INDIVIDUAL RESERVATIONS

You will learn:
1. How to create individual reservations
2. How to add meals, services and products to them
3. How to settle reservations
4. How to issue fiscal documents

1. How to create individual reservation?

There are several **ways of creating individual reservations**:
- select the given term on the calendar and click "Add a reservation" or hit Enter,
- double click on the first day of the reservation (date can later be changed in the reservation screen)

2. What does the individual reservation screen consist of?

Individual reservation screen consists of the following data:
   a. **Room data** – contains the most important room information your guest may be interested at

Pay attention:
There are a few fields that constitute the room data:
- Room symbol: you can view the room list by clicking an arrow next to the room symbol. This way you can move a reservation to another room.

- Amount of beds and extra beds: basic room parameters: number of beds and extra beds have been adjusted during the room configuration in the Rooms module. These settings can be changed by going back to the Rooms module and editing a desired room or room group.

- Suggested price per night: it is set in the Rooms module.

- Furnishing and room equipment: all data available in this part can be edited in the Rooms module.

   b. **Dates of stay** – arrival, departure day and a number of days

Pay attention:
Days can be specified by clicking an arrow next to the date, bringing up the calendar and selecting a desired day. KWHotel will highlight the selected day. Date can also be typed from the keyboard, i.e. 7th of January 2016 - 7.1.2016 and hitting the Enter key.

Number of days can be typed using keyboard or by shortening/extending the term by clicking arrows.

c. **Guest data** – basic information about your guest.

To quickly add a new customer, type his name. That is enough to save the reservation.

Pay attention:

you can always return to the reservation screen later to submit the rest of the data. If you wish to include all possible data, use the „Add a customer" option.

If your customer is already in the database, KWHotel will display this person after typing the first four letters. To check that person, click the desired customer in a drop down menu or double click the customer data that will display in the right part of the screen.

More details about adding new customers are explained in section "Managing the customer base".

d. **Comments** – type any additional feedback regarding this guest or reservation.

Pay attention:
Clicking „!" will display the first line of comments in the calendar.
Button above „!" allows you to add some additional data to the reservation; when you click it, a text editor will open.

It is also possible to add a reminder to the reservation. To do so:
- select a checkbox next to the date
- select a date.

e. **Settlement** – this section is used to settle any payments.

The "Settlement" tab allows you to select how to charge your customers. These settlement types are adjusted in the "Rooms" module when creating new rooms / room groups and in the "Rate plans" module.

It is also possible to correct the price manually. The grayed out fields cannot be modified, the white ones can.

Pay attention:
All three settlement types are explained in section 1.b.ii "Price per night / Price per person".

If you create a new reservation or modify an existing one, a message may appear: "Entered prices are different than default". This means that you have either changed a way of charging our guest or modified a price of the reservation. If you click "Set default rates" it will restore the default price for the given room - the one you created in the Rooms module or Rate Plans module before.

In the left part of the screen you manage the customer payments. If a full payment was made, you can either click "Full payment" or type the whole sum/advance in the fields just below.

Additionally, you can type a discount for the stay and guarantee a reservation with a credit card.

Pay attention:
Discount is deducted only from the accommodation price, not from meals or additional services.

Products` discounts can be assigned in the "Products" tab. The discount field will also display a discount granted to the customer in the Customer screen.

In the reservation screen you can also add a local tax. The local tax payment can also be inserted, just below the advance payment field.

Pay attention:
Local tax can be configured in Tools --> Configuration --> Taxes.

    f. **Documents** – here you can issue fiscal documents that will be connected with this reservation

Pay attention:
We highly recommend issuing all documents directly in the reservations they belong to. Documents issued in the Accounting module will not be connected with any reservations.

    g. **Meals** – here you can assign meals to the reservation

Pay attention:
All meals, their prices and lunchrooms can be configured in Tools --> Configuration --> Meals.

In the "Meals" tab you can verify a number of people eating meals, assign a meal for the whole stay for all guests or type the number of meals manually for each day.

In the "Meal time" tab you can set the time during which your guests will eat in the lunchroom. This option is highly recommended for hotels where the lunchroom is rather small.

Detailed meals report, including their provision time and assigned room, can be printed in the Meals module.

    h. **Credit card** – this tab allows you to save your customer`s credit card data (excluding the CVV code)

Pay attention:
To allow yourself to save the credit card data:

- run KWHotel as a Windows Administrator,
- create two encryption keys that consist of minimum 8 characters (small and capital letters and numbers)
- accept the regulations.

In the reservation window, a "Credit card" tab will appear. Here you must submit the credit card data and type the "Secondary key".

