AUTOMATED SENDING OF BOOKING CONFIRMATIONS AND OTHER DOCUMENTS

You will learn:
1. How to configure your mailbox within KWHotel
2. How to set up automated email messages
3. How to test manual and automated mailing

KWHotel allows you to send booking confirmations, letters of thanks and other types of documents. Messages can be sent in two different ways:

- by email (automatically or manually)
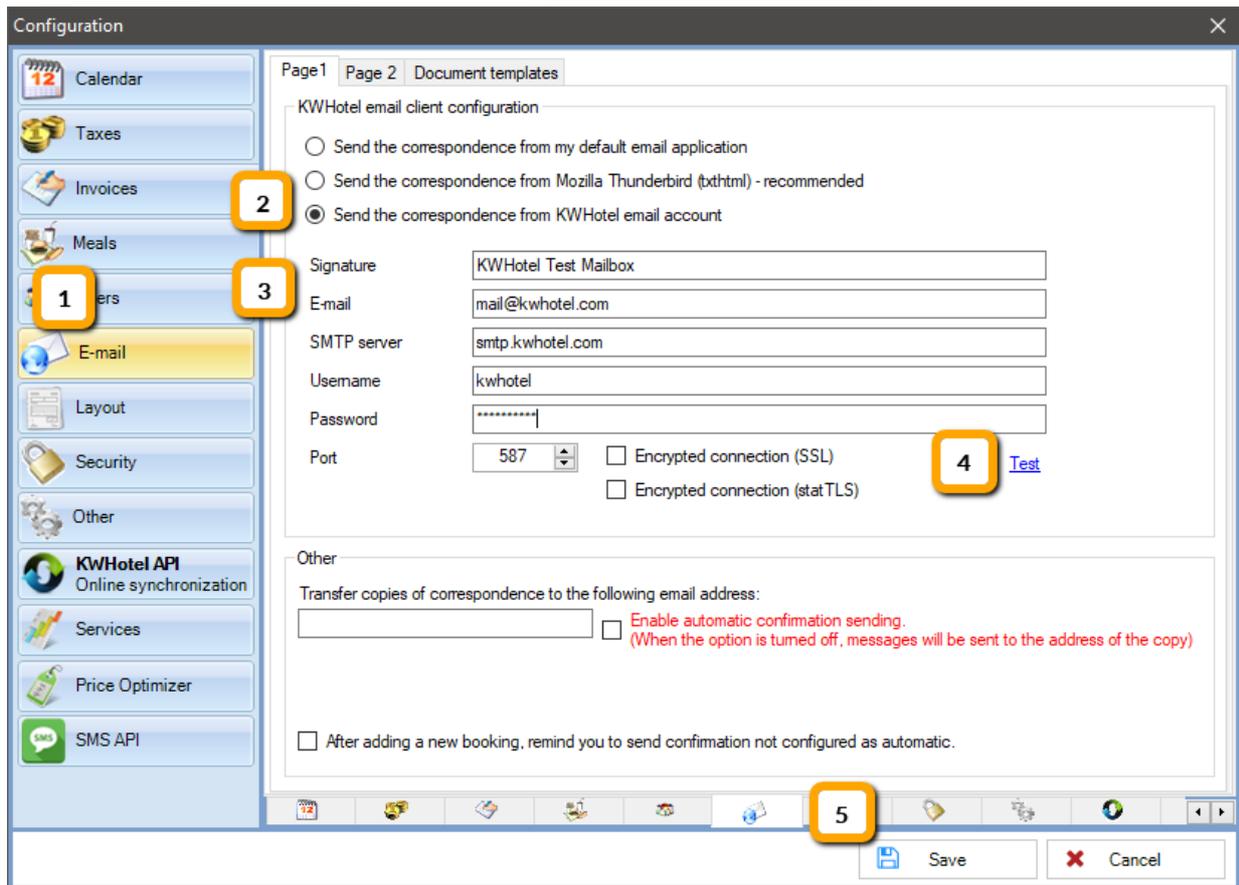- by text message (automatically or manually; requires purchasing the SMS API synchronization module.

