



AutoClerk User Guide

Tape Chart, Marketing, Yield Management

Table of Contents

TABLE OF CONTENTS	2
COPYRIGHT INFORMATION	3
1. TAPE CHART	4
SETTING TAPE CHART PARAMETERS	4
MENU BAR.....	6
TAPE CHART DESCRIPTIONS, CELL COLORS, FEATURES	8
<i>Room Status Column</i>	8
<i>Inhouse Column</i>	8
<i>Date Header Cells</i>	9
<i>Clean, Vacant, Not Blocked: White Cells</i>	9
<i>Inhouse: Blue-Green Cells</i>	10
<i>Blocked: Yellow Cells</i>	11
<i>Out-of-Order: Red Cells</i>	12
<i>Past Inhouse: Olive Green Cells</i>	12
<i>Past Transferred Room: Blue Cells</i>	13
<i>Past Unoccupied Room: Black Cells</i>	14
ASSIGNING A ROOM TO A RESERVATION.....	14
MOVING GUESTS AND RESERVATIONS ON TAPE CHART	15
2. MARKETING	17
MARKETING REPORT GENERATOR.....	17
<i>Permanent Reservations</i>	18
<i>Profile Survey Generator</i>	19
<i>Room Stack Reports (Yearly and Monthly)</i>	22
<i>Historical Source Code Analysis</i>	25
<i>Historical Production Analysis by Class/Company</i>	26
<i>Historical TA Impact Analysis</i>	27
<i>Historical Group Pickup Analysis</i>	28
<i>Historical Group vs. Non-Group Analysis</i>	29
<i>Reservation Denial Report</i>	30
<i>Reservation Denial Report by Month</i>	30
3. YIELD MANAGEMENT	31
TABLE OF FIGURES	36
INDEX OF AUTOCLERK V9 TAPE CHART, MARKETING AND YIELD MANAGEMENT ICONS, MENUS, AND COMMANDS	37

Copyright Information

Copyright 2018

AutoClerk User Guide

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, or otherwise without prior written permission of AutoClerk.

AutoClerk, Inc.

Address: 1981 North Broadway, Suite 430, Walnut Creek, CA 94596

Phone: 925.284.1005

Fax: 925.284.3423

URL: www.autoclerk.com

1. Tape Chart

The Tape Chart is an area in AutoClerk where many of the program's day-to-day functions can be accessed on one screen.

The Tape Chart is designed as an interactive user interface, which displays a grid in which the columns hold dates and the rows hold room numbers. (When there are too many rows and columns to fit on a screen, scroll right and left as well as up and down to view any portion of the chart.)

Setting Tape Chart Parameters

1. Click on the Tape Chart icon on the Main menu.
 - a. The Tape Chart box opens.
2. In the Starting Date field, enter a date you want the Tape Chart to start on. The default starting date is today's date.
 - a. Enter the date in the MM/DD/YY format. You can enter a past or future date, or leave the date to begin on the current day.
 - i. You can also enter the number of days into the future. For example, if you want to see two weeks from the current day, you can enter '14' in the Starting Date field.
 1. Once you tab to the Number of Days field, the Starting Date field displays the first three letters of the month, the two digits of the date of the month, the last two digits of the year, and the first three letters of the day of the week.
 - ii. In the Number of Days field, enter a number of days between 7 days minimum and 120 maximum. This is the number of days the Tape Chart displays.
 1. The default is 30 days. If you would like the default changed, please contact AutoClerk Support: (925) 284-1005, Option 2.
 - iii. Click the OK button, and AutoClerk displays the Tape Chart associated with the parameters you selected.
3. An example of the current day as the start date is shown in Figure 1. An example of a past date as the start date is shown in Figure 2.

Tape Chart									
Room Transfer	Checked-Out	GTD/hold	Checked-In	000					
Tape Chart	Room Status	Inhouse	Fri Mar24'17	Sat Mar25'17	Sun Mar26'17	Mon Mar27'17	Tue Mar28'17	Wed Mar29'17	Thu Mar30'
KG 100	DIRTY								
KG 101									
KG 102			{SCOTT}				
KG 103	DIRTY	COUGAR	{kingsley}					
KG 104									
QN 105	DIRTY	SAMUELS	-SAMUELS>						
QN 106									
KG 107	DIRTY		Out Of Order	Out Of Order	Out Of Order	Out Of Order	Out Of Order	Out Of Order	Out Of Order
KG 108									
KG 109	DIRTY	WILSON	WILSON>					
KG 110									
KG 111									
KG 112									
KG 114									
KG 115									
KG 116									
KG 117									
KG 118									
KG 119									
KG 120									
KG 121	DIRTY	BEAR							
KG 122									

