Learning Five Star

Front Desk Software

Five Star Hotel Systems

Corporation

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Logging In, Passwords, Security, Moving Around

This topic covers the simple techniques for getting in to Five Star, getting around in Five Star menus and screens, and using the special fields in the programs that offer features like date fields, lookup fields, and context sensitive help fields.

You can't use Five Star without having a User Login Name and a Password. This is the starting point for the system's security features. You can set up as many users as you like, and each will have their own secret password. You can use the security system to customize each user's menu selections. That is, you can exclude a user from any menu feature in the system.

To log in to Five Star type TUTORIAL in the User ID field and press enter. Then type SECRET in the Password field and press enter. You're in! Press F4 and you are out. (Don't worry about the Task Manager – that will be explained later)

To illustrate how security works, we will pretend to log in as SUSAN. In our pretend hotel, Susan is a new user, and she happens to be very nervous about touching the computer, as she is also new to front desk systems in general. To

log in she types her name Susan, presses enter, and then types her password Fluffy (that's her cat's name). You can't see it because it is a secret password. Notice how she has only a few features in the hotel menu and none in any of the other menus. Not only is she restricted, but since there are fewer choices, she finds it easier to learn.

The Administration menu's User Logins & Administration program is where her menu was set up. Only senior management should have access to this program, and all of your staff should be excluded from it. Select the user to be changed, and then select the Menu button.
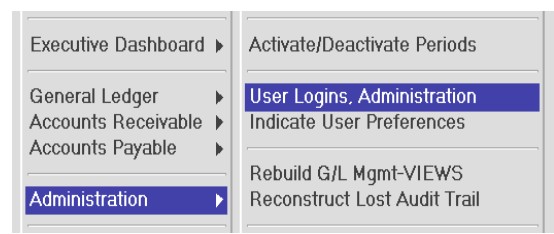
Click on any feature to add it to her menu, or remove the check mark to remove the feature from her menu. It's that simple. For a full explanation of menu design refer to the Front Office Reference Manual. The administrator will set up your user ID and password. The user ID is typically your first name. Your password can be from 1 to 8 numbers or letters. Don't forget your password because there is no way to look it up! If you forget your password the administrator will have to delete you as a user and recreate you. You can change your password by pressing F7 after you log in. Choose the Change Your Password button. You will need to type your old password in then type the new one, and then type it in again in the Confirm Password field. **Keep your password confidential.** The system tracks changes to reservations by the user login. It also tracks the posting of charges and payments by your login. A dishonest employee could login as you, complete a cash transaction, and put the money in his/her pocket instead of the till. That cash transaction would show on **YOUR** end of shift report and you would have to defend yourself!
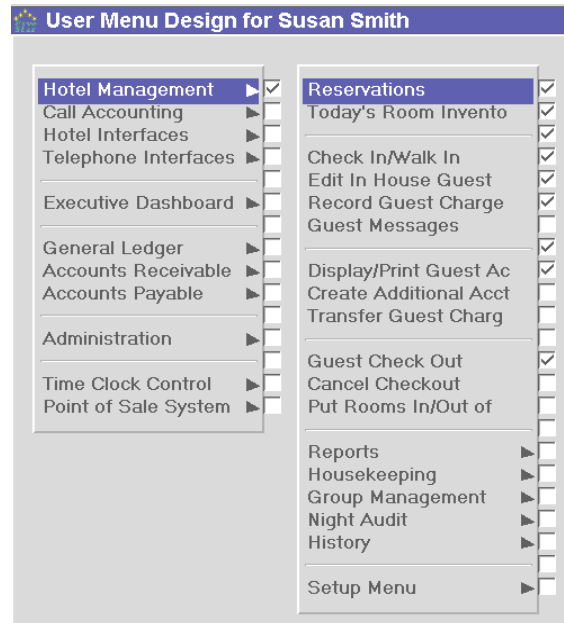
Getting Around with F3, F4, ALT, Arrows, Mouse

To move around on the menus, use the arrow keys, the Tab key, the Home key (it brings you to the top of a menu), the End key (brings you to the bottom of the menu), and Page up and Page Down (tabs you to the next dividing line in the menu) or of course you can use the mouse.

To move from field to field in all screens use the enter key. To reverse the steps press the F3 key. (Five Star supplies labels for your "F" keys. Check the box the program came with)

There are many keyboard shortcuts for getting quickly around all screens too. Whenever you see an underline under a letter if you press the ALT key and the letter or number that is underlined, the option will be immediately chosen.
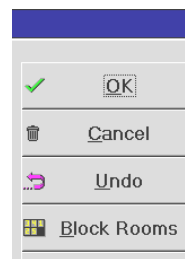
This is true throughout all Windows programs – it is called a Windows standard convention. For example, pressing ALT-O saves your screen of input. ALT-X takes you out of a screen. In addition, on most Five Star screens, if you press ALT1, 2, 3, or 4, you will be moved instantly to the 1st, 2nd third or 4th fields on that screen. These shortcuts eliminate the need to use the mouse.

We recommend that you learn to use the Five Star just with the keyboard. Most jobs like taking reservations can be done faster on the keyboard only, instead of switching from keyboard to mouse and back again, since you have to type names and addresses, and you can get from field to field using just the keyboard. It's slower if you have to move your hands from mouse to keyboard and back constantly. Many people are not comfortable with a mouse anyway.

The important exception to this rule is when you are editing existing information. It is very fast to simply point with the mouse to what you want to change, make the change and click Ok to save.
Note: any time you change a field you should press Enter. If you don't the program will use your next keystroke as an Enter. That is why you may find yourself double-clicking on OK. Your first click was used as Enter by the program.

Navigating Through Five Star - Entering dates, F1 Help & F2 Lookup Windows

Five Star date fields have a great shortcut. If the field already shows you the correct date, like today's date, just press enter. If you want a different day, but the same month and year, just type the day. If you want a different month, you have to type the month and day, but you still don't have to type the year. This can save thousands of keystrokes each year.

Please enter the expected Arrival Date	5	Jun 3/99
Please enter the Length of Stay in Nights	1	
Please enter the expected Departure Date	19990604	Jun 4/99

| Enter Date as YYMMDD | RmNites Available: 426 | RmNites Sold: 1 |

Most every field and menu option has context sensitive help for tips on what to do at every point. Press F1 anywhere in Five Star to see information about what to do at that point. You can even easily edit this help to customize it to exactly meet your own needs.

Help Guide

You may select a guest by placing the highlighter on the Guest's name and pressing ENTER.

Or select **Print Express Check Out Folios to print a folio for all of today's expected departures.

ar the guest you want. Use the arrow keys to select the guest if he is
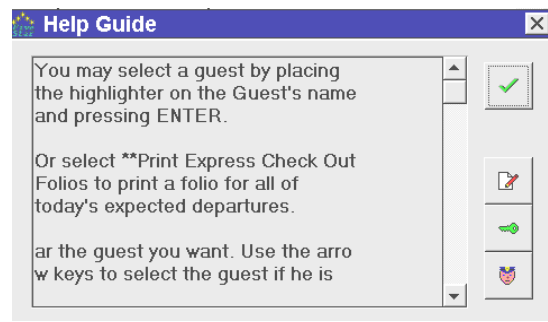
Many fields are for specific information, such as room numbers, transaction codes, etc. Using the list feature on these 'lookup fields' saves typing and having to remember choices. Lookup fields also have powerful search features. You know these fields by the magnifying glass icon to the left of the field.

Press F2 or click on the magnifying glass and up comes a search window. Scroll down the list and make your choice. Or faster still, just start typing the first few letters of what you want to find, and within a half second, your selection will be found. Remember that the speed search looks only down the left–most column. In the example below you would type in the first few letters of whatever Corporate Code you were searching for.

Many lookup windows have a first choice at the top of the list that makes the lookup different. For example in the Edit In House Guest screen you start by seeing a list of the existing in house guests by room number, and the first option on the list allows you to lookup by guest name. Either type a room number like 0105 to look up the guest in that room (Jack Carlton) or press enter to **Search for Guest by Name**.

The lookup always searches based on the information in the left hand column of the list. This is called the Speed Search. So if you see guest room number in the left column, you need to type in a room number in order to find the information. Or, you can choose the first option to lookup by last name, and the window changes to sort that way. Now you can type the last name and quickly find your guest. No matter how many guests you have the speed search always takes about a half a second to find something. It will never slow down, even with 500,000 names in guest history.

In addition to the Speed Search, if you press F2 while in a search window, you can do a more general Word Search. Type the complete word you want to match, and press enter. Five Star searches the entire file, not just the left hand column, for matches, and shows you all it finds. We call this the emergency search, since it can take longer, especially in big files (history). Use it for things like finding a guest's first name Susie, or someone from Washington, or a phone number 416-555-2223, or even find a credit card number. The word search makes finding information extremely flexible. Be very exact when using the Word Search. If your staff has typed in a phone number 416-555-2223 but you enter the Word Search as 4165552223 (no dashes), the Word Search will not find it. Five Star formats telephone numbers during a reservation, so make sure you don't overwrite the format. Train your staff to enter addresses etc in a consistent fashion. This consistency will also help you a year from now when you are doing mail merges.

ACAD01	Acadia Travel
ACAD02	Acadia Travel Agency
ACAD03	Acadia Travel Agency Ltd
ACAD04	Acadia Travel Service
ACCE01	Access Travel
ACCE02	Access Travel Corp ltp
ACET01	Ace Travel & Tour Consultants

Word Search for   Chicago

Toolbar Buttons – Task Manager
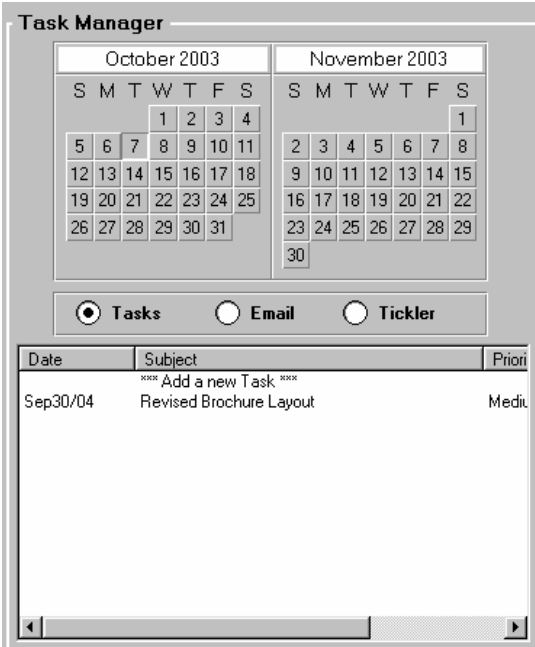
This feature appears automatically to remind you of any tasks you may have on the go and to show you if you have any e-mails. For users with the optional Banquet & Catering module you will see any Ticklers (reminders) that are due.

Click on ***Add a new Task*** and fill in the fields appropriately. This is a great tool when the manger has given you a project to complete or you need to remind yourself to make arrangements. Click on the Email radio button and you can check for any emails sent by other Five Star users. Note: the email system is not connected to the Internet. It works within the Five Star network at your property.

Toolbar Buttons – Screen Cam

This is an important feature for the new user. Your computer will require speakers for this feature. Click on the Movie Camera icon and you will see a list of topics. Click on the topic you are interested in. An audio-visual demonstration will begin. To stop the demo just click on the small control panel that will appear in the bottom-right corner of the screen.

	Sat Jul5 88% t2	Sun Jul6 73%	Mon Jul7 44%	Tue Jul8 37%	Wed Jul9 25%	Thu Jul10 25%	Fri Jul11 52%
DDN	0	1	12	13	12	11	2
DDS	0	0	2	2	3	3	4
HSN	1	2	2	2	3	3	3
HSS	1	1	1	1	1	1	1
KSN	0	0	1	0	1	2	0
KSS	0	0	0	0	0	0	1
QCN	2	3	1	3	5	5	5
QCS	1	0	1	1	2	2	2
QQS	0	1	1	2	2	2	2
QSN	1	4	6	7	8	8	3
QSS	0	2	2	2	2	2	2
Total	6	14	29	33	39	39	25

#Rms - Available
#Rms - Overbooked
Date - Yield Mgmt in effect

Continue
More Rooms
Next 7 Days
Previous 7 Days
Different Room Type
Groups of Room Types
Zoom in on Detail
Show 30 Day View
Exit

RmNites Available: 363   RmNites Sold: 178   % Occupancy: 49.04

The F5 Availability screen is accessed by pressing F5 or by clicking the white calendar grid icon third from the left on the toolbar. It is one of your most important information sources for what's available any time in the present, future, or past. It shows you a weekly view, or monthly, as you prefer. For this example, pretend today is July 5, 2003. We have 6 rooms left to sell today, 14 tomorrow, and on Tuesday and Wednesday next week we are not very busy.

It allows you to split your property into room types. In our sample, the property consists of Double Double Non-smoking, Double Double Smoking, Handicap Sofa Non-smoking, etc. This list is of course tailored to your property's structure.

The numbers in red represent room types and dates sold out or oversold.

The dates showing in yellow are impacted by Yield Management (not available in Five Star Lite). They are dates that you expect to be busy, based on past experience, so you tell Five Star to automatically raise prices. Yield Management can produce very substantial increases in profitability, and Five Star has one of the simplest, but most powerful yield management systems available.

At its simplest, you can set yield management to show yellow on busy dates, but also set it not to raise prices. This way yield management simply warns staff not to discount prices on those dates. Every hotel can benefit from even this simple form of yield management.

Beneath the date is the percentage occupancy for the day, and the tier increase level is shown. Five Star offers eight tiers or rate increases. This tier system is designed to encourage your guests to book early, much like the airlines do. The later you book, the higher occupancy will already be, and so the higher the price is likely to be. Please note that you can exclude any rate type from yield management, such as government, preferred corporate etc., if yield management should not impact their rates. You can also exclude any room type.

Use the next button to advance to any date in the future, or the previous button to go back.

Click on the Show 30 Day View

This gives a monthly view of availability. The black numbers represent the day of the month; the green numbers are the total availability and the brown numbers are the group rooms that haven't been "Picked Up" yet. When a group reservation (not available in Lite version) is first made the system blocks rooms but doesn't actually make an individual reservation for each room. That is done later.
If you want to view specific room types click on the Different Room Type button.

Toolbar Buttons - F6 Rooms Booked
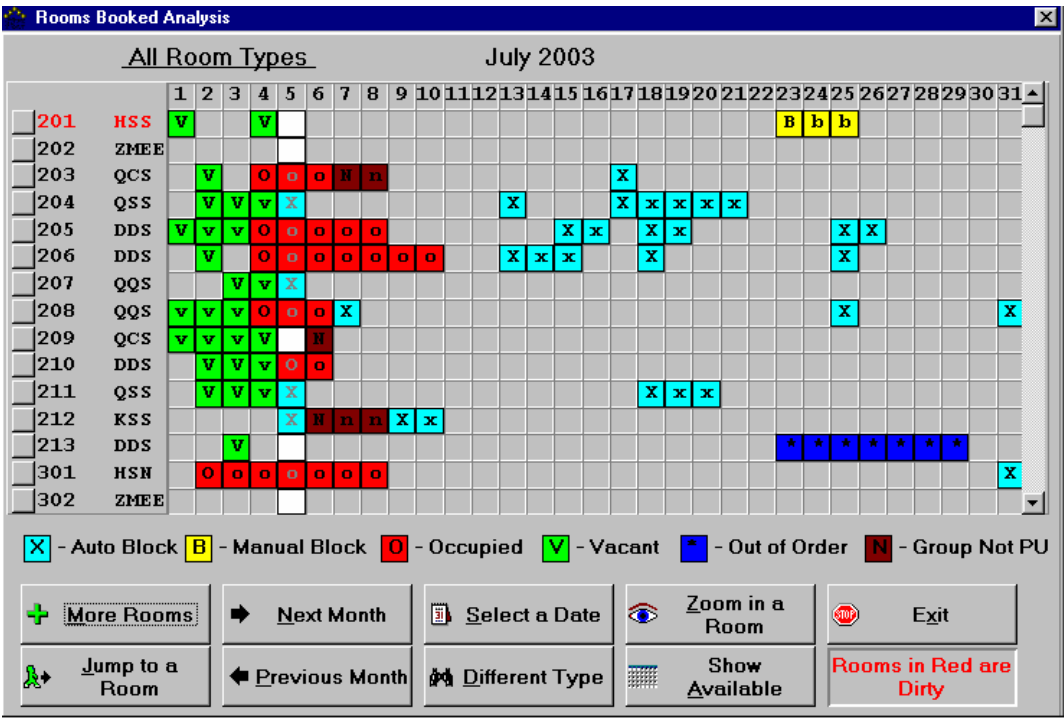
The Rooms Booked Analysis screen is accessed by pressing F6 or by clicking the white book third from the left on the toolbar. It too is one of the most important tools for information.

It shows your room numbers, and their room types. It displays the days of the month, and any activity for each room on any date. Red O's mean a room is presently occupied. Cyan X's mean there is an auto-blocked reservation. A yellow B means there is a manually blocked reservation. A manually blocked

reservation is made when you tell the computer the room number the reservation requires. An auto-blocked reservation happens when you specify only the type of room but not the room number. There are advantages to both. A green V means the room was occupied and the guest has checked out. A blue asterisk means the room is out of order. A brown N means that a group has a room of that type blocked but no reservation has yet been assigned. When the room number and room type code are red, it means the room is presently dirty (i.e. 201).

Press enter and the next 15 rooms are displayed, and you can quickly scroll through all the rooms and go back to the start again. Choose the Next (Alt +N) or Previous (Alt+P) buttons just like you can do on the F5 screen, and you advance a month at a time or go back by the month. To view specific room type availability like King Sofa Non-smoking only, choose the Different Type (Alt+D) button.

The Show Available (Alt+A) button is very useful when you have just a few rooms left and you want to see exactly which ones for a selected date range. Enter the date range and you see only the rooms that are available. If you have a guest already on the Reservations Screen or the Check-In Screen etc., and you pop up the F6 Screen, it already knows the arrival and departure dates.

The F6 screen is generally used when making a reservation or doing a check in for a guest that wants a specific room number, or needs something like 'it has to be close to the elevator'. Smaller properties with unique rooms, and larger properties, when booking suites, typically rely on the F6 screen for this information. When booking a standard type of reservation like ' I need a queen sized bed, non-smoking' the F5 screen is better suited to the task.

Toolbar Buttons – Other Useful Features

One of the more unique tool bar buttons is the show rooms button. Have you ever had someone want to see the honeymoon suite and it was occupied? Click the Show Rooms toolbar button fourth from the left, or press F7 and select the Display Pictures of Rooms option. Then choose the room to be displayed and the room photo is displayed. The feature can be a real time saver. This feature must be set up by your administrator/manager. They can take pictures with a digital camera then save the pictures as a Bitmap image on the computer.

The F7 key or tools button offers a big selection of the very important features you will use regularly, while doing other things. How often do you have to do two things at the same time on the front desk? Five Star lets you do it.

Tools

Guest Lookup by Name	Display/Print Guest Acct
Guest Lookup by Room #	View Group List
Guest Lookup by Res. #	Short Form Addresses
Display Pictures of Rooms	Reference Manual
Currency Calculator	Calculate Daily Fee
Currency Exchange Rates	Brochure Request System
Guest Messages	Record Guest Charges

The F8 key or bookmarks button truly opens up new worlds of flexibility. Have you ever been in a big batch of transactions and the phone rings for a reservation? In some systems you have to save what you have done, get out of the batch, find the reservations program, take it, and then get back to the batch. With Five Star you are 2 clicks away from the reservation (or anything else you want) and when you are done, you are right back to what you were doing. You can make your own list of bookmarks, and each user has his own list.

To create a bookmark click on the New button. You will be presented with a menu. Click on the item you want a shortcut to. You will then see that feature listed as in the example below. To access it in the future press F8 or click on the book icon then click on that feature and you are brought there immediately. When you are finished it will leave where you were before going to the bookmark.
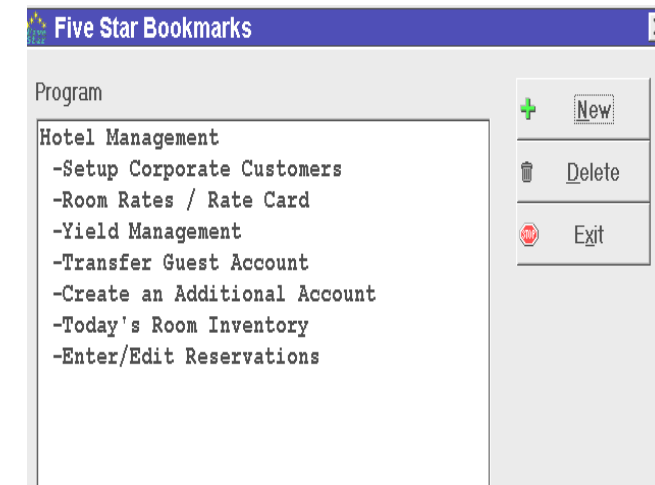
Have you ever had the night audit jam in the printer, or have you misplaced a report? Worry not – Five Star remembers every report you print for 1 day, and lets you reprint it at will. Click the printer icon (or press F9 key) to the right end of the toolbar. If you need to reprint someone else's report, you must log in under their user id. This is part of the security system. You would not want anyone to be able to reprint just any report. Choose the report you want then click the printer icon again and print.

Reprint Reports

Report#	Description	Date / Time
86563	The North American Inn\Occupancy Forecast from Thu Jun 3/99	00/07/11 08:39am
86464	The North American Inn\House Status Report for Thu Jun 3	00/07/11 08:38am
86441	The North American Inn\Room Availability Reconciliation for	00/07/11 08:38am
86423	The North American Inn\Occupancy Forecast from Thu Jun 3/99	00/07/11 08:38am

Select a report to view it.

