:** Generate daily reports on occupancy, revenue, and operational performance.
- **Check:** Ensure reports are generated quickly and are accurate, with data on bookings, room availability, and revenue.

Evaluate Advanced Features:

- **Action:** Check the functionality of advanced features like revenue management, guest relationship management (GRM), and task automation.
- **Check:** Ensure that dynamic pricing adjusts based on demand, guest profiles are updated correctly, and automated tasks (e.g., booking confirmations) are functioning.

Check Integrations with External Systems:

- **Action:** Verify that the PMS integrates correctly with external systems like OTAs, CRM, and POS systems.
- **Check:** Ensure that data is syncing between systems and that third-party services (e.g., online bookings, payment gateways) are working.

Test Customization and User Interface:

- **Action:** Verify if the system's interface can be customized (e.g., adjusting dashboards or creating role-based access).

- **Check:** Ensure that customization options are functional and relevant information is accessible to staff based on their roles.

Review System Backup and Security Features:

- **Action:** Perform a backup and restore test to ensure data is securely stored.
- **Check:** Ensure that data is being regularly backed up and that recovery processes are fast and efficient in case of system failures.

Test Mobile Access and Self-Service Features:

- **Action:** Use the mobile app or self-service features to check in, check out, and request services (if available).
- **Check:** Ensure that all mobile and self-service options function smoothly and are integrated into the PMS.

Evaluate System Speed and Uptime:

- **Action:** Check for any slowdowns or system crashes by performing multiple operations simultaneously (e.g., multiple check-ins, bookings).
- **Check:** Ensure the system performs efficiently without lag or downtime, especially during peak periods.

Conduct Security and Privacy Checks:

- **Action:** Review data protection measures such as encryption, user authentication, and secure payment processing.
- **Check:** Ensure that all data handling complies with privacy regulations and security protocols are active to prevent unauthorized access.



Activity 2: Guided Practice



Task 6:

Visit a nearest hotel and practice the following:

1. Check the PMS subscription models.
2. Calculate the cost and pricing of each model..
3. Create a list of criteria and Compare two PMS models.
4. Review PMS technology evolution.
5. Predict future trends in PMS.
6. Align PMS features with hotel goals.
7. Check the use of core PMS features in daily operations.



Activity 3: Application

Visit the front office, check if the PMS system is running smoothly, verify PMS subscription models, check cost and pricing structures and check core functionalities.



Formative Assessment

I. Choose the letter corresponding to the correct answer

1. Which of the following is typically considered as pricing factor when selecting a PMS subscription model?
 - a. The number of rooms managed
 - b. The number of staff members in the hotel
 - c. Guest satisfaction ratings
 - d. Room types offered

II. Answer by True if the statement is correct and, False otherwise.

2. Selecting a PMS subscription model is based solely on the number of rooms in the hotel.
3. A Property Management System (PMS) is used exclusively for managing hotel reservations and does not include other functions like guest check-in or payment processing.

4. PMS was developed in the early 1970s in response to the increasing need for automation in the hospitality industry.

III. Answer to the following questions

5. What are the three major technological advancements that have influenced PMS over the years?
6. Provide examples of how PMS helps hotels improve their daily operations, such as front desk management or housekeeping.
7. Discuss at least two ways PMS improves guest satisfaction and service delivery.
8. How do PMS contribute to managing data, and what role does this data play in making decisions at a hotel?
9. Identify and explain the tools available within PMS that manage reservations and bookings.
10. Discuss the role of CRM tools in PMS and how they help hotels build and maintain relationships with guests.
11. List and briefly describe the essential software components involved in PMS.
12. Name the hardware components required for PMS and explain their role in hotel management.
13. Discuss the subscription models available for PMS. What are the advantages and disadvantages of each model?
14. Explain two emerging trends in PMS and how these trends will impact the future of hotel management.



Points to Remember

- **Subscription Models and Their Costs:** Different subscription models (cloud-based, on premise, pay-per-use, freemium, and enterprise) have unique pricing factors like setup costs, support fees, or usage charges.
- **Future Trends in PMS Technology:** Future PMS systems will incorporate AI, IoT, mobile-first solutions, enhanced data security, and sustainability initiatives to improve guest experiences and operational efficiency.

- **PMS Features and Functionalities:** Key PMS features include reservation management, check-in/check-out, billing, housekeeping, with advanced options like revenue management, guest relationship management, and mobile access.
- **Customization and Integration Options:** PMS systems offer customization via user interfaces, third-party integrations, modular add-ons, and support for multiple languages and currencies to meet specific hotel needs.
- **Steps for Evaluating PMS Operational Condition:** Regular PMS evaluation involves testing reservations, check-ins, billing, housekeeping, and integrations to ensure the system runs smoothly and accurately.



Self-Reflection

1. Read the statements across the top. Put a check in a column that best represents your level of knowledge, skills and attitudes.

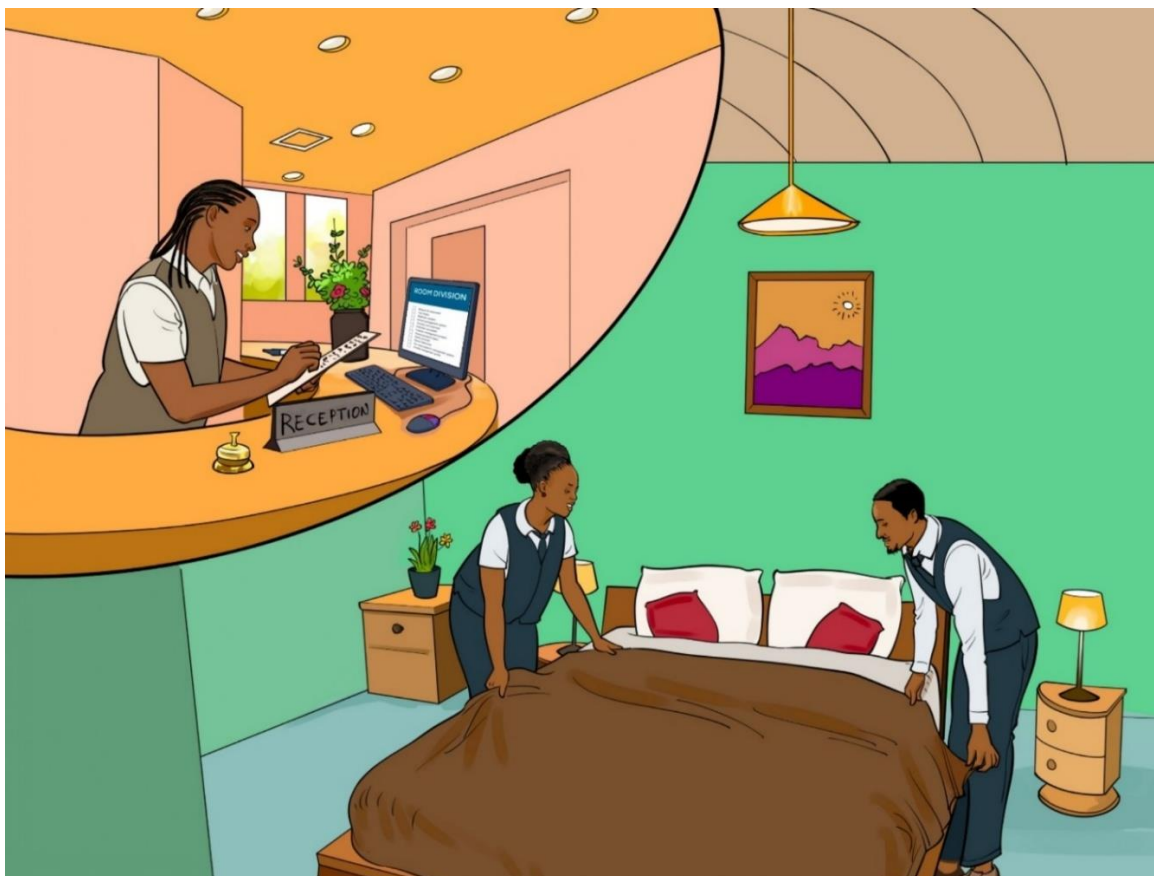
My experience	I don't have any experience doing this.	I know a little about this.	I have some experience doing this.	I have a lot of experience with this.	I am confident in my ability to do this.
Knowledge, skills and attitudes					
Discuss the historical background to PMS					
Explain the impact of PMS in hotel management					
Explain the functions and purpose of PMS					
Identify materials tools and equipment used for PMS					

My experience	I don't have any experience doing this.	I know a little about this.	I have some experience doing this.	I have a lot of experience with this.	I am confident in my ability to do this.
Knowledge, skills and attitudes					
Discuss the historical background to PMS					
Explain the impact of PMS in hotel management					
Explain the functions and purpose of PMS					
Identify materials tools and equipment used for PMS					

2. Fill in the table below and share results with the trainer for further guidance.

Areas of strength	Areas for improvement	Actions to be taken to improve
1.	1.	1.
2.	2.	2.
3.	3.	3.

UNIT 2: HANDLE ROOM DIVISION ACTIVITIES USING PMS



Unit summary

This unit provides the knowledge, skills, and attitudes necessary to handle room division activities using PMS. It includes creation of guest reservation, performing front desk activities, processing cashiering activities using PMS and updating room status using PMS

Self-Assessment: Unit 2

1. Look at the unit illustration above and answers the questions below:
 - a. What does the illustration show?
 - b. What do you think will be topics to be covered under this unit based on the illustration?
2. Fill out the below self-assessment. Think about yourself: do you think you can do this? How well? Read the statements across the top. Assess your level of knowledge, skills and attitudes under this unit.
 - a. There is no right or wrong way to answer this assessment. It is for your own reference and self-reflection on the knowledge, skills and attitudes acquired during the learning process
 - b. Think about yourself: do you think you have the knowledge, skills or attitudes to do the task? How well?
 - c. Read the statements across the top. Put a check in a column that best represents your level of knowledge, skills and attitudes.
3. At the end of this unit, you will assess yourself again.

My experience	I don't	I know	I have some	I have a lot	I am
Knowledge, skills and attitudes	have any experience doing this.	a little about this.	experience doing this.	of experience with this.	confident in my ability to do this.
Create guest reservation					
Perform front desk activities					
Process cashiering activities using PMS					
Update room status using PMS					

My experience	I don't	I know	I have some	I have a lot	I am
Knowledge, skills and attitudes	have any experience doing this.	a little about this.	experience doing this.	of experience with this.	confident in my ability to do this.
Use designated credentials					
Identify respected features					
Describe steps of creating reservation in PMS					
Describe steps for recoding guest request into PMS					
Describe steps for assigning Room					
Describe steps for creating guest folio					



Key Competencies:

Knowledge	Skills	Attitudes
1. Identify respected features	1. Create guest reservation	1. Pay attention to detail in room assignment and status updates
2. Describe steps of creating reservation in PMS	2. Perform front desk activities	2. Be team member - oriented and supportive in room division activities

Knowledge	Skills	Attitudes
3. Describe steps for recoding guest request into PMS	3. Process cashiering activities using PMS	3. Pay attention to detail in all room-related tasks within PMS
4. Describe steps for assigning Room	4. Update room status using PMS	4. Be strong in customer service orientation when managing room requests
5. Describe steps for creating guest folio	5. Use designated credentials	5. Be organized and methodical in executing room assignments and updates
		6. Pay attention to detail in room assignment and status updates



Discovery activity:



Task 1

Property Management System (PMS) plays a critical role in handling room division activities within a hotel. The system streamlines processes related to reservations, guest check-ins, room assignment, and more. As a front desk manager or room division manager, understanding how to use the PMS effectively to manage these activities is essential for providing smooth guest service and operational efficiency. Answer the following questions:

1. How does PMS assist in the creation of guest reservations?
2. What are the key features of PMS when making a guest reservation?
3. How does the system handle reservation changes, such as date or room type adjustments?
4. What benefits does PMS offer when creating guest reservations?

5. What potential issues might arise during the creation of guest reservations in PMS?

Topic 2.1: Creation of guest reservation



Activity 1: Problem Solving



Task 2:

As a room division manager, you need to efficiently handle room assignments, manage guest requests, and maintain room status using the Property Management System (PMS). You will guide your team on how to use the system for smooth and effective operations and to show that you are able to guide them, answer the following questions:

1. What are the steps for verifying room status?
2. What are the types of Credentials?
3. Explain the steps for changing room status?
4. Discuss the Process the payment and issue a receipt.
5. Describe steps for assigning room to the guest using PMS?
6. What do you understand by recording guest request into PMS?

Key facts 1.1: Creation of guest reservation

- **Using Designed Credentials**

- ✓ **Secure Login Procedures**



- Introduction to Credentials Management**

Credentials in PMS are used to verify the identity of users and ensure secure access to the system.



Designed credentials refer to specific login information that is unique to each user, such as usernames, passwords, and user roles.

- ✓ **Types of Credentials**



Username: A unique identifier assigned to each user, typically based on their role or department.



Password: A secret code known only to the user, required to access the system securely.

✚ **User Role/Access Level:** Defines the permissions a user has within the PMS, such as admin, front desk staff, housekeeping, etc.

✓ **Role-Based Access Control (RBAC)**

Access to different sections of the PMS can be restricted based on the user's role. Roles define what level of information and actions a user can access within the system (e.g., only admin can change system settings).

• **Secure Login Procedures**

✓ **Importance of Secure Login**

Ensuring a secure login process is vital for preventing unauthorized access and protecting sensitive guest and hotel data.

✓ **Components of a Secure Login**

✚ **Username and Password:** Standard authentication method.

✚ **Two-Factor Authentication (2FA):** A security method that requires two forms of identification—something the user knows (password) and something the user has (e.g., a code sent to their phone).