Figure 1: Tape Chart

Room Transfer	Checked-Out	GTD/hold	Checked-In	000				
Tape Chart	Room Status	Inhouse	Fri Feb 3'17	Sat Feb 4'17	Sun Feb 5'17	Mon Feb 6'17	Tue Feb 7'17	Wed
KG 100	DIRTY		-HOUSE	----->				
KG 101								
KG 102			-PELL	----->				
KG 103	DIRTY	COUGAR			Out Of Order	Out Of Order	Out Of Order	Out C
KG 104					Out Of Order	Out Of Order	Out Of Order	Out C
QN 105	DIRTY	SAMUELS			Out Of Order	Out Of Order	Out Of Order	Out C
QN 106					Out Of Order	Out Of Order	Out Of Order	Out C
KG 107	DIRTY				Out Of Order	Out Of Order	Out Of Order	Out C
KG 108								
KG 109	DIRTY	WILSON						
KG 110								
KG 111								
KG 112								
KG 114								
KG 115								
KG 116								
KG 117								
KG 118								
KG 119								
KG 120								
KG 121	DIRTY	BEAR						
KG 122								
KG 123				<SCOTT>				

Figure 2: Tape Chart – Past Days

Menu Bar

The following options are listed in the menu bar:

1. File
 - a. Print Confirmation Letter: This command prints a letter of confirmation for any highlighted reservation.
 - b. Print 13 Day Report (non-past). Prints out the tape Chart for 13 days.
 - c. Print Expanded Report (non-past). Prints out the Tape Chart for 60 days.

- d. Print Current Chart. Prints the chart currently displayed, which could include past days.
 - e. Exit. Exits the Tape Chart and returns back to the Main menu.
2. View
- a. List Unblocked Reservations: This displays a list of reservations without room assignments for the parameters selected.
 - i. You can use this to assign room to unblocked reservations.
 - b. New Start Date: This returns you to the Date screen where you can enter a new starting date and report length.
 - c. Sort by: This allows you to re-sort the current Tape Chart display by either Door Number or Room Type.
 - i. The default is by Door number.
 - ii. Once you make your selection, the Tape Chart refreshes.
 - d. Filter: This allows you to select which room types you want to see on the current display of the Tape Chart.
 - e. Refresh: If there is more than one station, or you have an interface to a reservation system, which allows room assignments such as ResOnTheWeb, Tape Chart information can become outdated. Refresh immediately updates the information on the Tape Chart.
3. Toolbar
- a. The Function keys are not visible at the bottom of the Tape Chart window.
 - b. To access the Function keys, select Toolbar from the Menu bar.
 - i. Select the desired function key you wish to use.
 - ii. If you know the Function Key you need to use, you can also just press that key on the keyboard.
 - 1. For example: if you hit F4 on the keyboard, Availability will come up.
4. Menu
- a. This will only appear if enabled.
 - b. Clicking on Menu allows the user to open another instance of AutoClerk without closing the current screen.
 - c. Depending on your property and how it is configured, Using Menu in the Tape Chart may cause slowdowns of the program.
 - d. If you do not have Menu and would like it enabled, please contact AutoClerk Support: (925) 2841005, Option 2.

Tape Chart Descriptions, Cell Colors, Features

Tape Chart cells are shown in one of the following background colors:

1. Clean, Vacant, Not Blocked: White
2. Inhouse: Light blue green
3. Blocked Reservations: Yellow
4. Out-of-Order: Red
5. Checked out: Olive green
 - a. This only appears when looking at past dates.
6. Transferred: Blue
 - a. This only appears when looking at past dates
7. Not occupied: Black.
 - a. This only appears when looking at past dates.

When you place your mouse pointer over a cell other than a Status column cell, additional information displays at the bottom of the Tape Chart window. (See the sections below for details.)

Room Status Column

1. The column labeled Room Status shows a room's current status.
 - a. If a cell contains the word Dirty, then the room is either:
 - i. Unoccupied, and it needs to be cleaned; or
 - ii. Out of Order
 - b. Right click on a cell to bring up the following command:
 - i. Modify Status. This command opens the Maid Status window.
 1. This allows you to update the status of the room. For example, from dirty to clean.

Inhouse Column

The column labeled Inhouse shows the last name of the current inhouse guest. The cell has a blue-green background.

1. Right click on a cell to bring up the following commands:
 - a. New Reservation: This command opens the New Reservations window with that room type and room number already in the form.
 - b. Create Res Using Existing: This command opens the Reservation from Existing window.
 - i. Once you have selected the reservation to copy and the New Reservation form opens, the data from the Existing reservation is

in the form in addition to the selected room type and room number are already in the form.