The credit cards` data is saved directly to the database and protected by two encryption keys. If someone has an access to the database or the encryption keys, he can see the credit card numbers. Saving the credit card data in KWHotel is done solely under your own responsibility. Starline company takes no responsibility in case your credit card data is leaked and for the consequences that might follow the leak.

Credit card data can be deleted manually by clicking the "Delete" option. The credit card data is removed automatically:

- if the reservation is set as settled
- if 10 days have passed since the reservation has finished
- if you delete the reservation or customer from the database

    i.   **Other** – this tab gives you the following possibilities:
-   manage sources of reservations

Pay attention:
Click "Edit a source of reservation". Type the source of the reservation (i.e. Booking.com, from the street, TV advertisement etc.) and then click the yellow plus.

-   fill an online reservation number (it can be used to quickly find the reservation)

Pay attention:
To find a reservation using its` online number, go to the Calendar, hit the magnifying glass number and type the number.

-   attach documents such as agreements, mail copies, etc.

Pay attention:
Before adding a document, you must set a path where it will be stored. To do so, please go to Tools --> Configuration --> Other --> Page 2 and fill the "Default images path".

To open a document, double click it.

-   connect several individual reservations into a group one

Pay attention:
Every single reservation can be added to a group one. To do that:

1. open the first single reservation that you want to add to the group reservation,
2. in the Other tab, fill the number of the group reservation (in case you want to add that reservation to an existing group reservation) or leave "0" and click "Create" (to change that single reservation into a group one)
3. read the group reservation number from the bar on the very top.
4. open another individual reservation and in the Other tab type the number of the group reservation that you can assign it to.

-   select the currency and its exchange rate if your customer hasn`t paid in your regular currency

Pay attention:
In the "Settlement" tab KWHotel will automatically recalculate the amounts into the new currency, according to the exchange rate you submitted.

-   copy the reservation into another term

Pay attention:

In the "Settlement" tab KWHotel will automatically recalculate the amounts into the new currency, according to the exchange rate you submitted.

j. **Custom** - allows you to add your own fields to the reservation, i.e. airport pickup request

Step by step instruction of creating custom reservation statuses

1. Click "Add value"
2. Type name of the new value

Pay attention:

You can type a default answer KWHotel will propose for this custom field

3. Choose a type of the field

Pay attention:

There are five possible types of fields:

a) String – a regular string of text and numbers

b) Number – numbers only

c) True/False - YES/NO choice, i.e. advance

d) Custom – you can create your own answers

e) Date – date such as 16.10.2016

4. Save changes. This field will now be available in every reservation

Pay attention:

You can mark each field as an obligatory – receptionist will not be able to save the reservation unless he fills the obligatory field.
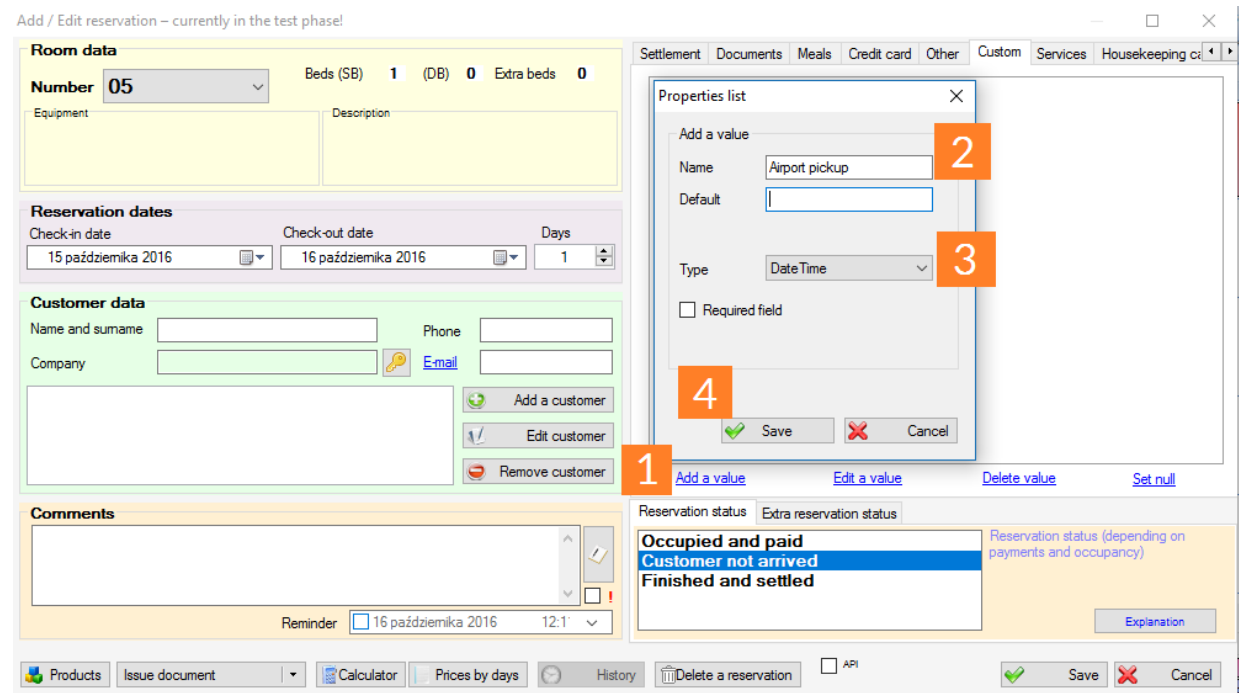
k. **Services** - Additional services can be assigned to the reservation. These services are preconfigured in Tools --> Configuration --> Services.