✚ **Biometric Authentication:** In some advanced systems, fingerprint or facial recognition can be used for secure access.

✓ **Steps in Secure Login Procedure**

✚ **Enter Username:** The user enters their assigned username.

✚ **Enter Password:** The system prompts the user to enter a password.

✚ **Two-Factor Authentication (if enabled):** A one-time code is sent to the user's phone or email, and they must enter it to proceed.

✚ **Access Granting:** Once credentials are validated, the user is granted access to the system based on their role.

✓ **Common Login Issues**

✚ **Forgotten Password:** Users should be able to reset their passwords securely using recovery methods (email, security questions, etc.).

✚ **Locked Accounts:** After multiple failed login attempts, accounts may be locked to protect from brute force attacks.

✚ **Expired Credentials:** Users may need to update their login credentials periodically for security reasons.

✓ **Best Practices for Secure Login**

- ✚ **Strong Passwords:** Encourage users to create strong, unique passwords (e.g., combining letters, numbers, and symbols).
- ✚ **Periodic Password Updates:** Regular password changes ensure additional security.
- ✚ **User Education:** Training staff to recognize phishing attacks and avoid sharing login credentials.

✓ **Understanding User Roles**

User roles define the level of access granted to each user in the PMS. Roles are typically assigned based on the employee's position or job function in the hotel. Each role has specific privileges that determine what actions can be performed within the system.

✚ **Common User Roles in PMS:**

- **Admin:** The highest level of access. Admins can configure settings, manage users, and access all system data.
- **Front Desk Staff:** Access to guest reservations, check-ins/check-outs, billing, and room assignments.
- **Housekeeping:** Limited access, typically to view room statuses and update housekeeping logs.
- **Sales and Marketing:** Access to room availability, pricing, and reservations, as well as customer data for marketing purposes.
- **Accountant:** Access to financial information, including invoices, payments, and reports.
- **Maintenance:** View room maintenance requests and update room status after repairs.

✓ **Defining Permissions**

Permissions refer to the specific actions or tasks a user can perform within the system. These are linked to user roles and determine the level of control a person has over the system's functions.

Types of Permissions:

- **View Access:** Ability to see information (e.g., room availability, reservation details).
- **Edit Access:** Ability to change or update records (e.g., modifying guest information, room status).
- **Delete Access:** Ability to remove records (e.g.^{vii}, cancel reservations or delete guest data).
- **Create Access:** Ability to create new records (e.g., making a new reservation or creating a new guest profile).
- **Administrative Permissions:** Full access to configure the system, manages users, and views all data.

✓ **Role-Based Access Control (RBAC)**

Role-Based Access Control (RBAC) is a security model that assigns permissions based on user roles. By using RBAC, PMS administrators can simplify the process of managing user access and ensure security.

Key Benefits of RBAC:

- **Simplifies User Management:** Permissions are assigned to roles, not individual users, reducing the complexity of user management.
- **Increases Security:** By restricting access based on roles, sensitive data and actions are only accessible to authorized users.
- **Improves Efficiency:** Employees only have access to the tools and information they need to perform their tasks, streamlining operations.

✓ **Assigning Roles and Permissions**

Steps to Assign Roles and Permissions:

- **Identify User Needs:** Determine the level of access required based on the employee's job function.
- **Create Role Profiles:** Define roles with appropriate permissions. For example, a front desk role might have access to guest reservations and check-in/check-out functions, but not financial reports.
- **Assign Roles to Users:** Link users to their roles when creating or updating their accounts in the system.

- **Customize Permissions (if necessary):** In some cases, you may need to tailor permissions within a role. For example, a front desk employee might need to access specific guest information, but only the admin should have permission to edit it.
- **Review and Update Regularly:** As employees change positions or responsibilities, roles and permissions should be updated accordingly.

✓ **Managing User Permissions**

How to Manage Permissions:

- **Granting Permissions:** Assign the necessary permissions based on the user's role. Ensure that permissions align with the employee's responsibilities.
- **Revoking Permissions:** If an employee's role changes or they leave the company, permissions should be revoked to prevent unauthorized access.
- **Audit Trail:** Some PMS systems include audit features that track changes made by users, including who made the change and what was changed. This is important for accountability and security.
- **Periodic Review:** Regularly review roles and permissions to ensure they are still appropriate for each user's job function.

✓ **Best Practices for Managing Roles and Permissions**

-  **Use the Principle of Least Privilege:** Users should only have access to the data and functions they need to do their job, nothing more. This reduces the risk of data breaches or errors.
-  **Keep Roles Simple:** Avoid creating too many roles with overlapping responsibilities. Aim for clear, distinct roles.
-  **Regularly Update Roles:** When employees change departments or responsibilities, make sure their roles and permissions are updated accordingly.
-  **Implement Strong Authentication:** Ensure users are required to authenticate their identity through strong login procedures (e.g., strong passwords, two-factor authentication).

- **Identification of Respected Features**

- ✓ **Essential Reservation Tools**

- **Introduction to Essential Reservation Tools**

In the Property Management System (PMS), reservation tools are vital features that help manage guest bookings and ensure smooth operations. These tools help manage room availability, rates, booking channels, and guest preferences, making it easier for hotel staff to offer an efficient and personalized service.

- **Key Reservation Tools in PMS**

- **Online Reservation System**

Allows guests to make bookings directly through the hotel's website or third-party booking platforms.

Integrates with the PMS to update room availability in real-time.

- **Booking Engine**

A software tool that enables the hotel to accept online bookings from external websites like OTAs (Online Travel Agencies).

Often linked to the hotel's website and PMS to ensure up-to-date availability and rates.

- **Room Availability Management**

Provides a real-time view of available rooms, making it easier for the front desk to assign rooms during check-ins and bookings.

Displays occupancy levels to prevent overbooking or under-booking.

- **Rate Management**

Allows hotels to set room rates based on demand, seasonality, and special offers.

Enables dynamic pricing strategies, including discounts and promotions.

- **Reservation Calendar**

A visual tool that displays room availability and reservations in a calendar format.

Helps front desk staff easily manage bookings, cancellations, and modifications.

- **Guest Preferences and Profiles**

Tracks guest preferences, such as room type, special requests, and previous stays.

Improves personalization by providing better service and anticipating guest needs.

- **Group Booking Management**

Special tool for managing group reservations, allowing hotels to allocate rooms for large parties or events.

Ensures accurate room assignments and pricing for group bookings.

- **Payment Integration**

Integrated payment systems for processing deposits and full payments for reservations.

Secure and reliable payment gateways reduce errors and enhance the guest experience.

- **Cancellation and Modification System**

Manages guest reservation changes or cancellations in accordance with the hotel's policies.

Updates room availability and adjusts revenue forecasts.

- **Confirmation and Notification System**

Sends automated emails or SMS confirmations to guests when reservations are made, modified, or cancelled.

Increases guest satisfaction and reduces no-shows.

- **Importance of Reservation Tools in PMS**

- **Efficiency:** Automates processes such as booking, confirmation, and payment processing, reducing manual errors and saving time.

- **Guest Experience:** Enhances guest satisfaction by ensuring seamless reservations and accommodating specific preferences.

- **Revenue Management:** Helps with dynamic pricing and yield management to maximize revenue during peak seasons and reduce losses during low occupancy periods.

- **Integration:** Ensures a smooth flow of information between different departments, including front desk, housekeeping, and accounting.

- **Advanced Search and Filter Options**

- ✓ **Introduction to Advanced Search and Filter Options**

Advanced search and filter options in a Property Management System (PMS) are powerful tools that allow hotel staff to efficiently find specific reservations, guest profiles, room types, and other relevant data. These features enable users to quickly narrow down search results, making daily operations smoother and more efficient.

- ✓ **Key Features of Advanced Search and Filter Options**

- **Guest Name Search**

Enables searching for reservations by guest name or group name.

Helps retrieve guest details quickly for check-ins, check-outs, or follow-up communications.

- **Reservation Date Filters**

Allows filtering by check-in/check-out dates to find future, current, or past reservations.

Useful for checking availability and managing bookings for specific periods.

- **Room Type Search**

Filters reservations based on room type, such as single, double, suite, or deluxe.

Helps staff locate available rooms that match guest preferences.

- **Booking Source Filters**

Search and filter based on where the booking was made, such as directly on the hotel's website, OTAs, or through travel agents.

Helps assess the effectiveness of different booking channels.

- **Payment Status Filters**

Allows filtering reservations based on payment status, such as fully paid, partially paid, or pending payment.

Facilitates quick follow-up on outstanding payments or billing issues.

Guest Profile Search

Filters guest information based on customer profiles, loyalty status, or preferences (e.g., smoking/non-smoking, special requests).

Enables personalized service for repeat or VIP guests.

Reservation Status Filters

Filter by reservation status, such as confirmed, pending, cancelled, or checked-in.

Provides a quick overview of the current state of bookings.

Booking Amount/Price Filters

Allows filtering by reservation price or amount to identify high-value or budget bookings.

Useful for analysing revenue or managing discounts and promotions.

Special Requests and Notes Search

Filters reservations based on special requests or notes added to the guest's booking (e.g., room preferences, early check-in).

Helps ensure that guest preferences are met during their stay.

Cancellation and Modification History Search

Search for reservations based on changes, cancellations, or modifications.

Useful for tracking trends or managing guest expectations in cases of overbookings.

✓ **Benefits of Advanced Search and Filter Options**

 **Time Efficiency:** Allows hotel staff to quickly find specific reservations, reducing search time and improving productivity.

 **Improved Accuracy:** Reduces errors by allowing precise filtering of data based on defined criteria, ensuring the right information is retrieved.

 **Enhanced Guest Service:** Enables personalized guest service by quickly locating guest preferences, previous stays, and special requests.

 **Better Decision-Making:** Helps management analyse booking trends, cancellations, or payments for more informed decision-making.

 **Operational Flexibility:** Provides greater flexibility to meet various operational needs, whether it's managing peak seasons or handling special booking requirements.

- **Steps of Creating Reservation in PMS**

- ✓ **Initiating a New Reservation**

- **Accessing the PMS System**

- **Login to PMS:** Use designed credentials to securely log into the system.
- **Navigate to Reservation Section:** Once logged in, go to the 'Reservations' tab or section of the PMS interface.

- **Guest Information Entry**

- **Input Guest Details:** Enter the guest's name, contact number, email address, and any other necessary personal details.
- **Special Requests:** Record any special requests from the guest, such as room preferences (e.g., smoking/non-smoking) or specific requirements (e.g., accessibility).

- **Payment Information**

- **Enter Payment Details:** Input payment information such as credit card details or alternative payment methods.
- **Verify Payment Method:** Ensure the payment method is valid and process the payment if required.

- **Review and Confirm Reservation**

- **Confirm Reservation:** Finalize the reservation by confirming the details, and ensure the guest receives a booking confirmation.
- **Review Reservation Details:** Check all entered information for accuracy, including guest name, room type, dates, and payment method.

- **Room Selection**

- **Assign Room Type:** Choose the appropriate room type based on the guest's needs (e.g., single, double, suite).
- **Check Room Availability:** Verify room availability for the specified dates based on the guest's preferences.

Finalizing the Process

- **Notify Relevant Departments:** Inform housekeeping, front desk, and other relevant departments of the new reservation.
- **Save Reservation Record:** Store the new reservation in the PMS system for future reference.

Send Confirmation

- **Generate Reservation Confirmation:** Create a confirmation document or email with all relevant details of the booking.
- **Send to Guest:** Email or SMS the confirmation to the guest, including the booking reference number and hotel contact information.

✓ **Reviewing and Confirming Reservation Details**

Accessing the Reservation

- **Locate Reservation Record:** Search for the reservation using the guest's name, booking reference number, or date of reservation.
- **Open Reservation Details:** Click on the reservation record to view all information related to the booking.

Reviewing Guest Information

- **Verify Guest Information:** Double-check the guest's personal details, including name, contact information, and special requests.
- **Confirm Payment Information:** Ensure the payment details (e.g., credit card information or other payment methods) are correct.

Checking Room and Stay Details

- **Confirm Room Type and Availability:** Review the room type selected and verify availability for the specified dates.
- **Check Stay Dates:** Ensure the check-in and check-out dates are correct, and the guest's stay duration matches the booking.

Special Requests and Preferences

- **Review Special Requests:** Confirm that any special requests (e.g., accessibility needs, smoking preference) are accurately recorded.
- **Check Room Preferences:** Verify that any room preferences (e.g., bed type, view) are noted in the reservation details.

Confirming Reservation Details

- **Final Confirmation:** Review all the entered details and confirm that everything is accurate, including pricing, room assignments, and guest information.
- **Update if Necessary:** If there are any discrepancies, update the details before final confirmation.

Notification to the Guest

- **Generate Confirmation Message:** Create a reservation confirmation email or document, including all relevant details.
- **Send Confirmation:** Send the confirmation to the guest via email or SMS, ensuring they receive all necessary information.

Updating PMS Record

- **Save and Finalize the Reservation:** Once all details are confirmed, save the reservation record in the PMS for future reference.
- **Notify Relevant Departments:** Inform departments like housekeeping, front desk, and food and beverage about the reservation to ensure they are prepared for the guest's arrival.

• **Steps for Recording Guest Request into PMS**

✓ **Logging Special Requests and Preferences**

Access the Guest Profile:

- Log into the PMS.
- Search for the guest's profile by name, booking ID, or room number.

Navigate to Special Requests Section:

- Open the reservation or guest profile.
- Locate the "Special Requests" or "Preferences" field.

Input the Request:

- Enter details of the guest's request (e.g., extra towels, specific room preferences).
- Use clear, concise language to avoid misinterpretation.

Tag Preferences (if applicable):

- Assign tags like "Allergy Alert," "VIP," or "Frequent Traveller."
- Use standardized codes if the PMS supports them.