- c. Create Res Using Folio: This command opens the Select Folio box.
 - i. Once you have selected the room number and folio and the New Reservation form opens, the selected room number and room type are already in the form.
 - d. Update Room Status: This command opens the Maid Status window.
 - i. This allows you to update the status of the room. For example, from dirty to clean, or out of order.
2. Placing your mouse pointer over a cell, displays the following at the bottom of the Tape Chart window:
 - a. Room number
 - b. Smoking or non-smoking (Room designation)
 - c. Available

Date Header Cells

Each day of the selected parameter has a column, headed by a cell with that day's date.

1. Placing your mouse pointer over a date cell, displays the following at the bottom of the Tape Chart window:
 - a. If you have entered any Yield/F4 notes. For example, a message notifying the staff of a big event.

Clean, Vacant, Not Blocked: White Cells

White cells represent rooms which are vacant and not blocked. Depending on the Status, they are either clean or dirty.

1. Right click on a cell (other than in the Inhouse column) to bring up the following commands:
 - a. New Reservation: This command opens the New Reservations window with that room type and room number already in the form.
 - b. Create Res Using Existing: This command opens the Reservation from Existing window.
 - i. Once you have selected the reservation to copy and the New Reservation form opens, the data from the Existing reservation is in the form in addition to the selected room type and room number are already in the form.
 - c. Create Res Using Folio: This command opens the Select Folio box.
 - i. Once you have selected the room number and folio and the New Reservation form opens, the selected room number and room type are already in the form.

- d. Walkin: This command opens the Checkin a Walk-in window.
 - i. This command is only available if you click on a cell in the current day's column.
 - e. Checkin a Reservation: This command opens the Checkin a Reservation selection form with today's arrivals.
 - i. This command is only available if you click on a cell in the current day's column.
 - ii. Double click on the guest you want to check in. The Checkin with a Reservation form opens.
 - 1. If you have selected a cell of a room type that is different than the reservation's room type, a Warning window opens. Click ok to continue with the checkin.
 - 2. If you select a cell and then select a reservation that has already been blocked in a different room type, a Confirm window will open asking you to confirm that you want to use the room type selected (Yes), or use the room and type already blocked (No).
 - a. If you choose no, and Checkin a Reservation window opens with the originally blocked room for the selected reservation.
 - f. Update Room Status: This command opens the Maid Status window.
 - i. This allows you to update the status of the room. For example, from dirty to clean, or out of order.
2. Placing your mouse pointer over a cell displays the following at the bottom of the Tape Chart window:
- a. Room number
 - b. Smoking or non-smoking (Room designation)
 - c. Available

Inhouse: Blue-Green Cells

Blue-green cells represent those guests who are inhouse. If the guest checked in prior to the current day, there is a dash preceding the name.

- 1. Right click on a cell to bring up the following commands:
 - a. Modify Folio Info: This command opens the A folio for modification.
 - b. Check-out: This command opens the Checkout window with the guest's room already filled in.
 - c. Folio Printing: This command opens the Folio to Show box with the guest's room number and A folio filled in.
 - i. Click ok and the SendTo pipeline opens.

- ii. Select your output.
 - d. Print Checkin Slip: This command opens the SendTo pipeline, where you can preview or print the checkin slip.
 - e. Post Charges & Payments: This command opens the Post to Room (F9) window with the guest's room number and A folio already filled in.
2. Placing your mouse pointer over a cell, displays the following at the bottom of the tape Chart window:
 - a. Room number
 - b. Smoking or non-smoking (Room designation)
 - c. Checkin and checkout dates
 - d. Balance.
 - e. Form of payment (FOP)
 - f. Open folio(s)
 - g. Number of people in the room: Adults, Kids, Babies
 - h. That Day's Room Rate

Blocked: Yellow Cells

Yellow cells represent those rooms that are blocked. If the reservation is guaranteed, all of the letters of a guest's last name are in an upper-case font. If the reservation is not guaranteed, the guest's name appears in a lower-case font.

1. Right click on a cell to bring up the following commands:
 - a. Modify Reservation: This command opens a Mod Reservation window.
 - b. Print Checkin Slip: This command opens the SendTo pipeline where you can select a printer.
 - c. Checkin: This command opens the Checkin with a Reservation form with the room number and Folio A filled in.
 - d. Cancel Reservation: This command opens the Cancel Reservation window.
 - e. Unblock Room: This command removes the room number from the reservation form.
 - i. When you save the change and are returned to the Tape chart, that reservation no longer appears.
 - ii. If you select a room that has the 'Requested' checkbox checked in the reservation, you receive an AutoClerk Warning that you cannot unblock a specially requested room.
 1. If you still need/want to unblock the room on the reservation, you must first modify the reservation; remove the checkmark in the Requested checkbox, then remove the room number.