The Email system helps when you get a call from crotchety old Mr. Jones, who is coming in well after your shift is over, and you have to get a message to the next shift on that night about a problem you must solve for Mr. Jones. Access Email by clicking on the envelope icon on the toolbar. Select the person you want to send mail to, type your mail message and send it. You will be presented with the option to send the message to another user. You can choose one, some or all users. This is useful when announcing

meetings, policy changes etc. Recipients will be notified of the message the next time they log in.

Here, always available, is your list of vital phone numbers and addresses, for pizza, fire, police, taxi, etc. etc. Any names entered here are accessible to all users.

You can store personal numbers here. Information entered in this list is accessible only to the person who entered it.

Pop up a calendar for any date check. What day of the week does Christmas fall on this year? Press F2 in a date field to access the calendar.

July 1872

	1872	
	July	

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

OK
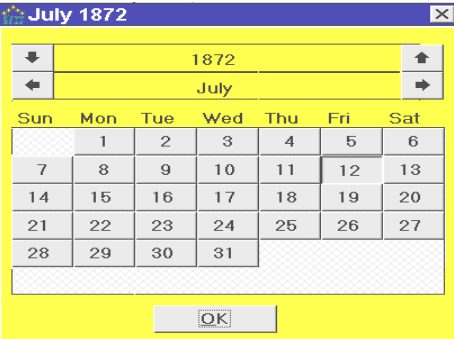
Pop up a calculator (press F2 in a numeric field), do the math, and press ALT+T and the answer is automatically placed in the field you were in (i.e. Room rate, charge amount). This is much better than a desktop calculator. You can use the keypad on the right side of your keyboard. The " / " key is for division and the " * " key is for multiplication. Enter your numbers as you would on an accounting calculator, not like a scientific calculator.

Five Star Calculator

4.00

2.00+
2.00+
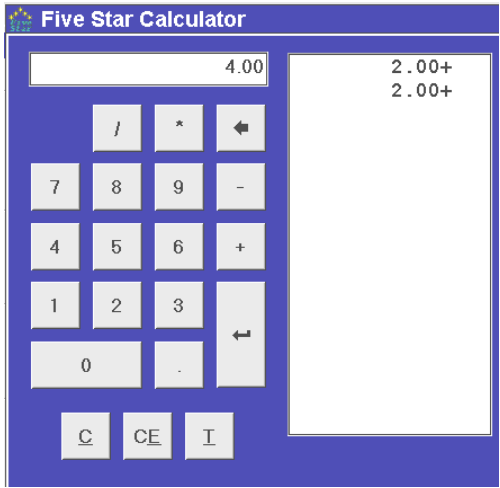
Use the alarm clock to remind you of phone calls you need to make. So long as you are in Five Star you will see a reminder on the screen when the alarm goes off. The alarm is visual only – there is no sound alarm.

Reservations - Taking a Simple Reservation for a New Guest

This first reservation example is made simple, to show you how to get through a complete reservation. Other examples follow that build on the basic one.

The reservation process begins with the phone ring, and the Reservationist asks: 'North American Inn, how can I help you?'

The Guest answers: I would like to make a reservation for Dec 5th.

As soon as you hear these words (and if you are in the Hotel Management menu) press the HOME ENTER ENTER keys. Starting the process with these three simple keystrokes instantly starts the reservation process from any point in the hotel menu. Doing it that way means less thinking and less room for keystroke error.

The Current Selling Date in the Five Star System is either incorrect or the Date on your Computer is not set properly.

YOU SHOULD NOT PROCEED WITHOUT CONSULTING YOUR MANAGER!

OK
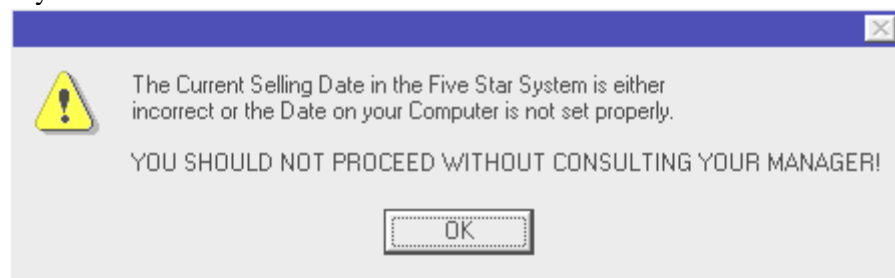
If you see the above screen when practicing in the Learning Hotel, don't worry. The program checks the selling date in Five Star and compares it to the date on your computer. The Learning Hotel selling date seldom matches the actual date. If you are in the Real Hotel and you are live, then you shouldn't be getting this message. That means that the auditor has run the night audit more than once or has forgotten to run it completely! Note: the date displayed in the bottom right hand corner is refreshed from your computer's date when you start Five Star. This is not necessarily the selling date in Five Star. Choose OK to bypass this message when practicing.

Availability Summary

	Wed Dec3 67%	Thu Dec4 88% t2	Fri Dec5 58%	Sat Dec6 58%	Sun Dec7 58%	Mon Dec8 0%	Tue Dec9 0%
DDN	1	0	1	1	1	16	16
DDS	2	0	2	2	2	4	4
HSN	3	0	3	3	3	3	3
HSS	1	0	1	1	1	1	1
KSN	2	0	3	3	3	3	3
KSS	0	0	1	1	1	1	1
QCN	4	2	6	6	6	6	6
QCS	1	1	2	2	2	2	2
QQS	0	0	0	0	0	2	2
QSN	2	2	2	2	2	12	12
QSS	1	1	1	1	1	2	2
Total	17	6	22	22	22	52	52

#Rms - Available
#Rms - Overbooked
Date - Yield Mgmt in effect

- Continue
- More Rooms
- Next 7 Days
- Previous 7 Days
- Different Room Type
- Groups of Room Types
- Zoom in on Detail
- Show 30 Day View
- Turn Away / Wait List
- Exit

Please enter the expected Arrival Date 20031203 Dec 3/03
Please enter the Length of Stay in Nights 1
Please enter the expected Departure Date 20031204 Dec 4/03

Room Type
Rate Type

You are brought to the room availability screen. It shows you a weekly view, or monthly, as you prefer. For this example, pretend today is December 3rd, 2003. There are 17 rooms left to sell today, 6 tomorrow, and on Monday and Tuesday next week the property is empty.

Your property is split into room types. In our sample, it consists of DDN - Double Double Non-smoking, DDS - Double Double Smoking, HSN - Handicap Sofa Non-smoking, etc. This list is of course tailored to your property's structure.

The numbers in red represent room types and dates sold out or oversold. The dates showing in yellow are impacted by yield management. They are dates that you expect to be busy, based on past experience, so you tell Five Star to automatically raise prices. Yield management can produce very substantial increases in profitability.

At its simplest, you can set yield management to show yellow on busy dates, but also set it not to raise prices. This way yield management simply warns staff not to discount prices on those dates. Every hotel can benefit from even this simple form of yield management.

Beneath the date is the percentage occupancy for the day, and the tier increase level is shown. Five Star offers eight tiers or rate increases. This tier system is designed to encourage your guests to book early, much like the airlines do. The later you book, the higher occupancy will already be, and so the higher the price is likely to be.

Your cursor should be in the Arrival Date field.
At this point you ask three questions in this order. If you remember an ant crawling on the floor you can remember the questions – Arrival, Nights, Type of room.

What date will you be arriving?

The Guest answers: We'll be arriving December 3rd.

Enter the arrival date, and notice the availability instantly shows you the date selected. Press Enter.

It just so happens that on the date this guest will be here, a special event is taking place. Five Star can notify your reservations agent of the event, as a selling opportunity, or even just as a simple reminder of something. You get to impact every reservation taken for any date.

Yield Management Information

Yield Mgmt info for Wed Dec 3/03:
Murder Mystery in dining rm. Show and dinner $99/couple. Seating starts at 6:00pm.
Reservations required.

OK
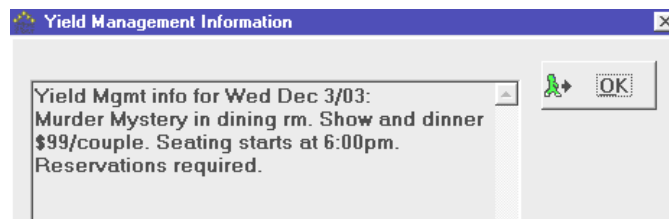
And the Reservationist asks: How many nights will you be staying?

The Guest answers: 1 night.

Enter the number of nights, or skip the field and enter the departure date, depending on how your guest gives you the information.

If you are sold out at this point you can stop, or suggest alternative dates. Otherwise your cursor should be in the Room Type field. If you have availability, press F2 in the Room Type lookup window.

And the Reservationist asks: And what type of room would you prefer?

The Guest answers: It's for my wife & I so we want a queen sized bed. Non-smoking please. We don't need a suite.

And the Reservationist says: I would suggest one of our Nonsmoking Queen bedrooms.
Select QCN from the list of room types and the prices are shown. Do this by typing QCN or "arrowing" down to that room type and pressing Enter.

The Room rate screen is automatically displayed. Yield Management impacts yellow rates. If the guest is staying over a weekend, and your rates change on weekends, you can select the weekend button and display the weekend rates.

And the Reservationist says: Your rate will be $89.99 per night plus taxes.

The Guest answers: That's fine.

Arrow down to the rate and press enter.
You are brought to the next screen. Your cursor should be in the Last Name field. At this point put your finger on the F2 key.

And the Reservationist asks: Have you ever stayed with us before?

If the answer is yes, press the F2 key and you access the Guest History file. For this example, the answer is no, so we will type the reservation details. (If you have accidentally pressed F2 just press F4 once to get back to the Last Name field.)

The Guest answers: No this is our first time at your property.

And the Reservationist asks: Would you spell your last name?
We ask the guest to spell their last name since you usually end up asking this question anyway. It also assures accuracy. No guest wants to see his or her name misspelled on the Registration Card.

The Guest answers: Wilson, W I L S O N.

And the Reservationist asks: And your first name?

The Guest answers: Bob & Sally.

If you don't normally take addresses you can skip this step, but we recommend that if you have time you do take the address. That way when the guest arrives, his registration card is already filled out completely. Check in can be much faster, and the guest feels you are giving him better service
And the Reservationist asks: And your mailing address please?

The Guest answers: 345 South Avenue Toronto, Ontario,

And the Reservationist asks: And your postal code please?

The Guest answers: M2W 3E4

As you type Five Star cleans up the typing, by putting in capital letters where they should be (including Scottish names). This makes registration cards, confirmation letters, folios, and mail outs more professional and personal. The short form addresses feature saves typing time too. You can set up as many of

these as you like. This program can be accessed from the F7 tools menu, Short Form Addresses program.

Establish a common format for all staff when entering addresses.

E.g. Address line 1 should be street address
     Address line 2 should be city and province
     Address line 3 should be the country if the guest is from a foreign country, otherwise leave it blank

This is done for uniformity and to simply mail merges in the future.

And the Reservationist asks: And your telephone number, area code first please?

The Guest answers: 416 332 4454.

Don't bother entering spaces or dashes. Five Star will do it for you once you press Enter.

And the Reservationist asks: With what credit card would you like to guarantee the reservation sir?

The Guest answers: Visa. 5454 5454 5454 5454. (Use this number while training. Five Star doesn't format credit card numbers so you will need to insert spaces or dashes. Adopt a uniform method among staff.)

Five Star alerts you immediately to incorrectly typed numbers
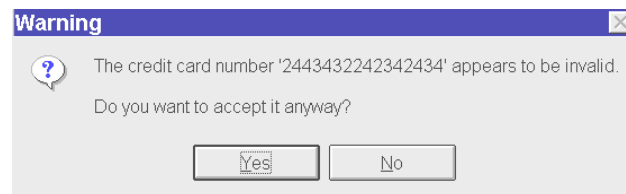
The expiration date is checked at the end of the reservation when you choose OK. The Expiration Date field will be highlighted if the card expires before the current month. If the card expires before the guest's arrival date but not before the current month you will be reminded but you still have the option to

accept the card and proceed. This could occur for guests booking a year from now but their card expires in 8 months.

And the Reservationist asks: And the expiry date?
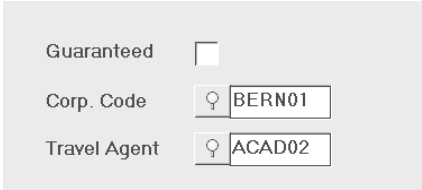
The Guest answers: 0906.

And the Reservationist asks: Would you like to receive a confirmation via email?

Enter the email address in the email field. Five Star can be configured with Outlook (not Outlook Express) to automatically send a confirmation letter via email. You must have Outlook and access to the Internet for this to work. And the Reservationist asks: Are you traveling on business?

The Guest answers: No it's a holiday.

If the guest is traveling on business, you can record the corporate Code, so his company can be direct billed. Five Star prints the invoice and does the billing. If the guest has no corporate code but would like one, then management will have to create one in the Hotel Setup menu. Usually the guest must apply for a code since they are essentially applying for credit.

If the person on the phone is a travel agent, you can record his information. This is all the work you need to do to ensure the agent gets paid, as the

program gives you a report each day for commission amounts payable. And if you have the Five Star Back Office Accounting Program too, it even prints the cheques. Five Star can dramatically ease the work needed to pay travel agents, when compared to a manual system. Five Star comes pre shipped with 2500 Canadian Travel Agents! To create a new agent just press F2 in the Travel Agent field and choose **Add a New Travel Agent**
The code should be the first 4 letters of the agency followed by 01. If another agency is already using this code then use the first 4 letters followed by 02. Fill in the fields as indicated. Make sure you enter the appropriate commission and if it is a Canadian agent include the GST number. If they don't have their number then just put the number 1 in so that the system calculates the GST for the agent's commission.

And the Reservationist asks: The number of adults in your party?

The Guest answers: 2

And the Reservationist asks: And the number of children under 12?

The Guest answers: None.

And the Reservationist asks: And you just need one room?

The Guest answers: Yes, just one.

And the Reservationist asks: So to confirm, your rate will be $89.99 per night plus taxes.

The Guest answers: Fine.

If the rate needs to be changed, you can do it at this point.

Press enter twice and you are brought to a second screen, Guest Prefernces. (If the screen does not come up that means your defaults have been set to bypass this screen. You can access this screen by choosing the Guest Prefs button on the reservation screen)

Guest Preferences for

Vehicle Type	
Plate Number	
Driver's License	
Special Occasion	ANNIVERSAR
Spouse's Name	
Parking Pass	
T/A Contact Name	
Member #	
Partner	
VIP Guest	Market Source Code ♀ TRAV
History Notes:	
:	
Comments :	guest requests a bottle of Mumm's champagne in room on arrival

The first 9 fields showing on this screen are called User Defined fields (not available in Five Star Lite), meaning that you can make them appear, or simplify the screen by making them not appear. There are up to 40 of them, and we presently have 9 examples defined. You can make them ask any question you need, and they can be from 1 to 40 characters wide. Standard hotels don't use many; high service properties use them extensively. Any of these fields can be made mandatory and can also be set up to give you a list of pre-defined choices. The information you store here can be sent to a report for later use (Not available in Five Star Lite).

Press Enter until you get to the VIP box. Press the space bar or click on the field to check it off.

The market source code allows you to track how your guests have heard about you. This can be set as a mandatory field. It is very important that you fill this in correctly so that management can see where their advertising dollars are being used most effectively. (These reports are unavailable in the Lite System)

And the Reservationist asks: By the way sir, how did you hear of us?'

The Guest answers: We saw your ad in the Buffalo Daily News.

If Five Star can help you turn $500 worth of advertising into $100,000 in new business or help you see that a $3000 ad netted only $1000 in new business, you can see the impact of this feature. We think it is the most important thing a reservations program can do for you.

Save the history notes field for later. History notes are to be reserved for listing undesirable guests (i.e. damage to room, unpaid expenses etc). The Comments fields are to note anything that wasn't included earlier but needs to be. One of the next reservation examples will show you how useful these fields are. Any information entered into the History or Comments fields will automatically pop-up when the reservation is accessed, such as during check-in or when copying from history.

And the Reservationist asks: Anything else you need?

The Guest answers: Could we have a bottle of champagne in the room on arrival?

And the Reservationist asks: Certainly sir, the cost is $45 for Mumm's. Will that be fine?

The Guest answers: Yes, great.

Enter this information on the first line of the comments section. Five Star will print a report so housekeeping can be sure to have the special requests prepared. (Not available in the Lite version) Avoid entering information in the 4th or 5th lines of Comments. These lines are used by the system to record cancellation or no-show information. Keep your comments short and to the point. Use codes if necessary. Your guest is waiting while you are typing.

Press Alt + O to wrap up the process. Review the information on the main screen with the guest. Press Alt + O to accept the reservation.

And the Reservationist responds: Your confirmation number is 001013, and we look forward to seeing you on December 3rd Mr. Wilson. Do not give the guest the room number. If that room is unavailable at check-in you will have a problem on your hands!

Last, if you want, a hard copy of the reservation will be printed. If you aren't prompted to print a copy of the reservation it is because the defaults weren't set to. Most hotels don't print hard copies. If you do require one go back to the Reservation screen, call up the reservation then press F9 with the reservation on the screen, and send it to a printer.

Reservations - Taking a Simple Reservation for a Repeat Guest

This example will be for reservations taken for repeat guests. One of the most valuable things any system will do for you is to improve guest service and save time, by copying from the computer's guest history file. Each time you check in and check out a guest, Five Star saves over 150 pieces of information about the guest's name, address, room type, rate type, rate, room number, preferences, and special requests, for saving time on repeat business, or for market analysis reporting. The process starts the same:

The Reservationist asks: What date will you be arriving?

The Guest answers: We'll be arriving June 5.

And the Reservationist asks: How many nights will you be staying?

The Guest answers: 2 nights.

And the Reservationist asks: And what type of room would you prefer?

The Guest answers: It's for my wife & I so we want a queen sized bed. Non-smoking please. We don't need a suite.

Select the room type, quote the rate, and select it.

You are brought to the next screen. The cursor will be in the Last Name field. At this point put your finger on the F2 key.

And the Reservationist asks: Have you ever stayed with us before?"

The Guest answers: Yes we have.

Press F2.

And the Reservationist asks: Would you spell your last name?

The Guest answers: Jeffery Adams. A D A M S.

Guest Name	Address	Res.#	Visit#	Arrival	Nts	Rm.#
** Copy from another Reservation or the Brochure System **						
Adams, James	5 Cambrian Dr	904475	1			
Adams, James	Box 97	907639	1			
Adams, Jeananne	203 Birchdale	916433	2	Jun 14/03	1	203
Adams, Jefferey	2108 Blue Ridge Cr	011231	1	Jul 28/03	2	303
Adams, Joyce	158 185 Rr1	907291	1			
Adams, Leigh	Box 202	900554	1			
Adams, Leslie	735 Eaton Ave	903946	1			
Adams, Louise	Box 186	913330	1			
Adams, Mary	12650 Larch St	910764	1			
Adams, Monique	.	910464	1			
Adams, Robert	201 Ash Ave	001717	1	Oct 13/02	3	504
Adamski, John	Box 132	900446	1			
Adamson, Pat	Box 37 Site 2	916642	1			
Addams, Michelle	33 B Apple Lane	915885	1			
Addictions Foundatio	Barry Henrickson	005483	1	Jan 24/03	0	ZG16
Addison, Kyle	1500 Royal St	007764	1	Mar 14/03	2	305
Adduno, Sid	34 Archibald St	907644	2	Jun 14/03	2	400
Adelard, Gauthier	La Broquerie	913644	1			
Adema, Rinse	80 1st Ave	917178	1			

Speed Search `ADAMS`

F10 - Show All Visits

Start typing the first three or four letters of the last name, **but don't press enter**. Notice the speed search starts right away, and within a ½ second lands on the first match. This may not be the right guest, for example you might have 100 Smiths on file. Use the arrow key to select the right one. You might ask for the street name and number, or say

And the Reservationist asks: That's Mr. Adams of 2108 Blue Ridge Crescent?

The Guest answers: That's right.

Notice the screen also shows you the number of visits, and the details on the screen are for the last one. If you want to see all visits, press the F10 key and all appear. This might be useful if your guest says 'We liked the room we had two years ago and didn't like the one you gave us last year.'

When you get the right one, highlight it and press enter. All the guest information appears on the screen. In the case of Mr. Adams, this second guest preferences screen appears, because there is information from the previous visit in the comments field. We call this a value added selling opportunity. That is, a chance to add value to your guest's stay, without it costing your property money.

And the Reservationist asks: Mr. Adams, would you like me to make sure you are on the ground floor again sir?

Mr. Adams loves it.

Back on the first screen, all the previous information is displayed – credit card info, corporate, preferred room type, rate type, and even the last room number, which the computer will try to rebook if available. It also shows you number of previous visits, cancellations, no shows, V.I.P. status, room rate and last revenue. Run through the information with your hand on the mouse ready to point to any fields that must be changed. Confirm the information like this: We have you at 2108 Blue Ridge Crescent, Victoria BC, Do you want to guarantee the reservation with your Amex card again sir?

The Guest answers: That will be fine.

And the Reservationist asks: I will need the new expiry date for your card Mr. Adams.

The Guest answers: It's currently 1004.

When a change is necessary, point to the field, and click, change, press Enter and click OK. The reservation is complete.

Here is another example of why guest history can save you time and money. Lets start another reservation and copy from history for Barry Adraktas. Oh Mr. Adraktas I see we have just sold out. Perhaps I could recommend the xyz hotel down the street. The bad list saves you from taking undesirable reservations. Is there anybody you would like to exclude?