 Set Priorities:

- Mark urgent requests if needed (e.g., same-day delivery).
- Include deadlines or specific times for fulfilment.

 Save and Confirm:

- Save changes to the guest profile or reservation.
- Double-check entries to ensure accuracy.

✓ **Logging Special Requests and Preferences in PMS:**

 Categorize Requests:

Divide requests into categories like Room, Food, Services, or Amenities.

 Standardize Entries:

Use consistent formats (e.g., "Extra pillows: 2" instead of vague notes).

 Attach to Profiles:

Link recurring preferences (e.g., dietary restrictions) to the guest profile for future stays.

 Notify Relevant Teams:

Automatically or manually alert housekeeping, F&B, or other departments.

 Review and Update:

Regularly review recorded preferences for relevance and accuracy.

✓ **Updating and Managing Ongoing Guest Requests**

 Locate the Guest Record:

- Log into the PMS.
- Search for the guest by reservation number, room number, or name.

 Review Existing Requests:

- Access the "Special Requests" or "Ongoing Requests" section.
- Check the status of each request (e.g., pending, in progress, completed).

 Update Request Details:

- Modify existing entries if guest preferences change (e.g., change "2 towels" to "4 towels").
- Add comments or notes for clarification.

 Communicate Changes:

- Notify relevant departments (e.g., housekeeping, room service) about updates using internal communication tools or task management features in the PMS.

Track Progress:

- Monitor the status of requests and follow up on overdue tasks.
- Assign deadlines or priorities where necessary.

Mark Requests as Completed:

- Update the PMS when a request is fulfilled.
- Ensure the system records the completion time and department responsible.

Record for Future Stays:

- Save recurring preferences in the guest profile for personalized service in future visits.

Audit and Review:

- Regularly check for unfulfilled or outdated requests.
- Address gaps in service promptly to ensure guest satisfaction.



Activity 2: Guided Practice



Task 3:

To show your understanding of the application of PMS, visit a nearby hotel and work on the following tasks:

1. Create a reservation for a guest with a king-sized bed for three nights and a late check-in use PMS.
2. Book two rooms for a family of four, linking them under one reservation, with one room having two queens and the other a king using PMS
3. Extend a guest's reservation by one night and adjust the rate and availability in the PMS.
4. Confirm a reservation from an OTA for a standard double room, checking availability in the PMS.



Activity 3: Application



Task 4:

Property Management System (PMS) is an essential tool for modern property management, this is a solution used by property managers to handle various tasks related to managing a property or a portfolio of properties. To further understand the application of PMS, visit a nearest hotel front office and perform the following tasks:

1. Record a guest's request for a room near the elevator and notify the front desk or housekeeping.
2. In a hotel, modify a guest's reservation to change the room type from a queen to a king-sized bed.
3. Handle a last-minute cancellation and update the room availability in the PMS.
4. Create a reservation for a guest booking a room through a walk-in process and confirm the details in the PMS.

Topic 2.2: Performing front desk activities using PMS



Activity 1: Problem Solving



Task 5:

You are a PMS supervisor at a hotel, overseeing front desk operations. Your role is to ensure the PMS handles reservations, check-ins, check-outs, guest inquiries, and billing efficiently. You must ensure the system is maintained, secure, and used effectively by staff to enhance guest experience.

1. What are the steps for assigning room?
2. Discuss the steps for creating guest Folio?
3. Explain steps for managing guest account?
4. Discuss the steps for checking out guest?

Key Facts 2.2: Performing front desk activities

- **Steps for Assigning Rooms**

- ✓ **Check Available Rooms:**



- Access the PMS (Property Management System):**

- Log into the PMS to access real-time data on room availability. The system displays the status of rooms, including vacant, occupied, or reserved rooms.

- ✓ **Verify Room Types:**



- The PMS categorizes rooms by type (e.g., single, double, suite). Filter the available rooms based on the guest's preferences or booking details.

- ✓ **Room Status:**



- Confirm room availability by checking the "room status" in the PMS. Rooms under maintenance or cleaning will be marked as unavailable, ensuring you don't assign them.

✓ **Cross-check with Housekeeping:**

- ✚ Coordinate with housekeeping to confirm that rooms listed as vacant are ready for occupancy. If rooms are delayed in cleaning, update the PMS to reflect the current status.

✓ **Check Room Availability Across Dates:**

- ✚ For longer stays, verify that the room is available not only on the current date but also for the upcoming days to prevent any conflicts or overbooking.

✓ **Update Availability in Real-Time:**

- ✚ Keep the PMS updated by recording check-ins and check-outs promptly to avoid double-booking or confusion about room status.

• **Assign Rooms as per Guest Preferences:**

✓ **Guest Preferences Review:**

During booking, review the guest's preferences (e.g., preferred floor, bed type, view, or proximity to hotel facilities) to ensure their needs are met when assigning a room.

✓ **Room Assignment Process:**

Use the PMS to assign a room that aligns with the guest's preferences (e.g., a guest requesting a higher floor should be assigned an upper-floor room).

✓ **Special Requests Handling:**

Pay attention to special requests, such as non-smoking rooms or rooms with bathtubs, and ensure these preferences are reflected in the assigned room. The PMS allows custom notes to track these requests.

✓ **Room Features and Amenities:**

Ensure the assigned room has the required amenities as promised, such as Wi-Fi, air conditioning, and toiletries. The PMS tracks which amenities are available in each room.

✓ **Availability Confirmation:**

Once a room is selected, verify that the room number corresponds with the guest's booking. Generate room assignment reports for the front desk and housekeeping to ensure accurate room allocation.

✓ **Booking Confirmation & Communication:**

Confirm the room assignment with the guest at check-in. Automated notifications or front desk staff should inform the guest of their room number and details.

✓ **Ensure Smooth Check-in Process:**

When the guest checks in, ensure the room assignment is accurately reflected in the PMS, making the check-in process seamless and avoiding errors or confusion.

Steps for Creating a Guest Folio (Guest Account)

✓ **Create a New Guest Folio:**

 Access the PMS (Property Management System):

- Log into the PMS, which is the central platform for managing guest accounts, reservations, and billing.
- Navigate to the "Guest Management" or "Folio Management" section where you can create new folios.

✓ **Enter Guest Information:**

 Basic Details:

- Input essential guest information such as full name, address, phone number, email address, and identification details.
- Accuracy is crucial, as this data will be used for communication, billing, and generating reports.

 Special Requests:

- Ask if the guest has any preferences, such as a specific room type, bed preference, or accessibility requirements.
- This information ensures that their stay is tailored to their needs.

 Assign a Unique Folio Number:

The PMS automatically generates a unique folio number for the guest account. This number acts as the identifier for all transactions related to the guest's stay and ensures that each folio is distinct and trackable.

Example: Folio numbers might be generated as a combination of letters and numbers, such as F12345, to easily distinguish between multiple folios.

 Track Reservation Details:

- **Reservation ID:** Include the reservation number to associate the folio with the guest's booking.
- **Check-in and Check-out Dates:** Record the dates for check-in and check-out to track the duration of the guest's stay.
- **Room Type and Preferences:** Assign the room type based on the guest's preferences or availability.
- The folio should be directly linked to the reservation to ensure seamless billing for the duration of the stay.

Add Payment Information:

- **Initial Payment/Deposit:** If the guest made a deposit during booking, record it in the folio to ensure it is reflected in the final bill.
- **Payment Method:** Include payment details such as credit card information, cash, or prepayment.
- This helps keep track of any pre-arranged payments, reducing the risk of billing discrepancies at check-out.

Customize the Folio for Specific Needs:

- **Third-Party Billing:** If the guest is having their bill sent to another party (e.g., company or travel agency), this should be noted in the folio.
- **Special Charges:** If the guest is entitled to special pricing (corporate rate, promotional rate), add it to the folio for accurate billing.

Generate the Folio:

- After completing the guest's details, the PMS generates the folio, which will now serve as the record for all charges and payments throughout the guest's stay.
- **Proactive Updates:** The folio should automatically update with any additional charges (room service, mini-bar use, etc.) during the guest's stay.

● **Link the Folio to the Reservation:**

✓ **Locate the Guest's Reservation:**

Search for the guest's reservation in the PMS database by using search filters like reservation ID, guest name, or check-in date.

 **Accurate Linking:** Ensure that the folio is linked to the correct reservation to track all charges associated with the booking.

 Link Folio to Reservation:

Once the correct reservation is found, link it to the guest folio. This step ensures that all transactions are tracked together and there are no discrepancies when processing charges at check-out.

 **Double-Check Room Assignment:** Confirm that the folio is correctly associated with the room type, room number, and any requests that were made during the booking process (e.g., king-sized bed, non-smoking room).

✓ **Confirm Folio Details:**

Review the folio for accuracy before finalizing. This includes confirming guest details (name, contact info), room information (room type, number), and special requests or services.

Adjustments and Additions: Add any changes to the reservation, such as room upgrades or extensions to the stay, to the folio.

✓ **Track Charges and Adjustments:**

 **Add Services and Charges:** As the guest uses hotel services (room service, spa, laundry), these charges should be recorded directly on the folio.

 **Monitor Real-Time Updates:** The folio should reflect real-time changes in charges, which are tracked automatically in the PMS. This ensures the folio is always up to date.

✓ **Provide Access to the Guest:**

 **Preview Folio:** Before check-out, provide the guest with a preview of their folio (either digitally or in print) to ensure all charges are correct.

 **Final Review:** Ensure the guest understands any charges that may be unexpected, such as incidental fees, and allow them to ask questions.

✓ **Monitor the Folio During Stay:**

 Regularly review the folio to ensure it reflects all charges as they occur, allowing you to detect any discrepancies before check-out.

 **Adjustments:** If the guest requests a change (such as a cancellation of a service), adjust the folio accordingly.

✓ **Finalize Folio at Check-out:**

 **Final Payment:** At check-out, the final balance must be reviewed with the guest to ensure all charges are accounted for and that any payments have been applied.

 **Payment Processing:** Process any remaining charges through the guest's preferred payment method (credit card, cash, etc.).

 **Close the Folio:** Once payment is completed, mark the folio as "paid" and "closed" in the PMS system. This ensures the folio is archived for future reference and the reservation is finalized.

 **Receipt Generation:** Generate a final receipt that summarizes the guest's charges and payments, which can be provided to the guest for their records.

• **Steps for Managing Guest Account**

✓ **Update Charges and Payments:**

 Access the Guest Account:

- Log into the Property Management System (PMS) and search for the guest's account or folio by using the reservation ID or guest name.
- Ensure you are viewing the correct guest account before proceeding with updates.

 Track Additional Charges:

- **Services Used:** Add charges for any services used during the stay, such as room service, spa treatments, parking fees, or laundry services.
- **Incidental Charges:** Update the account with incidental charges such as mini-bar use, phone calls, or Wi-Fi usage.
- **Late Fees:** If the guest has requested late check-out or incurred a penalty (e.g., for smoking in a non-smoking room), update their account with the corresponding fees.

 Update Payments:

- **Record Payments:** Whenever the guest makes a payment (partial or full), enter the amount, date, and payment method (e.g., credit card, cash, gift certificate) into the PMS.

- **Apply Deposits:** If the guest has paid a deposit previously, apply it to the final balance. This helps track the outstanding amount accurately.
- **Apply Prepayment:** In case the guest made a prepayment at the time of booking or check-in, ensure it is properly credited to the folio.

Reconcile Payments and Charges:

- Verify that the charges and payments are in balance. The total amount owed should reflect all the charges minus any payments or deposits already made.
- Review the guest's account for any outstanding balances and ensure they are promptly addressed to avoid discrepancies at check-out.

Provide Updated Folio:

- After updating charges and payments, provide the guest with an updated folio (digitally or in print) showing the balance and any recent changes.
- Allow the guest to review the charges to ensure accuracy before proceeding to adjust discounts or finalize the bill.

Adjust Discounts or Transfers:

- **Apply Discounts:**
- **Loyalty Programs:** If the guest is part of a loyalty program, apply any applicable discounts based on their membership level or benefits.
- **Promotional Offers:** Apply special promotional discounts, such as seasonal offers or discounts for extended stays, as applicable.
- **Corporate or Group Discounts:** If the guest is part of a corporate account or group booking, apply any negotiated discount rates for the entire stay.

Adjust Based on Issues or Complaints:

- If the guest experienced issues during their stay (e.g., room problems, service complaints), apply any compensatory discounts to their account as a gesture of goodwill.
- Make sure to document the reason for the adjustment within the PMS to maintain an accurate record of guest interactions.

Transfer Charges:

- **Third-Party Billing:** If the guest is not personally responsible for all or part of the bill (e.g., if a company is covering the charges), transfer relevant charges to the third-party folio.
- **Room Transfers:** If charges need to be reallocated due to a room change, ensure that the charges are correctly transferred from one room folio to another.
- **Group Transfers:** In cases of group bookings, transfer individual guest charges to the main group folio, ensuring all individual charges are consolidated under the correct account.

 Adjust Taxes and Fees:

If there are any tax or fee adjustments (e.g., tax exemption or changes in service charges), update the guest account to reflect these changes.

- **Final Review and Confirmation:**

Double-check the account to ensure that all discounts, transfers, and adjustments are properly applied and that the final amount due is correct. Provide the guest with a summary of the adjustments and updated balance before finalizing the bill at check-out.

- **Steps for Checking Out Guest**

- ✓ **Finalize the Guest's Bill:**

- **Review the Guest Folio:**

Access the guest's folio in the Property Management System (PMS) and ensure all charges are accurate, including room rates, additional services, taxes, and fees.

Verify that any discounts, payments, or adjustments (e.g., loyalty rewards, corporate discounts) are correctly applied.