- f. Copy Res to New: This command copies the information from a reservation and opens it in a New Reservation window.
 - g. Print Confirmation Letter: This command opens the SendTo pipeline where you can select to print or email a confirmation letter.
 - h. Deposit Folio: This command opens the SendTo pipeline where you can print or email a deposit receipt.
 - i. Post Advance Deposit: This command opens the Post Advance Deposit to Reservation window.
1. Placing your mouse pointer over a cell, displays the following at the bottom of the Tape Chart Window:
 - a. Room number
 - b. Smoking or non-smoking (Room designation)
 - c. Confirmation number
 - d. Checkin and checkout dates
 - e. Balance. An advance deposit would show as a balance.
 - f. Form of payment (FOP)
 - g. Number of people in the room: Adults, Kids, Babies
 - h. That Day's Room Rate

Out-of-Order: Red Cells

Red cells represent out-of-order rooms. For each day that a room is out of order, AutoClerk displays Out of Order.

1. Right click on the cell to bring up the following command:
 - a. Maid Status. This command opens the Maid Status window.
 - i. This allows you to update the status of the room. For example, from dirty to clean.
2. Placing your mouse pointer over a cell displays the following at the bottom of the Tape Chart window:
 - a. Room number
 - b. Smoking or non-smoking (Room designation)
 - c. Out of Order reason
 - d. Out of Order end date

Past Inhouse: Olive Green Cells

These cells can only be seen if your Tape Chart start date is in the past as shown in Figure 2 above. When the Tape Chart opens, the Room Status and Inhouse columns are also displayed.

If a guest checked in prior to the requested past start date, there is a dash preceding the name.

1. Right click on a cell to bring up the following commands:
 - a. Make New Reservation: This command opens the New Reservations window with that room type and room number already in the form.
 - i. The arrival date is the current date.
 - b. Folio Printing: This command opens the Folio to Show box with the guest's room number and A folio filled in.
 - i. Click ok and the SendTo pipeline opens.
 - ii. Select your output.
2. Placing your mouse pointer over a cell, displays the following at the bottom of the Tape Chart window:
 - a. Room number
 - b. Smoking or non-smoking (Room designation)
 - c. Checkin and checkout dates
 - d. Balance. This should always be \$0.00 as the guest has checked out.
 - e. Form of payment (FOP)
 - f. Number of people in the room: Adults, Kids, Babies
 - g. That Day's Room Rate

Past Transferred Room: Blue Cells

These cells can only be seen if your Tape Chart start date is in the past as shown in Figure 2 above. When the Tape Chart opens, the Room Status and Inhouse columns are also displayed.

If a guest checked in prior to the requested past start date, there is a dash preceding the name.

1. Right click on a cell to bring up the following commands:
 - a. Make New Reservation: This command opens the New Reservations window with that room type and room number already in the form.
 - i. The arrival date is the current date.
 - b. Folio Printing: This command opens the Folio to Show box with the guest's room number and A folio filled in.
 - i. Click ok and the SendTo pipeline opens.
 - ii. Select your output.
2. Placing you mouse pointer over a cell displays the following at the bottom of the Tape Chart window:
 - a. Room number

- b. Smoking or non-smoking (Room designation)
- c. [Guest Last Name] transferred to room:[room number]

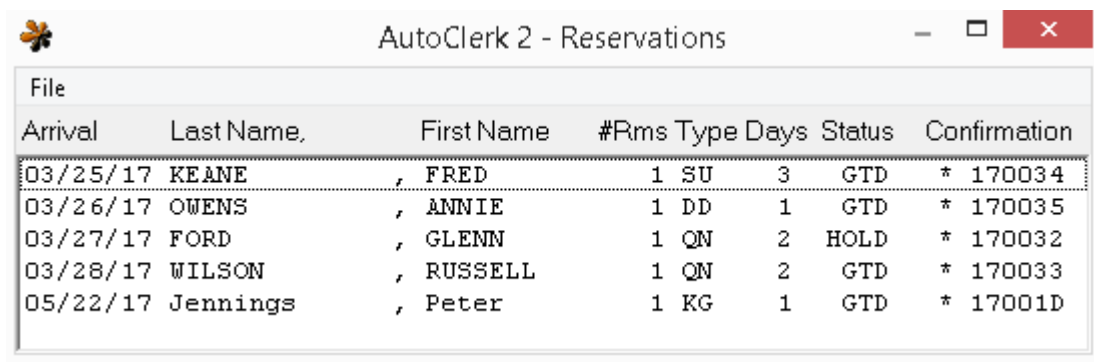
Past Unoccupied Room: Black Cells

These cells can only be seen if your Tape Chart start date is in the past as shown in Figure 2 above. When the Tape Chart opens, the Room Status and Inhouse columns are also displayed.