Notes from History:

GUEST DAMAGED ROOM NO FURTHER SERVICE

OK
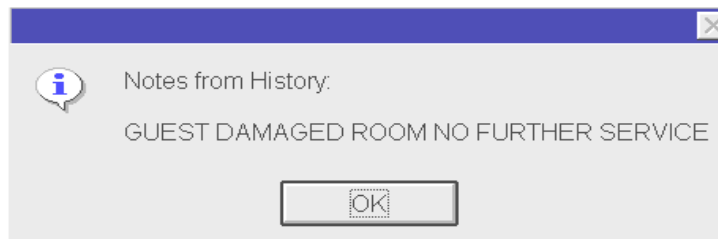
Now the question is – is that faster and better guest service than taking all the information over again every time? How much would your regular guests appreciate your being fully prepared for them every time? As a regular traveler myself, one of the first impressions I get from a property are based on using guest history, and having my registration card and check in all ready for me when I arrive.

The system also tracks how many times a guest visits. If a guest is entered new each times he comes instead of copying from history, Five Star will treat each visit as the first. If you decide to run a frequent visitor program, Five Star will show this person as having arrived many times but each time was the first, instead of the 10th, or 20th, etc.

Reservations - Taking a Reservation for a Specific Room Number

So far the reservations taken were all auto-blocked. That means, we selected the room type and did not have to select a room number. Many reservations require you to pick a specific room number to ensure the guest gets what he asks for.

Manual blocking makes more sense for guests that want a particular room number, or who make a request like 'I need to be next to the elevator since I have a bad leg.' Or 'Can I have room 102 again. We love the view of the lake.'

Auto juggling would likely not meet the guest's need, so his room should be manually blocked. (Auto juggling will be explained shortly) To do so, start the reservation like the examples shown in the previous topics. And before you finish, choose the Block Rooms button. Or if you forget while taking the reservation, it is easy to call it to the screen again and do it after the fact. Enter the room number and complete the reservation. A Manual Block is put on the room, i.e. a yellow B on the Rooms Booked (F6) screen.

Frequently the F6 screen is used in conjunction with manually blocking a room. Click on the Show Available button. The screen already knows your guest's arrival and departure dates. The F6 screen shows you only rooms that are available on the dates requested. Choose a room, press F4 and enter it in the Block Room field(s). Accept the reservation. Notice that the last window shows the room is manually blocked, and the F6 screen shows the block with a yellow B.

What if you had already accepted the reservation before manually blocking a room and the system had auto-blocked the room you wanted? You need to turn the auto-block into a manual block so that the auto-juggler or another staff member doesn't bump your room assignment. Go to the Block Rooms button then click on the Manual Block button.

There are three advantages to auto blocking, but you may not be able to do it all the time. However, even in the most unique and smaller properties, there is still an opportunity to auto-block at least 40 percent of reservations. We're talking about the kind of reservation typically made like 'I need a nonsmoking room for 2 nights for my wife and I, so we need a queen sized bed.' A perfect opportunity to auto block.

The first advantage to auto-blocking is that it is faster and easier. You pick the room type, and the computer picks the room number.

The second advantage is the auto bump feature. When you have a reservation that wants a room that is already auto blocked, simply manually block the second reservation to the room and Five Star asks if you want to bump the first reservation to another room.

Room #0108 is Auto Blocked for another Guest.

Would you like to move the Auto Blocked Guest to another Room?

[Yes] [No]
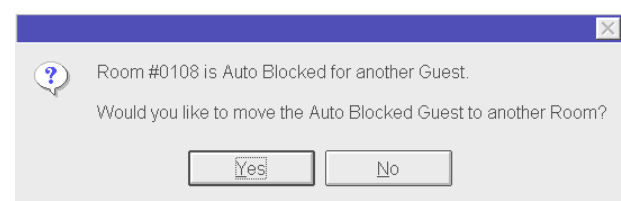
The third and most important advantage is a feature called auto-juggling. The night audit automatically evaluates all auto-blocked reservations, (not manually blocked ones) to increase the yield of the property. For example when it finds a situation like this, it may move the reservations from room 109 and 106 to 108, making it possible to block other reservations for the other rooms for the whole month. This juggling is a process you likely do now, and Five Star reliably does it every night for the whole property. Experts say that since it typically takes three reservations to get in the way of a fourth, on average, juggling can increase the yield of a busy reservations property by up to 25%. The auto-juggler does not move manually blocked rooms nor will it change the room type. Only the room number will be changed. This occurs automatically during the night audit.

Reservations - Advanced Reservation Features

This section covers a range of features Five Star offers for reservations in addition to those we have already covered.

Requesting Confirmation and Other Letters:

You can set Five Star to print confirmation letters (not available in Lite version) for every reservation or for just the ones that request them. And confirmation letters are user defined, meaning that you can change them to suit your exact requirements. They can include any of the pieces of data you record in your reservations, including confirmation of special requests and preferences. Choose the Other button on the guest's reservation.

To request a confirmation letter click on the Confirmation Letter Required box. In addition on this screen you can request a deposit letter, or you can request a deposit dollar amount, and specify the date it is required. When a confirmation or deposit letter is printed it shows in the Confirmation Letter Printed field and the Deposit Letter Printed field. If a registration card is printed it shows in the Registration Card Printed field. If a deposit is received it shows in the Deposit Amount Received field and in the Date Received field. This screen also displays the estimated room charges including tax and will calculate the balance owing if the guest has sent a deposit.

Change Log:

Five Star logs every reservation, check in and check out with the date, time and operator who did it. Click on the View Changes button then choose **Show all changes**. You will see any changes made to the reservation after the reservation had been initially booked and accepted.

Every change that gets made is recorded as well, with all the details. In this example, you see the credit card expiry date was changed, and the room blocking was changed twice by GJSYSTEM. Marc changed the credit card and the card number. This information is available until the guest goes to history.

Other Daily Charges:

Choose the $Daily Chgs button on the guest's reservation. For guests that require other amenities like a cot in the room, parking, or safety deposit box these charges can be recorded in the Other Daily Charges screen. This is only for transactions that take place once each day, or in the case of a weekly, monthly or package rate, once for each week, month or package. The night audit will post the charge and applicable taxes each night automatically to the guest folio.

Turn Away / Wait List:

Do you ever have to turn away a guest because you are full, or can't accommodate his specific needs, or because you don't want the guest? The turn away and wait list feature helps. When you get to the point in the reservation where you don't continue, click the Turn Away button. Choose the reason you stopped, and fill in any blanks you want to, and save.
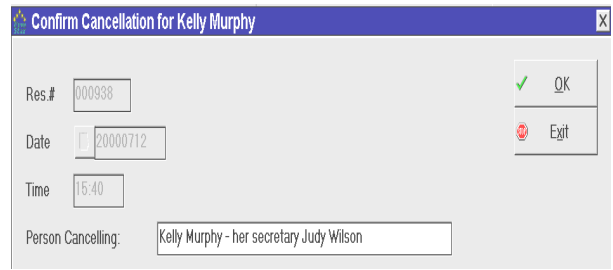
There is a report in the Reports menu called the Turn-away/Wait List report that shows you the reasons from a statistical perspective. You can recall guests that were on the wait list, or just use the statistics for evaluating changes you may be considering to cut down on the Turn-away opportunities lost.

Canceling a Reservation:

When a guest calls to cancel his reservations you can quickly find him with the speed search in the reservations screen. Select the guest, and choose the Cancel button. You will be asked for the name of the person canceling, such as a secretary or spouse, if it is not the guest.

When you Ok it, a cancellation number is generated. The reservation is immediately moved to guest history, where the cancellation number, date, time, operator, and person canceling are recorded. The next time you take a reservation for this guest the information will be displayed in the Comments. If you copy from a cancelled reservation you should erase the cancellation info in the comments since it doesn't apply to the new reservation.

Editing an Existing Reservation:

It is easy to change a reservation after it is taken. Go to the reservations screen, and using the speed search, type the first few letters of the guest's last name, without pressing enter. Use the arrow key to go down to the right guest and press enter. Alternatively you can do a Word search by pressing F2. Enter a reservation number, phone number etc then press Enter. Reminder – when using the word search you must enter the data exactly as it appears in the field. Use the mouse to make the change, and then click Ok and you are done. All changes will be logged in the edit log and the view changes screen.

Reservations - Yield Management (not available in Five Star Lite)

Five Star Yield Management can be used in a simple seasonal way, but is powerful enough to be very sophisticated too. At the simple end of the scale, you can set any number of rate types up, and you can specify seasons in your rate cards. Summer months might be higher, while in winter months prices may be lower. Also in winter you might not set up some rate types, so they cannot be used. Yield Management is setup in the Hotel Management Setup menu. Detailed instructions for the setup are in the Reference manual.

The Yield Management system has two types of price control. The first is based on occupancy percentage and the second is based on preset dates (Daily Calendar feature). On the occupancy percentage screen you can create up to 8 tiers of pricing. As the percentage occupancy goes up, the price can go up. This creates urgency for guests, the same way an air flight is priced. The earlier you book, the better the price.

Some properties set up one percentage rate occupancy on the first line and leave the others, and then set the price increase rate to 0. Do this if you don't raise your prices when you are about to sell out, and at least you want staff to not discount. They see the yellow dates on the availability screen (F5) and know to hold their ground on price. Even a simple approach like this can significantly increase your bottom line. Every property should practice at least this kind of yield management.

The second way to set up yield management is by date. When taking a reservation you may see a date highlighted in yellow yet the % occupancy is not very high. That means management has set this day specifically with Yield Management. This might occur when there is a festival and the hotel is typically sold out, so management has set Yield Management to take effect that day.

You can also set the minimum number of nights. Commonly you would use this for Friday and Saturday nights to limit the minimum stay to 2 nights on busy summer weekends. If you attempt to take a reservation on a day that has been blocked, the following prompt comes up:

> **Warning** ✕
>
> This date is closed for arrival. You must choose another arri[val]
>
> Proceed anyway?
>
> 🛡 O<u>v</u>erride   ✕ <u>C</u>ancel
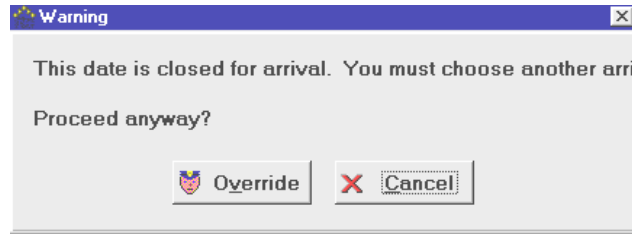
If you choose Override you will then be prompted for the Manager's Override Password. This is not the manager's personal password but rather the password set to Override Night Audit found in the General Hotel Profile, Options button. See your manager to get this password.

The other popular feature is the pop up message option. The date screen of yield management allows you to send messages to staff as they take reservations. These messages can be reminders about pricing on the date, or it could advise on special events for the date. Here's an example of a reminder to sell a Murder Mystery package. What a great way to up-sell, and add value to your guest's stay.

> **Yield Management Information** ✕
>
> Yield Mgmt info for Wed Dec 3/03:
> Murder Mystery in dining rm. Show and dinner
> $99/couple. Seating starts at 6:00pm.
> Reservations required.
>
> ⅄➜ OK
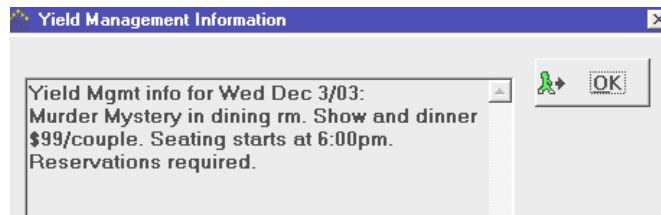
Again, even if you set the rate increase to zero, you are implementing yield management because staff knows not to discount rates on those dates. Here is an example of what the F5 availability window looks like on a date that yield management has been activated.

Availability Summary

	Thu Jun3 23%	Fri Jun4 11%	Sat Jun5 10%	Sun Jun6 7%	Mon Jun7 8%	Tue Jun8 100% t8	Wed Jun9 92% t7
JACC	8	8	10	11	10	0	0
NDD	3	5	5	5	5	0	0
NQ	4	5	4	4	5	0	1
NSUI	3	4	4	4	4	0	0
SDD	14	15	15	15	16	0	0
SQ	10	11	11	12	10	0	0
SSUI	5	6	6	6	6	0	4
Total	47	54	55	57	56	0	5

#Rms - Available
#Rms - Overbooked
Date - Yield Mgmt in effect

Continue
Next 7 Days
Previous 7 Days
Different Room Type
Groups of Room Types
Zoom in on Detail
Show 30 Day View
Turn Away / Wait List
Exit

Please enter the expected Arrival Date	19990603	Jun 3/99
Please enter the Length of Stay in Nights	1	
Please enter the expected Departure Date	19990604	Jun 4/99

Room Type
Rate Type

Enter Date as YYMMDD	RmNites Available: 426	RmNites Sold: 152	% Occupancy: 35.68

When you start a reservation you see the percentage occupancy dates, rates and tier level shown in yellow. June 5 and 6 are examples of date yield management, and June 8 and 9 are examples of occupancy percentage yield management. When you quote rates a little further into the process, yield management has impacted the rates that show in yellow. And finally, on the reservation screen when the phrase Yield Mgmt shows in red next to the Room Rate, your staff knows the price has been changed, or at least they should not discount prices.

Daily Rates

If this feature has been turned on you will see Daily Rates in blue next to the Room Types field on the guest's reservation. Daily Rates allows you to preset different room rates for each day of a guest's stay. For example you might charge the guest $90.00 for the first 2 days then $45.00 for the last day as part of a 3 day special or frequent visitor special.

Guest Check In and Walk In - Check In a Reservation

We distinguish a check in as a guest with a reservation, and a walk in as one without a reservation.

The single biggest thing Five Star can do to improve guest service on check in, is to have registration cards all ready printed when the guest arrives. Have you ever had a regular guest complain 'Why do I always have to fill in your guest card – I have been here many times'?

Five Star can print registration cards in advance with whatever information on them you want from the reservation file, along with any other text you need. Five Star prints registration cards on either blank paper or it can print on your forms. The layout of the card is user defined (not available in Lite version). Full instructions for designing your registration card are found in the front Office Reference Manual. We suggest you use blank paper, because of the significant cost saving. A plain paper form costs about a ½ cent each whereas preprinted forms can be 5 to 10 cents each. We know of one front desk system that cost justifies itself based on forms savings alone.

Before the person coming to your front desk with suitcases gets to the desk, you can be ready for him. Get to the Check In/Walk In screen.

Guest Name	Arriving	Departing	Rms	Stat	Group#	Rm.#	RmTy
** Walk in a Guest without a Reservation **							
Bierworth, Daniel	Jun 03/99	Jun 04/99	1	Res		W104	JACC
Horner, Brock	Jun 03/99	Jun 06/99	1	Res		0402	JACC
Kaur, Harveer	Jun 03/99	Jun 05/99	1	Res		0401	JACC
Lozanovski, Ratko	Jun 03/99	Jun 04/99	1	Res		0301	SQ

Start by greeting your guest and asking 'Do you have a reservation?'

The Guest answers: Yes, my name is Carol Cameron.

And the Reservationist asks: Would you spell your last name?

The Guest answers: Cameron, C A M E R O N.

You have a check in. A check in can be done in as little as 5 keystrokes. Speed search on the name, just like reservations or guest history. Select the name from the list, and his information is displayed.

Notice that the check in screen is the same as the reservations screen. This is one of the reasons Five Star is so easy to learn. All the main screens – Reservations, Guest Check-in, Edit In-House Guest, Create Additional Accounts, Guest Check-Out, Cancel Guest Check-Out, and Guest History, are all exactly the same program. Once you have learned reservations, you actually have learned 75% of the whole system.
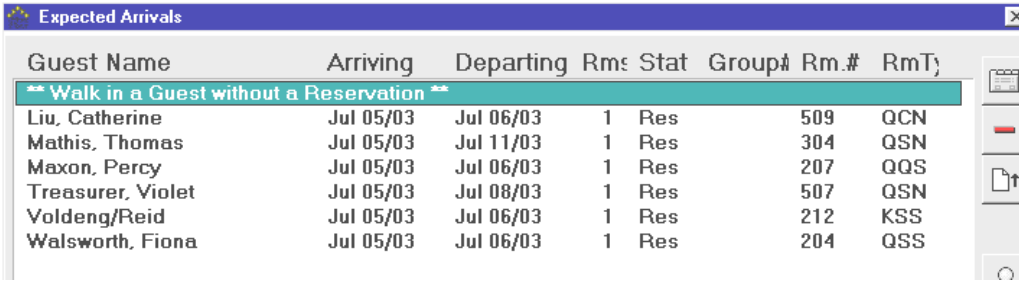
Give the guest the registration card from the batch of those preprinted *(We'll cover printing registration cards during the Night Audit procedures).* Check the settlement method, and ask 'May I take an imprint of your credit card while you check the registration card and sign it.' Press enter and the guest is checked in. Give him his key and thank him for staying with you. It is that quick and simple. We will deal with cash and debit card guests in the next example.

Guest Check In and Walk In - Walk In

A walk-in differs from a check-in in a few key areas. When you asked your guest 'Do you have a reservation?'

The Guest answers: No I don't.

So you start the walk-in process. Select the first option on the lookup list to **Walk in a Guest without a Reservation**.

Guest Name	Arriving	Departing	Rms	Stat	Group#	Rm.#	RmTy
** Walk in a Guest without a Reservation **							
Liu, Catherine	Jul 05/03	Jul 06/03	1	Res		509	QCN
Mathis, Thomas	Jul 05/03	Jul 11/03	1	Res		304	QSN
Maxon, Percy	Jul 05/03	Jul 06/03	1	Res		207	QQS
Treasurer, Violet	Jul 05/03	Jul 08/03	1	Res		507	QSN
Voldeng/Reid	Jul 05/03	Jul 06/03	1	Res		212	KSS
Walsworth, Fiona	Jul 05/03	Jul 06/03	1	Res		204	QSS

The F5 availability screen helps with a walk in just like it does a reservation. Notice the arrival date field is grayed out. Ask the guest how many nights he will be staying, press Enter, and what type of room he wants. Rates are displayed and you can negotiate the price. When negotiating price you should stick to the rate structure as much as possible. If a guest asks for a discount you might say "Are you eligible for any of our discount rates? CAA, Senior etc" Rates displayed are yield management adjusted. If the guest declines the stay, you might use the Turn-away button to record the decline, so your statistics are updated. If the guest accepts, continue to the walk in screen.

Once in the Last Name field ask him if he has ever stayed with you before. If he has, press F2 and copy from guest history just as if you were taking a reservation. All the information from the previous visit appears. You can manually assign a room number by using the Block Rooms button or OK the walk-in it will tell you the room number you should give him the key for. It might ask if you want to print a registration card depending on your system defaults (look on page 2 of the Std Reservation Assumptions in the Setup menu). Print it and have him sign it. If the payment method is cash, then you will be taken to the payment screen too.

If the guest has not stayed with you before start the Check In as before. Enter the number of nights, room type and rate type, but once you get to the Last Name field, we suggest you give him one of your old blank registration cards from before you had Five Star and ask him to fill it out. This is a great way to use up your old cards, and since they are only for walk-ins now, they will last much longer.

Ask the guest how he will be paying, and swipe the credit card to get a pre-authorization. The credit card contains all the information you need to check

the guest into the system. The only fields you must fill in to complete a check in are the Last Name, Settlement Method, Card # and Expiry date. You have all this information on the credit card. By doing the things in this sequence you get the guest busy right away, which does not make him feel like you kept him waiting. We prefer this technique to the style of walk-in where you ask for all the information and type it as you ask, then print a registration card at the end. Five Star can be configured to automatically print a registration card at the end of the Check-in. However this is a much slower process, makes your guest impatient, and is usually stressful for staff, particularly the least computer competent new users. It results in spelling mistakes and less than professional results. Instead, when you get the credit card, type only the last name from it. Then press enter to get to the card number field, fill it in with the expiry date. Press enter to get to the adults/kids/rooms fields and fill them in. Complete the walk-in without printing the registration card, because you have the one the guest filled in.

Then, when the desk clears, and you have a few moments, go to the Edit In-House Guest screen, find the guest and fill in the rest of the blanks

*** You can speed up the Check In process even further by purchasing a card "swiper". The "swiper" installs in series with your keyboard or you can purchase a keyboard that has a "swiper" built into it. While in the last name field swipe the credit card and the name and credit card information will be instantly filled in for you. If the guest has an Ontario driver's license you can swipe it and the name and address information will be filled in. This is great when you have those questionable customers who insist on paying cash. ***

If the guest is paying cash, debit card or cheque, a further screen is displayed to remind you to take the cash on check in. Select the payment method from the list; press enter to get to the amount field. The top section of the screen shows you how much money to take in, and if you press F9 (like it suggests at the bottom-left corner of the screen), the amount you need to collect is automatically posted. You can also type any amount you like in case you are taking extra as a security deposit.

Click OK twice and your guest is checked in. It will print a receipt for the payment if you want, and then it shows you the room number assigned. Give the guest the key and thank him. Again, it's very simple.

Record Guest Charges

All guest charges, payments deposits, cash sales, adjustments, refunds, etc. can be recorded on the Record Guest Charges screen. You can access it from the Hotel Management menu, or while doing anything else from the F7 Tools menu. You also see the screen when checking in a guest whose settlement method has a zero credit limit, such as cash, cheque, debit card etc. And you see the screen when you do a check out. There, you can post just the final payment, as well as other charges such breakfast, as you post the settlement. Let's run through a few examples.

To record an **advance deposit**, go to the Record Guest Charges menu. Five Star defines an advance deposit as any payment made before the guest checks in. The Record Guest Charges screen initially shows you only guests that have checked in, since that's the group to which you do most of your postings. But for deposits, select the first option on the screen, **Enter charges by Guest Name**. Speed search on the guest's last name, and then press Enter to choose it. Notice the Guest name displayed in the blue bar and their reservation number is displayed in the Res/Rm field.