User can create his own template (using a built-in Fast Report software or a simple built-in HTML editor) or use the existing templates.

Attention! *Before you proceed to configuring the automated emails, the mailbox must be set up in KWHotel.*

1. How to configure mailbox within KWHotel

Step by step instruction on how to extend the synchronization periods:

1. Go to Tools --> Configuration --> Email.
2. Select "Send the correspondence from KWHotel email account" option.
3. Insert your mailbox details. If you are uncertain of the correct configuration for your mailbox, please consult a person who set it up in your hotel.
4. Having completed the configuration, click the blue "Test" button. A test message will be dispatched to your email.
5. If you received a message successfully, save the changes.

Attention! *Before you proceed to configuring the automated SMS messages, the synchronization with SMS API must be performed. You will receive a detailed manual upon purchasing the synchronization module.*
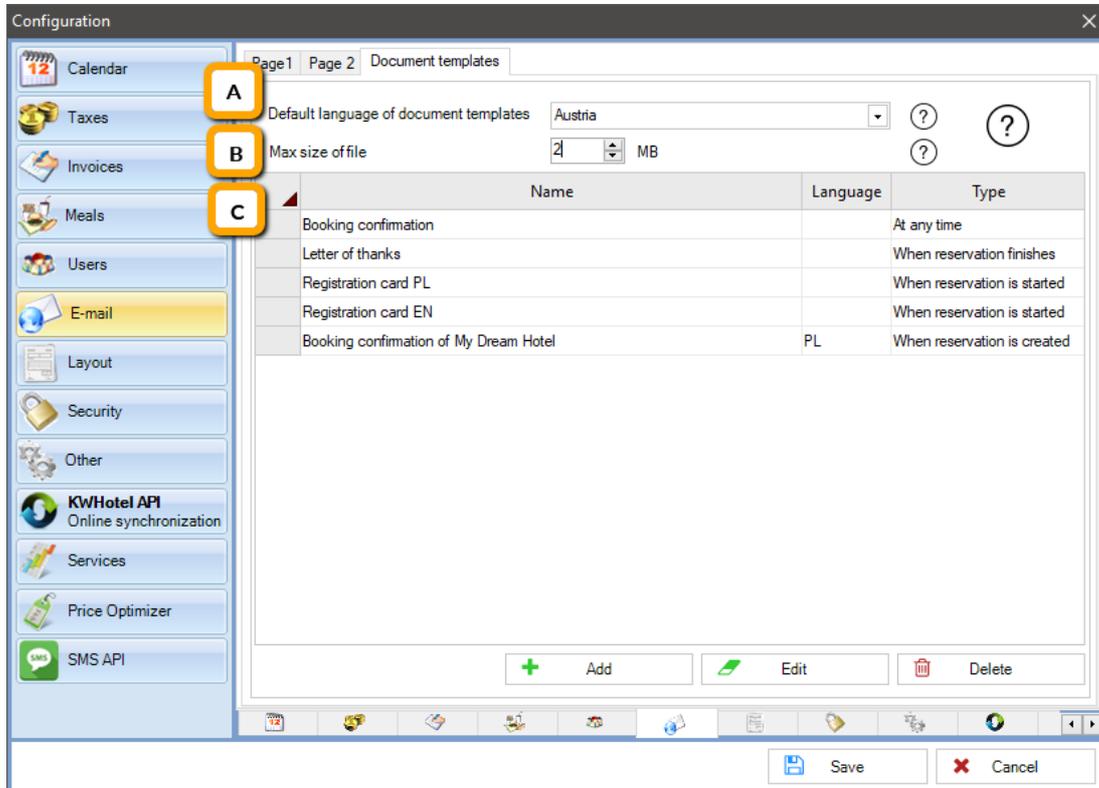
2. Setting up the email and SMS messages

You can set up new templates and edit the existing ones in Tools --> Configuration --> Email --> Document templates.