1. Placing your mouse pointer over a cell displays the following at the bottom of the Tape Chart window:
 - a. Room number
 - b. Smoking or non-smoking (Room designation)
 - c. Previous Night

Assigning a Room to a Reservation

1. In the Tape Chart, click on the View menu.
2. Select List Unblocked Reservations from the View menu. The Reservations box appears as shown in Figure 3.



The screenshot shows a window titled "AutoClerk 2 - Reservations" with a standard Windows-style title bar (minimize, maximize, close buttons). Below the title bar is a menu bar with "File". The main area contains a table with the following data:

Arrival	Last Name,	First Name	#Rms	Type	Days	Status	Confirmation
03/25/17	KEANE	, FRED	1	SU	3	GTD	* 170034
03/26/17	OWENS	, ANNIE	1	DD	1	GTD	* 170035
03/27/17	FORD	, GLENN	1	QN	2	HOLD	* 170032
03/28/17	WILSON	, RUSSELL	1	QN	2	GTD	* 170033
05/22/17	Jennings	, Peter	1	KG	1	GTD	* 17001D

Figure 3: Reservations to be Assigned

- a. Double-click on the reservation for which you want to assign a room. The Assign which room box appears as shown in Figure 4.



Figure 4: Room Number Assignment Selection

- b. You can either type in a room number or use the drop down arrow to select a room.
 - i. Click ok to assign the room to the reservation. An AutoClerk Confirmation box appears confirming the status, confirmation number, arrival date, when it was modified, and by whom it was modified.
 - ii. Click ok and the reservation will then show on the Tape Chart with a yellow background.
 - iii. If you select a room number whose type is different that the type in the reservation, you will receive a warning and ask you to confirm the room type change as well as a rate change, if applicable.
 - c. The Reservations box appears. You can either block additional reservations or view that there are no unblocked reservations left.
3. Click the X to close the Reservations box, and you return to Tape Chart.

Moving Guests and Reservations on Tape Chart

To move an inhouse guest or reservation from one room to another, you can drag-and-drop the guest name to a specific cell.

1. Put the mouse pointer on the inhouse guest or reservation you wish to move.
 - a. Press and hold the left mouse button.
 - b. Drag the item by moving the mouse pointer to the new destination.
 - c. If you try to drag and drop the guest or reservation to a different room type, AutoClerk prompts you to confirm your action.
 - d. If you try to drag and drop a reservation with a checked "Requested" field in the reservation form, AutoClerk won't allow you to move the guest or reservation to the new room.

- e. Release your finger from the mouse button when you have moved the guest or reservation to its new location.
 - i. An AutoClerk Confirm box appears.
 - ii. Click ok to close the box and return to the Tape Chart.

2. Marketing

Marketing reports are tools for analyzing information about past stays. These reports look at performance based on selected criteria of your past guest stays. Note: If you check into a hotel and stay for 5 nights, this counts as 1 stay (visit) and 5 nights (days).

Marketing Report Generator

1. Click on the Marketing icon.
2. Select Marketing Report Generator. The Historical Marketing Report Generator window appears as shown in Figure 5.

AutoClerk 2

Help Menu

Historical Marketing Reports Generator

Start Date:

End Date:

What Date is within the start and end dates?

Arrival

Depart

Any Stay Dates

"Any Stay Dates" = stay is selected if any day of the stay falls within the specified date range. Assumes no stay began more than 200 days before the start date.

Use Current Reservation Data

Use Current Inhouse Data

Use History Data

Remove Punctuation before Combining

Totals Entire Stay Totals In Dates

Use only Stays for selected Rate Classes

- All
- RARACK
- GR GROUP MASTER
- 3A TRIPLE A
- GI GROUP INDIVIDUAL
- SR SENIOR/AARP
- MG MANAGER'S SPECIAL
- RP ROMANCE PACKAGE
- CO CORPORATE
- WR WEEKLY RATE
- VP PARKING PACKAGE
- MR MONTHLY RATE

Which fields identify a unique record?

- Guest Last Name
- Guest First Name
- Guest Street
- Guest Street 2
- Guest City
- Guest State
- Guest Zip Code
- Guest Country
- Guest Phone Number
- Guest Email Address
- Guest Email Address2
- Company Name
- Co. Street
- Co. Street 2
- Co. City
- Co. State
- Co. Zip Code
- Co. Country
- Co. Phone Number
- Co. Email Address
- Co. Email Address2
- Travel Agency
- TA IATA
- TA Street
- TA Street 2
- TA City
- TA State
- TA Zip Code
- TA Country
- TA Phone Number
- TA Email Address
- TA Email Address2

If Guest Last Name is checked then all BROWNS will be combined into one record. If the Last and First names are checked then all AL BROWNS will be