- **Check for Outstanding Balance:**

Ensure the guest's balance is fully paid, including all charges for the stay. If there is an outstanding balance, prompt the guest for payment before proceeding with check-out.

If necessary, apply any final charges that might have been missed, such as room service, mini-bar consumption, or incidentals.

 Provide the Final Bill:

Once the folio is complete, provide the guest with a final, itemized bill, either in print or electronically (email or mobile). Ensure the guest understands all charges.

Offer to explain any charges or adjustments if the guest has questions.

 Process Payment:

If the guest has not yet paid, process the payment using their preferred method (e.g., credit card, debit card, cash, or other forms).

Ensure that any payment received is accurately recorded in the PMS, and the guest's account is cleared of any remaining balance.

 Verify Payment Confirmation:

After receiving payment, confirm the transaction with a receipt or payment confirmation, and ensure that the PMS reflects the updated payment status.

✓ **Close the Account and Update Room Status:**

 Close the Guest's Folio:

Once the bill is paid in full, formally close the guest's folio in the PMS. This action marks the account as "checked-out" and removes it from active guest accounts.

Ensure that no further charges can be added to the closed folio.

 Record the Room as Vacant:

Update the room status in the PMS to reflect that the guest has checked out and the room is now vacant. This allows housekeeping and front desk staff to prepare the room for the next guest.

The status may be updated as "Vacant Clean" (if the room is ready for the next guest) or "Vacant Dirty" (if housekeeping needs to clean the room).

 Update Availability for New Reservations:

Once the room status is updated, the PMS should reflect the room's availability for future bookings. If the guest has extended their stay, update the system accordingly to prevent double-booking.

 Ensure Room Inspection:

Inform the housekeeping team to inspect the room, especially if there are any notes regarding room conditions or maintenance requests.

Ensure that any special instructions (e.g., mini-bar replenishment or maintenance issues) are passed along to the relevant departments.

 Record Guest Feedback (Optional):

If the guest provided feedback or filled out a survey during check-out, ensure that it is recorded in the system for future reference and quality improvement.

 Ensure a Smooth Departure:

Greet the guest warmly during check-out, ensuring they feel welcomed and appreciated. Thank them for their stay, offer assistance with transportation if needed, and invite them to return.



Activity 2: Guided Practice



Task6:

Visit the hotel and ask a computer where the Property Management System (PMS) software is installed and perform the following tasks:

1. Assign rooms as per guest preferences
2. In the hotel, check in a guest who arrives with a reservation,
3. Check available rooms.
4. Create a new guest folio.
5. Link the folio to the reservation.
6. Finalize the guest's bill.
7. Close the account and update room status



Activity 3: Application



Task 7:

Practice the following tasks in the hotel which has a good front office:

1. Check available rooms
2. Assign rooms as per guest preferences
3. Create a new guest folio.
4. Link the folio to the reservation
5. Update charges and payments.
6. Adjust discounts or transfers. Finalize the guest's bill.
7. Close the account and update room status.

Topic 2.3: Processing cashiering activities using PMS



Activity 1: Problem Solving



Task 5:

As a student studying Front Office operations in your school's workshop, you are tasked with using a Property Management System (PMS) to process cashiering activities. During the session, your instructor presents problems like incorrect guest billing, pending payments, split payment requests, and errors in posting charges. You need to use the PMS to resolve these issues and ensure accurate and efficient cashiering processes.

- 1) How will you use the PMS to assign room to the guest?
- 2) What steps will you take to process a pending payment using the PMS?
- 3) How can you handle a guest's request for split payment through the PMS?
- 4) What methods will you use to ensure all charges are posted accurately in the PMS?
- 5) How will you update the guest's account after processing payments in the PMS?

Key Facts 2.3: Processing cashiering activities using PMS

- **Steps for Preparing Guest Bill**

- ✓ **Review All Guest Charges**

- ✚ **Verify Room Charges:** Check that the room rate and number of nights are accurate in the PMS.
- ✚ **Inspect Additional Services:** Review charges for services like laundry, room service, or spa usage added to the guest's account.
- ✚ **Cross-Check Discounts:** Ensure all applicable discounts or promotional offers are correctly applied.
- ✚ **Confirm Tax and Fees:** Verify that local taxes and service fees are calculated and displayed accurately.

- ✓ **Add Any Pending Items to the Bill**

- ✚ **Identify Pending Charges:** Look for any pending charges from in-house services like dining or minibar usage that are not yet posted.

-  **Post Late Additions:** Use the PMS to manually add any last-minute services or items consumed during the guest's stay.
-  **Reconcile Transactions:** Cross-check receipts or department logs (e.g., restaurant or spa) to ensure all charges are accounted for.
-  **Update the Total:** Review and confirm the updated bill total in the PMS before presenting it to the guest.

- **Receive Payment**

- ✓ **Confirm Payment Method**

- **Verify Guest's Preferred Payment Method:**

Check the guest's profile in the PMS for their indicated payment preference (e.g., cash, credit card, mobile payment).

- **Confirm Payment Details:**

Ask the guest to confirm their payment method during check-out. For credit cards, ensure the card matches the guest's identification.

- **Check for Pre-Authorization:**

Verify if the guest's credit card has a pre-authorized hold for the charges. If so, confirm the amount to be finalized.

- **Address Special Requests:**

For requests like split payments or billing to a third party, update the PMS to reflect the arrangement accurately.

- ✓ **Process the Payment and Issue a Receipt**

- **Input Payment Details in the PMS:**

Enter the payment amount and select the appropriate payment type in the PMS (e.g., cash, card, or digital payment). For credit cards, ensure the terminal processes the transaction securely.

- **Verify Payment Success:**

Confirm successful payment through the PMS and, if applicable, the card payment terminal. Address any errors or declines promptly.

- **Generate and Provide Receipt:**

Use the PMS to generate a detailed receipt, including payment confirmation, itemized charges, and the total amount paid. Print or email the receipt as per the guest's preference.

 Log and Update Records:

Update the PMS to reflect the completed payment. Record the transaction in the daily payment log to ensure accurate end-of-day reconciliation.

- **Close guest account**

- ✓ **Verify the Balance is Settled**

- **Review Guest Account Details:**

- Access the guest's account in the PMS and check for any outstanding charges, such as room rates, additional services, or taxes. Ensure all items are accounted for in the final bill.

- **Confirm Payment Completion:**

- Verify that the guest has settled all charges using their chosen payment method. Check for pending transactions, failed payments, or discrepancies in the balance.

- **Handle Pending Charges:**

- If there are any outstanding amounts, politely inform the guest and process the payment. For prepaid bookings, confirm that the prepayment covers the full balance.

- **Provide a Final Bill for Review:**

- Share a detailed, itemized bill with the guest to confirm all charges are accurate and settled. Address any questions or disputes before proceeding.

- ✓ **Close the Account in the PMS**

- **Finalize the Account Status:**

- Once the balance is settled, mark the guest's account as "closed" or "paid" in the PMS to indicate the transaction is complete.

 Update Room Status:

Change the room status in the PMS to “vacant” or “ready for cleaning,” allowing the housekeeping team to prepare it for the next guest.

 Record Departure Information:

Log the guest’s check-out time and payment details in the PMS for record-keeping and reporting purposes.

 Secure the Guest’s Data:

Ensure the guest’s personal and payment details are handled securely and in compliance with data protection policies.

 Provide a Departure Receipt:

Offer the guest a final receipt as confirmation of their account closure. Print or email the receipt based on their preference.



Activity 2: Guided Practice



Task 6:

Scenario:

Visit a nearby hotel and assume you are the Property Management System (PMS) supervisor at a hotel.

Your role includes performing front desk activities. Assign room to the guest using PMS, Creating Guest Folio (Guest Account), Link the folio to the reservation, Managing Guest Account, Update charges and payments and Adjust discounts or transfers.



Activity 3: Application

Visit a nearby hotel and assume you are the Property Management System (PMS) supervisor at a hotel. Check in and check out guest, prepare their bill, process payment, issue a receipt, and close their account.

Topic 2.4: Updating room status using PMS



Activity 1: Problem Solving



Task 5:

Assume you work in the housekeeping department of a 5-star hotel. A guest has checked out, and you need to update the room status to "vacant" in the PMS. However, the room requires extra cleaning due to a maintenance issue. You must coordinate with the front office and housekeeping teams to ensure the room is ready for the next guest and the PMS reflects the accurate room status.

- 1) How will you update the room status to "vacant" in the PMS after check-out?
- 2) What are the steps for verifying room status using?
- 3) Discuss on how you can change room status
- 4) How will you save the updated information in PMS?
- 5) What steps will you take to ensure the room is ready on time for the next guest?

Key Facts 2.4: Updating room status using PMS

- **Steps for Verifying Room Status**

- ✓ **Check Current Room Status in PMS**

- ✚ Review the status of each room in the PMS system.
- ✚ Ensure that all rooms are marked as occupied, vacant, out-of-order, or ready for check-in.
- ✚ Make sure no discrepancies exist in room status to prevent booking conflicts.

- ✓ **Confirm Room Condition with Housekeeping**

- ✚ Ensure the housekeeping department verifies the room's cleanliness.
- ✚ Housekeeping should confirm whether the room is ready for check-in or still needs cleaning.

-  Update PMS once housekeeping completes their inspection and cleaning tasks.
- **Steps for Changing Room Status**
 - ✓ **Select the Room to Update**
 -  Identify the specific room using the room number or guest's name.
 -  Access the room's current status in the PMS.
 -  Ensure no other operations are conflicting with the room update.
 - ✓ **Change the Status**
 -  Change the room status in the PMS from vacant to ready for check-in once cleaning is done.
 -  Update status to occupied once the guest checks in.
 -  Set the status to out of order if maintenance is needed or room is temporarily unavailable.
 -  Change from occupied to vacant after check-out, and verify with housekeeping for cleaning.
- **Steps for Updating Room Information**
 - ✓ **Edit Room Details**
 -  Modify room details such as configuration (e.g., bed types, amenities) if necessary.
 -  Update the PMS when special requests are made by the guest, like extra amenities or modifications to room setup.
 -  Correctly log room repairs or maintenance changes in the system, such as fixing a broken air conditioner or TV.
 - ✓ **Save the Updated Information in PMS**
 -  After editing room details, save the changes in the PMS to ensure they are recorded for future bookings.
 -  Regularly review and update room details to ensure the information is always accurate.
 -  Keep records of maintenance and cleaning statuses to avoid potential errors in room assignment.

- **Communication and Coordination Between Departments**

- ✓ **Housekeeping and Front Desk**

- ✚ The front desk needs timely updates from housekeeping about the status of rooms. If housekeeping completes a room, front desk staff should change the room status in the PMS accordingly.
- ✚ Housekeeping should notify the front desk if the room is ready for check-in after cleaning.

- ✓ **Housekeeping and Maintenance**

- ✚ When maintenance issues arise, housekeeping should inform maintenance and update the PMS on room conditions.
- ✚ If repairs are required, room status should reflect “Out of Order” until the maintenance issue is resolved.
- ✚ Coordination ensures that no room is assigned before it is properly cleaned or repaired.

- ✓ **Front Desk and Maintenance**

- ✚ If a room becomes unavailable due to maintenance issues, front desk staff should update the PMS immediately.
- ✚ Maintenance staff must ensure rooms are safe and functional before they are marked as available for booking.
- ✚ Accurate room status updates help avoid double-booking or assigning guests to rooms that are not in a usable condition.

- **Challenges in Room Status Updates**

- ✓ **System Failures**

- ✚ The PMS might encounter technical issues or downtime, affecting real-time updates.
- ✚ This can cause discrepancies, leading to overbooking or incorrect room assignments.
- ✚ Regular system maintenance and backup plans are essential to prevent downtime.

✓ **Communication Gaps**

- ✚ Miscommunication between housekeeping, front desk, and maintenance teams can lead to inaccurate status updates.
- ✚ Lack of communication can result in rooms being marked as available when they are not ready for guest check-in.
- ✚ Effective communication protocols must be established to ensure smooth operation.

✓ **Human Error**

- ✚ Staff may accidentally forget to update room status or enter incorrect information in the PMS.
- ✚ Training and regular checks can minimize human error in updating room statuses.
- ✚ Implementing automated systems can reduce the chance of mistakes.

• **Importance of Real-Time Room Status Updates**

✓ **Guest Satisfaction**

- ✚ Real-time updates ensure guests are assigned rooms that are ready for check-in.
- ✚ Immediate updates help prevent guests from experiencing delays or inconveniences.
- ✚ Accurate room status also ensures that any special guest requests are properly handled.

✓ **Operational Efficiency**

- ✚ Timely updates allow staff to allocate resources effectively, such as cleaning and maintenance staff. Ensures rooms are available for the next guest in a timely manner, minimizing downtime.
- ✚ Efficient room status updates lead to smoother operations, reducing the workload for various departments.

✓ **Prevents Double Booking**

- ✚ Accurate and up-to-date room status in PMS ensures that no room is accidentally assigned to multiple guests.