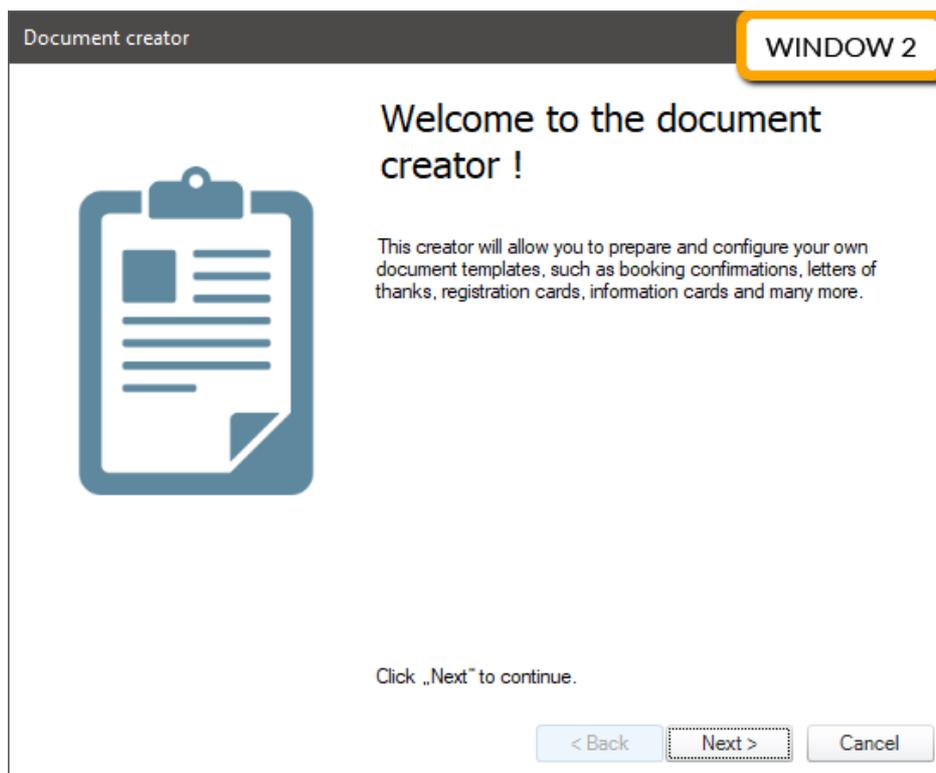Once you open this window, the following data will display:

A) **Default language of document templates**: if you have no template in the customer`s language, the template from the default language will be sent.

B) **Max size of file**: determines the maximum size of the attachment that can be added to a template.

C) **List of templates**: displays the already existing templates and those created by you.