Esc OK

Figure 5: Historical Marketing Reports Generator

- a. Enter start and end dates in the Start and End Date fields.
 - i. In this report, these dates can be past, present, or future.
- b. Select Arrival, Depart, or Any Stay Dates as your Date within the start and end dates.
- c. Check the appropriate checkboxes. You can select more than one checkbox for your report.
 - i. Use Current Reservation Data: This data includes data for future reservations.
 - ii. Use Current Inhouse Data: This data includes current guests checked inhouse.
 - iii. Use History Data: This is checked by default. This data is past data and doesn't include current or future inhouse guests.
 - iv. Remove Punctuation before Combining: This is checked by default.
- d. You can select which rate classes to include in the report. The default is to include all.
- e. If you want to select only certain rate classes, click on one to select it.
 - i. Hold down the Ctrl key and click on any additional rate classes, if any, you want to include.
- f. On the right side of the window, check the boxes for the fields you wish to include in the report.
 - i. Note: If you check only the last name, all guests sharing that last name are combined into one record. For example, all guests with the last name Brown will be combined into one record.
 - ii. The default is last name and first name so you can differentiate each guest.
- g. Click the OK button. The SendTo menu opens.
 - i. Select an output.
 - ii. If you select Display, when you close the browser, you are returned to the Main menu.

Permanent Reservations

This report shows you a list of all permanent reservations currently on file and their respective status.

1. Click on the Marketing icon.
2. Select Permanent Reservations.
3. The SendTo menu opens.
 - a. Select your output.

- b. If you select Display, when you close the browser, you are returned to the Main menu
4. The report lists:
 - a. Confirmation number
 - b. Last name
 - c. Company name
 - d. Number of nights used/booked
 - e. The most recent use: date and number of nights
 - f. The next most recent use: date and number of nights.
5. The report can help you determine how often a Permanent Reservation is being used.

Profile Survey Generator

Note: The larger the date range, and the more parameters you set, the longer this report will take to generate. You may want to start with a smaller date range, and then grow your criteria after you have generated a few reports.

The Profile Survey Generator report is a way to see who your top customers are based on various criteria. You can run the report, and based on the results, offer incentives to those top customers.

1. Click on the Marketing icon.
2. Select Profile Survey Generator. The Profile Market Survey window appears as shown in Figure 6.

Profile Market Survey

Category

Person

Company

Travel Agent

Date Range

Starting Month / Year: MARCH 2016

Ending Month / Year: MARCH 2017

Geographic Filter, By Zip Code

Starting Zip:

Ending Zip:

(leave blank for all)

Report Format

ASCII comma separated output?

Include Guest Notes?

Activity Thresholds

Minimum # of days:

Minimum # of stays:

Minimum Room Revenue \$:

(leave blank for all RM revenue)

Include groups?

Must have email address

Best Customers

Limit Report to Best

(leave blank for all customers)

Report Customers by:

Criteria

Days

Stays

Revenue

Esc OK

Figure 6: Profile Market Survey

- a. Select Person, Company, or Travel Agent from the Category box.
 - i. Only one can be selected.
- b. Enter the dates you wish to view in the Starting Month/Year and Ending Month/Year in the Date Range box.
- c. In the Geographic Filter by Zip Code, you can enter specific zip codes. You are not required to enter data into these fields. Leaving these fields blank includes all zip codes in your report.

- d. In the Report Format box, leave the ASCII comma separated output checkbox empty, unless you wish to take the results from this report and import into another application, such as Microsoft Excel.
 - i. Checking the Include guest Notes checkbox will add any Guest notes to the end of each guest's record.
 - e. In the Activity Thresholds section, you can set certain criteria based on # of days, # of stays, and/or minimum room revenue.
 - f. In the Minimum # Days field, you can tell the report to only show guests that have stayed a certain # number of days.
 - g. In the Minimum # of Stays field, you can tell the report to only show guests that have a certain number of stays.
 - h. In the Minimum Room Revenue field, enter a dollar amount. If you leave this field blank, all room revenue appears on your report. For example, if you wish to see the guests that have generated more that \$500 at your hotel, enter \$500.
 - i. The Includes Groups checkbox is checked by default. It includes all data from group stays.
 - j. The Must Have Email Address checkbox, if checked, includes only guest records with email addresses.
 - k. In the Best Customer box, Report Customers by, select Days, Stays, or Revenue. This works in conjunction with the Limit to Report to Best field. For example:
 - i. If you put 500 in the Limit Report to Best field, and select Days from the Report Customers by Criteria radio buttons, your report shows the top 500 customers who stayed with you the most number of days.
 - ii. If you select the Stays radio button, this shows the top 500 customers who stayed most often the date range you designated.
 - iii. If you select the Revenue radio button, this shows the top 500 customers who spent the most money at your property during the date range you designated.
3. Click the OK button. (The Esc button returns you to the Main menu.) The SendTo menu opens.
- a. If you checked the box for ASCII comma separated output, select Edit in the SendTo menu and save the file as a .txt.
 - i. In a spreadsheet application, like Microsoft Excel, you will be able to import this data.
 - b. Click the Display button. The Market Survey window appears. Your criteria are displayed at the top. The details of the report are displayed in the lower section of the report.