Next you see the list of transaction codes that can be posted to guest folios. This list is, of course, customized to your property's needs. We have structured it for easy learning. There are sections that can be speed searched on by typing the first letter or number of the code (left hand column of list).

Code	Description
1	PAID CASH - Thank you
2	PAID BY CHECK - Thank you
3	PAID BY VISA - Thank you
4	PAID BY MASTERCARD - Thank you
5	PAID BY AMEX - Thank you
6	INVOICE BALANCE OUTSTANDING -Direct Bill
7	PAID BY DC/ENROUTE - Thank you
8	PAID BY DISCOVER - Thank you
9	Paid US Funds - Thank you
10	REFUND - Cash
11	REFUND - Visa
12	REFUND - Mastercard
14	REFUND - Amex
15	REFUND - Other
A1	Adjustment - Phone Charges
A5	Adjustments - Food
A6	Adjustments Room Charges
B1	Bar Sales
D1	Dining Room Charge

Five Star has groups of codes like this:

1 digit number for all payments types,
2 digits for refunds,
A for adjustments,
D for dining room & bar charges,
M for meeting room charges,
R for room charges,
S for sundry charges,
T for telephone charges & taxes.
Your management may have modified this list.

Select the appropriate payment code and press Enter. In the Reference field enter the cheque number and the words 'Advance Deposit'. The reference field should always associate the charge/payment back to the original transaction. (I.e. for cheques enter the cheque number, for credit cards enter the authorization number, for dry cleaning enter the receipt number, for cigarettes enter the number of packs etc.) The Reference shows on the guest's bill so be careful how and what you type! The reference field isn't mandatory. You can leave it blank if you want. Press enter to get to the amount field. Enter the pretax amount, press enter. A new window will display the amount entered plus appropriate taxes. Take a moment and review the screen. If you think there is an error just press F3 until you get to the field you want to modify. Fix the mistake then click the post button.

Viewing / Printing the Folio

The guest folio immediately reflects the deposit and you don't have to remember to transfer it to the folio before the guest checks in. Go to Display/Print Guest Acct menu and speed search by Last name for the guest you just posted the deposit to.
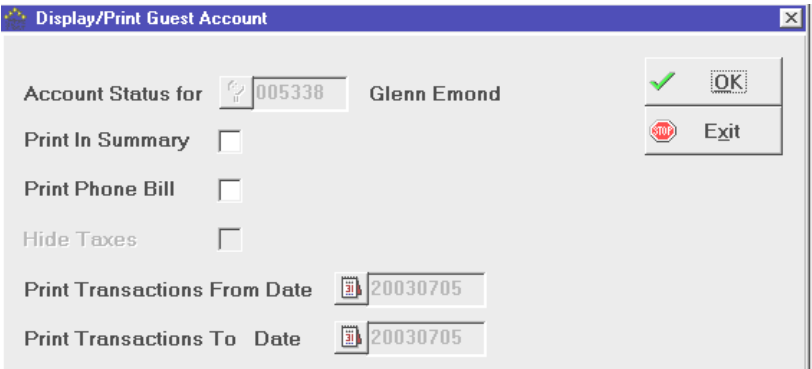
To simply view or print the folio, choose OK. Print In Summary will print one line for each class of billing code used. This is useful if you have guests with very long folios. A group master folio may be such a folio. Print Phone Bill allows you to print a folio containing only phone charges. This is useful if you are running a residence and long term guests need to pay their phone bill on a monthly basis.
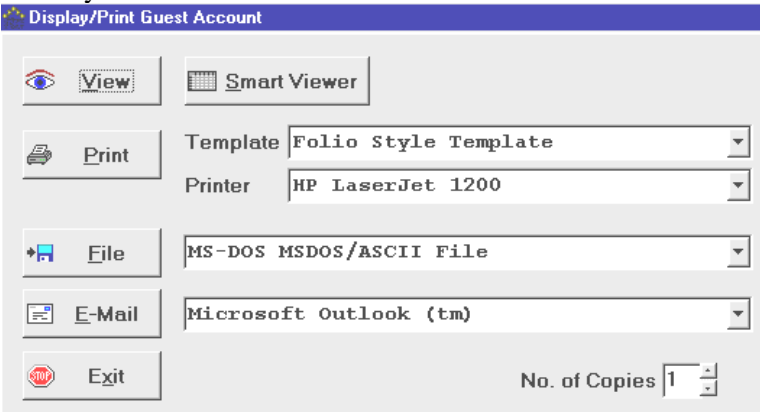
Choose View to display the folio on the screen. You will see the deposit in the Credits column. You can also Print the folio should the guest require a hard copy. If your computer has access to more than one printer you can choose a different printer from the pull down menu in the Printer field. Five Star can print your document with different sets of predefined fonts for a more professional look. Click on the pull down menu in the Template field. These templates are defined in the Administration menu and are explained in the Setup Manual. By default folios are set to print using the Folio template. You can save the folio as a file as well. The file can be saved as an MS-DOS text file(.txt format), as a spreadsheet file(.prn format) or as a mail merge file. If your workstation has Internet access with Outlook (not Outlook Express) and your workstation has been configured properly (refer to the Setup manual for complete instructions) you have the option of emailing the folio. You can also see deposits on the Other button of the reservation file. Lastly, there is an option on the Confirmation Letters and Cards program that prints a deposit receipt.

Posting Other Transactions:

The next common type of transaction is the **telephone charge**. If you have the Five Star Call Accounting program or a call accounting interface, there is no need to post such charges, as they will automatically go to the guest's folio. If you don't have call accounting or an interface, follow these steps.
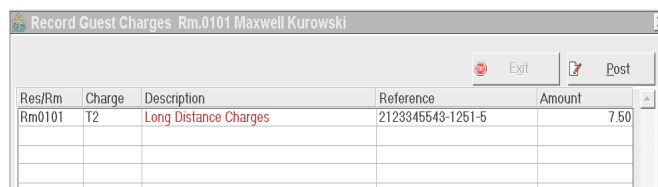
Select the guest by room number or choose the first option **Enter Charge by Guest Name** and speed search by the last name.

In the billing code field, press the T to initiate a speed search, but don't press Enter. Arrow down to the long distance charges code, T2, and select it. Enter

the phone number and duration in the Reference field. Enter the amount, and then post it. The charge is instantly on the guest folio. Taxes and markup will be posted automatically.

Dining room charges are just like telephone charges, as are most of the others, except that they are usually posted with taxes and tips already in the total. Select the guest, and speed search on the D, select the billing code and post the amount. Don't forget to enter the chit# from the POS system or cash register in the reference field.

Daily Sales from Behind the Counter

Five Star can process all types of non guest sales, like cash transactions, vending machine receipts, parking, etc. The most common is the cash sale at the desk, like candy bars, toiletries, faxes, etc. There is a special folio preset for these transactions called the Daily Cash Sales Folio. This folio always has a zero balance because the purchase is paid for when the sale is made. That means you must record the charge for the item then record the payment.

In the room number field type ZNON and press enter. Select the billing code for fax – T5 and press Enter. In the reference field you might enter the fax number and the number of pages sent. In the amount field, enter the pre-tax amount. You have just recorded the charge for the fax.

Record Guest Charges Rm.ZNON ZZDaily Cash Sales

Res/Rm	Charge	Description	Reference	Amount
RmZNON	T5	Fax Services	709-229-7355 7pgs	12.25
RmZNON	1	PAID CASH - Thank you	709-229-7355 7pgs	

Batch Total with Surcharges: 14.09   **Batch Total: 12.25**

You must now record the payment. On the second line press enter to select the same room number ZNON. (Notice how the program remembered that you were already posting to room ZNON). Select payment code 1 for Cash. Press F9 in the reference field to repeat the description from the previous line. The cursor should now be in the amount field. Look at the bottom left of the Record Guest Charges screen in the example above. Batch Total with Surcharges shows you the amount to collect including taxes. Enter this amount and post. The Batch Total (bottom right) shows you the total of what you have typed in, not including any taxes. Once you have entered the payment amount and pressed Enter the Batch Total with Surcharges should be zero.

Hint *If you need to perform a calculation, press F2 in the amount field, and the calculator appears. It has a unique feature - the 'T to Transfer' button. To illustrate its use, suppose your guest sends 7 pages at $1.75 per page. In the calculator, click on 7, then *, then 1.75, then press enter to get the result. Press ALT-T to transfer. The result will be Transferred into the amount field.*

Posting Day Rates and Late Check-Ins

Use the Record Guest Charges screen to post room charges too. Since the night audit normally posts room charges for you, there are only a few instances when this is necessary. Day rate charges should be posted here, when the guest checks in the same day he checks out. Since the guest checks out before the night audit is run you must post the charges for this guest manually. If a guest checks in late, after the night audit is run, you will have to post his room charge in this screen too. Enter the room number, the billing code (all start with R in our scheme) and the pretax amount. The room charge and taxes will be posted.

Charge/Payment Adjustments and Corrections

Charge adjustments happen the same way, here is an example of a room charge adjustment. The amount is entered as a positive number; you don't need to enter a minus sign for the adjustment to reduce the folio balance.

Transferring Charges from One Folio to Another

There are times when you want to move a charge from one account to another. One guest may want to pay for another guest's room or a guest wants you to put his bar charge on his incidental folio (we'll explain incidental folios in the next section). Go to Transfer Guest Charges in the Hotel management menu. Look up the guest you are transferring charges **from** by speed searching on the room number or press Enter on the top choice **Lookup Guest by Guest Name** and speed search by their last name. Now choose whom you are going to send the charge **to**. Again you can speed search by room number or choose the top choice and speed search by last name. You now have the choice to transfer All Charges or hit the down arrow to choose Selected Charges. We will choose Selected Charges. The screen will look as below:

All of the guest's charges will be listed. Arrow down to the charge you wish to transfer. Highlight the charge and press Enter to choose it. It will now change the lookup screen so that the charge you just selected is at the top of the list. If the charge has surcharges or taxes associated with it you don't need to select them. You can continue choosing charges if you are transferring more than one. If you accidentally select the same charge more than once don't worry, the system will only transfer the charge once. When you have completed your selection press F4 once.

You will see a summary of the charges you have selected. You won't see the taxes or surcharges here, but they will be transferred. Review the screen to ensure that you have chosen the correct guests and the correct charges. Choose OK to complete the transfer and Exit to cancel the transfer.

Go to Display/Print Guest Account and look at the accounts of the 2 guests. The account you transferred charges **from** will have no trace of the charges you transferred. The charges on the folio you transferred charges to will have "Fr: Rm###" added to the reference field.

Removing Errors and the Garbage Folio

There are times when you want to completely remove a charge from a folio. Perhaps you posted a Visa and it should have been MasterCard, or maybe you posted a charge to an incorrect folio. Transferring the charge from the wrong folio to the correct one isn't really an option because we don't want "Fr: Rm203" to appear in the reference field on the guest's folio. Five Star has a special account called the Garbage folio. You will transfer errors to this account. It should always be checked into room number ZGAR with a room type ZNON and rate type ZNON. It is a house account, which means it doesn't affect your occupancy statistics. It is also a clearing account, which means that whenever you post to it the net result must balance to zero and the Night Audit will automatically remove all transactions from this folio after posting them.

The procedure begins as before when we transferred charges. Go to the Transfer Guest Charges feature and choose the guest with the charge we want to get rid of. When you get to the "To which Guest" lookup, choose the top choice **Lookup Guest by Name or Transfer to Garbage Folio*" *(if you don't see this then the Garbage folio hasn't been set up properly. Make sure it is checked in AND that room# ZGAR is set in the Standard Resumptions, pg2 Transfer Adjusted Transactions To Folio field).* The top choice should now be **Remove Transactions to Garbage Folio**. Choose this. You will now see a list of all the charges on the guest's folio. As before choose those charges you want sent to the garbage folio. When done selecting, press F4. Review the charges selected and if correct choose OK. The computer will now send the

charges you selected AND a reversing entry for each charge to the Garbage folio. There will be no trace of the original charge on the guest's folio and the Garbage folio will contain the original charges along with the reversing entries. From an accounting point of view it is as if the original charges never occurred. View the Garbage folio to see the results.

Create Additional Accounts

In addition to the main folio, you can create incidental and shared folios too. Some guests need one folio for room charges, one for food or phone charges. We know of one property that requires no less than 6 folios per room – 2 guests per room, each with 3 bills.

Create additional or incidental folios in the Create Additional Folios screen. Simply select the guest, change the name by adding the word incidentals or dining room etc. and click Ok. You have 2 folios. When you view a shared guest in the Edit In House Guest screen or in the Reservations screen you will see the sharer information. If you accidentally create an incidental folio the only way to get rid of it is to check it out.

Create an Additional Account		
Res.#	☐	Status C/I
		Group #
Last Name	Andrews	Room(s) 0108
First Name	Allan, incidentals	
Addr 1	476 Sheppard Ave.	
Addr 2	Dorval, PQ	
Addr 3		

Five Star always shows the main one first on any list sorted by room number, and the incidental or shared folio second. Also, the number of rooms shows as 0 for the incidental. You can use the transfer guest charges program to easily move specific charges or all charges from one folio to another. Charges from our Call Accounting or Movie interface will always post to the main account.

Guest Search by Room #			
Room#	Guest Name	Stat	Departing
** Setup a Sharer with a Reservation **			
0105	Carlton, Jack	C/I	Jul 02/99
0108	Andrews, Allan	C/I	Jun 04/99
0108	Andrews, Allan, incidentals	C/I	Jun 04/99
0110	Bryen, Chris	C/I	Jun 04/99
0110	Bryen, Chris, incidentals	C/I	Jun 04/99
0111	Appleton, Nader	C/I	Jun 03/99

You can also use this program to create shared folios, that is, two guests sharing the room, each with a folio splitting the room charges. Select the main guest, change the name and address as required, and enter half the room rate in the rate field. Depending on your Reservation Assumptions, the rate field will be updated if you change the No of Adults field from 0 to 1. You will need to change the main folio room charges if you haven't already done so.

Move Sharers

Use this program when you need to:
1. Move a sharer from one room to be a sharer in another room.
2. Move a sharer from one room to their own room.
3. Move a guest from his or her room to be a sharer with someone else.

This can occur in a residence when 2 people sharing a room don't get along anymore and you need to move one person to another room. Perhaps you have a conference and people will be sharing rooms and your guests decide to change rooms during their stay.

The Move Sharers program can be used for reservations as well as in-house guests, however room numbers must have been assigned to the reservations. Some hotels don't assign room numbers until the day of arrival.

Go to the Move Sharers feature. From the lookup list choose the guest you want to move. If you are attempting to move a reservation you will have to choose **Search by Guest Name**. You will be notified that you will be leaving that room empty unless that room already had a sharer. In the Move To field choose the guest you want to share with. You will be asked to confirm your selection, and then choose OK.

You can check a sharer in before or after the main account. If you check the main account out before the shared account, the shared account will then become the main account.

Guest Messages:

Use this feature in lieu of yellow sticky notes. Choose the guest from a list and record the information in the appropriate fields. When you check the guest in you will be notified that there is a message for this guest. This feature can be useful even if your hotel has voice-mail. If you receive a call for a guest who hasn't arrived yet you will be able to notify them as soon as you check them in.

Guest Check Out

Express Check Out:

If you want to save lineups in the morning, use the Express Check Out option on the Display/Print Folios program. It prints all the folios for guests checking out on the date range specified. Put the folio under the guest door before he gets up in the morning, with a note that it is not necessary for him to come to the front desk to check out. Most city properties use this technique to save time at check out, and to improve guest service. Many business travelers prefer the express check out.

Guest Search		
Guest Name	**Arriving**	**Departing**
** Print Express Check Out Folios **		
Abate, Esamullah	Jun 02/99	Jun 06/99
Adams., Jefferey	Jun 05/99	Jun 06/99
Ainsworth, Pat	Sep 21/99	Sep 24/99
Anderson, Frank	May 29/99	Jun 02/99
Anderson, Frank	May 29/99	Jun 07/99
Anderson, Tom	Aug 28/99	Aug 31/99
Andrews, Allan	May 30/99	Jun 04/99
Andrews, Allan, incidentals	May 30/99	Jun 04/99
Appleton, Nader	May 28/99	Jun 03/99

Start a regular check out by selecting the room number. You will see the guest's current balance in the top left corner, just to the right of the reservation number. With the guest on the screen, and before you click OK, press F7 tools, and select Display Guest Folio by pressing ALT-D. The program already knows the guest to select.

You can print or display the folio to check the charges before you do the actual check out. This is useful if you suspect the guest may question the folio. Depending on how your monitor is arranged you can swivel the monitor so the guest can see his account or print it for them to preview. Press F9 to print the folio once it is on the screen.

```
                          The North American Inn                    Page # 1
                              123 Main Street
                             Toronto, Ontario
                                 M6Y 5R4
                    Telephone: 234-567-8901  Fax: 234-567-1234

Daniel Brock                              Res. #      000491
   160 Forest Dr.                         Checked in  Wed Jun  2/99 -  4:46 pm
   Surrie, BC                             Departing   Thu Jun  3/99
                                          Room Rate      95.00
   V0R 2X2                                Room         0115

Date  Description                 Reference              Charges     Credits
Jun02 Room Charges                                         95.00
Jun02   GST                                                6.65
Jun02   PST                                                4.75
Jun03 PAID BY VISA - Thank you                                        34.54
Jun03 Sundry - Confections                                 4.50
Jun03   GST                                                0.32
Jun03   PST                                                0.36
                                                      ---------- ----------
                                          77.04          111.58       34.54
```

Press F4 to exit the folio check, and then choose OK and Check-Out. You will
be taken to the Record Guest Charges screen, to process any final charges and
to record the payment. Select the payment method, and press enter to get to
the reference field. If the payment is a credit card, enter the authorization
number. This means that you should process the credit card before finalizing
the payment in Five Star. If the guest's card doesn't clear then you won't have
to correct Five Star. In the amount field, press F9, and the guest balance will
be entered in the amount field. Choose Post, and a final copy of the folio can
be printed for the guest.

If you have a last minute charge to post, like breakfast, simply do that on the first line of Record Guest Charges, and then on the next line, enter the payment. When the cursor is in the payment field you will have to press F2 to make the list of Payment codes appear. In the amount field you can press F9 and the balance including the breakfast charge will be posted.

When the guest checking out is not paying, but instead you will be invoicing his company, we call it a direct bill. When you get to the payment screen, select code 6 - Invoice Balance Outstanding – Direct Bill. The Corporate Code field must be filled in on the reservation. If there is no Corporate Code the program will stop you with a prompt warning you that the guest doesn't have a corporate account. You can go no further until you change the payment method or put a corporate code on the reservation. This special code causes Five Star to print the folio as an invoice. It prints the corporation name and address in a position where you can fold it and put it in a window envelope. Look in the top right corner of the folio. Next to the reservation number there is an invoice number. The number starts with the check out date,and the next 4 numbers are a counter which increase by one for each direct bill checked out that day.

Note: What if you have guests who stay in your hotel for extended periods (months) but you would like to invoice their company bi-weekly or monthly? Go to the Record Guest Charges screen and post a payment with code 6 – Direct Bill. When you complete the posting the system will ask if you want to generate an invoice. Answer Yes. You can repeat this procedure on a weekly, bi-weekly or monthly basis, depending on your billing practice. Print the folio from the Display/Print Guest Account feature and send it to the company for payment. If you have our Accounts Receivable module a new invoice will be created in the account for that company. The night audit will print a report for all direct billing done that day.

If a company calls to say they never received the bill (that never happens!) you can go to the History menu and choose Historical Folio Inquiry. Speed search by the guest's last name and reprint the bill. Your history is there for years.

```
                        Five Star Hotel
                        1005 Main Street
                         Toronto, ON
                          M5W 1E5
              Telephone: 416-545-3147  Fax: 800-242-4708

Bob Swehla                      Page #       1
  Box 105                       Res. #       011162  Inv.# 0307050004
  Grassland, AB                 Checked in  Fri Jul  4/03 -  6:38 pm
                                Checked out Sat Jul  5/03 -  2:38 pm
  T0A 1V1                       Room Rate       78.00
                                Room        205


Date   Description                  Reference          Charges    Credits
Jul04 Hospital                                          78.00
Jul04    GST                                             5.46
Jul04    PST                                             5.46
Jul05 Sundry - Movie/VCR Rental     2345 Fr:Rm203       12.00
Jul05    GST                        2345 Fr:Rm203        0.84
Jul05    PST                        2345 Fr:Rm203        0.84
Jul05 INVOICE BALANCE OUTSTANDING -                               102.60
                                                     ---------- ----------
          Total Outstanding this Invoice     102.60     102.60    102.60

 Five Star Hotel Systems Corp
 Attn: Peter Abel
 44 Rutherford Drive
 Newcastle, ON
 L1B 1G7

 Thank you for visiting with us.
 Book now for your Christmas banquets
 Net 30 days
 X:_____
```

Advanced Check Out:

Do you ever have the guest who comes to the front desk the evening before his check out and says he has an early flight, and would like to settle up now? When this happens, you have an 'Advance Check Out'. Five Star can do this one day before check out only, and only for nightly stay guests. It can't do it further in advance, or for package, weekly or monthly stay guests.

Start the check out as normal, and you see the message 'Is this an Advance Check Out?'
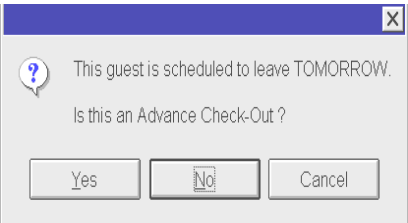
If you answer **Yes**, the guest is paying for his room **IN ADVANCE** of leaving tomorrow. The guest will be staying tonight but wants to pay for his bill right now, including tonight's room charges.