Step by step manual on how to create a new template.
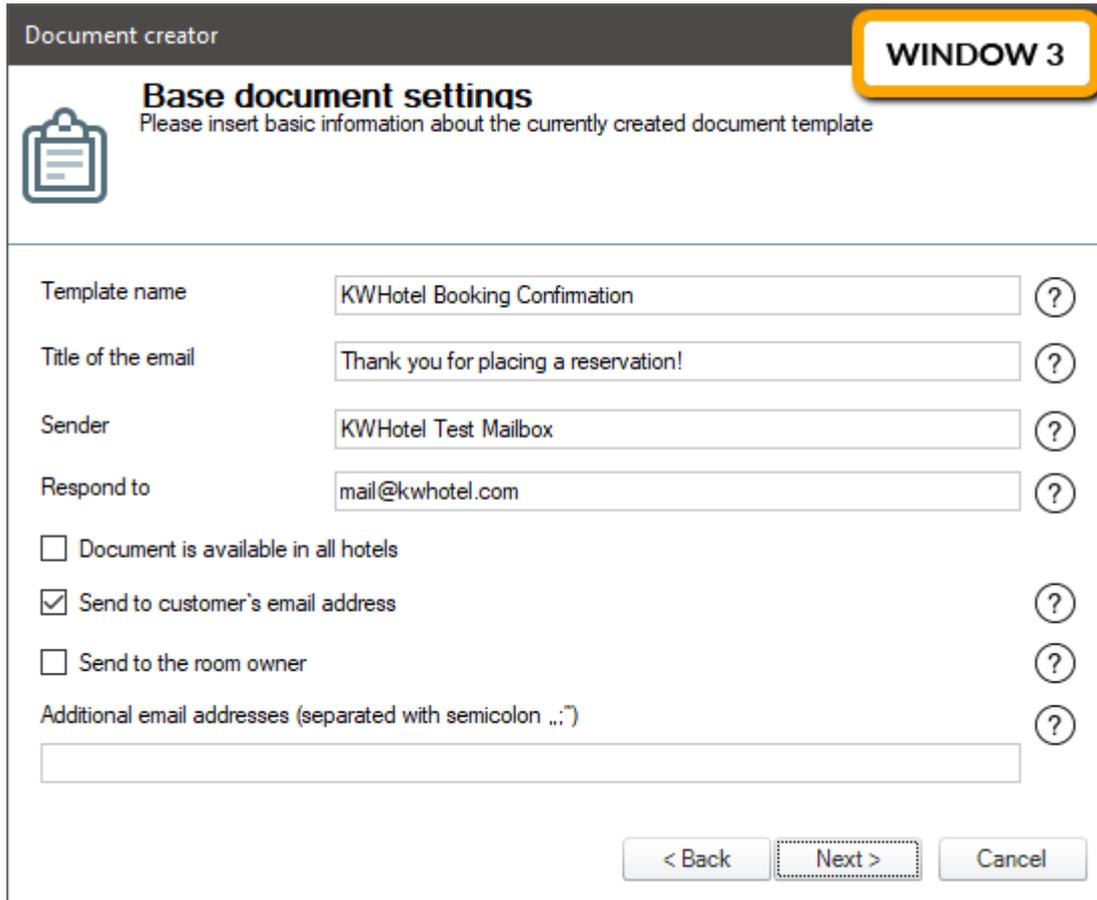
1. WINDOW 1. Click the "Add" button.

2. WINDOW 2. In the newly created window, click "Next".

3. WINDOW 3. Perform the following operations:

- insert the template`s name: it will be displayed in a reservation window --> Issue document.
- insert the title of email: it will be displayed in the customer`s mailbox.
- insert the sender`s name: customer must know that this message is from your hotel.
- in the "Respond to" field insert the email address where you wish to receive customers` replies.
- select whether this template shall be visible in every hotel: this feature is useful in case of multiple properties located on the same database. If you do not want other properties to use the given template, please deselect this option.

Additionally, in this window you are able to define the message recipient. It is required to select at least one of the aforementioned options, in order to proceed to the next window.

OPTION A: "Send to customer`s email address" - used in case where your guest is supposed to be a recipient.

OPTION B: "Send to the room owner" - used in case where your recipient shall be the room / apartment owner. The owner`s email address can be set up in Tools --> Configuration --> Users --> edit the owner`s account --> fill in the "Email" field.

OPTION C: "Additional email addresses" - allows to define specific email addresses where the given template shall be sent to. For instance you may set the hotel manager`s email here.

☑ Send to customer`s email address   (?)

☐ Send to the room owner   (?)

Additional email addresses (separated with semicolon „;")   (?)

4. WINDOW 4. Here you may set availability of the given template as well as its` automated delivery time.

The following options are available here:

- After reservation is created
- Before reservation starts
- After reservation starts
- When reservation is pending
- Before the stay is over
- Once the stay is over
- After the modification is applied
- All the time

Each of the above-mentioned options includes a detailed explanation, accessible by clicking the question mark icon next to it.