- i. Click on the Search button on the Market Survey window to search for any specific data. (Click on the Edit button if you decided to generate the report data in a way you can export it to another application. This sends the data directly to a Notepad window, which is toggled on under File→Notepad. You can then save this file as a .txt file to import into another application.)
4. Click on the X in the upper right-hand corner of the window to return to the Main menu.

Room Stack Reports (Yearly and Monthly)

This report breaks out the activity for each room based on the historical files. You can run this report so it shows the units rented or the revenue generated.

This report shows the data by room number. This can be helpful when determining when to flip mattresses in a room or which rooms have had the most use and therefore may need a deep cleaning.

1. Click on the Marketing icon.
2. Select Room Stack Reports (Yearly and Monthly). The Stack Report window appears as shown in Figure 7.

TEST HOTEL 6.2.5
Room Stack By Year
 Hotel Date: Mar-26-2017

Room	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Totals
100	0	0	1	4	0	7	2	3	0	1	1	3	22
101	0	0	0	2	0	7	1	2	0	0	0	0	12
102	0	0	0	4	0	5	1	3	0	0	2	0	15
103	0	0	0	2	0	4	1	2	0	0	0	2	11
104	0	0	1	2	0	1	0	1	0	0	0	0	5
105	0	0	0	0	0	1	0	0	0	0	0	0	1
106	0	0	0	0	0	4	0	0	0	0	0	0	4
107	0	0	0	0	0	2	0	0	0	0	0	0	2
108	0	0	0	0	0	5	0	0	0	0	0	0	5
109	0	0	0	0	0	0	0	0	0	0	0	0	0
110	0	0	0	0	0	2	0	0	0	0	0	0	2
111	0	0	0	0	0	0	0	0	0	0	3	0	3
112	0	0	2	0	0	1	0	0	0	0	3	0	6

Figure 8: Stack Report Results

- e. The room numbers are listed down the left side of the report.
 - i. If you selected a specific month to report, the days of the month run across the top of the report as column headers. A number in the intersecting columns shows how many times that day the room was occupied. After the last day of the month, the Total column shows how many times total for that month that room was occupied.
 1. At the bottom are Monthly Totals.
 - ii. If you did not select a specific month to report, each month in the year selected is a column header. A number in the intersecting columns shows how many times that month the room was occupied. After the last day of the month, the Total column shows how many times total for that month that room was occupied.
 1. At the bottom are Monthly Totals.
- f. If you select Revenue Report, the report shows the dollar amount that room generated each day, and the Total column shows the total revenue for the month earned via that room.
 - i. At the bottom are Monthly Totals.
3. If you selected Display in the SendTo menu, after reviewing the report, if you click Esc, the reports in graphical format appear. You can either click through the pages, or click on Esc to go back to the Main Menu. Click on the X in the upper right-hand corner of the window to return to the Main menu.

Historical Source Code Analysis

Use this report to analyze where and how your guests selected your property. This report pulls its data from The Sources fields on the New Reservation Form

1. Click on the Marketing icon.
2. Select Historical Source Code Analysis. The Historical Source Code Analysis window appears as shown in Figure 9.