> After you choose Yes the Record Guest Charges screen will appear. You will see tonight's room charge posted automatically. The list of Payment codes will appear. Choose the appropriate one and continue like a regular check out and give the guest his receipt. The guest is still checked into the computer but his balance is zero. The night audit will NOT post a room charge since it was already posted during the advanced check out. The night audit will print a list of advanced checkouts. Use this list to check the guest out of the computer in the morning.

If you answer **No**, the guest is leaving **RIGHT NOW** and will not be staying tonight.

> The computer will automatically move the cursor to the departure date field and fill it with today's date. Choose OK (Alt+O) and proceed with the checkout as usual.

Guest Check Out - Cancel Check-Out for Late Charges

If you incur late charges or check out a guest by accident, it is simple to cancel a check out. Select Cancel Check Out from the Hotel menu, select the guest, and click Ok. The guest is checked back in for more charges. The system will try to put the guest back into the original room number. If unavailable you will have to choose a different room. If you are completely full you will have to check the guest into a House Account. Change the Room Type to ZHOU and the Rate Type to ZNON. You can always correct the room and rate type later once the guest has actually gone to history. That way your records will be correct. You can't modify a folio once in history.

You can only cancel a check out before the guest is transferred to history. The history transfer depends on a setting in the General Hotel Profile, Options section. The software can be set to delay the transfer to history. If this field is blank or set to 0 then the guest is sent to history at the end of the next night audit. If the Transfer to History field is set to 3 days the guest won't go to history for 3 days. (You can set the delay from 0 to 99 days.) During those 3 days the guest will remain in the Cancel Check Out screen. If you need to correct a folio go to Cancel Check Out screen, choose the guest and choose OK.

Group Reservations (not available in Five Star Lite)

The group system is designed to make fast reservations for groups, do instant check ins, offer flexible transaction control during the stay, and do fast check outs. Coupled with reports for managing groups, group sales history report market analysis, and group sales forecasting, the Five Star group system is powerful and flexible.

The group reservation process starts on the main group screen. There is lots of room for name and address information. The **Group Name** is equivalent to the Last Name on a regular reservation and the **Convention** field is like the First Name field. The **Contact** is the person you are dealing with. The **Contact#** could be a cell or alternate phone number for this person. The **Address** fields, **Postal Code** and **Telephone** fields will be copied to the

individual reservations created for each group member. The **Contract Date** is typically the date you enter the reservation into the computer.

The **Cutoff Date** is the date you require a rooming list by. There is a **Group Cutoff Report** in the Group Management menu that shows you who should have sent their rooming list by a given date.

Signed By refers to the person in your hotel who is responsible for this reservation.

The **Deposit Required** and **Date Required** are also coupled with the Deposit Cutoff Date report to ensure that you get paid on time. You will find this report in the Hotel Management, Reports menu.

The **Market Source Code** allows you to do analysis on where group business comes from. This field is copied to the individual reservations.

Group Pays Room; this is a very important field. Checking the Group Pays Room box will result in the group master folio having all the room and tax charges for the whole group posted to it. Phone charges and other incidental charges must be manually posted or transferred to the master folio if required by the group. (You can do this using the **Xfer Charges to Master** feature in the Group Management menu.) With no check mark in the box, each guest's folio gets the room charges. When you book a group of 50 guests and 50 rooms for the guests, Five Star creates 51 reservations, one for each group member plus a group master folio. Even if all room charges go to the master folio, each guest still gets an incidental folio for phone charges, dining room, etc. The Group Pays Room field can be changed anytime, even after the group has checked in. If you check a group in for 3 nights, run the first night audit and discover this box wasn't set correctly, you can come back here and set it correctly. It won't undo the room charges already sent to the wrong folio(s) but it will make sure the next 2 night's charges are sent to the correct folio(s).

Corp Code and Travel Agent: If the group charges will be invoiced, enter the Corporate Code here. If the reservation is coming from a Travel Agent,

you can enter it here. Both of these fields will be copied to the individual reservations.

Enter the **Arrival** and **Departure** dates. The total number of nights cannot exceed 31.

Rate Type: Do Not Choose GRUP. This rate type is used by the system for the Master Folio only. The rate type entered in this field is a real rate like RACK, CORP, TOUR, CONF, BUS etc or any other real rate you have setup for groups.

Five Star calculates the number of **Guests per Room** from the estimated number of rooms, and number of guests. This is an average number, and is simply used as a default to save you a little time in entering rates on the next screen.

We recommend you enter CASH for the **Settlement** field. This field is copied to each of the individual reservations and you won't know how individuals are paying.

NOTES: This is equivalent to the Comments section in Guest Preferences on a regular reservation. The first 2 lines in this screen will be copied to the individual reservations. You might put in "Send Fax & Phone charges to Master Folio!"

GUEST PREFS: This is a list of the custom Guest Preferences that you see in a regular reservation. This screen will be copied to each of the individual group reservations.

CHANGE ARRIVAL / DEPARTURE: This gets used after a group reservation has been set up and the client calls back to change the arrival/departure date for the **entire group**. Do not use this if you are changing the arrival dates for a few group members only. Change individual arrival/departure dates in the regular Reservation screen in Hotel Management. If you do change an individual group guest's arrival date to arrive earlier you will also have to change the arrival date on the group master

folio in the regular Reservation screen. This is because the group master folio must be checked in before any group member can be checked in. When you do this you will see the following warning:

This is just a reminder, not an error. If you are changing the date to accommodate one or a few reservations then choose OK and continue. If you are changing the arrival date for the entire group then proceed to the Group Management menu, Group Reservations.

Group Reservations cont'd:

DETAILS: With the first screen complete you are taken to the **Details** screen to block rooms.

The screen shows all your room types, what you want to block, and what is left to be blocked. Use the arrow keys to go to the date column you want to block, and the room type. The first column is the number of guest per room, NOT the number of rooms.

The Rm. Rate column is filled in based on the Guests/Rm and the Rate Type you chose on the previous screen. You can override this rate if you have negotiated a different rate. If you see "No Rate" in red then you can't sell that room type with that rate type. No rate card has been set with that Room / Rate combination. Your manager may have decided that she doesn't want you selling the Jacuzzi suites to the hockey teams using the Team rate. You cannot override "No Rate". See your manager.

Group Room Requirements - Cobourg Tae Kwan Do Martial Arts Tournament

Arriving Wed Dec 3, 2003 for 2 nites, Departing Fri Dec 5, 2003

Room Blocking | Rooms Picked Up | Rooms Available   Exit | View Group | OK

	Gsts/Rm	Rm.Rate	WedDec3	ThuDec4
DDN	1	75.00	1	1
DDS	1	81.00	2	2
HSN	1	81.00	3	3
HSS	1	81.00	1	1
KSN	1	101.00	3	3
KSS	1	101.00	1	1
QCN	1	81.00	4	4
QCS	1	81.00	1	1
QQS	1	81.00		
QSN	1	81.00		
QSS	1	81.00		
Total			16	16

Print

Total Rooms: 16 Est. Rooms: 16   Est. Rms Remaining: 0 Est. Guests: 16   Rooms Picked Up: 0

If you want to check availability for the dates the group will be here, click on the Rooms Available tab or click ALT-A. You see the F5 availability window just like when you take a regular reservation. Click back to the Blocking tab, or press ATL-B, and enter the number of rooms you want for each room type under the Date columns. Notice that as you block rooms the availability drops accordingly in the Rooms Available screen.

This way you might accommodate 8 guests on the first night, 10 the second night and 7 on the third night, exactly as your group requires. You can return to the details screen any time to modify the room block for the group. Note: Once you have picked up rooms you cannot reduce the rooms blocked below the amount of rooms picked up. Later, the Rooms Picked Up tab will reflect rooms you have picked up.

You have just completed Step One of Group Reservations. Your Room Availability (F5) has been reduced by the number of rooms you have blocked, the Rooms Booked Analysis (F6) has brown N's indicating a group has

tentatively taken rooms, and a master folio has been automatically created (i.e. Room# ZG1, Room type GRUP, Rate type GRUP). No individual reservations exist yet. That is the next step called Picking Up Rooms.

Group Reservations – Room Assignments (not available in Five Star Lite)

The assigning of names to rooms in Five Star is called Picking up the Room. There are 3 ways to Pick Up Rooms.

1. The group coordinator sends you a rooming list and you will assign the names in the Pickup/Assign Rooms menu. (Bus Tour, Convention)
2. There is no rooming list but you will create a generic list of reservations in the Pickup/Assign Rooms menu. Guests will call in independently and your front desk staff will modify generic reservations in the regular hotel Reservation screen with the guest's name and address. (Wedding)
3. There is no rooming list but you don't want to clutter the reservation screen with generic reservations. Guests will call in independently and your front desk staff will copy from the group master folio to create the individual reservations. (Wedding)

 Method 1:
Go to the Pickup/Assign Rooms menu. Choose your group.

The cursor will be blinking in the first field under Arriving. If the first guest on the list is arriving the day the group arrives, just press enter and the arrival date field is filled in. If he is staying the group number of nights, press enter again.

Type the last and first name. Notice how it fixes your typing if you don't use capitals.

Now in the **Rm Type** and **Room#** fields you have four choices:
1. First, if you leave both fields blank Five Star will simply assign any room type pre blocked, to the guest once you accept this screen.
2. Second, if you press F2 in the room type field and select one of the types on the list, that room type will be assigned to the guest, without having to specify a room number.
3. Third, leave the room type blank and select a room number from the F2 list in the room number field. Notice the list only shows you room numbers for the room types blocked in the original screen. The program will fill in the room type once the room number is chosen.
4. The fourth option is to enter a different room type in the first field that has not already been pre-blocked. A block will be added to the group, and it will be picked up as well. Conversely, when you take one of the first three choices, no block is added, simply one of the current blocks is picked up.

If you have more than one guest in a room, enter the second name, and Five Star will create a sharer folio automatically. If you have a second and a third guest to enter you can.

On the second line the example is a guest who is not arriving on the group date.

At the end of the entry of the rooming list click OK and you are asked a few more questions. You can specify whether you want auto blocks or manual blocks for the group. When reservations are made with a B (manual block), the juggler (optimizing routine that runs automatically during the night audit) does not change the room numbers assigned.
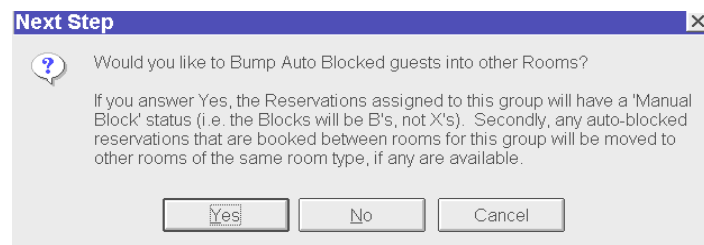
Also, if you answer yes, and if there are auto-blocked guests in the area of the property where the group will be, they will be moved to other rooms of the same room type. For instance, the hockey team has been blocked from room 301 to 345. Old Mrs. Jones is currently auto-blocked in room 320. The team will surround her and she is unlikely to get any sleep. When you choose Yes to bump she will be moved to another room of the same type but outside of the Team's block. If you prefer the room assignments to be optimized by the auto-juggler during the night audit, answer no. Even if you answer no to auto-block the group, any members with specific room numbers assigned in the first step will have manual blocks assigned. This is useful if you want a special room for the group coordinator. Most group pick-ups are made as manual blocks.

Lastly, you can specify the area of the property to start the pick up from, or the floor. Five Star prints a report showing you what you asked to be blocked, and what it was able to block. You cannot view this report, it must be printed.

Method 2:
This method starts like previous method; go to the Pickup/Assign Rooms menu. Choose your group.

Click on the **Reserve All** button. As before you will asked if the rooms are to be Manual or Auto-blocks. Then you will be asked which room you wish to start blocking from. A report will be printed showing the room assignments. You will see that a series of generic reservations have been created. The last name is the name of the group and the first name is Room#1, Room#2 etc for each room that you requested. Each reservation will have the same arrival and departure date as the group master. These reservations will show in the Rooms Blocked Analysis screen (F6) as either yellow B's or cyan X's depending on how you answered the auto block question. These reservations will also show in the regular hotel reservation screen and they can be modified like any reservation.

If this were a wedding reservation, the individual guests would phone in and your front desk staff would modify one of the reservations and enter the name and address of the individual guest. That means the front desk staff don't need access to the Group Reservation. That room would then be considered Picked Up. This is an important point, as we shall see later in the Release program.

The advantage of this system is that it is very quick and you can view all the reservations in the regular Reservation screen.

Method 3:
This method is similar to the last except there are no reservations made ahead of time in the regular Hotel Reservation screen except for the master folio.

Start a regular reservation based on the dates the guest will be coming, you can even set the arrival date before the group arrival, or the departure date after the group leaves. Don't pick a room type or rate type yet. When you get to the reservation screen, press F2 to copy from history. Then press enter when the highlight is on the first option, to copy from current reservations.

Type the first few letters of the group name. Select the group master folio. It is always the first one on the list, and the room number will be something like ZG01 rather than an actual room number. Select it and all the details of the group will be copied to the new reservation. Press ALT-L and change the last

name to the guest's last name. Add any other name and address information you need. Press enter to get to the room type field.

Press F2 to show the room types that are available from the group block. Select a room type and rate type.

When you finish the reservation Five Star assigns a room, in other words, does the pickup. It does not reduce the number of rooms available, like a normal reservation does, because you have copied the reservation from the group master folio. The only time the availability will be affected is if you have already picked all the rooms originally blocked. When you accept the reservation you will be prompted that another block has been added to the group.

Cancel / Release Group

It is important to use this feature to ensure that your availability reflects the true availability of your property. There are 2 reasons to use this feature; the group wishes to completely cancel their booking or the group hasn't picked up as many rooms as they had originally blocked and you wish to make those extra rooms available to sell to someone else.

Canceling a Group: Go to Cancel/Release Group and look up the group in question. Click on the **Erase** button. This will totally remove the group from the computer including the master folio (ZG01) and the individual reservations whether they have been picked up or not. The system will not erase a reservation if there is a balance on it (i.e. deposit) or if it has been checked in. Only the group master folio will go to history (Scan /Edit Guest History).

Releasing a Group: Use this feature to make blocked rooms, which have not been picked up, available to sell to others. It is important to define a picked up room. The computer assumes a room is picked up when a reservation exists for that room AND the first name field has been changed. That means if you used the Reserve all feature but didn't go into the Reservation screen and modify the first name field any

reservation that still shows Room#1, Room#2 etc in the first name field is not considered picked up. Go to the Cancel/Release feature and choose Release. This will release rooms NOT picked up back to inventory. This will leave the master folio (ZG01) and any room picked up still in the computer. The rooms for that group in the Rooms Booked Analysis (F6) screen that showed as brown N's will now disappear. HINT*: If you aren't sure about rooms not being picked up on certain days you should go to the Reports menu and print the Room Availability Reconciliation Report for that day. Near the end of the report you will see if any groups have rooms not yet blocked.*

Group Reservations – Groups In House (not available in Five Star Lite)

Group Check In Procedures:

There are 2 ways to check in groups. It all depends on how they arrive; individually or en masse. Regardless of which technique you employ, you must always check in the master folio (ZG01) first. Go to the Check In/Walk In feature in Hotel Management and check in the ZG folio for that group. If you attempt to check in a group member first you will be stopped with a prompt informing you that you must check in the master folio first.

Individual Check In: You can check in the group folios individually if the group members are arriving one at a time. Check them in like a regular guest. Their registration cards will be printed along with the regular guests. There is a feature in the registration card printing routine that allows you to exclude group members. Some hotels don't bother with registration cards for group members.

Early Arrivals: (Previously discussed in Group Change Arrival/Departure)

Change individual arrival/departure dates in the regular Reservation screen in Hotel Management. If you do change an individual group guest's arrival date

to arrive earlier you will also have to change the arrival date on the group master folio in the regular Reservation screen. This is because the group master folio must be checked in before any group member can be checked in. When you do this you will see the following warning:

This is just a reminder, not an error. If you are changing the date to accommodate one or a few reservations then choose OK and continue. If you are changing the arrival date for the entire group then proceed to the Group Management menu, Group Reservations.

Fast Check In: When the bus rolls up to the hotel you find yourself with a lobby full of guests waiting to be checked in. Use the Fast Check In feature in the Group Management menu. If you haven't checked in the master folio you won't see your group listed here. If you see your group here then select it. You will have to choose between Proceed and Check In All.

> Proceed: This will only check in rooms that have been picked up by individual group members. As well the rooms must be vacant, clean and the guest due to arrive that day. You can run the Fast Check In more than once. If some of the group is arriving today and some are due tomorrow, you can rerun the Fast Check In tomorrow.

> Check In All: This checks in all the group members even if the rooms haven't been picked up. The rooms must be clean, vacant and the reservation must be due to arrive today.

You will have to print a report after the Fast Check In process. It will show who was checked in and where, if they were checked in and if not, why. If you don't print the report the Fast Check In will be aborted.

Xfer Charges to Master:

This is a useful feature when the group master is paying for more than just room charges. Once charges are incurred you can transfer them from all of the individual reservations to any other reservation in that group including the master folio. Go to the **Xfer Charges to Master** in the Group Management menu. Choose the group folio you wish to transfer charges to. You will then see this screen:

All Charges will transfer every charge on each of the group folios to the folio you chose. Room/Package Charges will only transfer room charges posted by the night audit. This is useful when the Group Pays field in the main group reservation file wasn't checked and it should have been. Selected Charges will present you with a list of the Billing and Receipt Codes. Choose which billing codes you wish to transfer. Choose OK when you have completed your selection. Use this when a convener tells you that the master folio will pay for any faxes that the group members may have charged to their rooms. This feature only works for charges that exist. It isn't something you can set up ahead of time. You would probably use this just prior to check out.

While the group is in house, room charges may be posted to the master folio or to the individual folios, depending on whether the Group Pays Room field was checked or not. Other charges will still be posted to the individual folios.

Group Check Out:

Just like the check in process, there are 2 ways to check out groups: individually or as a whole.

If the guests come to the front desk they can be checked out one at a time just like a regular guest. The advanced check out feature does not work with a group reservation.

A speedy way to check out the entire group is the Fast Check Out. This will check all members of the group scheduled to depart today. Great for buses! Go to Group Management and choose **Fast Check Out**. Choose your group from the list. A guest will be checked out if they are due to leave today, and they have a zero balance. If some of the group is leaving today and some tomorrow, you can run Fast Check Out today and again tomorrow. If a guest owes you money then you must check them out manually, or deal with their balance in Record Guest Charges or transfer their charges to the master folio if appropriate. Fast Check Out does not check out the master folio. You must check this out manually in the regular check out screen. You don't have to check out the master folio the same day as the group guests. In fact it may be useful to leave it checked in, in case you discover some extra charges to apply to the group.

Group Reporting:

There are several reports available. The Sales Forecast Report shows information in one-month blocks. It lists groups for the month, dividing those with and without deposits. It shows the number of rooms booked for each day and lists financial information at the end of the report.

Use the Group Cutoff Report to determine which groups still haven't submitted final rooming lists. This is important so that you can release the rooms not picked up back to inventory.

The Group List can be used to list information gathered on the main group-booking screen. It can be sorted in a variety of ways. Name and address are at

the top of the report, number of rooms blocked and picked up are in the middle section and a list of group members and their rooms are found at the end. Some hotels send this report to the group convener to confirm the booking.

Package Plans (not available in Five Star Lite)

Five Star is very popular amongst resorts and high service inns partly because of its strengths in handling package plans. You can create single day and multi day packages like the '2 Day Golf Package' for a total of $600 for double occupancy, which includes room for 2 nights, breakfast and dinner for 2 with 2 days of golf for each person. The folio will simply show the title, with one charge of $600 plus taxes, while your sales reports and accounting records will automatically split the total into the various departments and nights. For details on setting up a package refer to the Front Office Reference Manual.

During the Reservation: There are some differences when booking packages as compared to nightly rates. Packages are set for a number of nights. You can have 1-night, 2-night even 7-night packages. If a guest is booking for a 2-night stay, you won't see packages that are set for 3 or more nights listed in the Rate screen during the reservation process.

While In-House: It is possible for a guest to stay more nights than the package is set for. Many hotels have a B&B package set for 1 night, but guests stay for multiple nights. Depending on how the package is set the guest may be charged for the package each night or only once. Make sure your manager explains the difference to you so that guests are charged correctly. Details of the package setup are in the reference manual.

During Check Out: If, for example, a guest is checked in for a 3-night package and they try to leave after 2 nights you will get a prompt notifying you that the minimum package length is 2 nights. You must change the rate to either a 2-night package or a nightly rate in order to check out the guest. The

advance check out feature does not work with packages. If the guest wishes to pre-pay then you can open their reservation in Edit In-House Guest and click on the Other button. You will see their estimated balance on the right hand side. This balance won't include any incidental charges like telephone or sundry purchases.

The Four Keystroke Night Audit

The Five Star Night Audit is fully automated and fast. It takes just four keystrokes to run. While every property is different, and every day is different, we tested a 190-room property, with 179 rooms occupied in the summer, running on an NT server and a Windows 98 workstation, both Pentium IIs, 350 megahertz, on a 100-megabit network. It took just 11 minutes!

There are a few things you should do before you run the night audit. There are 3 "Cheat Sheets" that came with Five Star. These are a great reference for the night auditor. These are " The 4 keystroke Night Audit", "Nite Audit Balancing", and "Nite Audit Balancing Worksheet".

"The 4 Keystroke Nite Audit"(*listed below in italics*) describes step by step what your auditor should do. We suggest you modify this sheet to reflect all the duties required of you auditor and set it as a checklist so that nothing is missed.