Document creator   **WINDOW 4**

Document availability
Select document`s availabilty in the reservation screen or time when it will be sent automatically

Document availability

- ⦿ After reservation is created   (?)
- ○ Before reservation starts   (?)
- ○ After reservation starts   (?)
- ○ When reservation is pending   (?)
- ○ Before the stay is over   (?)
- ○ Once the stay is over   (?)
- ○ After the modification is applied   (?)
- ○ All the time   (?)

< Back   Next >   Cancel

5. WINDOW 5. In this window you may decide whether this template would be sent manually or automatically.

If you select the automated delivery option, in the following sections of the wizard you will define delivery time and conditions that must be met.

Please also note that selecting this option will cause two additional fields to appear:

"**Type the number of days**": inserting a numeral here will cause an automated delivery once the provided number of days has passed. For example, if you choose the "Before reservation starts" option and insert value "3", KWHotel will automatically send message to your guest 3 days before reservation starts.

Attention! You may insert "0" value, making KWHotel send message immediately after creating a reservation.

"**Type the hour of sending**": template will be sent to customer at a specified hour, if KWHotel is currently running. If KWHotel is switched off during that time, a message will be sent right after KWHotel is started.

Attention! You may leave this field empty, causing the message to be sent immediately after the remaining criteria are met. Of course KWHotel must be switched on, otherwise delivery will happen once KWHotel is started again.

If you choose the manual delivery, template will be available to send via reservation window ("Issue document" option). Please note that template will be displayed only if all conditions are met.

6. WINDOW 6. Here you may specify the criteria, according to which the message will be sent.

- Document language
- Payment status
- Reservation source
- Chosen room
- Chosen room group

Each of the above-mentioned options includes a detailed explanation, accessible by clicking the question mark icon next to it.

Attention! Currently it is not possible to select several rooms or room groups. You may either send the same template to every room / room group or create one template per room / room group.

7. WINDOW 7. In this window you may select the template`s content. It is possible to either create a new template (by using the built-in Fast Report software) or use an existing template.

If you choose the "Load template" option, just pick one of the existing templates from the list and proceed forward.

Should you prefer to customize your template, select the "Edit current template" option. Now pick the format of your message. The following options are possible:

- .FRX file: format that can be modified in the built-in Fast Report software. Having selected this option, please use one of the following buttons:
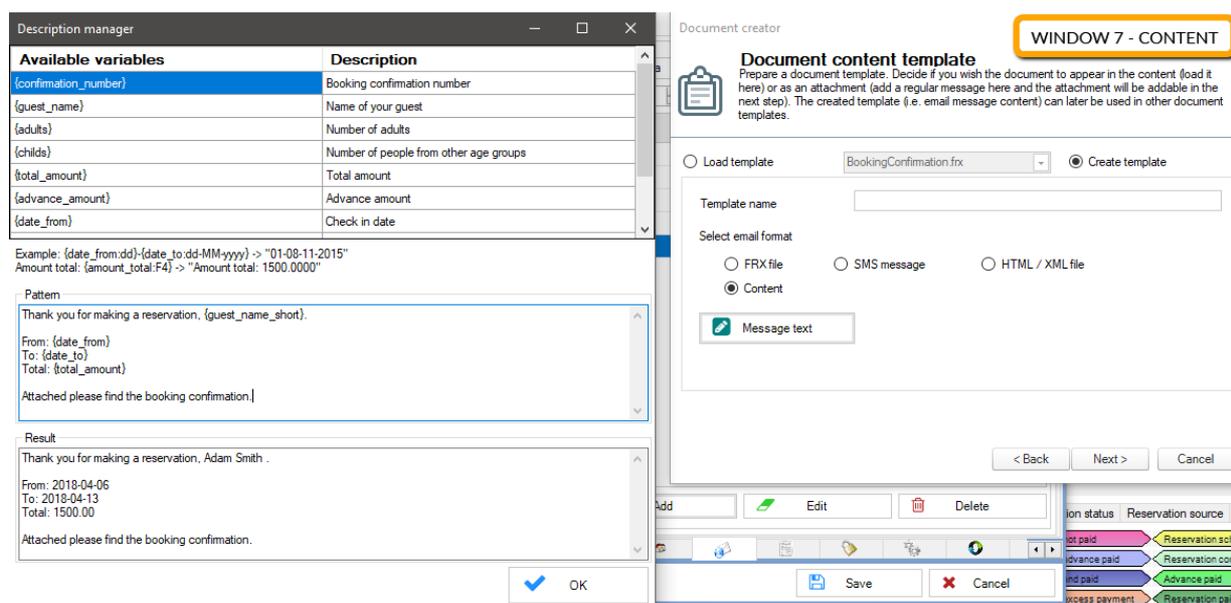
LOAD TEMPLATE: clicking this option opens KWHotel folder which stores the .FRX files. Select the desired file and click "Open".