Pay attention:
What services can be created? Bike rentals, conference rooms, etc. These services are managed using the hour based time frames in the Services module.

l. **Housekeeping calendar** - this tab shows a calendar with the reservation term highlighted in yellow. For each reservation you can assign a different cleaning date by selecting the days of the week or an interval between each cleaning (To do so click the "Interval" option). The cleaning days will be highlighted in pink. You can also specify the time of the cleaning.

All information submitted in the housekeeping calendar can be printed in the Housekeeping report, available from the "Reports" menu.

Pay attention:
This module can be enabled by going to Tools --> Configuration --> Other --> Page 3 and clicking the blue "Housekeeping calendar" sign.

m. **Reservation statuses** – dynamically adjusted reservation statuses. KWHotel will only display the logical possibilities.

Pay attention:
Reservation statuses depend on:
- reservation term (past, future, present)
- payments done

n. **Additional reservation statuses** – create your own custom reservation statuses.

Step by step guide to create additional reservation statuses:
1. Click "Extra reservation status" tab
2. Select "Edit a booking status"
3. Type a name of the status, its` order on the list and color
4. Click "Add"
5. Click "Save"
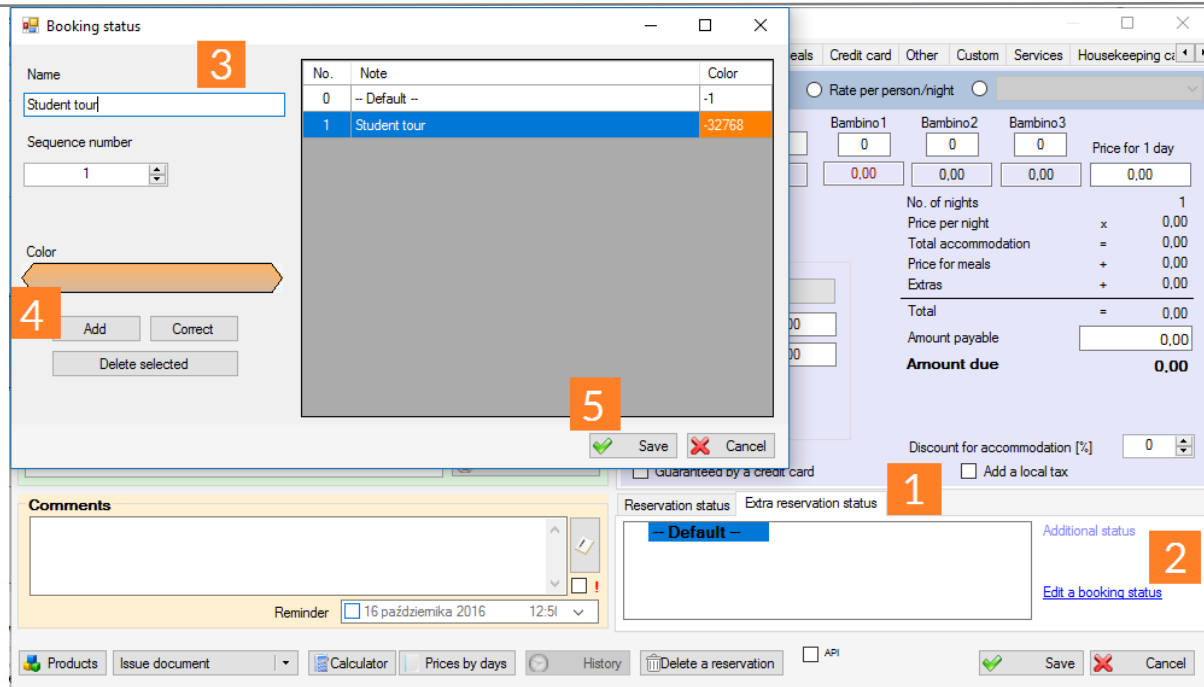
o. **Advance due date** - If you select this option and set a date, KWHotel will remind you during that day that the advance was supposed to be paid by then.

p. **Products** – each reservation can include extra products and services

q. **Issue a document** - You can issue documents such as booking confirmation, local tax payment confirmation, meals report, letter of thanks etc.