1) *Check the Check In screen to see if anyone is not in yet. Check in guaranteed reservations or charge credit cards as required. Use the No Shows Report to do this during the audit.*

This step will vary depending on your policy for no shows. If you leave no shows, that is don't cancel their reservation, then they will go to history during the night audit and will show on the no shows report. The system can even be configured (Hotel Profile/Custom) to automatically charge them. However someone will have to post the payment after the audit. You can also check the guest in and let the audit post the room charge. If the guest shows up after the audit then just give him a key to his room. If he doesn't show then you can decide to reverse the room charge in the morning (manager's decision) or post a payment against his credit card and check him out. Print the No

Shows Report (Night Audit menu) before checking the no show in so that you have a list as a reference.

2) *Post dining room & phone charges etc. if any.*

If you have a dining room there might by charges to be posted from guests who ate and room charged their meal. Use billing code D1. You may also have to manually post telephone charges (codes T1-T6) if you don't have our call Accounting Interface. Go to Record Guest Charges to post. If you have our Call Accounting and/or POS Interface then remove this step.

3) *Post the dining room/bar/gift shop cash out from each cash register's Z key. Use the User ID CASHOUT (password CASHOUT).*

You may want to post sales from other sales areas into Five Star. Five Star will include these sales in the night audit reports. If you also have our accounting program then the sales will post to the proper gl account. There are 2 Cheat Sheets (Point of Sale Cashout Worksheet) that can be used to balance your sales. The auditor enters the sales from the "Z" reading onto the Cashout sheet. Notice that there is a billing code that corresponds to each type of sale from the "Z" reading. Once this sheet balances then go to Record Guest Charges and look up the house account ZDIN and post using the billing codes listed on the sheet. This entry must balance to $0.00. Remember to put a negative in front of the entry for D1 (Room Charges) since it must be a credit in this posting. If you use our POS system then you can skip this step.

4) *Print the End of Shift Report for the user named CALL (the call accounting report)*

If you use our Call Accounting system then you require the End of Shift Report for Call Accounting. It has been posting automatically throughout the day. In the Hotel Management menu go to Reports, End of Shift Report and look up the user Call. Print the report in summary or you will see all the charges posted. You will get that detail during

the audit. All we need is the total. Put this report aside for the balancing section later.

5) Print your End Of Shift Report and balance to your till. Make your deposit.
All users should have printed an End of Shift Report, balanced and signed a detailed copy. Designate a tray where these reports are left so the auditor can balance them later. They should also print a summary version and include it with their deposit.

6) Print the Preview Room Charges Report (Night Audit menu) and compare to the registration cards in the bucket. All reg cards should have the room rate on them. Make sure all room rates are right. Use the Edit In House Guest screen to make changes.
This is the bucket check and must not be skipped. It is far easier to correct an incorrect rate before it is posted than after the audit has run and the charge is on the guest's folio. It is less embarrassing as well compared to explaining to a guest that there is a mistake on their folio.

7) Print the Preview Charges Report (Night Audit menu). Balance to the credit card machine totals printout.
The Preview Charges Report will show a total for each settlement method posted in Five Star. This must balance to the totals from the credit card machine. If it doesn't then someone forgot to post a payment in Five Star or forgot to post into the credit card machine.

8) Run the House Status Report (Reports menu), in case of check-ins or outs during the backup & audit.
This is your emergency report. We recommend printing this report at the beginning of each shift. It gives a snapshot of the property and will allow you to deal with guests should you loose access to Five Star. You can't access Five Star during Night Audit, backup or if the power goes out. It also shows staff the status of the hotel so they can plan their shift.

9) Make a zip drive, hard disk to hard disk, or tape backup. DO NOT SKIP THIS STEP. This is your insurance policy against hardware or power failure.

Your hardware technician must set up a back up routine. There is backup information with your Five Star package. We recommend the auditor fill in a logbook indicating who and when the backup was completed by. If there are any issues with the backup they must notify management the next day. Five Star does not warrant or support backups but we will work with your hardware technician to configure a backup. The day you need to restore a backup is not the day you want to find out it hasn't been working!

10) Run the night audit. Get yourself a cup of coffee!
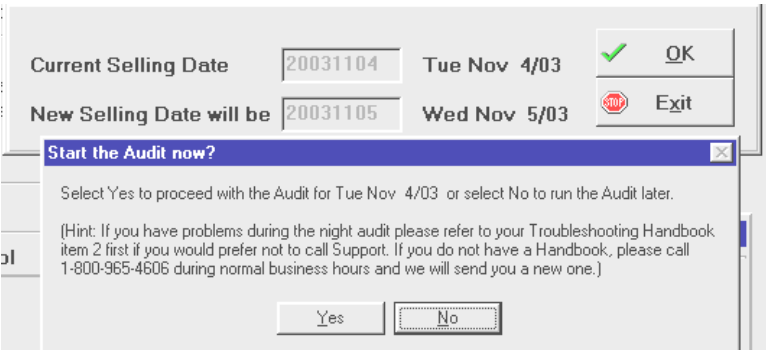
You will be presented with the above screen. Choose Yes to proceed. Next choose where you want to print the audit then choose Print. You will see the name of the various reports as they are processed. Don't touch the keyboard. Notice that you also have the option to send your night audit to file. This can save time and paper. The audit will create a file for each report and save it in the folder indicated in either System Parameters or Workstation Setup (Administration menu). The reports can then be viewed with Notepad, or Word. You will have to organize these files once created. The files are named MSDOD001.txt, MSDOS002.txt etc. These files should be moved to a suitably named directory or floppy disk for future reference.

The audit is complete when you see the following display:
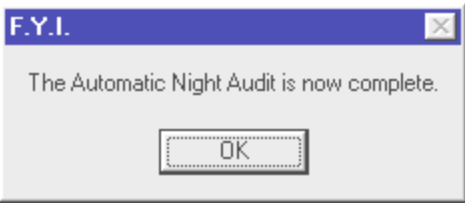
The audit has now advanced the selling date from today to tomorrow and printed all the reports selected in the General Hotel Profile/Custom screen. A description of the Night Audit reports and features follows this section on Night Audit procedures. For now we will continue with Night Audit procedures.

11) *Follow the balancing steps on the balancing worksheet.*
Your auditor can now fill in the Nite Audit Balancing Worksheet that was included with your Five Star package. This will be discussed in the Balancing section a little later.

12) *Print the registration cards for all of tomorrow's expected arrivals. Use the Conf/Dep/Reg Cards program, Registration Cards - Expected Arrivals - All Reservations to a Selected Date option. Enter the default date.*
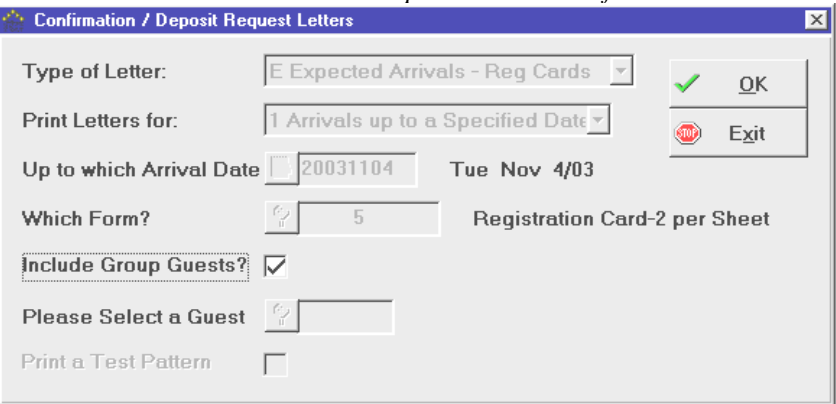
This is normally done after the Night Audit has been run. One of the last steps in the Night Audit is the aforementioned Auto-juggler. The juggler may change the room numbers assigned so it is best to wait until after the night audit to print the cards so that the correct room numbers are printed on the cards. Some hotels review the daily arrivals in the morning and then move guests around manually. These properties should wait until they have manually moved the rooms before printing the registration cards for that day's arrivals.

To print the registration cards go to the Reports menu, and then choose Confirmation/Deposit/Reg Cards. In the Type of Letter field press the down arrow and choose "E Expected Arrivals – Reg Cards". In the Print Letters For field press Enter to choose "1 Arrivals up to a Specified Date". Press Enter in the "Up to which Arrival Date" field. Notice that it defaults to today's date. In the Which Form field choose the design you want to use. Five Star comes pre-loaded with 2 registration card designs. The most popular one is #5, 2 per page. This will put 2 registration cards on one page. *(Once printed you would then use a good paper cutter to cut the batch in half. Don't use scissors. They never cut evenly and don't give the guest a very good impression of your hotel.)* Keep pressing Enter until you get to the printer screen. Choose the printer you wish to send the cards to.
If you happen to take more reservation for today after having already printed today's registration cards you can go back and repeat the same procedure. The system won't reprint the same registration cards. It will only print the new ones. If you did want to reprint all of today's registration cards then choose "R Reprint Expected Arrivals" in the Type of Letter field. If you want to print cards for just one or a few select reservations then choose "2 Selected Reservations" in the Up to which Arrival Date field. Continue as before. Once you choose the printer a lookup screen will appear. Highlight and press Enter on each

guest for whom you wish to print a card. Press F4 when you have completed your selection(s) and the cards will begin printing.

13) Print confirmation letters for any reservations made that day that requested one. Use the Conf/Dep/Reg Cards program, Confirmation Letters - All Reservations to a Selected Date option. Enter the date as Dec 31, 2005. (Not available in the Lite version.)

14) Use the Print Other F/O Reports program to print the Special Requests Report (shows the special things your housekeeping staff will prepare for today's guests. Not available in the Lite version)

Your manager may have designed reports to give any pertinent information from the reservations arriving today. Anything recorded on a reservation can be included on a Front Office Report. This allows the morning staff to prepare the special requests for today's arrivals. Go to the Reports menu then down to Print F/O Reports.

15) Print the housekeeping report.

Choose the Housekeeping Report from the Hotel Management menu. You can print this report for the entire hotel or you can choose a range of rooms. That way if one housekeeper prepares rooms 102 to 151 and another is responsible for 202 to 251 you can print a separate report for each. There is a dotted section where you can hand write any notes. The report doesn't take long to print so you may want to wait until the housekeepers arrive. That way they will have the most current status for the rooms (in case guests leave).

What the Audit Does:

The **selling date** is changed from today to tomorrow. Regardless of when you start the audit; 10pm, midnight, 2am or 6am, your business day changes when the audit is run.

First it will update your inventory for **No-shows** and **Stay-overs**, and can post guest credit card no-show revenue if configured in the General Hotel Profile.

Next it prints a simple report showing **Arrivals** and **Departures** for the day. These are arrivals and departures for the day of the audit, not the upcoming day.

Then it posts **Other Daily Charges**, such as the cot in the room. These are charges set up on individual reservations in the Daily Charges button.

The next report is a very important one, the **Post Room Charges** report. It shows room charges plus taxes, and posts all to guest folios. It also breaks package plans in to their accounting components for posting at a later stage of the night audit. Lastly, it provides a balancing total called Net Change to the Guest Ledger. It puts an asterisk next to the room rates that have been changed from the standard rate so you can spot the exceptions.

Next is the **Guest Ledger** report. It shows all guests in-house plus those that have deposits. The total on this report represents the balance of the guest ledger account in your general ledger, or in other words, the amount that you would collect if they all checked out right now. The right-hand columns of the report are used to balance from yesterday to today. Five Star knows the balance today and remembers the balance yesterday. It takes yesterday's balance, adds the net changes for today for the guest, and compares the total to today's balance. If there is a difference, something has gone wrong. So at a glance you can prove that your numbers have not been messed up. The only time there should be an imbalance is if you have transferred charges from one guest to another. There will be 2 equal but opposite imbalances so they will net to zero.

Next the **City Ledger Transfers** report is created for all your accounts receivable postings (direct billings). Use it to reprint invoices from the folio history program (History, Historical Folio Inquiry) for mailing the very next day. Note: If you have set Five Star to delay the transfers to history (General Hotel Profile, Options) then you will have to go to Display Guest Account in Hotel Management to print direct bill invoices from yesterday. If you have the Five Star back office module, these invoices will be posted to the accounts receivable module.

The next step is the calculation of **Travel Agent Commissions**. Any guest booked by a travel agent, who checks out today, will appear on this list. You simply enter a travel agent code in the travel agent field in the reservations program for this to happen. The commission will be posted to the accounts payable module if you have purchased the Five Star back office program. All you have to do then is print the cheques. This is one of the things Five Star can change most from a manual system. It is a lot of work to track and pay a $5 cheque to a travel agent if done by hand. And paying travel agents is one of the simplest things you can do to increase occupancy.

The next report is also a very important one for balancing and control purposes, the **Charges Report and GL Update**. It shows every transaction for the day, sorted by transaction billing or receipt code. It is identical to the end of shift report, except that it prints for all users, and it shows the room charges and the other daily charges. Use the net change to guest ledger total at the end of the charges report for balancing to the end of shift report totals.

Further down this report in the **GL Update** section the general ledger journal entry is created. You can link Five Star to your chart of accounts in the Five Star back office program. When this report is run, Five Star posts to its own back office if you have purchased it, or it simply stops at this point and provides you with a report on what to post to your other accounting system. If you use Accpac Plus, Simply Accounting, Fortune 1000, MYOB, Quick Books or REMS accounting software you can configure Five Star to create a batch file that these accounting packages can post to their general ledgers.

The **Daily Revenue and Statistics** report is the most important in the night audit. It shows your sales figures daily, monthly and yearly. It breaks them down into revenue categories of room, miscellaneous, telephone, food & beverage. Then it shows payments, taxes, gratuities, and direct billing. It gives you a revenue subtotal. The exact billing codes like room rack, or room seniors are based exactly on your property's revenue sources.

The second section of the report is for statistical information. It also has a daily, weekly, and yearly column. Apart from statistics like new reservations, check-ins etc, it shows all the important average daily rate and percentage

occupancy figures. The year-to-date column automatically resets to zero at year-end. You can specify fiscal or calendar year-end in the General Hotel Profile, Options menu. Your year-end is set in the Administration menu in the Setup Company Profile menu. It can only be changed by Five Star support once set or you can set it if you create a new company.

Once the reports are complete then the program will send guest information to history, marketing stats will be updated and you may see the auto-juggler run. You know the audit is complete if you see "The Automatic Night Audit is now complete".

Night Audit - Handling Errors

Occasionally you may run into errors in Five Star. Proper computer usage (*refer to "12 Things that Ensure Trouble Free Computing" in the Five Star package*) and professional hardware setup will avoid the majority of issues. We have also provided the Troubleshooting Handbook that will get you through most situations. This 16 page (or so) leaflet comes with every update and it is available on our website. Every employee should have one and there should be a permanent copy at each workstation. There is even a copy in the Five Star program if you click on the Movie Camera icon in the top left corner of the toolbar. Look at the bottom of the list in the T's. You may need to page down.

If you do get an error in Five Star you will get an information screen. It contains 4 pieces of information critical to resolving the problem.

```
┌─────────────────────────────────────────────────────────────┐
│ ⁘ Error #12!    (in Setup/Edit Customers)              [×]   │
├─────────────────────────────────────────────────────────────┤
│  Program: GJR51          Statement: 7040   Level: 1 - 4.582  │
│                                                              │
│  It appears that you have an error # 12.                     │
│  If you are not in a payroll, accounts payable, or general ledger update, you may │
│  use the SAFE EXIT option to restart Five Star and try the same procedure again.  │
│  If you SAFE EXIT from a batch entry program such as P/R Time Entry or A/P         │
│  Invoices, you will lose whatever you were working on.       │
│                                                              │
│  If you are unsure how to handle this error yourself, check your Troubleshooting  │
│  Handbook items 2, 3, or 5 (or on another terminal click the movie icon top left  │
│  on the Five Star Toolbar) first if you prefer not to call Support. If you do not have │
│  a Troubleshooting Handbook, please call 1-800-965-4606 during normal business    │
│  hours and we will send you a new one.                       │
│                                                              │
│  🐜  Retry        ♻  Safe Exit         🛑  Exit             │
└─────────────────────────────────────────────────────────────┘
```

Make sure you record the **Program**, **Statement**, **Level** and **Error#**. Without these Five Star Support staff will not be able to properly diagnose the problem. You will need this information as well. The Troubleshooting Handbook will give you different solutions depending upon the type of error you get. Refer to the Troubleshooting Handbook **BEFORE** calling support. If you call after hours or if you don't have a daytime support plan charges will apply. It seems a waste to pay for a support call when you were able to fix the problem yourself!

Retry will do exactly what it states. Try this for printer issues. **Safe Exit** will bring you back to the login screen. **Exit** will "break out" of the program. You will see some small script on the screen. If you type *bye* and press Enter, Five Star will be closed and you will be brought back to Windows Desktop. If you type *start* and press Enter you will be returned to the login screen.

There is a section in the troubleshooting Handbook devoted to issues during the Night Audit. Auditors must be familiar with it. We will revue it here. You act differently depending on when the audit is interrupted.

If the interruption occurred any time after the Post Room Charges report, **don't rerun the night audit**. All the functions that follow will be run automatically during the next night's audit.

If the interruption happens during Post Room Charges report, **don't rerun the night audit**. You will need to manually post those room charges the audit missed. If the Room Charges report is partially printed, check to see the room it stopped at. Confirm which rooms need to be manually posted by going to the Guest Account Inquiry and looking up each guest's folio.

If the interruption occurs before the Post Room Charges report then you can rerun the night audit.

If you run the audit again and room charges have already been applied, the program will charge the guests again. There is no undo feature. You will have to remove the charges manually in the Transfer Charges feature. We have built in safeguards to avoid this. The next 3 sections will show what to expect depending on when the audit was interrupted.

1. If you attempt to run a night audit within 12 hours of the last one you will see the following:
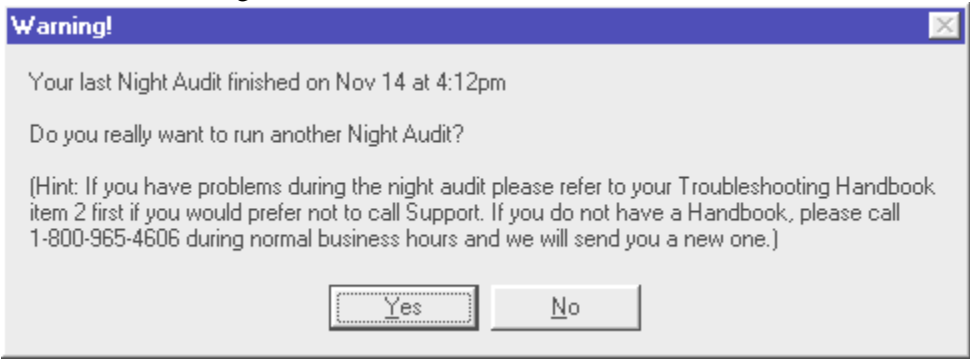
If you choose No you will return to a regular menu. Yes will bring up the next screen:

Before you can proceed with the Night Audit, you will have
to enter the Manager Override Password.

If you do not know the Password, it can be found by
making the following selections starting at the
Applications Menu:
- Hotel Management
- Hotel Setup Menu
- General Hotel Profile
- Options

If you do not have access to any of the above selections,
please contact your Supervisor.

Five Star does not know your passwords and cannot give
them to you. Call your manager if you don't know the
password.

(Hint: If you have problems during the night audit please
refer to your Troubleshooting Handbook item 2 first if you
would prefer not to call Support. If you do not have a
Handbook, please call 1-800-965-4606 during normal
business hours and we will send you a new one.)

Please enter the Manager Override Password.

Look for the password as described in the message above. Do not call
Five Star for the password. The only times you might run more than one
night audit in a 12-hour period is if your system has been down for
several days and you are trying to recreate the missing days. Perhaps
your property closes for part of the year, you might run a night audit
around midnight then run a second audit in the morning after your last
guests for the season have checked out.

2. You have started the night audit but it was interrupted before posting any
room charges. You fix whatever caused the audit to stop then you attempt
to start the audit again that night. This screen comes up:
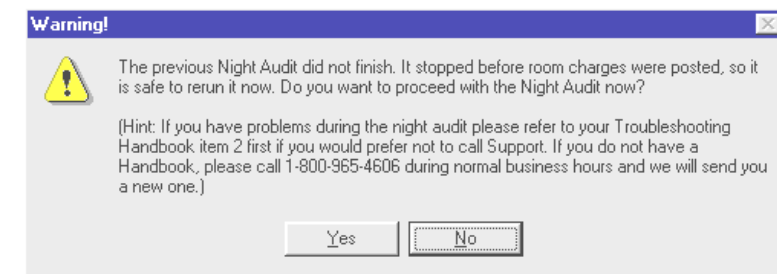
Choose Yes. The screen requiring a password will appear. Enter the password as before then there will be a prompt concerning the selling date (see below). Remember that the very first thing the audit does is to advance the selling date from today to tomorrow.
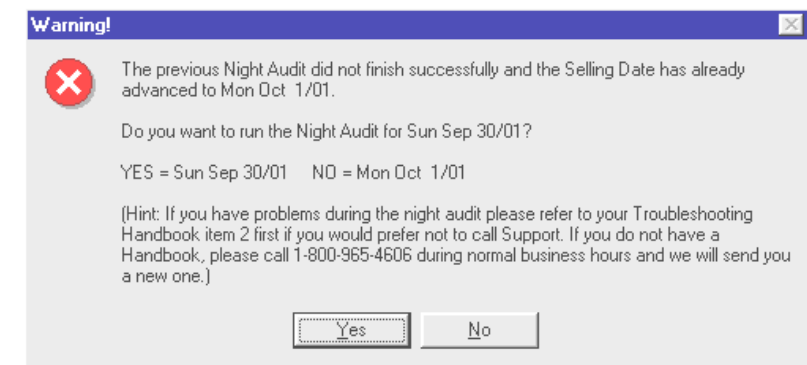
If you are trying to rerun the audit then choose Yes and proceed with the audit. If it is the following night (the error occurred the previous night), then choose No and continue.