EDIT TEMPLATE: clicking this option opens the Fast Report editor, where you may customize a previously selected template.

NEW TEMPLATE: clicking this option open the Fast Report editor, where you may create a new template, based on the chosen file.

- **SMS message**: allows to insert content of an SMS message that will be sent to guest. Having selected this option, click the "Message text" button and fill in the content. You may use the variables, thanks to which KWHotel will download certain information (i.e. guest name, advance amount) from the reservation window.

- **HTML / XML file**: allows to create messages, using a simple HTML editor. Having selected this option, please use one of the options below:

LOAD TEMPLATE: clicking this option opens KWHotel folder which stores the .HTML files. Select the desired file and click "Open".

EDIT TEMPLATE: clicking this option opens the HTML editor, where you may customize a previously selected HTML template.

NEW TEMPLATE: clicking this option opens the HTML editor, where you may create a new template, based on the chosen file.

- **Content**: allows to type a simple text message that will be issued to guest. Having selected this option, press the "Message text" button and fill in the content. You may use the variables, thanks to which KWHotel will download certain information (i.e. guest name, advance amount) from the reservation window.

8. WINDOW 8. Allows you to include attachment in this template

If you do not wish to add any attachment to the currently created template, do not select the "Add attachment" option. Just click the "Next" button and finish the configuration.

If you wish to add an attachment, select the "Add attachment" option and then follow the same pattern as you did in window 7.

The only difference is the presence of "Any file" option. It allows you to include any file you wish.

9. Template configuration last window.

Congratulations! You have just created a new email / SMS template. Hit the "Save" button to complete your configuration.

3. Testing the newly created template

In case of manual templates:

Step 1. Enter any reservation.
Step 2. Click the "Issue document" button.
Step 3. Choose your previously created template.

Attention! *If your template is not present on the list, at least one of conditions you set up for it was not met.*

Step 4. In the newly opened window make sure, that email address you wish to send the message to, is correct.
Step 5. Press the "Send message" button.

In case of automated templates:

Step 1. Proceed to Tools --> Configuration --> Email.
Step 2. In the "Transfer copies of correspondence to the following email address" field insert an email address where, for the testing purposes, all messages will be sent to.
Step 3. Save changes.

Step 4. Create new reservation. Insert such data that conditions for automated delivery are met.
Step 5. Save reservation.

Step 6. Check if message was sent properly during the specified time and condition. All messages sent from KWHotel, can be viewed, by clicking the "Email log" button.

If all automated email templates work correctly, you may return to Tools --> Configuration --> Email, delete email address from "Transfer copies of correspondence to the following email address" and turn on the "Enable automatic confirmation sending".

Congratulations! You have just configured a message template!