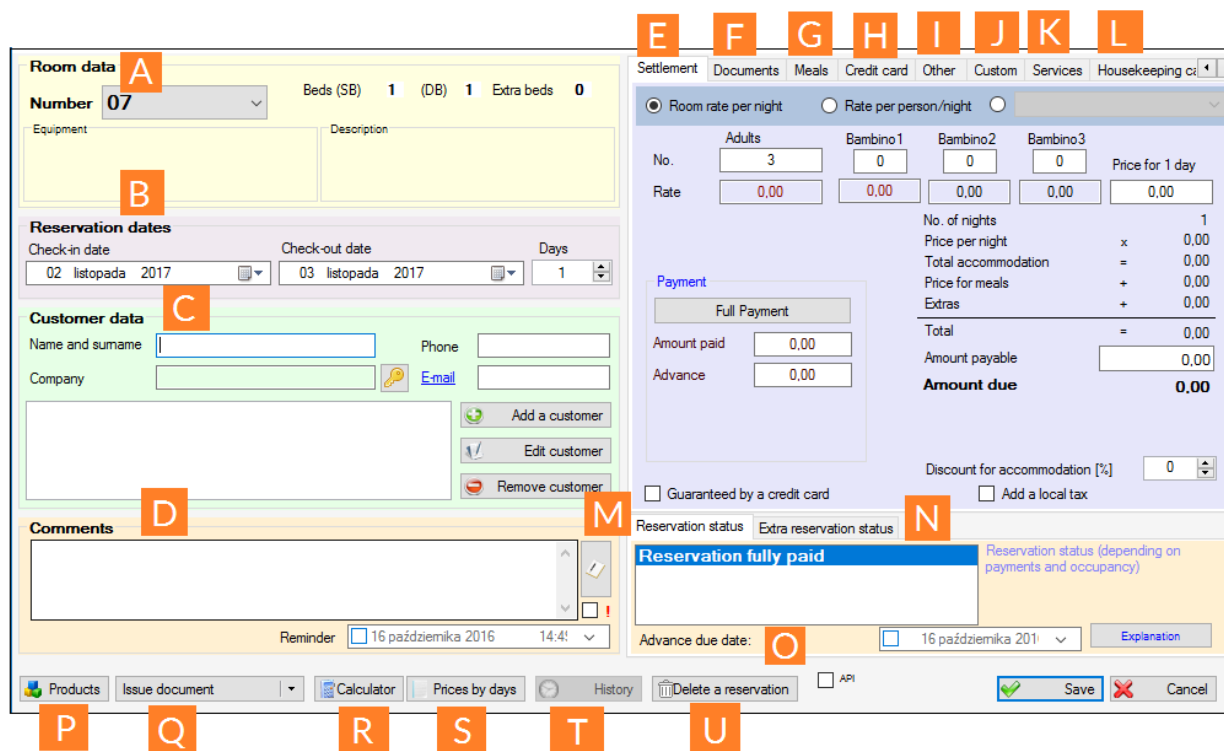r. **Calculator** – clicking this option will open the Windows calculator.

s. **Prices by days** - if your reservation contains different prices for different days, this option will display them.

t. **History** - displays all modifications that have been done to the reservation and which user did them.

u. **Delete reservation** – allows you to erase reservation. It can be viewed later in Reports →
Deleted reservations report

Pay attention:
Deleted your reservation by mistake? You can restore it by finding it in Reports → Old reports →
Deleted reservations report, double clicking it and accepting a message!

3. How to create a reservation?

Step by step guide to create an exemplary reservation:

1. Select a term on the calendar and hit "Enter" or click the "Add reservation" button.
2. Make sure that correct room is selected.
3. Adjust dates of stay and number of days if necessary.
4. Fill in the basic customer data or click "Add customer" to include all information right away.

Pay attention:
You can always get back to this reservation to use the "Edit customer" option and add all details.

5. Submit comments if any.
6. Add products or services to your reservation if necessary
7. Select a type of rate settlement

8. Adjust the number of adults and children
9. Configure the price if required
10. If customer wishes to pay on the spot or any advance payment was made, fill the "Amount paid" or "Advance" field.