- ✚ Prevents overbooking issues that may arise from rooms not being marked as occupied, cleaned, or repaired.
 - ✚ Ensures a consistent guest experience where no rooms are overbooked or unavailable due to status errors.
- **Role of Technology in Updating Room Status**
 - ✓ **Automated Room Status Updates**
 - ✚ New technology allows for automated updates when housekeeping marks a room as cleaned or when a guest checks in or out.
 - ✚ This reduces the chances of human error and ensures that room statuses are immediately updated across all systems.
 - ✚ Automation improves operational efficiency and saves time for staff members.
 - ✓ **Integration with Mobile Devices**
 - ✚ Mobile apps can be used by housekeeping or maintenance staff to update room statuses in real time.
 - ✚ Staff can update the PMS as soon as they enter a room's condition, reducing delays in room assignment or guest check-in.
 - ✚ Mobile integration allows for seamless coordination and better service delivery.
 - ✓ **Cloud-Based Systems**
 - ✚ Cloud-based PMS solutions enable remote access for all departments, ensuring real-time updates and synchronization across hotel operations.
 - ✚ This allows managers to monitor room statuses, housekeeping activities, and guest check-ins/check-outs from any location.
 - ✚ Cloud-based systems reduce the risk of data loss or delays in updates, enhancing operational flexibility.
- **Best Practices for Managing Room Status Updates**
 - ✓ **Regular Training for Staff**
 - ✚ Ensure that all hotel staff, especially those working with PMS, receive regular training on proper room status updates.

- ✚ Training should cover how to accurately mark room status, update details, and handle exceptions such as maintenance issues or guest requests.

- ✚ Ongoing education ensures staff can troubleshoot issues promptly and avoid mistakes.

✓ **Set Clear Communication Channels**

- ✚ Establish clear communication channels between housekeeping, front desk, and maintenance teams.

- ✚ Use messaging systems, group chats, or team management software to facilitate instant updates and communication.

- ✚ Ensure all departments are aware of the current room status and any immediate changes.

✓ **Routine Audits and Checks**

- ✚ Regularly audit room statuses to identify and resolve any discrepancies.

- ✚ Cross-check PMS updates with physical room inspections to ensure consistency and avoid conflicts.

- ✚ Perform routine audits to catch potential issues before they impact guest check-ins or reservations.

✓ **Use Alerts and Notifications**

- ✚ Set up automated alerts in the PMS to notify staff when room statuses need to be updated.

- ✚ Alerts can help remind housekeeping to update a room's status once cleaning is complete or maintenance issues are resolved.

- ✚ Notifications ensure that important tasks aren't overlooked and that room statuses are continuously accurate.



Activity 2: Guided Practice



Task 6:

You are a front desk agent at a hotel. The room status in PMS shows a discrepancy. You must verify with housekeeping, update the system, and ensure the room is available for guests. Practice the following in the hotel which uses PMS.

1. Verify the current room status in the PMS before updating it?
2. Confirm room condition with house keeping
3. Edit room Details using PMS
4. Save the updated information in PMS
5. Handle a room status discrepancy between the PMS and actual room condition?
6. Updated guest details in the PMS when a guest checks out?



Activity 3: Application

As a student in the nearest hotel, practice the following tasks.

1. Using a computer which has application of PMS update room status using PMS
2. Verify the room status in the PMS before making any updates?
3. Edit room details
4. Make a report that a room is not yet cleaned
5. Handle a discrepancy in room status between the PMS and the actual condition?



Formative Assessment

I. To the following questions answer by True or False

1. You should check the current room status in the PMS before making any updates.
2. You can update room status using PMS from a computer that has the PMS application installed.
3. It is necessary to verify the room status in the PMS before making any updates.

II. Match the statement in column A with the correct action in column B by writing its corresponding number in the provided space

Answer	Statement	Action
.....	a. A. Update room status using PMS	I. This step is required before making any updates to ensure accuracy.

.....	b. B. Verify room status before updating in PMS	II. This action can be performed from a computer with the PMS application installed.
-------	--	--

III. Choose the letter corresponding to the correct answer

4. What is the first step when checking a guest's reservation in the PMS?
 - a. Assign rooms as per guest preferences
 - b. Check available rooms
 - c. Create a new guest folio
 - d. Close the account and update room status
5. What is the purpose of creating a new guest folio?
 - a. To track payment methods
 - b. To record guest preferences
 - c. To generate a bill for the guest
 - d. To assign rooms to guests

IV. Answer the following questions

6. What is the process for confirming room conditions with housekeeping?
7. After verifying the room condition, what steps should you take to change the room status in the PMS?
8. How do you select the correct room to update in the PMS?
9. What information should you edit in the PMS when updating room status?
10. How do you ensure that the room status update is accurately reflected in the PMS?
11. What is the procedure for saving updated room information in the PMS after making changes?
12. How would you resolve a discrepancy between the room status in PMS and the actual condition reported by housekeeping?



Points to Remember

- Always verify the current room status in PMS before making any changes.
- Confirm room condition with housekeeping to ensure accuracy before updating the status.
- Select the correct room number in PMS to update its status.
- Change the room status (e.g., from "dirty" to "clean") based on housekeeping's report.
- Edit room details such as guest name, check-out date, or special requests when needed.
- Ensure that any updates made are saved in the PMS to reflect the most current information.
- Double-check the updated information before finalizing changes in the system.
- Always follow proper procedures to handle discrepancies between PMS status and room condition.
- Keep clear communication with housekeeping to avoid miscommunication about room readiness.
- Regularly update room statuses to maintain accurate guest check-in/check-out processes.



Self-Reflection

1. Read the statements across the top. Put a check in a column that best represents your level of knowledge, skills and attitudes.

My experience	I don't have any experience doing this.	I know a little about this.	I have some experience doing this.	I have a lot of experience with this.	I am confident in my ability to do this.
Knowledge, skills and attitudes					
Create guest reservation					
Perform front desk activities					
Process cashiering activities using PMS					
Update room status using PMS					
Use designated credentials					
Identify respected features					
Describe steps of creating reservation in PMS					
Describe steps for recoding guest request into PMS					
Describe steps for assigning Room					

My experience	I don't	I know	I have some	I have a lot	I am
Knowledge, skills and attitudes	have any experience doing this.	a little about this.	experience doing this.	of experience with this.	confident in my ability to do this.
Describe steps for creating guest folio					

2. Fill in the table below and share results with the trainer for further guidance.

Areas of strength	Areas for improvement	Actions to be taken to improve
1.	1.	1.
2.	2.	2.
3.	3.	3.

UNIT 3: PREPARE HOTEL REVENUE REPORTS USING PMS



Unit summary

This unit provides the knowledge, skills, and attitudes necessary to **prepare hotel revenue reports using PMS**. It includes generation of room revenue reports, producing food and beverage revenue reports, making MICE revenue reports and generation of miscellaneous revenue reports.

Self-Assessment: Unit 1

1. Look at the unit illustration above and answers the questions below:
 - a. What does the illustration show?
 - b. What do you think will be topics to be covered under this unit based on the illustration?
2. Fill out the below self-assessment. Think about yourself: do you think you can do this? How well? Read the statements across the top. Assess your level of knowledge, skills and attitudes under this unit.
 - a. There is no right or wrong way to answer this assessment. It is for your own reference and self-reflection on the knowledge, skills and attitudes acquired during the learning process
 - b. Think about yourself: do you think you have the knowledge, skills or attitudes to do the task? How well?
 - c. Read the statements across the top. Put a check in a column that best represents your level of knowledge, skills and attitudes.
3. At the end of this unit, you will assess yourself again.

My experience	I don't have any experience doing this.	I know a little about this.	I have some experience doing this.	I have a lot of experience with this.	I am confident in my ability to do this.
Knowledge, skills and attitudes					
Explain the process of generating room revenue reports					
Describe food and beverage revenue report production					
Explain the steps in preparing MICE revenue reports					
Discuss the generation of miscellaneous revenue reports					

My experience	I don't have any experience doing this.	I know a little about this.	I have some experience doing this.	I have a lot of experience with this.	I am confident in my ability to do this.
Knowledge, skills and attitudes					
Highlight the importance of reviewing revenue trends					
Identify the use of PMS in revenue report preparation					
Explain the process of generating room revenue reports					
Describe food and beverage revenue report production					
Explain the steps in preparing MICE revenue reports					
Discuss the generation of miscellaneous revenue reports					
Highlight the importance of reviewing revenue trends					
Identify the use of PMS in revenue report preparation					



Key Competencies:

Knowledge	Skills	Attitudes
1. Explain the process of generating room revenue reports	1. Gather data on room bookings and rates	1. Pay attention to detail in compiling information
2. Describe food and beverage revenue report production	2. Compile payment and consumption details	2. Be analytical in reviewing sales trends
3. Explain the steps in preparing MICE revenue reports	3. Gather data on events and bookings	3. Be organized in task execution
4. Discuss the generation of miscellaneous revenue reports	4. Compile payments and transaction details	4. Be proactive in identifying additional revenues
5. Highlight the importance of reviewing revenue trends	5. Generate reports using PMS or POS tools	5. Pay attention to detail in reviewing summaries
6. Identify the use of PMS in revenue report preparation	6. Analyse revenue and sales trends	6. Be team-oriented and supportive
7. Explain the process of generating room revenue reports	7. Gather data on room bookings and rates	7. Pay attention to detail in compiling information



Discovery activity:



Task 1

Act as Front Desk Manager at a nearby hotel, use the Property Management System (PMS) to Collect Information for Making Reports, Generate reports using PMS tools including room bookings.

1. How do you collect data on room bookings and rates for revenue reports?
2. What information do you need to compile for generating food and beverage revenue reports?
3. How do you gather data for MICE revenue reports?
4. What steps do you follow to collect data on miscellaneous revenue sources?
5. How do you use PMS tools to generate and review revenue reports?
6. What role does data analysis play in reviewing revenue trends for reports?

Topic 3.1: Generation of room revenue reports



Activity 1: Problem Solving



Task 2:

As the Front Desk Manager at a hotel, you are responsible for generating the Room Revenue Report using the Property Management System (PMS). After gathering data on room bookings, rates, payments, and occupancy,

1. How can you generate the room revenue report?
2. What is the primary purpose of generating room revenue reports in a hotel?
3. Which key data points are typically included in a room revenue report?
4. How can you gather all the required data (room bookings, rates, payments, occupancy details) correctly and completely?
5. Identify errors in inputting guest bookings, room rates, or payments into the PMS system?
6. What are the Steps of Collecting Information for Making Reports?

Key Facts 3.1: Generation of room revenue reports

- **Steps of Collecting Information for Making Reports**

- ✓ **Gathering Data on Room Bookings and Rates**

- ✚ Room revenue reports rely heavily on accurate and timely data regarding room bookings, rates, and occupancy details. This process begins at the moment a guest reserves a room and continues until they check out.

- ✓ **Booking Channels**

- ✚ Hotels often receive bookings through various channels such as direct bookings via the hotel's website, third-party booking sites (OTAs), and through phone or in-person reservations. Each of these channels may have different methods for tracking bookings.

- ✚ It's essential to gather data from each of these sources to ensure that all bookings are accounted for in the revenue report. For example, the PMS integrates information from all sources, providing a central location for tracking.

- ✚ Data points such as guest name, check-in and check-out dates, room types, special requests, and the rates paid need to be collected to ensure the report reflects the full scope of bookings.

✓ **Room Rate Data**

- ✚ Room rate data should be tracked and recorded at various levels. This includes both standard rates (which may vary based on the room type or time of year) and promotional or discounted rates.

- ✚ Dynamic pricing strategies, which adjust rates based on demand, should be closely monitored. For example, higher rates are often set during peak seasons or during special events.

- ✚ Tracking rate changes in real time is crucial to ensure that the revenue report is accurate and reflective of the pricing strategy in place. It is also important to ensure that any rate discrepancies between bookings and the actual rate paid by guests are noted.

✓ **Occupancy Data**

- ✚ Occupancy rates play a central role in generating accurate room revenue reports. Hotels collect data on room occupancy by tracking check-ins and check-outs for each room type.

- ✚ Occupancy rates are calculated by dividing the number of rooms sold by the total number of available rooms. This figure provides insight into the hotel's ability to generate revenue based on demand.

- ✚ It is essential to gather daily, weekly, and monthly occupancy data to generate accurate revenue projections and identify periods of high or low demand. The PMS automatically collects and updates this information based on guest reservations and arrivals.

✓ **Special Rates and Discounts**

- ✚ Many hotels offer special rates for certain guests, such as corporate clients, members, government employees, or loyalty program participants. These special rates should be tracked and accounted for separately to identify their impact on revenue.
- ✚ Any promotional rates, such as discounts or seasonal offers, should be captured to ensure the report reflects the revenue lost due to discounts and the revenue gained from promotional strategies.
- ✚ This data is essential for determining the hotel's overall profitability and assessing whether the hotel is offering discounts that are beneficial or detrimental to revenue.

✓ **Compiling Payment and Occupancy Details**

- ✚ After collecting booking and rate data, the next step is to compile the payment details and occupancy information into a comprehensive report.

✓ **Payment Data Collection**

- ✚ Payment information includes data on how guests paid for their stay, whether it was through credit cards, debit cards, cash, room charges, or other payment methods.
- ✚ Each payment transaction should be linked to the corresponding booking, ensuring that any payments made before or during the stay are properly recorded.
- ✚ A hotel's PMS tracks these transactions in real time, allowing staff to view the payment status for each booking. This also includes details such as deposits, partial payments, and final settlement amounts.
- ✚ Payment details should also reflect any additional charges or adjustments, such as room upgrades, extra services (e.g., spa or room service), taxes, and service charges.

✓ **Guest Charges and Adjustments**

- ✚ As guests check in and use services, additional charges such as food and beverage consumption, parking fees, and other service charges (e.g., laundry or Wi-Fi) must be tracked.
- ✚ Adjustments may be necessary if guests change their booking, such as modifying their stay dates or switching to a different room type. These adjustments can impact the final payment amount and, ultimately, the revenue report.
- ✚ Compiling these charges alongside the initial booking and payment data ensures that all guest-related revenue is captured in the report.

✓ **Occupancy Details and Status**

- ✚ Detailed occupancy information includes the number of rooms sold, unsold, and the percentage of rooms occupied compared to total room availability. This information is key to determining the hotel's revenue performance.
- ✚ PMS systems often generate reports that provide a snapshot of occupancy data in real time, which is useful for tracking revenue goals and assessing whether the hotel is meeting its financial targets.
- ✚ Additionally, occupancy details also involve tracking no-shows and cancellations, which can affect both the room revenue and the accuracy of occupancy data.