3. The audit was interrupted after posting some or all of the room charges. You attempt to run it again that night and the following screen appears:

Warning!

You are attempting to re-run a Night Audit that has already been run for today. The previous Night Audit has likely posted some or all of the Room Charges. If you re-run now, you may double post these charges! It is not necessary to re-run the Night Audit now because everything that happens after this point will automatically be done tomorrow night on your next Night Audit.

We suggest that you do NOT continue at this point.

Do you want to proceed with the Night Audit anyway?

(Hint: If you have problems during the night audit please refer to your Troubleshooting Handbook item 2 first if you would prefer not to call Support. If you do not have a Handbook, please call 1-800-965-4606 during normal business hours and we will send you a new one.)

[Yes]   [No]

You should choose No if you see this immediately after running the audit and are attempting to run a second. Answer Yes if the interruption occurred the previous night. Example: You ran the audit Monday night and the audit was interrupted after the room charges were posted. When you come in Tuesday night you will see the above message. Answer Yes Tuesday night.

Balancing

In order to be able to rely on the reports and information Five Star provides you with, you must know that it is correct. Balancing and controls are amongst the most important features in the Five Star system. If you can't prove the sales and receipts are correct, your employees can steal, and you don't have control over your business. The audit trail and controls are carefully designed with the help of accountants and our users.

Five Star is your cash register. That means you don't need another cash register, just Five Star. It will provide you with a report at the end of each shift much like an X-out on a cash register, and a Z-out report like the end of day reporting from a cash register. Here is how the information flows and is balanced.

```
                      The North American Inn              Pg 1
                    End of Shift Report for Thu  Jun 03/99
                            Operator: Susan Smith

Guest Name                   Room/Res Reference          Time         Amount

     1 - PAID CASH - Thank you

Maxwell Kurowski             Rm0101                      07:49        -300.00
Jack Carlton                 Rm0105                      07:49        -100.00
John Davidson                Rm0101                      07:49        -350.00
                                                                   ----------
                                                         Total:      -750.00
     2 - PAID BY CHECK - Thank you

Herb Stevens                 Rm0209                      07:49        -250.00
                                                                   ----------
                                                         Total:      -250.00
     3 - PAID BY VISA - Thank you

Chris Bryen                  Rm0110                      07:49        -223.43
Esamullah Abate              Rm0203                      07:49         -45.54
Daniel Brock                 Rm0115                      07:49         -34.54
                                                                   ----------
                                                         Total:      -303.51
```

At the end of each shift each operator must print a detailed **End of Shift Report**. It shows you all the cash transactions for the day, for Visa, Master Card, etc., with details for each guest. Here Susan Smith ended her shift, having taken in 3 cash transactions from Max Kurowski, Jack Carlton, and John Davidson. She recorded 3 Visas and 1 cheque. Her total deposit is $1717.10. These reports have a grand total at the end called the **Net Change to the Guest Ledger**. This total will be used for balancing purposes. It represents the net financial effect this operator has had on the system including both charges and payments.

If there is a difference between the report and the deposit, she must make the corrections before her shift ends. She should sign the final correct report and put it in the night auditor's end of shift report tray. She should then print a summary version and enclose it with the deposit drop, signed. If you have purchased our point of Sale system then each server must print an End of Shift Report and submit a copy to the Night Auditor's tray. The Night Auditor will require the room charges from the server's reports to balance.

```
                        The North American Inn                     P
                 Charges Report & G/L Update for Thu Jun  3/99

                                                      Date of
Guest Name                  Room/Res Reference      Time    Operator Record

    1 - PAID CASH - Thank you
ZZDaily Cash Sales          Z        Chit # 01000037  13:34   PA      Jun  1/9
ZZDaily Cash Sales          Z        Chit # 01000039  14:01   PA      Jun  1/9
Chris Bryen                 000073                    16:48   PETER   Jun  2/9
ZZDaily Cash Sales          Z        Chit # 01000040  14:09   PA      Jun  2/9
Maxwell Kurowski            Rm0101                    07:49   SUSAN   Jun  3/9
Jack Carlton                Rm0105                    07:49   SUSAN   Jun  3/9
John Davidson               Rm0101                    07:49   SUSAN   Jun  3/9
Herb Stevens                001002                    15:35   PETER   Jun  3/9

                                          Total:
    2 - PAID BY CHECK - Thank you
Herb Stevens                Rm0209                    07:49   SUSAN   Jun  3/9

                                          Total:
    3 - PAID BY VISA - Thank you
ZZDaily Cash Sales          Z        Chit # 01000037  13:34   PA      Jun  1/9
Frank Anderson              000837   65465            16:58   PETER   Jun  2/9
Chris Bryen                 Rm0110                    07:49   SUSAN   Jun  3/9
Esamullah Abate             Rm0203                    07:49   SUSAN   Jun  3/9
Daniel Brock                Rm0115                    07:49   SUSAN   Jun  3/9
```

When the night audit is run, it produces the Charges and General Ledger Update report. Its structure is the same as the end of shift report, but it shows all operators for the day. It is used as a total of all the end of shift reports. This report also has a **Grand Total Net Change to Guest Ledger**, which is used to balance to the end of shift reports.

Five Star provides you with a form called the Balancing Worksheet. Just before running the audit enter all of the operator's End of Shift reports Net Change to Guest Ledger totals first. You will also have to enter the Net Change to Guest Ledger for the operator "CALL" if you have our Call Accounting interface, and "MOVIE" if you have our Movie interface. Remember that interfaces have been posting phone or movie charges all day long. Total these. You can now view the End of Shift report for all operators and compare to the sub-total you just calculated. If there is a difference then likely someone forgot to hand one in or they posted more charges after printing their end of shift report. You may have to go back into the Reports menu and reprint that person's report. Run the audit. Now add also the Net Change to the Guest Ledger from the Room Charges report and the Post Other Daily Charges report from the night audit. These net changes in total must equal the total on the Charges report. If so, then the transactions reported and balanced to on all the end of shift reports exactly equal the transactions in the computer at the end of the day.

```
G/L Summary Postings

99-231-0         N/A Jun03    GST                        -295.35
99-236-0         N/A Jun03    PST                        -331.33
99-301-1         N/A Jun03  Adjustments Room Charges       125.00
99-322-2         N/A Jun03  Bar Sales                   -1,316.17
99-321-2         N/A Jun03  Dining Room Charge            -986.62
99-121-0         N/A Jun03  Guest Ledger for Thu Jun  3/99 -26.65
99-379-1         N/A Jun03  Meeting Room - Audio Visual Re -40.00
99-101-0         N/A Jun03  PAID BY AMEX - Thank you       314.52
99-101-0         N/A Jun03  PAID BY CHECK - Thank you      250.00
99-101-0         N/A Jun03  PAID BY DISCOVER - Thank you   560.00
99-101-0         N/A Jun03  PAID BY MASTERCARD - Thank you 367.94
99-101-0         N/A Jun03  PAID BY VISA - Thank you       647.21
99-101-0         N/A Jun03  PAID CASH - Thank you        3,022.40
99-101-0         N/A Jun03  REFUND - Other                -140.00
99-302-1         N/A Jun03  Room - Corporate              -935.00
99-269-0         N/A Jun03  Room - Long Term-Day 1-000414   23.43
99-317-1         N/A Jun03  Room - Long Term-Day 1-000414  -23.43
99-318-1         N/A Jun03  Room - Meeting Rooms          -155.00
99-301-1         N/A Jun03  Room - Regular              -1,020.00
99-326-0         N/A Jun03  Service Charge                 -36.45
99-340-4         N/A Jun03  Sundry - Confections            -4.50
                                                    ================
                              Difference:              0.00
```

Back on the Charges and G/L update report you can see how the transactions are sorted by transaction code, and subtotaled. There is a general ledger account number for each transaction code. The report summarizes each code into a journal entry as shown at the end of the report. For each transaction code total there is a corresponding debit or credit, forming the journal entry for the day.

If you purchase the optional Five Star back office program, the entry will be posted in the general ledger immediately. You can check the postings in the general ledger too so that you can prove that every dollar gets from the front office to the back office. Each month each account shows every posting.

There is a second balancing point. The Guest Ledger report shows yesterday's balance, and today's transactions. It then adds them together to see what today's balance should be by guest. If the total differs from what the balance actually is today the guest is flagged. By proving that today's transactions all exactly match the deposit, and that none of the transactions from previous dates are in error, you prove that the system is correct.

All the balancing described above takes about 10 minutes each day and can be done by your night auditor.

```
                                          The North American Inn
                                     Daily Revenue Report for Thu Jun  3/99

                        ---------- T o d a y ----------  -------- Month to Date
                           Amount    Adjust  Net Total      Amount     Adjust


Room Charges
  Adjustments Room Charges     0.00  -125.00   -125.00        0.00    -125.00
  Room - Corporate           405.00     0.00    405.00    1,180.00       0.00
  Room - Long Term            23.43     0.00     23.43       23.43       0.00
  Room - Meeting Rooms         0.00     0.00      0.00      155.00       0.00
  Room - Regular             660.00     0.00    660.00    1,285.00       0.00
                        -------------------------------  -----------------------
Total Room Charges         1,088.43  -125.00    963.43    2,643.43    -125.00

Regular Charges
  Sundry - Confections         4.50     0.00      4.50        4.50       0.00
                        -------------------------------  -----------------------
Total Regular Charges          4.50     0.00      4.50        4.50       0.00

Food Charges
  Dining Room Charge         112.97     0.00    112.97      986.62       0.00
                        -------------------------------  -----------------------
Total Food Charges           112.97     0.00    112.97      986.62       0.00
```

The daily revenue report also shows you its figures by transaction code, so you can prove that it is identical to the charges and g/l update report. Also, the net change to the guest ledger grand total on the Charges Report is the same figure as the grand total on the daily revenue report.

Housekeeping & Rooms Out of Order

Housekeeping with Five Star is simple, and really saves time. Print the housekeeping report for your staff each morning. It shows which rooms are clean and dirty. It shows guests who are checking out, which are staying, and which are checking in. The status of the room changes automatically when the night audit is run, that is, occupied rooms become dirty. When a guest checks out, or moves to a new room, the status automatically changes to dirty as well. All you have to do is change the status to clean when the housekeepers tell you. Or they can do it themselves.

You can use the update room status program to quickly change the room to clean. Simply type the room number and it shows you the current status. Press enter again and it becomes clean. If you keep pressing enter it selects the next room and cleans it. Or you can clean the whole property by pressing Alt+A.

If you order the Five Star telephone interface optionally, the housekeeper can tell Five Star the room is clean simply by pressing keys on the telephone and the room is automatically cleaned.

Use the Put Rooms out of Order program to take rooms out of inventory for repairs, maintenance etc.

Put Rooms In/Out of Order		**✕**
Room Number	109	✓ OK
Date Out	20031220	Dec 20/03	↩ Undo
Date In	20031223	Dec 23/03	🗑 Delete
Reason #1	Painting		🛑 Exit
Reason #2		

You can specify a date out and a date back in service, along with the reason. After putting a room out of order press F6 (Rooms Booked Analysis), and you will see a blue * for that room on the date(s) for which it is out of order. Your availability will also be reduced on those dates. If the work is cancelled or you need to change the dates you must delete the original record then create a new one.

When you first go into the Out of Order feature, press F9 to create a report of a list of maintenance requirements sorted by date out of service. This produces a maintenance schedule.

Scan/Edit Guest History

There are 2 levels of history in Five Star. The first level includes names, addresses, preferences etc and is found in **Scan/Edit Guest History** in the History menu.

For every guest, past present and future it shows name, address, postal code, credit card, email, corporation billing information, travel agent, preferred room type rate type, rate, all preferences, guest history notes, comments, who took the reservation, and the date and time, and the same for the check in and the check out, other daily charges, deposit information.

It keeps the number of visits, and it keeps all this information for every visit, none is filtered out. So if your guest calls and says he didn't like his last room but he liked the previous one, you can quickly see the right one. When you copy from guest history, when taking a reservation you see only the last visit. That way you don't have to wade through a much longer history file.

Deposit Information for Pat Ainsworth

Deposit Required	50.00	
Required by	20000710	Jul 10/00
Deposit Received	50.00	

On the other hand, to quickly view any other visit for the same guest, press F10 and you see all visits. You can edit guest information. This is useful if you discovered that a guest has damaged a room or made off with towels. Look up the guest in history and click on the History button to add the information. Should the guest try to reserve again the information will pop up if your staff copies from history.

All this information is available to you in the report generators and the user defined cards and letters program (not available in Five Star Lite). To add any field to a report in one of the report generators, we use design codes. Details on designing your own reports are explained in the section titled Report Generators. The report generator allows you to design your own reports, while the letters and cards program allows you to design your own registration cards, confirmation letters, deposit letters, deposit receipt letters, and miscellaneous other letters.

History can also be used to create mass mailings or even very targeted mailings (not available in Five Star Lite). Using the report generators (not available in Five Star Lite), you design a simple report with name and

address. And instead of printing the report Five Star can output it to a Word or Word Perfect secondary mail merge file. Five Star comes with instructions to do a mail merge in these programs so you can make any kind of letter imaginable.

Here is one interesting example: One of our smaller high service properties did a mail out by having Five Star select all her guests who had visited 8 times or more between June 1 and September 30. The letter thanked them for their summer business and offered them 10% off coupons for the big fall colours season. What a great way to fill rooms in the shoulder seasons!

History Folios and Space Required

The second level of history is the guest's folio or bill. Have you ever had a call from the person who says he is doing his taxes or expense account and he lost his receipt? Your question of course is when did he stay here, and the answer, of course, is 3 months ago. Have you ever had to go looking for one of these receipts? Well, try this instead. Go to **History Folio Inquiry** in the History menu. Use the speed search to find the last name, select it and print the folio. It's that simple. Five Star keeps every folio for as long as you want it. If you have Outlook (not Outlook Express) you can email the guest their folio directly from Five Star.

```
                        The North American Inn
                         123 Main Street
                         Toronto, Ontario
                             M6Y 5R4
                  Telephone: 234-567-8901  Fax: 234-567-1234

Gary Ambasitor                       Res. #       000237
  1916 Brookshire Sq.                Checked in  Tue Mar  4/97 - 10:14 am
  Winnipeg, MB                       Checked out Tue Jun 23/98 - 10:01 am
                                     Room Rate     115.00
  R0A 2B3                            Room        0107

Date  Description                    Reference          Charges    Credits
May06 PAID BY CHECK - Thank you      423423                        200.00
May15 Room Charges                                       115.00
May15   GST                                                8.05
May15   PST                                                5.75
May20 PAID CASH - Thank you                                        -71.20
                                                       ---------- ----------
                                            0.00        128.80    128.80
```

Don't worry about running out of space. We have found from existing users that the average 100-room hotel uses about 200 megabytes of disk space per year, including all guest history and folios. So over 5 years, even if you erase or archive nothing, and you have 300 rooms you will use up 3 gigabytes.

Since the smallest hard drive you can buy at the time of writing is 10 gigabytes, you will not run out of space.

The History menu does have some features to clean up your history. The detailed use of these features is explained in the reference manual. You may wish to clean up history to speed up searches and report generators after using the system for a number of years. You can also use these features to clean up information you no longer want.

Standard Reports

Five Star comes with the standard reports you need to operate, manage and plan your business. All reports can be printed or viewed on screen, or exported to an ASCII file, or Lotus or Excel file, or Word or Word Perfect file. If you print a report and then need to print it again later, simply click on the printer icon on the toolbar. You see all the reports that were printed on this workstation under your user id. You can't print other users reports. If you want to you have to log in under their User ID. This is a security feature. You wouldn't want a user to be able to reprint a report they did not have access to in the first place. This feature is useful when your printer eats your night audit reports. Don't rerun your night audit just reprint the reports.

The Arrivals List shows who is expected to arrive on any date today or in the future. While this is a commonly required report in other computer systems, it is less important in Five Star, because the check in screen always shows you who is not checked in yet for today. On screen information is always more up to date than a printed report, which is out of date as soon as something changes.

```
                         The North American Inn                Pg 1
                          Arrivals for Thu Jun 3

                                  Rate                Adults
Guest Name                Room(s)  Type   Arrival  Departure  /Kids  Rm.Rate

Bierworth, Daniel         W1(4       RACK Thu Jun 3 Fri Jun 4   2      100.00
Horner, Brock             04(2       CORP Thu Jun 3 Sun Jun 6   2      120.00
Kaur, Harveer             04(1       RACK Thu Jun 3 Sat Jun 5  2/2     150.00
Lozanovski, Ratko         03(1       CORP Thu Jun 3 Fri Jun 4   2      137.00
                                                          ------- ---------
                Total Rooms: 4                    Totals:   8/2     507.00

                          ===== End of Report =====
```

The In-House list is also a commonly required report for showing you who is in the property, but it is less important for Five Star. That's because the F7

Tools button on the toolbar has a lookup by name, a lookup by room number and a lookup by reservation number. These are the three fast lookups in Five Star. They are better than an in-house list for things like checking if someone has checked in yet, because they show the guest status. C/I means checked in, C/O means checked out, and RES means the reservation is not checked in yet. One easy to access feature finds all guests whether arrived, checked out or not arrived yet.

```
                          The North American Inn              Pg 1
                       In House List for Thu Jun 3

                                                      Adults    Current
Guest Name                Room(s)    Arrival  Departure /Kids    Balance

Abate, Esamullah          0203     Wed Jun 2 Sun Jun 6  2       553.66
Anderson, Frank           0303     Sat May29 Mon Jun 7  1      -192.27
Andrews, Allan            0108     Sun May30 Fri Jun 4  3       671.74
Andrews, Allan, incident  0108     Sun May30 Fri Jun 4  0         0.00
Appleton, Nader           0111     Fri May28 Thu Jun 3  2       553.83
```

The Occupancy Forecast report has proven to be one of the most important. It shows you, for any date range, the number of rooms you have to sell, number of arrivals, departures, guest in house, adults in house, children in house, rooms left to sell, total revenue, average daily rate projected, and revpar. Lots of useful information.

Date	# of Rooms	Out of Order	Arrivals	Rooms Occupied	Departing	Rooms Available	Adults / Kids	Room Revenue	% Occ	Aver Ra
Thu Jun 3	61	1	4	14	4	46	30/4	1545.33	23	110
Fri Jun 4	61	0	2	7	9	54	13/2	738.33	11	109
Sat Jun 5	61	0	1	6	2	55	11	543.33	10	90
Sun Jun 6	61	0	1	4	3	57	7	248.33	7	62
Mon Jun 7	61	0	3	5	2	56	10	308.33	8	61
Tue Jun 8	61	0	6	61	0	0	16/4	544.32	100	8
Wed Jun 9	61	0	2	56	7	5	12	393.33	92	7
Thu Jun10	61	0	1	6	1	55	12	393.33	10	65

(Header above table: "The North American Inn   Pg" / "Occupancy Forecast from Thu Jun 3/99 to Wed Jun30/99")

The House Status Report is your emergency report. In any system you should find an emergency report, that is a single report you can print that tells you

everything you need to run the property in the event that the computer is not operational. You might have an extended power failure, or the computer might fail, and you need a contingency. The House Status report shows you which rooms are occupied or vacant, which are dirty or clean, which arrivals, departures, in-house guests, and their balances. Everything you need is on one report. Print it at the beginning of every shift, and you will never find yourself in a serious bind.

Room Availability Reconciliation: This report is an excellent way to find out why the Availability (F5) screen doesn't appear to match with the Rooms Booked (F6) screen. You can run it for one day or a range of dates. It lists all the rooms in the property. It then lists (for the date range selected), rooms out of order, rooms with reservations, group blocks, group rooms picked up and rooms not yet picked up. Rooms not yet picked are usually why your availability appears lower than what you think it is.

House Status Report: This is your emergency paper backup. It lists every room in the property with 3 main columns: guests arriving today, guests leaving today and guests in-house. Each of these columns contains the name of the guest, number of adults and children and their current balance. The in-house column also includes the arrival and departure dates. Staff should print one copy of this report at the beginning of a shift or anytime you expect the computer(s) to be down.

End of Reservation Log: Information is stored for the previous 7 days. It is divided into the following sections: New Reservations, Modified Reservations, Check-Ins, Check-Outs, and Cancelled Reservations.

The Turn Away/Waiting List report does double duty as a waiting list and as a list of reasons why guests were turned away. You can sort it based on any of the fields stored.

Detailed Charges Report: This can be run for today or any day in the past. It is similar to the charges report during the night audit, list charges for a given day. You can look at a specific billing code(s), a range of codes or all codes. This is useful when staff has forgotten to print their end of shift report and the

audit for that day has been run. (The End of Shift Report resets to zero once the audit runs). The only charges not accessible by this report are charges sent to clearing accounts like the Garbage folio or the Daily Sales account. Since the charges on these folios are cleared after the night audit, they no longer exist on the system. All other charges go to history when the guest is checked out, so they are still stored in the computer.

Occupancy by Market Segment: When you set up your rate types you were able to link them to market segments. You may have market segments to represent corporate rates, tour rates, and regular rates. For each segment you defined you will see the number of rooms booked, the ADR(Average Daily Rate), and revenue for each day of the month selected.

Reservations on the Books: This quick report lists the number of reservations for one year into the future. The months are listed across the top and the days of the month down the side.

Report Generators (not available in Five Star Lite)

A report generator is a program that lets you design your own reports. Many property management systems come with third party programs that are designed for report writing in general, and not specifically for hotel history reports, market analysis or current reservation reports. Because the Five Star report generators are built in, they look and feel exactly like all other Five Star software, which helps learning. More importantly, they are designed specifically for hotel report generation. Because they are task specific, they are generally found to be easier to learn, and do more for you.