Pay attention:

Please remember to always issue a fiscal document (i.e. invoice) whenever a payment is made. This will ensure your statistics and reports are ran correctly. You can issue a document by clicking the "Documents" tab (upper right corner of the reservation screen) and selecting a desired document type.

If you do not wish to issue any documents, we highly recommend you at least enable an automated cash document creation.
It can be done in Tools → Configuration → Invoices → Page 3. Here find and enable the "Force issuing a cash document after each payment in the reservation" option.
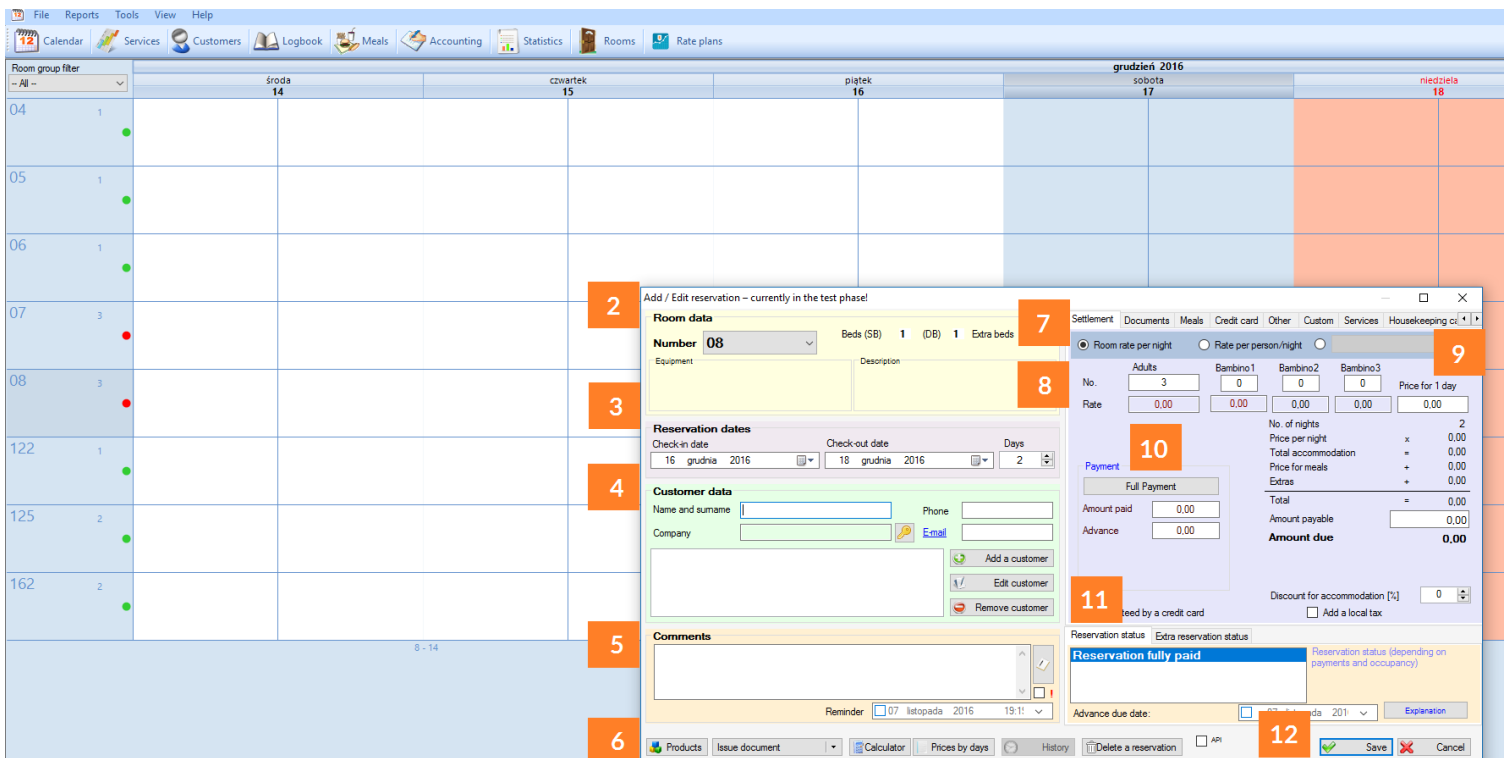
Now, whenever you add any payment in the reservation and save it, a cash document will be created in the background. You can now generate cash reports, located in the Reports section of KWHotel.

11. Having issued a fiscal document and / or a cash document to ensure correct payment flow, please select a reservation status.
12. Save your reservation

Pay attention:
The above route discusses only the most basic handling of the reservation process