✓ **Room Revenue Reports**

- ✚ Once the necessary data has been collected, it can be used to generate room revenue reports using PMS tools. These reports provide a clear picture of the hotel's financial performance and help stakeholders make informed decisions.

• **Generating Reports Using PMS Tools**

✓ **Accessing the Reporting Module**

- ✚ To generate a room revenue report, staff first access the reporting module of the PMS system. This module contains a variety of pre-configured report templates, including those specifically designed for room revenue analysis.

- ✚ The PMS allows hotel managers and accounting staff to select the type of report they need, such as daily, weekly, or monthly reports, or custom reports for specific periods.
- ✚ A key benefit of PMS tools is their ability to automate report generation, saving time and reducing human error. Automated reports can be set to run at scheduled intervals (e.g., every morning or at the end of each month).

✓ **Selecting Report Parameters**

- ✚ When generating the report, staff can select several parameters, such as the date range (e.g., for the past week, month, or a specific custom range), the types of rooms, and the specific outlets to be included (e.g., restaurant, bar, spa, etc.).
- ✚ Additional filters such as guest type (e.g., business or leisure), rate type (e.g., standard or discounted), and source of booking (e.g., direct, OTA, or corporate) can also be applied to refine the data presented in the report.
- ✚ PMS tools also allow users to generate detailed breakdowns of room revenue by categories such as room types, rates, occupancy, and additional services.

✓ **Report Customization**

- ✚ PMS systems are designed to be flexible, allowing users to customize reports based on specific business needs. This customization can involve the inclusion of graphs, tables, and charts to make the report easier to understand and analyse.
- ✚ Reports can be adjusted to include detailed comparisons of room revenue over time, showing trends in revenue growth, room occupancy, and the impact of special pricing or promotions.
- ✚ This feature allows hotel managers to assess their pricing strategies, identify patterns in guest booking behaviour, and determine which room categories are most profitable.

✓ **Reviewing Revenue Trends and Summaries**

- ✚ Once the report has been generated, it's essential to review and analyse the revenue trends and summaries to gain valuable insights into the hotel's performance.

✓ **Revenue Trend Analysis**

- ✚ A critical component of any room revenue report is the analysis of revenue trends over time. By examining these trends, hotel managers can identify patterns in guest demand, peak booking periods, and low-demand times.
- ✚ For example, analysing weekly or monthly data can help identify seasonal trends, such as increased bookings during holidays or a slowdown during off-peak seasons.
- ✚ Additionally, comparing revenue trends over different periods can help determine the effectiveness of pricing strategies, promotions, or other marketing initiatives. For instance, if revenue drops during certain months, it may indicate a need for targeted promotional campaigns or adjusted pricing.

✓ **Occupancy and Revenue Correlation**

- ✚ One of the most important insights provided by room revenue reports is the relationship between occupancy and revenue. A high occupancy rate does not always translate to high revenue if the average room rate is too low.
- ✚ Managers should closely examine the occupancy rate alongside the average daily rate (ADR) to evaluate whether the hotel is maximizing its revenue potential. This analysis can reveal whether the hotel is consistently filling rooms at optimal rates or leaving money on the table.
- ✚ In periods of high demand, it may be appropriate to raise rates to capture additional revenue, while during low demand periods, offering promotions or discounts may help maintain occupancy.

✓ **Revenue Per Available Room (RevPAR)**

- ✚ RevPAR is a key metric for evaluating a hotel's financial performance. It's calculated by multiplying the ADR by the occupancy rate or by dividing total room revenue by the total number of available rooms.
- ✚ By regularly reviewing RevPAR in the room revenue reports, hotel managers can assess the overall effectiveness of their pricing and revenue management strategies.
- ✚ RevPAR provides a more accurate picture of revenue than occupancy alone, as it considers both the number of rooms sold and the pricing level.

✓ **Room Revenue by Category and Room Type**

- ✚ A detailed breakdown of room revenue by category and room type provides insights into which segments of the hotel are performing best. This allows managers to determine which room types (e.g., standard rooms, suites, or premium rooms) generate the most revenue and which may need adjustments.
- ✚ For example, a high revenue generation from suites could suggest that the hotel may want to invest in additional suite upgrades or adjust the pricing of standard rooms to increase sales in other categories.

✓ **Discounts and Comped Rooms Analysis**

- ✚ Room revenue reports also highlight the impact of discounted or complimentary rooms on overall revenue. Special rates and promotional discounts can significantly affect revenue, and it's crucial to track these figures carefully.
- ✚ By reviewing these reports, managers can determine whether discounting strategies are effective in driving occupancy without undermining overall profitability. If the revenue lost due to discounts exceeds the benefits of increased occupancy, pricing strategies may need to be re-evaluated.

Category of tools, equipment and materials	Tools, equipment and materials		Use of the tools and equipment
Property Management System (PMS)	Computers		Used to run PMS software, store data, and manage guest information and reservations.
	POS Terminals		Used to process guest payments, manage transactions, and generate receipts.
Communication Tools	Telephones		Used for communication between hotel departments and with guests.



Activity 2: Guided Practice



Task 3:

A hotel front desk manager generates a room revenue report for the past month using the PMS, collecting data on bookings, rates, occupancy, payments, and discounts. To show that you understand a room revenue report is generated answer the following questions.

1. Gather room booking and rate data in the PMS?
2. Collect information for making report
3. Categorize room rates in the PMS?
4. Calculate occupancy rate in the PMS?
5. Track special rates and discounts?
6. Link payments to bookings in the PMS?



Activity 3: Application



Task 4:

You are the front desk manager of a hotel, tasked to generate a room revenue report for the past month. You need to gather data on room bookings, rates, occupancy, and guest payments to ensure accurate reporting. With the given information perform the following:

1. Collect data from all booking channels (website, OTA, phone)?
2. Compile charges and payments using PMS
3. Pass through the appropriate steps to track and verify room rate data?
4. Calculate occupancy rate and its effect on revenue?
5. Work on additional charges (like upgrades) and include them in the report?
6. Apply filters to generate the room revenue report?
7. Analyze revenue trends using occupancy and room rates?

Topic 3.2: Producing food and beverage revenue reports



Activity 1: Problem Solving



Task 5:

A hotel manager noticed inconsistencies in the food and beverage revenue report. Some sales data from the bar and restaurant are missing, and discounts from promotions are not reflected correctly. The manager must use the PMS to compile accurate data and resolve these issues.

1. How do you gather sales data from different outlets?
2. How do you ensure discounts are accurately recorded?
3. What tools in the PMS help produce revenue reports?
4. How do you verify the accuracy of compiled data?
5. What steps do you take to analyze sales trends?

Key Facts 3.2: Producing food and beverage revenue reports

- **Steps of Collecting Information for Making Reports**

Creating accurate and comprehensive reports requires a systematic approach to collecting data. The process is fundamental in industries like hospitality and food & beverage (F&B), where timely and precise data-driven decisions are crucial for the success of the business. In this context, the main goal is to compile relevant information that enables the generation of financial and operational reports, such as sales reports, revenue breakdowns, and consumption analytics. Below, we will outline the steps involved in collecting data, focusing on gathering sales data from food and beverage (F&B) outlets, and compiling payment and consumption details.

✓ **Identifying the Sources of Information**

The first step in the data collection process is to identify where the relevant data resides. In F&B outlets, data can come from several sources, including:

-  **Point of Sale (POS) Systems:** The POS system is typically the primary source of sales data. This system records every transaction that occurs at the outlet, including the products sold, their quantities, prices, discounts, and customer details. It is essential to have a robust POS system that integrates with other management tools such as Property Management Systems (PMS), which track customer data for those staying at hotels or using other services.
-  **PMS (Property Management Systems):** If the F&B outlet is part of a hotel or resort, the PMS will provide additional customer data, including room service orders, customer profiles, and charges related to the F&B purchases. This data is crucial for compiling detailed and accurate reports that tie F&B revenue to guest profiles.
-  **Accounting and Payment Systems:** For accurate payment records, the data from accounting software and payment systems must be considered. This includes the method of payment (credit card, cash, mobile wallets), any discounts applied, and the total amount paid.
-  **Inventory Systems:** Consumption data is also gathered through inventory management systems. These tools track the quantities of raw materials used in the preparation of menu items, providing insights into consumption trends and product waste.
-  **Staff Input:** Sometimes, manual data collection is necessary. Staff members may input information into various systems, or daily logs might be maintained for reference, especially when certain sales or consumption data is not captured automatically.

● **Setting Up Data Collection Templates**

Once the sources have been identified, it is important to create a standardized template or format for collecting the information. Having a consistent format ensures that all data can be easily compiled and analysed later. Templates can be created in

Excel or other software tools like Google Sheets or more advanced business intelligence tools like Tableau.

- ✓ For example, sales data collected from the POS can be structured in columns, including:

- ✚ **Date**
- ✚ **Item Sold**
- ✚ **Quantity Sold**
- ✚ **Price**
- ✚ **Discount Applied**
- ✚ **Total Sales Revenue**

- ✓ Similarly, payment data could include the following:

- ✚ **Transaction ID**
- ✚ **Payment Method**
- ✚ **Total Amount**
- ✚ **Discounts Applied**
- ✚ **Service Charges**

Using standardized templates helps eliminate errors that could arise from inconsistent data collection methods.

✓ **Data Collection from POS Systems**

In most modern F&B outlets, the POS system is the key tool used for transaction logging. The process of collecting sales data from the POS typically involves the following:

- ✚ **Exporting Transaction Data:** Most POS systems allow data to be exported into CSV or Excel files. These files contain detailed records of all transactions during a given period, often broken down by date, time, outlet, and server.
- ✚ **Ensuring Data Accuracy:** During data collection, it is essential to ensure that the data is accurate and complete. Errors in data entry, such as incorrect pricing or item misclassification, can significantly impact the accuracy of the report.
- ✚ **Checking for Completeness:** All transactions should be included, and no sales should be omitted. It is crucial to cross-reference POS records with cash

register logs or other transaction records to ensure nothing has been overlooked.

✓ **Compiling Payment and Consumption Details**

In addition to sales data, payment and consumption data must also be gathered for a holistic understanding of the outlet's performance. Payment data is gathered from the payment system, which records every payment made by customers. This is particularly important for:

- ✚ **Analysing Payment Methods:** Identifying which payment methods are most popular (credit cards, mobile payment, cash) can offer insights into customer preferences and help optimize payment systems.

- ✚ **Discounts and Promotions:** When customers use discount coupons or promotional offers, it is crucial to document these transactions accurately. Including this data in the report helps evaluate the effectiveness of marketing campaigns and discounts.

On the other hand, consumption details are vital for understanding which items are popular and which ones are not. Consumption is tracked using the inventory system and POS system in combination. The steps include:

- ✚ **Inventory Tracking:** Track inventory usage to match the items sold with the stock used. This helps determine food waste, overproduction, or underproduction.

- ✚ **Menu Analysis:** Regularly analyse which menu items are selling well and which are underperforming. This can help adjust the menu offerings and ensure optimal inventory usage

✓ **Quality Control and Data Verification**

After gathering the data, it's crucial to verify that the information collected is correct. This step ensures that the sales figures, consumption details, and payment data are accurate. Verification processes may include:

- ✚ **Cross-checking with Invoices:** Comparing POS reports with invoices helps verify that the sales data matches actual transactions.

✚ **Reconciling Sales with Inventory:** Cross-referencing sales data with inventory logs can help spot discrepancies, such as stock shortages or waste.

✚ **Validation by Management:** Having supervisors or managers review the data ensures that no mistakes or inconsistencies are overlooked

✓ **Food and Beverage Revenue Reports**

Once the data collection process is complete, the next crucial step is to generate the F&B revenue reports. These reports provide a snapshot of the financial health of the F&B outlets, helping management make informed decisions about pricing, marketing strategies, and operational adjustments. Generating comprehensive revenue reports involves using specific tools, such as Property Management Systems (PMS) and Point of Sale (POS) systems, to analyse the data collected.

● **Using PMS or POS Systems for Report Generation**

Both PMS and POS systems offer valuable tools for generating detailed financial and sales reports. Here's how each system contributes to the revenue reporting process:

✓ **POS Systems:** The POS system is the most direct source of sales data. Modern POS systems are equipped with reporting functionalities that can automatically generate daily, weekly, or monthly reports, summarizing total sales, sales by category (food, beverage), and discounts offered. Key metrics that can be generated through the POS include:

✚ **Total Sales Revenue:** The total income from all sales in a given period.

✚ **Item Sales Breakdown:** A detailed report on the sales of individual items, which can help identify best-sellers and underperforming products.

✚ **Sales by Time/Shift:** This report shows how sales vary by time of day, day of the week, or during different shifts, providing insights into peak business hours.

✚ **Discount Analysis:** POS systems can also generate reports on the discounts applied, helping to evaluate their impact on overall revenue.

✓ **PMS Systems:** For F&B outlets attached to hotels or resorts, the PMS is a powerful tool to understand customer consumption patterns. Through PMS, managers can generate reports that include:

✚ **Guest Consumption Analysis:** This tracks F&B consumption by guest profiles, enabling segmentation by room type, length of stay, or guest loyalty status.

✚ **Package Sales:** Some hotels offer F&B packages, and PMS can help track the sales and revenue generated from such offers.

✚ **Revenue Per Occupied Room (RevPAR):** This metric helps analyze the revenue earned from F&B per room occupied, which is useful for assessing how well the hotel is integrating its F&B offerings with the guest experience.