Lets look at a sample history report design. This report is a Corporate Summary Report, designed to show you how much business each of your corporations bring you.

The first element of the report design is how it is sorted. This one is sorted by corporate customer name (B51). It will give you all the data for one corporation, followed by the data for the next. A report can be sorted by any field in the report generator, such as the postal code, credit card, rate type, room type, travel agent, operator who took the reservation, etc., etc. Press F2 in the Sorted By field to see a list of all the possible codes. Page down to see the complete list.

The next element of any report is whether it will have subtotals or not. You need subtotals for each corporation. You might want to subtotal the number of nights and revenue each corporation brought you. A report sorted by guest last name does not need subtotals, since most guests have only been once. Subtotals would give you the guest, then a subtotal, then another guest and another subtotal, and so on. It would make your report unnecessarily long.

If you choose the summary only button, you will only see one line per corporation (what you are sorting by), rather than one line per guest for each corporation, a more practical report. If you choose summary only you will only see data that can be summarized, like number of nights, revenue, etc. Data like names, addresses, and emails can't be summarized. Any columns including these types of data would be empty in summary. Whether subtotals is set to yes or no, the report would show one line for each guest and for each corporation, while a summary report would only show one line per corporation.

Next you begin to set up the actual columns in the report. This report has 9 columns. You can create up to 14 columns.

The first piece of information for each column is the data type. In this field press F2 to see the list of design codes from the guest history file and select the one you want. In this report we want the corporation name in the first column. In the first column you should always use the data code for the way you are sorting the report, that way you know it is sorted right.
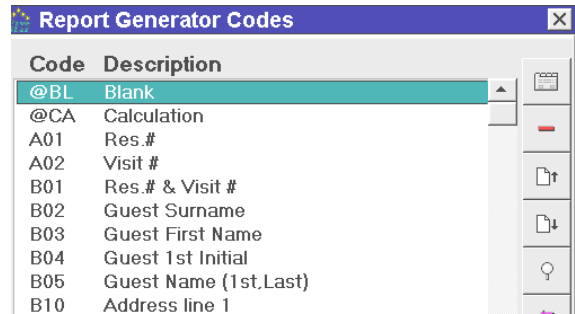
The Format Field is for the way numbers will be presented. In this case the column is text so the format is N/A. Press F2 to see the other formats. For number columns you might choose 2 decimal places for money columns or no decimal places for number of guests columns. Five Star usually suggests the best format automatically, so you don't have to make decisions here.

Presentation Formats

Code	Description
C1	-99,999.99 (2 decimals)
C1R	-99,999.99, reverse sign
C2	(99,999.99) (2 decimals)
C2R	(99,999.99), reverse sign
D1	-99,999 (no decimals)
D1R	-99,999, reverse sign
D2	(99,999) (no decimals)
D2R	(99,999), reverse sign
NA	Not Applicable
P1	1 decimal point

The # Chrs. field allows you to choose the width of the column. Again, Five Star knows how wide to make the column, and suggests the right width. If you are making a very wide report you might have to make one or more columns fewer characters. The column must be wide enough for the width of the data as well as the width of the heading. Too narrow and it will chop off the column heading when printed! Watch the width counter (*to the right of the report title*) to see if your report is too wide. Most laser printers can go to about 165 characters wide.

Five Star suggests what the heading or title of the column should be. If you need a different heading, type it over what Five Star suggests.

Normally you skip the calculation column, unless you use the @ CA calculation design code. This allows you to do calculations on the columns in your report. I.e. Column 2 has code B22, No. of Nights. Column 3 has code B34, Room Rate. If you were to multiply the number of nights by the room rate you could calculate the expected revenue. To do this you would put @CA in column 4 and in the calculation field you would enter C2*C3. You can do plus, minus, times, divided by, and brackets. For example you can multiply

the number of nights by the number of rooms to come up with the number of room nights. You can calculate variances, percentages, differences, averages etc.

The conditions section of the report design is perhaps the most important. It lets you select groups of guests. If you didn't create conditions, you would get a report on every guest in the history file. Conditions are the filter of your report so you only see the information you are interested in.

In this example we are saying that the corporation code field must be greater than 0. What does that mean? We want only guests who came under a corporation. The corporate code field in each reservation will either be blank, if there was no corporation, or it will have a corporate code in the field. We have included only those guests with this command because to the computer, blank is less than zero.

We put a bullet next to AND for the second condition. 'OR' differs from 'AND' in that with 'AND' both conditions must be satisfied for the guest to appear on the report. With the 'OR' condition, if either conditions are satisfied, the guest will appear on the report. You can have up to 4 conditions.

Next, we say and the arrival date must be between 19990101 and 19991231. That is the way of requesting only corporate records in the year 1999. To make your report more flexible type the word **ASK** in the Condition field. When you run this report the condition screen will pop up and the word ASK will be highlighted. Erase the word ASK then enter whatever date range you want. Make sure the date is formatted *YYYYMMDD,YYYYMMDD*. A longer report could exclude this second condition. Exclude it simply by changing the 'AND' to 'N/A'.

To see now how the report we just designed looks, go to the print history report screen, and choose the report. This report should be printed for all visits. View the report before printing. What if you didn't get the condition quite right?

```
                             The North American Inn                  Pg
                              Corporate Summary Report

Corp                       #      #      #     #          #        Total
Name              Nites Adults  Kids Guests Rooms   Room Nites     Revenue

Bernie's Pipe C     214    218    36    218    87       371.00   59,065.70
Brock & Sons To       2     10     4     10     3         6.00    1,590.00
Brock Horner Tr       7      2     0      2     1         7.00      840.00
Ceramic Villiag     138    140    11    140    55       255.00   31,490.60
Deloitte & Bake      13     15     0     15     7        15.00    1,140.00
Five Star Hotel       4      3     0      3     2         4.00      565.00
Goreski Caterin      31      8     0      8     4        31.00    1,615.00
Kelly, Bailey &      98     62     3     62    25       126.00   16,862.77
Richard's Custo       3      2     0      2     1         3.00      584.06
Voo Doo Tatooin      93     66    10     66    27       116.00   14,724.71

                   ------ ------ ------ ------ ----- ------------ ------------
                     603    526    64    526   212       934.00  128,477.84
                   ====== ====== ====== ====== ===== ============ ============

                         ===== End of Report =====
```

There are some differences between the 3 main report generators.

Front Office Report Generator: You can select from 4 different databases within Five Star. You can choose from reservations, in-house guests, guests checked-out (who haven't gone to history yet), and the brochure system. You can also choose from all of the above. When you choose from the reservation database the report will automatically ask you for a range of arrival dates when you run it, so you don't need to add that condition.

History Report Generator: This generator only looks at guests who are in history. This includes guests checked-out and at least one night audit has run. If your profile is configured to delay the transfer to history then a guest will only be in history after that number of days has passed. Cancelled reservations go to history as soon as they are cancelled. No-shows go to history as they are processed by the night audit.

Marketing Report Generator: This section stores information differently than the previous 2 report generators. Information is stored as monthly totals in a statistical format. Refer to the reference manual for a complete description.

Output to Word/ Word Perfect Mail Merge (not available in Five Star Lite)

Not only can the report generators print reports but they can also send lists of names and addresses to Word or Word Perfect as a mail merge secondary file. Merge this list with a letter and you get a customized letter for each recipient on the list. This makes mass and targeted mailings a reality. We ship Five Star with an example, the special occasion mailing list. It is sorted by postal code, to save on the mailing costs. It includes the guest name, address, city, and postal code. It also includes the arrival date.

In the conditions it specifies that the special occasion field must be AN. That's the code we use in our hotel for guests who were here on their anniversary. In the second condition we say the arrival date must be between 19991001 and 19991031; in other words, last October. We will print this report in August of 2000 and mail it to all guests on the list inviting them back this year for another anniversary.

When you print the report, select last visit only, because you don't want a guest who has been twice to get two letters.

Instead of printing to a printer, select the last option output to Word Perfect/Word Mail Merge. This will create a mail merge secondary file, i.e. a list of names and addresses formatted to do a mail merge in Word or Word Perfect.
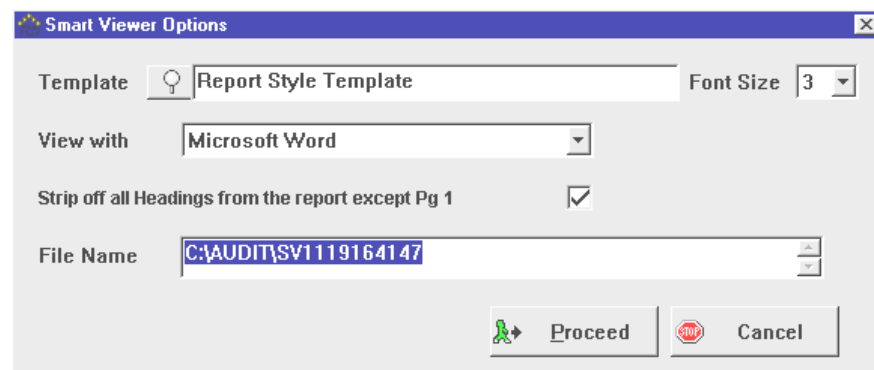
If you have Word or Excel loaded on your computer you can use the Smart Viewer feature in Five Star. Run your report as you normally would but when the "Where Would You Like It Printed" screen comes up choose Smart Viewer.

In the "View with" field choose Word or Excel. Put a check mark in the "Strip Headings" box. Choose where you want to save the file. Use the Word mail merge wizard to merge this file to your main document.

To make the process even easier, we ship Five Star with a Word and a Word Perfect mail merge primary letter. It says something like 'We would like to thank you for having stayed with us, and we hope to see you again soon, etc.' You can easily change the wording, and save it as another letter, or save many letters. We provide instructions in the user manual for how to use Word and Word Perfect to perform a mail merge, with the primary letter file and the secondary address file. The result? If you have a list of 50 names and addresses in the secondary file you have 50 letters all nicely personalized and ready to be mailed. What could be easier for soliciting past guests to come back to your property?

If you are using the phone company to call you or fax you with long distance time and charges (commonly called HOBIC) you could save over $100 per room per year. A 20 room property saves the price of the program every year, and it can pay for the complete Five Star solution over 3 years.

Why? The phone company charges you $2.50 per call, plus long distance charges of 38 to 55 cents per minute. If you have call accounting, your long distance rates will be about 7 to 15 cents a minute. So if you continue to charge the rates you are charging now for your long distance services, you make the profit instead of passing it to the phone company. If you consider just the $2.50 charge, and if you see 2 longs distance calls per day from the hobic operator, $2.50 x 2 x 365 days = $1875 per year in savings! That's the price of the program saved every year.

Here's how to figure out your exact savings. Keep a log for a month of the duration and charges of the calls the hobic operator calls back with. At the end of the month, add up the minutes. Multiply the total by 15 cents, and that's what you should have paid. Now add up what you did pay, and subtract the what you could have paid. The difference is your monthly savings. Multiply by 12 months and that's how much you could save in a year.

Should you get the Five Star call accounting or a third party program? There are three main benefits to the Five Star Call Accounting when compared to other systems. First, with Five Star you don't need a separate computer. That alone saves about a thousand dollars.

Second, the technology is much simpler with Five Star. With a third party call accounting program, the many things you need to post a charge into a guest folio is:

a cable between the phone switch and the call accounting computer, a call accounting computer, the call accounting program, the call accounting computer needs an interface program sending records to Five Star, then you

need another serial cable from the call accounting computer to the Five Star computer, on the latter you need a Five Star interface program to talk to the interface program on the call accounting computer.

If all of these things are working, you get calls in the folios. If something goes wrong you don't get calls posted. Worse yet, you call the call accounting company and they say the problem is the property management system and the property management company says it is the call accounting system's fault. And you are stuck in the middle. When Five Star provides you with both you can't lose.

Third, Five Star does not require rate tables that have to be updated every year, as most of the other call accounting systems do. Such updates usually cost up to $500 per year, whereas Five Star's annual cost is just $95 per year. On other call accounting systems, if your rate tables are out of date, rate table systems cost wrong. Some don't even cost at all. Five Star's costing is so simple, it needs no rate tables, which is actually the biggest benefit of using Five Star. Because the system is so simple, many users tweak their pricing regularly. One 24 room property told us they saved $2600 in the first month alone, because the owner had complete control over its pricing strategy.

Setup/Edit Call Acct Rules - Call Costing

OK
Undo
Delete
Exit

Day of the Week — DEFAULT

	Cost/ Minute	Min/ 6Sec	Disc. Code	Minimum Duration	Minimum Cost	Maximum Cost	Charge Code
411 Calls	1.25	S		4.00	1.25	1.25	T5
911 Calls	0.00	S		0.00	0.00	0.00	
Local Calls	0.50	S		4.00	0.50	0.50	T1
Near Area Long Distance	0.44	S		5.00	2.50	0.00	T2
N.America Long Distance	0.58	S		5.00	2.50	0.00	T2
International Calls	5.50	S		8.00	5.50	0.00	T2
1 800 Calls	1.00	S		5.00	1.00	1.00	T6
1 900 Calls	5.00	S		8.00	20.00	0.00	T2
1 976 Calls	5.00	S		8.00	20.00	0.00	T2
Operator Assisted Calls	1.00	S		5.00	1.00	1.00	T6

There is one simple screen for all your rate rules. You can charge for directory information, local calls, long distance, international, calling card and 800 calls, and operator assisted calls. For long distance we provide for 2 rates throughout North America. The lower rate is for near area codes, and the second rate is for the rest of North America. There is one per minute rate for international calls.

Fine tuning rates and profit is simple. For example, to increase the rate from 38 cents per minute, to 39 simply change it on this screen.

The difference is that other systems base what you charge on a complex cost table, because they were designed in the 80's when rates were very complicated. However today, your true cost is no longer reflected in a rate table, since most long distance plans are simple flat rate per minute systems, like 15 cents a minute. Secondly, the rates you charge should not be based on a cost table but rather on what your market will bear. That is what the Five Star system is designed to do.

Five Star can read your actual phone bill on diskette, and compare each call cost to its revenue. If you want to see exactly what your profit is on your phone system, you should get your phone bill on diskette. Five Star can read the phone bill and match it call by call with what was recorded by your call accounting system. It will show the exact cost, revenue and profit by call. More importantly, it will show you how many calls are not being costed by the call accounting, or missed. No other call accounting system on the market can give you that level of accuracy and feedback.

Optional Modules Purchased Separately - Point of Sale

The point of sale is a touch screen system, meaning that instead of using the mouse or keyboard, you simply touch the screen. It is very easy to learn. Servers typically learn in under an hour or two.

The process starts by logging in. I will log in with my code PA.
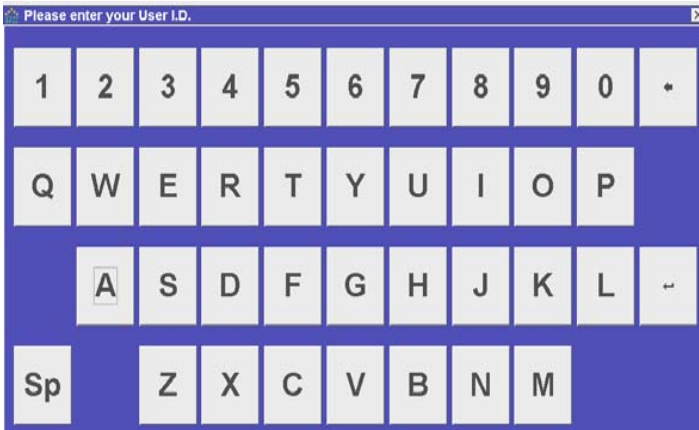
Since this is my first transaction of the day Five Star prompts me to start my
shift. I enter a float of $100 and start the shift.

I seat 2 guests at table 11, which is green, so it is open.

I will start a simple chit, consisting of 2 beers, an appetizer and an entree. Five Star lets you say how the entrees are to be prepared, using preparation option tables.

By touching send, the orders go to the bar and kitchen respectively, and are printed for preparation. This saves steps to both the bar and kitchen for the server. More importantly, it cuts down on employee fraud. If bartenders and chefs are instructed to prepare only that which comes off the prep printers, then all orders must be rung in to be delivered, and it becomes harder for employees to pocket the money.

At the end of the order I walk away from the computer.

When the meal is done, I return to log in, go to the open table, retrieve the open chit, and print it. The guest signs a tip and gives me his visa card. I add the tip, and post the total to visa, print a final copy for the guest, print a final copy for myself, and close the chit. Standard bills are just that simple.

Let's add some of life's standard complexities. To split a chit, it is best to enter it by seat number. Here is a beer for seat 1, then I change to seat 2, and add a glass of white wine, then change to seat 3, and add a Chivas Regal. I return later to seat one and add an entree, then do the same for seats 2 and 3.

Later I am told that seat 2 and 3 want one bill and seat 1 wants his own bill. No problem, I can easily edit the seat 3 items to seat 2. I touch seat 2, then edit, then the item to be changed, then touch only change the seat number.

Now it is seat 2. I do the same for the rest of the items. Next I touch split by seat and split and print. Presto I have two bills.

The first guest says he is on the package plan and signs a tip to the bill then signs it to his room. I touch Other, then change room number, then find, then scroll down the list to the guest. It shows the name and room number so I can be sure to get the right one. I select the guest. Notice how it is now showing as a chit for the specific guest room.

I touch package plan, and the items that are part of the plan have their prices removed from the chit. They still show without prices on the bill so the guest knows he is getting the benefit of the package plan, and the amounts are gone. This is important that it be done this way, so that food and beverage managers know what their true sales are.

I touch room charge, print the chit and print and close and again, instantly the chit is on the guests folio in the front office.

What you have just seen represents most of what servers need to learn.

At the end of the shift I can print a chit log that shows me everything I did that day. I also review the end of shift totals to make sure they match my deposit.

I can easily make corrections by opening another chit. For example, suppose Five Star said $10 more Visa than I have and $10 less Master Card than I have. Open a new chit, go to the settlement screen. Touch Visa, then –10, then Master Card, and T to transfer. Print and close the chit. The end of shift report is now correct. Print the end of shift report and end the shift.

One of the greatest advantages of a fully integrated point of sale system is that you can set up menu and sales items from your desk, and you can see what is going on in the dining room from your desk. You don't have to go to a point of sale station to see the status.

Reports like the sales by item report are current to the second. When I view this report it is as of right now. Here is a real example of the power of an integrated system: We set up the front desk and point of sale systems in one of our client's properties. Two weeks after the system was operational we added a terminal on the owner's desk and showed him how to see this report. He studied it for 45 minutes watching the numbers tick by. Then he picked up the phone and called his bartender. He asked 'Why are you selling happy hour at a quarter to the hour. I could lose my license.' There was a pause on the other end of the line and finally 'Sorry it won't happen again.' Five minutes later the owner called again and said 'Why are you running a tab in my bar. I told you all sales for drinks are pay as you go.' Again, the answer was 'Sorry it won't happen again.' The owner turned with a big smile and said 'I have never had this level of control in my bar in my life!'

In addition to instant on-screen reporting, point of sale offers period reporting for any date range you want. Report on yesterday, last week, month, year, two years ago, five years ago, last mothers day, last Monday to Thursday, the long weekend, anything. Use this information to plan for current and future periods.

Changing information is easy with Five Star. To add a new menu item, go to the sales item screen. Let's add a Tuna Salad Sandwich to the menu. First, since we have never sold it before we need a new sales item. Create an item number. The description is for reports. The chit description is what shows on the guest chit. The button description is how the button will show on the screen menu. Enter the price, and then any preparation modifiers. In this case for the sandwich we want the modifier table that offers types of bread, mayonnaise, etc. Accept the screen.

Then go to the menu design screen. Find the sandwich sub menu in the list of menus. Go to the first blank square, and click. In the first field indicate that this is a new item. Select the item number we just created, and the colours the button should be. Click ok and your new item is set up and on the menu.

Optional Modules Purchased Separately - Back Office

The biggest advantage of using the Five Star back office program is the full integration. Most accounting programs share many common features, so these days there isn't a lot of difference. And the time savings and the timeliness of financial statements, accounts receivable, and accounts payable is worth far more than the cost of the program. In one property with 180 rooms the controller estimated that one third of his time was saved by using a fully integrated program. That's worth about $15000 per year if the controller is worth $45000 per year.

For owners and controllers there is one other common advantage. We have seen owners go to their controllers and ask for a financial statement, a point of great tension. The controller says with a nasty look 'how do you expect me to just whip up a statement for this month when I don't even have last month done yet?' And so it goes. With the Five Star back office system, the owner can get an instant on screen financial statement himself that is accurate as of yesterday on the revenue side, and as of the last batch of payable invoices entered or payroll is run. You can window in to each line, for complete details, right down to the individual transaction.

The three points of integration between the Front Office and Back Office modules are general ledger debits and credits, accounts receivable invoices, and travel agent commissions to accounts payable:

When the night audit is run, and the charges and general ledger update report is printed, the debits and credits for the journal entry created that day will be immediately posted to the general ledger.

When the Transfers to City Ledger Report is printed during the night audit any invoices showing on the report are sent to the accounts receivable module.

When the Travel Agent Commissions report is printed during the night audit those commissions for guests checking out that day are posted to accounts payable. All you have to do to pay them is print cheques. It's that easy.

Accounts Receivable main features include customer statements, delinquency lists, delinquency letters, aged reports bank reports, finance charges, payment receipts. Accounts Payable offers cheque writing and bank reconciliation. General Ledger offers the instant on screen financial views, complete detailed printed financial statements, AM&HA chart of accounts and financial statements already set up, or use your own. In addition it includes a budgeting module and a fixed asset management module.