✓ **Analysing Revenue and Sales Trends**

Once the data has been collected and reports are generated, the next step is to analyze the trends in the data. This involves identifying patterns, understanding revenue sources, and deriving actionable insights.

✚ **Revenue Trends Analysis:** By comparing sales reports over different time periods (monthly, quarterly, yearly), trends can be identified. This includes tracking seasonal variations, the impact of holidays or special events, and identifying periods of low or high sales.

✚ **Sales Category Breakdown:** Analysing the sales by different categories (e.g., food, beverages, desserts) helps identify which product categories contribute most to revenue. Managers can then focus on promoting high-performing categories or work on improving the underperforming ones.

✚ **Customer Behaviour Analysis:** By integrating POS and PMS data, you can analyse customer behaviour more deeply. For instance, by comparing data on the average spend per customer and the types of items bought, businesses can tailor their marketing strategies and adjust pricing to maximize revenue.

✓ **Reporting Key Performance Indicators (KPIs)**

A crucial aspect of F&B revenue reports is the tracking of Key Performance Indicators (KPIs). Some common KPIs for F&B outlets include:

✚ **Average Check Size:** The average amount spent per customer or per table. This metric helps assess pricing strategies and the effectiveness of upselling.

✚ **Revenue per Available Seat Hour (RevPASH):** A common metric in the restaurant industry that tracks the revenue generated per seat in an hour.

✚ **Cost of Goods Sold (COGS):** Tracking the cost of ingredients and materials used to prepare menu items. This helps in determining the profitability of each dish.

✚ **Labour Cost Percentage:** The percentage of total revenue spent on labour. This helps evaluate operational efficiency.

By comparing KPIs across different periods, it is possible to gauge performance, identify areas for improvement, and make data-driven decisions.

✓ **secure information storage.**

✚ **External Hard Drives:** Store backups of guest records, financial data, and communication within the property.



Activity 2: Guided Practice



Task6:

You are working as a front desk manager at a hotel that uses a Property Management System (PMS) to manage reservations, check-ins, room assignments, and billing. The hotel is receiving a high volume of online bookings through different channels, and you must ensure smooth operations by managing room availability, handling guest requests, and resolving any potential double bookings.

1. Integrate an online booking engine with PMS to prevent overbooking issues?
2. Manage guest check-ins and check-outs using PMS?
3. Track guest preferences and personalize their stay USING PMS?
4. What impact does real-time room availability in PMS have on guest satisfaction?
5. Leverage data to improve the hotel's revenue management strategies?



Activity 3: Application



Task 7:

At Grandview Hotel, the F&B team collects data from the POS system, PMS, and inventory software to create accurate revenue reports. The POS tracks sales, PMS provides guest data, and the inventory system monitors stock usage. Networking devices ensure communication between systems, while barcode scanners speed up transactions. Challenges include system integration, data accuracy, and staff training. Given the chance to visit the Hotel use the above information to do the following:

1. Gather sales data from F&B outlets
2. Generate reports using PMS.
3. compile payments and consumption details
4. analyses revenue and sales trends using PMS
5. Create food and beverage revenue report in PMS

Topic 3.3: Making MICE revenue reports



Activity 1: Problem Solving



Task 5:

A hotel is hosting a corporate conference under its Meetings, Incentives, Conferences, and Exhibitions (MICE) services. The event manager is responsible for booking the event space, while the finance team handles payments for the venue, catering, and other services. The hotel needs to generate accurate revenue reports to track the success of the event and make informed decisions for future bookings. Answer the following questions which are related to the generation of revenue report:

1. What are the steps for collecting information to make reports?
2. How do you gather data on events and bookings?
3. What is the process for compiling charges and payments?
4. How do you make MICE revenue reports?
5. How do you generate reports using PMS tools?
6. How do you review revenue and trends?

Key Facts 3.3: Making MICE revenue reports

- **Steps of Collecting Information for Making MICE Revenue Reports**

- ✓ **Gather Data on Events and Bookings**



Event Details

- Type of event (conference, seminar, exhibition, etc.)
- Event date(s) and duration
- Event size (number of attendees, rooms required, space needed)
- Guest requirements (special accommodations, AV equipment, transportation)
- Special requests and additional services (catering, audio-visual setups, equipment)

 Booking Information

- Booking source (direct booking, corporate client, event planner)
- Reservation method (online, email, phone)
- Event organizer and contact details (responsible person, client organization)
- Date of booking confirmation and initial deposit/payment details
- Room reservations (number of rooms, type of rooms, room rate)

 Space Requirements

- Type of event space reserved (conference rooms, ballroom, exhibition halls)
- Setup style (classroom, theatre, banquet, U-shape)
- Special setup requirements (staging, lighting, sound systems, etc.)

 Event Schedule

- Time slots for various sessions or events
- Registration timings, breaks, meals, and social events
- Pre-event preparation and post-event wrap-up details
- Adjustments in space or time based on client requests

 Data Integration

- Integration with internal calendars for space and resource availability
- Integration with sales and reservation systems to capture confirmed bookings

 Compile Charges and Payments **Revenue Categories**

- **Venue Charges**
 - Rental fees for event spaces (per hour, day, or based on event size)
 - Premium rates for high-demand or large spaces. Discounts or negotiated rates for long-term or bulk bookings
- **Catering Charges**
 - Charges for food and beverages (meals, snacks, coffee breaks)
 - Custom menu costs, special dietary requirements
 - Additional catering services (alcohol, themed events, banquets)

Service charges for wait staff, bartenders, etc.

- **Audio-visual Equipment and Technology**

- Charges for rented audio-visual equipment (projectors, microphones, screens)
- Setup and technician fees for specialized equipment
- IT support charges, including internet and Wi-Fi for events

- **Accommodation Charges**

- Room bookings for event attendees (number of rooms, room rate)
- Special rates or packages offered for large group bookings
- Additional charges for room upgrades, early check-ins, or late check-outs

- **Additional Service Fees**

- Charges for transportation services (shuttles, VIP transport)
- Event signage and décor rental
- Staff services (security, concierge, housekeeping)

 Payment Methods

- Types of payments accepted (credit cards, wire transfers, checks, cash)
- Partial payments or deposits (for bookings made in advance)
- Final payments (due before, during, or after the event)
- Tracking payment status (fully paid, pending, or outstanding balances)

 Payment Reconciliation

- Matching payments with charges (ensuring full payments for services rendered)
- Tracking and resolving discrepancies or overcharges
- Verifying that all payments have been processed and logged correctly

 Billing and Invoices

- Issuing invoices for event bookings and services
- Adding taxes, service charges, and gratuities
- Generating final bills that consolidate all charges for an event

- Providing clients with detailed breakdowns of all charges

✓ **Data Collection and System Integration**



Utilizing Technology

- Use of Property Management System (PMS) for booking and event data
- Integration between PMS, Point of Sale (POS), and Accounting Systems
- Automatic updates of bookings and event details across platforms
- Real-time synchronization of payments, services, and client information



Collecting Real-Time Data

- Collecting real-time payment information (e.g., using mobile POS for on-site payments)
- Updating event schedules and any changes immediately into the PMS
- Monitoring last-minute changes (additional bookings, cancellations)
- Gathering post-event data (guest feedback, service quality)



Customer Relationship Management (CRM) Integration

- CRM system integration to capture guest preferences and history
- Tracking customer inquiries, complaints, and special requests
- Storing guest profiles and event-specific details for future reference



Manual Data Collection

- Using paper logs or spreadsheets in cases where digital systems are unavailable
- Staff input of special requests or adjustments that are not automatically tracked
- Maintaining backup records for auditing and verification purposes

● **Making MICE Revenue Reports**

✓ **Generating Reports Using PMS Tools**



PMS Reporting Capabilities

- PMS systems provide a central platform for generating reports on event-related revenue
- Data from bookings, payments, and service charges can be extracted automatically
- Detailed reporting functions, such as revenue by category, event type, or client
- Automated reports for daily, weekly, or monthly revenue breakdowns



Types of Reports Generated

- **Revenue by Event Type:** Segmentation of total revenue by event type (conference, exhibition, seminar, etc.)
- **Revenue by Service Category:** Breakdown of revenue by venue rental, catering, accommodation, and additional services
- **Booking Trends:** Insights into booking patterns (peak season, low season, booking lead time)
- **Payment Reports:** Detailed reports of payment methods (credit cards, cash, mobile payments, etc.)
- **Client Payment History:** Tracking payments by client or event organizer



Customizable Report Features

- Ability to filter data by event date, room type, client organization, or specific revenue streams
- Creating custom reports for specific business needs (e.g., tracking event costs, evaluating discounts)
- Exporting reports to formats like PDF, Excel, or CSV for easier sharing and analysis



Data Accuracy and Verification

- Ensuring data is accurate and up-to-date before generating reports
- Cross-checking with event logs, invoices, and payment systems to confirm completeness

- Using data validation tools within PMS to eliminate errors before finalizing reports



Real-Time Data Access

- Ability to view revenue performance in real-time during the event (adjusting prices, adding services, etc.)
- Monitoring revenue trends as the event unfolds to make adjustments if needed
- Track changes to event details that may affect revenue, such as increased attendance or additional services



Integration with Other Business Tools

- Connecting PMS reports with external tools like accounting software or financial dashboards
- Integration with CRM to align event revenue with customer segmentation and profiling
- Sharing PMS reports with sales, marketing, and operations teams for better collaboration

✓ **Reviewing Revenue and Trends**



Revenue Trends Analysis

- Tracking changes in revenue over different time periods (monthly, quarterly, annually)
- Analyzing growth or decline in MICE revenue compared to historical data
- Identifying peak periods and seasonal trends (e.g., holidays, summer months)
- Comparing revenue from different years or specific months to identify patterns
- Identifying the most lucrative types of events (conferences, weddings, corporate meetings)



Revenue Breakdown by Service

- Understanding how each service category contributes to overall revenue (venue, catering, accommodation)

- Identifying high-performing revenue categories and services that may need improvement
- Reviewing trends in additional services (e.g., catering, AV equipment, transportation)



Client Behaviour Insights

- Analysing revenue by client segment (corporate, leisure, associations, government)
- Identifying profitable clients or repeat customers and their preferences
- Analysing booking behaviours (advance bookings vs. last-minute bookings)
- Reviewing client requests for additional services (e.g., room upgrades, custom menus)



Discount and Promotional Analysis

- Reviewing the impact of discounts and promotions on MICE revenue
- Evaluating the effectiveness of pricing strategies (early bird discounts, group bookings)
- Identifying trends in discount use by event type or client segment



Forecasting and Budgeting

- Using historical data and trends to forecast future revenue
- Creating budgets for future events based on previous performance
- Adjusting revenue forecasts based on market conditions, competition, and demand
- Providing management with insights into expected revenue growth or decline



Comparing Actual vs. Budgeted Revenue

- Comparing actual revenue to the budgeted or projected revenue for events
- Identifying any discrepancies and understanding the reasons behind them

- Making adjustments to pricing, marketing, or sales strategies to align future revenue with targets

✓ **Decision Making and Strategic Actions**

Optimizing Service Offerings

- Identifying high-demand services and exploring ways to expand them (e.g., premium catering, AV packages)
- Understanding customer preferences to tailor future service offerings (e.g., themed menus, personalized packages)
- Analysing underperforming services and making improvements or discontinuing them

Improving Client Relations

- Engaging with repeat clients to foster loyalty and secure future bookings
- Offering customized packages for high-value clients or large corporate groups
- Using CRM data to target specific client needs and preferences for future events

Revenue Growth Strategies^{viii}

- Implementing marketing strategies to increase bookings during off-peak periods
- Introducing loyalty programs or long-term contracts with corporate clients
- Exploring partnerships with event planners, corporate organizations, or industry associations

Cost Control and Efficiency

- Analysing service costs to ensure profitability (catering, AV, staffing)
- Identifying opportunities for cost reduction without compromising service quality
- Implementing more efficient event management practices (e.g., improved staffing, better logistics)



Activity 2: Guided Practice



Task 6:

A hotel is hosting a conference with multiple events and sessions. The event team uses the hotel's Property Management System (PMS) to collect data on bookings, services, and payments. They need to generate a MICE revenue report to analyse revenue from venue rentals, catering, and other services provided during the conference. Respond to the following questions.

1. Collect all the required data from the PMS to create an accurate MICE revenue report.
2. Categorize revenue from services. Describe the revenue trends which should be reviewed when creating a MICE revenue report.
3. Use PMS to track payment methods for MICE services.
4. Describe all the steps to ensure that the MICE revenue report is accurate before sharing it with management.



Activity 3: Application

A hotel is preparing a revenue report for a MICE event. The team gathers data on event bookings, such as room reservations, catering services, and additional services through the Property Management System (PMS) In a nearest hotel practice the following:



Task 7:

1. Collect Information for Making Reports:
2. Gather data on events and bookings using PMS?
3. Compile charges and payments using PMS?
4. Making MICE Revenue Reports:
5. Generate reports using PMS tools?
6. Review revenue and trends USING PMS?

Topic 3.4: Generation of miscellaneous revenue reports



Activity 1: Problem Solving



Task 5:

A hotel is hosting a corporate conference under its MICE services. The event manager is responsible for booking the event space, while the finance team handles payments for the venue, catering, and other services. The hotel needs to generate accurate revenue reports to track the success of the event and make informed decisions for future bookings.

Questions

1. How can the hotel ensure accurate event data is entered into the PMS?
2. What steps can be taken to avoid missing payment records for the MICE event?
3. How can the PMS system help generate detailed MICE revenue reports?
4. What tools can the hotel use to analyse MICE revenue trends over time?
5. How can communication between the event management and finance teams be improved for better reporting?

Key Facts 3.4: Generation of miscellaneous revenue

- **Steps of Collecting Information for Making Reports**

- ✓ **Gathering Data on Additional Revenue Sources:**

Miscellaneous revenue refers to income generated from sources other than room revenue or standard food and beverage charges in a hotel or hospitality business. These can include services and products provided to guests or non-guests.

The process of collecting data for generating miscellaneous revenue reports begins by identifying the different revenue streams involved.

- ✓ **Identifying the Sources of Miscellaneous Revenue:**

- ✚ **Spa and Wellness Services:**

- Income from massages, facials, beauty treatments, and wellness packages.
- Data should include the number of treatments, types of services offered, and pricing.

Retail Sales:

- Products sold in hotel gift shops or boutiques (e.g., souvenirs, toiletries, clothing, snacks, and beverages).
- Sales data should include the product categories, quantities sold, and total income generated.

Parking Charges:

- Fees for valet parking or self-parking for guests or external visitors.
- Information required includes parking charges per day, valet service fees, and other applicable services.

Telephone and Internet Services:

- Income from guest calls, in-room internet services, or Wi-Fi packages.
- Relevant data includes the number of calls made, the duration, the services used, and total charges.

Conference and Event Fees:

- Charges for hosting business meetings, conferences, and social events.
- Data gathered should involve the space rental fees, AV services, and any additional services used during the event.

Laundry and Dry-Cleaning Services:

- Income from washing and dry-cleaning services provided to guests.
- This can include single-item charges or bulk laundry service fees.

In-Room Dining and Mini-Bar Revenue:

- Revenue from food and beverages ordered via room service or consumed from the mini-bar.
- This should include itemized charges and quantities consumed.

Transportation Services:

- Income from shuttle services, car rentals, or other transportation provided by the hotel.

- Data should include the service types (e.g., airport transfers, tours) and charges per service.

✓ **Understanding the Collection Mechanisms for Miscellaneous Revenue:**

 Point of Sale (POS) Systems:

- Each revenue stream has a corresponding POS system that logs transactions and charges to the guest folio or other billing accounts.
- For example, POS for spa services, retail products, or in-room dining will capture each transaction and generate receipts.

 Guest Folios:

- The guest folio is the central document where all charges, including miscellaneous ones, are recorded.
- For accurate report generation, it is necessary to ensure that every service or product provided to the guest is linked to the folio and properly categorized.

 Manual Logs and Records:

- For certain services (e.g., parking, transportation), manual logs may be maintained to record payments and transactions, particularly in situations where an automated system is not available.
- Regularly updated logs help ensure that the data is up-to-date and accurate for reporting purposes.

 Accounting Systems:

- Integrating miscellaneous revenue sources with the hotel's accounting system can help centralize and track all transactions, making it easier to collect and report data.

 Third-Party Providers:

- In some cases, external providers (such as a third-party laundry service or transportation company) may be involved in generating revenue. Data from these providers must be collected and integrated into the hotel's revenue reporting system.

• **Compiling Payments and Transaction Details**

✓ **Tracking Payments for Miscellaneous Services:**

For each miscellaneous revenue stream, payments need to be recorded to complete the data compilation process. These payments may include:

 Cash Transactions:

- Cash payments for services such as parking, retail, and spa services.
- Cash receipts should be accurately logged and cross-referenced with the corresponding service records.

 Credit and Debit Card Payments:

- Payments made through credit or debit cards are the most common method for miscellaneous charges.
- Ensure that payments recorded in the PMS are linked with the corresponding transactions to ensure accurate financial reporting.

 Mobile Wallet Payments:

- Increasingly popular in the hospitality industry, mobile wallet payments (e.g., Apple Pay, Google Pay) for miscellaneous services should also be recorded.
- Track mobile wallet transactions for consistency and reconciliation.

 Direct Billings:

- Some services may be billed directly to corporate clients or through negotiated agreements, such as meeting space rentals.
- Ensure that such charges are captured as part of the overall revenue reports.

 Transaction Data Verification and Accuracy:

- After gathering the data, it is crucial to cross-check the transaction details with the corresponding services rendered and payments made.
- Verify if any discrepancies exist, such as overcharges or undercharges, and address them promptly to maintain accuracy in the final revenue reports.

 Reconciliation of Transactions:

- Regular reconciliation of transactions can help ensure that all charges are accounted for and all payments are collected.

- Reconciliation reports must be generated daily or weekly depending on the volume of miscellaneous revenue transactions.
- Cross-check POS system data with payment system records and guest folios.

Payment Schedules and Timing:

Payments for miscellaneous services may be collected at different points in time:

 **Prepaid Services:** For services such as spa packages or retail items sold before consumption, payments may be collected upfront.

 **Post-Consumption Payments:** For services like mini-bar usage or laundry services, payments are typically collected after consumption or at checkout.

Compiling data requires that payments are categorized based on the timing of collection to ensure that revenue is accurately assigned to the correct accounting period.

• **Miscellaneous Revenue Reports**

✓ **Generating Reports Using PMS Tools:**

 **PMS (Property Management System):** The PMS is integral in generating miscellaneous revenue reports as it consolidates data from various departments and services.

The PMS should be configured to track different miscellaneous revenue sources.

Tools within the PMS can be used to filter and categorize various charges (spa, retail, transportation, etc.), ensuring a detailed view of all income.

✓ **Generating Detailed Reports:**

The PMS tools allow for custom reporting, including but not limited to:

 **Revenue by Category:** Separate reports for each miscellaneous revenue category (e.g., spa, retail, transportation).

 **Daily/Monthly Summaries:** Reports can be generated on a daily, weekly, or monthly basis depending on reporting needs.

✚ **Payment Method Breakdown:** Analyse the payments made for miscellaneous services, broken down by cash, credit, debit, and mobile payments.

✚ **Guest Segmentation:** Revenue from miscellaneous services can be broken down by guest type (e.g., transient, corporate, group) to understand spending patterns.

- **Customizable Filters for Report Generation:**

The PMS tools often offer filtering options that enable the user to select specific time periods, departments, or revenue categories to generate more granular reports.

- ✓ Filter options might include:

- ✚ **Revenue** generated by a specific revenue stream (e.g., spa revenue vs. retail sales).

- ✚ **Time** periods (daily, weekly, monthly).

- ✚ **Guest** types or loyalty status (frequent guests vs. new guests).

- **Automated Report Scheduling:**

- ✓ Many PMS systems have built-in functionalities to automate the generation and emailing of reports on a regular schedule.

- ✓ **This** ensures that relevant stakeholders (finance, management, and department heads) receive timely and accurate information.

- **Reviewing Revenue Summaries and Trends:**

Once reports are generated using PMS tools, the next step is to review the data and analyse trends in miscellaneous revenue.

- ✓ **Revenue Breakdown by Category:**

Summarize revenue data to understand which services or products contribute most to miscellaneous income:

For example, if spa services are generating more revenue than retail, the hotel can focus on promoting wellness packages.

Understanding the revenue distribution across different departments enables management to focus marketing and sales efforts on the most profitable areas.

✓ **Trend Analysis:**

 Monthly and Seasonal Trends:

- Analyse monthly, quarterly, or yearly revenue trends to understand how income fluctuates over time.
- For example, spa revenue may peak during winter months, while retail sales may be higher during holidays or special events.
- Seasonal trends also help forecast future revenue and optimize the availability of services during peak seasons.

 Revenue vs. Occupancy Rates:

- Analyse the correlation between room occupancy and miscellaneous revenue.
- Higher occupancy rates may lead to higher demand for services like in-room dining, parking, and spa treatments, which should be tracked for accurate forecasting.

• **Identifying Opportunities for Increased Revenue:**

✓ **Cross-Selling and Upselling Opportunities:**

-  Use the trend analysis to identify areas where upselling or cross-selling can be effective. For example, a guest staying for a conference might be more likely to purchase spa services or dine in the hotel restaurant.
-  Bundling services together (e.g., spa + room upgrades) can be an effective way to increase miscellaneous revenue.

✓ **Expense Control and Profitability Analysis:**

-  Compare income from miscellaneous revenue with costs associated with providing the services (e.g., salaries for spa therapists, inventory costs for retail).
-  Use these comparisons to identify areas where expenses can be reduced without compromising service quality.

- ✚ Analyse profit margins for each revenue stream to determine which services are the most profitable and which need improvement.

✓ **Guest Preferences and Behaviour:**

- ✚ Collecting data on guest preferences and habits regarding miscellaneous services helps understand how to improve the guest experience and increase revenue.
- ✚ Data on guests who frequently use spa services or retail can help inform promotional strategies, such as loyalty programs or targeted offers.



Activity 2: Guided Practice



Task 6:

You are the Revenue Manager at a hotel. It's time to prepare the miscellaneous revenue report, which includes revenue from parking, spa services, in-room dining, laundry, and retail. You gather data from the PMS and POS systems to generate the report and review the trends.

1. Collect data for additional revenue in the hotel?
2. Use PMS to compile payments and transaction details
3. Generate reports using PMS tools
4. Review revenue summaries and trends
5. Ensure all payments are correctly recorded for miscellaneous services?
6. Analyzing the revenue from in-room dining help improve future sales?



Activity 3: Application

A hotel manager needs to prepare a miscellaneous revenue report for services like room service and parking fees. They gather transaction data from the PMS and POS systems, then compile the payment details. The manager will use this data to generate and analyse the revenue report.



Task 7:

1. Gather data on additional revenue sources?
2. Track payments for miscellaneous services?
3. Compile transaction details into a report?
4. Analyse trends in miscellaneous revenue?



Formative Assessment

Attempt all questions

I. To the following statement answer by True or False

1. Integrating an online booking engine with a PMS can prevent overbooking issues.
2. Managing guest check-ins and check-outs is not possible using a PMS.
3. Tracking guest preferences and personalizing their stay is possible using a PMS.
4. Real-time room availability in the PMS does not affect guest satisfaction.

II. Matching Question: Match the statements in column A with its corresponding function in Column B

Answer	A	B
.....	1.PMS	a. Tracks guest bookings and preferences
.....	2.POS	b. Records food and beverage sales
.....	3. Inventory System	c. Monitors inventory usage
.....	4.Barcode Scanners	d. Speeds up transaction processing

III. Multiple Choice Questions:

5. Which system helps prevent overbooking by integrating online booking with hotel management?
 - a. POS system
 - b. MS system
 - c. inventory system
 - d. HR system
6. What data is most essential for generating a MICE revenue report in a PMS?
 - a. Employee payroll data
 - b. Event bookings, room reservations, and catering services
 - c. Guest satisfaction surveys
 - d. Staff training schedules
7. Which of the following is primarily used to track sales from food and beverage outlets?
 - a. PMS
 - b. POS
 - c. Inventory system
 - d. HR management software
8. What is the purpose of using barcode scanners in the hotel's system?
 - a. To record guest preferences
 - b. To process payments quickly
 - c. To track food and beverage inventory
 - d. To ensure communication between systems

IV. Answer the following Questions:

9. Why is it important to gather room booking and rate data from the PMS when preparing a revenue report? How does this data help in generating an accurate report for hotel management?
10. When creating MICE revenue report, why is it important to link payments to bookings in the PMS? How does this improve the report's accuracy and help with financial transparency?

11. How do compiling charges and payments using the PMS contribute to overall revenue management? Discuss how this process helps in generating accurate financial reports and understanding revenue trends.
12. What challenges might arise when gathering and categorizing additional revenue sources such as room service or parking fees using the PMS? How can these challenges be addressed to ensure an accurate miscellaneous revenue report?



Points to Remember

- **Revenue Streams:** Identify various miscellaneous revenue sources like spa, retail, parking, and services.
- **Data Collection:** Use POS systems, guest folios, and accounting systems for accurate transaction recording.
- **Payment Methods:** Track payments via cash, cards, mobile wallets, and direct billing, ensuring reconciliation.
- **Reporting & Analysis:** Use PMS to generate detailed reports and analyze trends for opportunities to increase revenue.
- **Track Booking Channels:** Collect data from various sources like direct bookings, OTAs, and phone reservations to ensure all bookings are accounted for.
- **Monitor Room Rates:** Record dynamic and promotional rates, ensuring accurate pricing data for the revenue report.
- **Gather Payment Data:** Link payments to bookings, including methods like credit cards, cash, and additional charges (e.g., services or upgrades).
- **Analyze Occupancy Rates:** Track room occupancy and cancellations to calculate revenue potential accurately.
- **Use PMS for Report Generation:** Utilize the PMS system for automated, customizable room revenue reports and detailed performance analysis.



1. Read the statements across the top. Put a check in a column that best represents your level of knowledge, skills and attitudes.

My experience	I don't have any experience doing this.	I know a little about this.	I have some experience doing this.	I have a lot of experience with this.	I am confident in my ability to do this.
Knowledge, skills and attitudes					
Explain the process of generating room revenue reports					
Describe food and beverage revenue report production					
Explain the steps in preparing MICE revenue reports					
Discuss the generation of miscellaneous revenue reports					
Highlight the importance of reviewing revenue trends					
Identify the use of PMS in revenue report preparation					
Explain the process of generating room revenue reports					
Describe food and beverage revenue report production					

My experience	I don't have any experience doing this.	I know a little about this.	I have some experience doing this.	I have a lot of experience with this.	I am confident in my ability to do this.
Knowledge, skills and attitudes					
Explain the steps in preparing MICE revenue reports					
Discuss the generation of miscellaneous revenue reports					
Highlight the importance of reviewing revenue trends					
Identify the use of PMS in revenue report preparation					
Explain the process of generating room revenue reports					
Describe food and beverage revenue report production					

2. Fill in the table below and share results with the trainer for further guidance.

Areas of strength	Areas for improvement	Actions to be taken to improve
1.	1.	1.
2.	2.	2.
3.	3.	3.

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