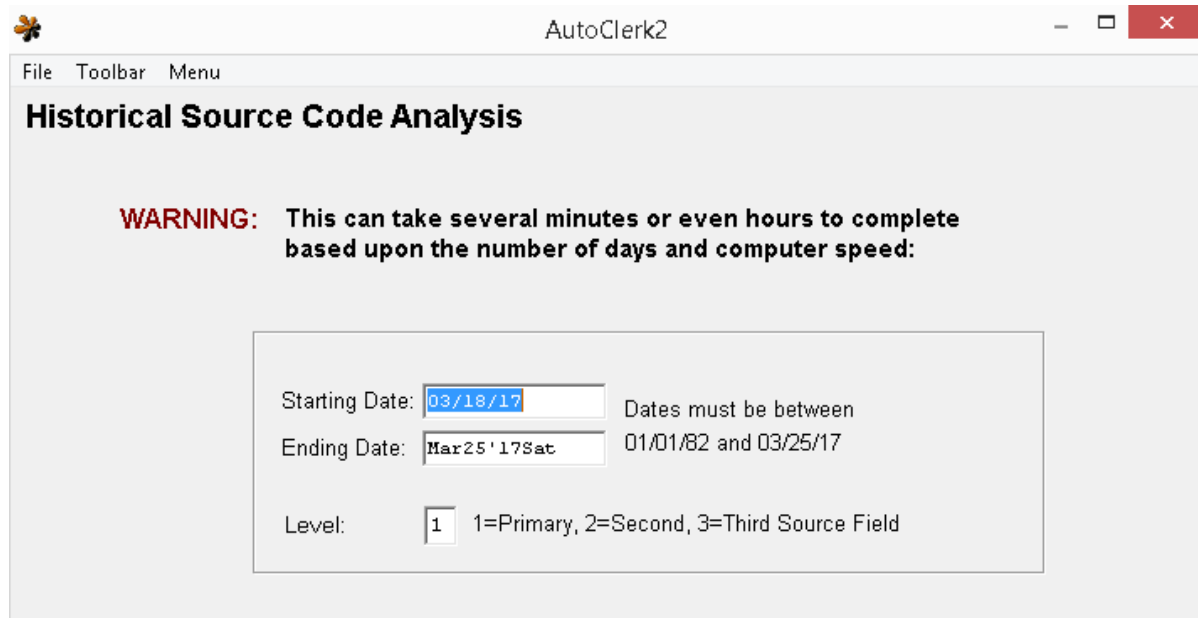


Figure 9: Historical Source Code Analysis

- a. Enter start and end dates in the Starting and Ending Date fields. In this report, all data is generated from before the current date.
 - b. The Level field is actually the Source Code 1, Source Code 2, and Source Code 3.
 - i. These correspond to the Sources fields on the bottom left side of the New Reservation form. These were set up in ACConfig when you configured AutoClerk.
 - ii. Enter 1, 2, or 3 as appropriate.
 - c. Click the F10 Save button to save your work. (The Esc button returns you to the Main menu.)
3. The SendTo pipeline appears.
 - a. Click the Display button.
 - b. The Historical Source Code Analysis report appears in your default browser window as shown in Figure 10.

Page 1

TEST HOTEL 6.2.5
Primary Source Code Analysis
From Dec 1'16 Thu To Mar 1'17 Wed

Code	Description	Units	ADR	Revenue
FF	FRIEND/FAMILY	6	156.17	937.00
WI	WALKIN	24	142.65	3423.50
Totals:		30	145.35	4360.50

Figure 10: Historical Source Code Analysis Report

- i. This report provides all of the source codes, the descriptions for the source codes, the units rented per source code, the average daily rate (ADR), and the total revenue for each source code.
4. After AutoClerk generates the Historical Source Code Analysis, you return to the Main menu.

Historical Production Analysis by Class/Company

Use this report to analyze which companies are booking under your various rate classes. This report pulls its data from the Company field on the New Reservation form. If a company's information is used on more one rate class, you must generate a separate report for each of these rate classes in order to see all of the relevant data.

1. Click on the Marketing icon.
2. Select Historical Production Analysis by Class/Company. The Historical Production Analysis by Class/Company window appears.
 - a. Enter start and end dates in the Starting and Ending Date fields. The default is the past 7 days.
 - i. In this report, all data is generated from before the current date.
 - b. In the Rate Class field. Enter the rate class you wish to analyze, or select one from the pull-down menu and auto fill this field.
 - c. Click the F10 Save button to save your work. (The Esc button returns you to the Main menu.)
 - d. The SendTo pipeline appears.
 - i. Click the Display button. The Historical Production Analysis by Class/Company report appears as shown in Figure 11.

Page 1

TEST HOTEL 6.2.5
Historical Production Analysis Report
From Jan 1'17 Sun to Mar25'17 Sat Rate Class: RA

Company	Days	ADR	Revenue
	16	140.31	2,245.00
ACME TRUCKING	1	125.00	125.00
KAISER PERMANENTE	1	150.00	150.00
{Unknown, no profile}	0	N/A	15.00 CR
Total:	18	139.17	2,505.00

Figure 11: Historical Production Analysis Report

- e. This report provides all of the companies that use the rate class you selected.
 - i. In addition, you can view the units rented per company for this rate class, the average daily rate (ADR), and the total revenue for each company using this rate class.
 - ii. The Company field in the first line of the report is usually blank. This data is for all stays under that rate class that did NOT have any Company contact information provided.
3. After AutoClerk generates the Historical Production Analysis by Class/Company, you return to the Main menu.

Historical TA Impact Analysis

Use this report to analyze how travel agent activity influences your room revenue. This report pulls its data from the Travel Agent section of the New Reservation form.

1. Click on the Marketing icon.
2. Select Historical TA Impact Analysis. The Historical TA Impact Analysis window appears.
 - a. Enter start and end dates in the Starting and Ending Date fields. The default is the past 7 days. In this report, all data is generated from before the current date.
 - b. If you want to see a specific room number, enter that room number in the Room Number field. (This is unusual.) If you leave this field blank, you see all room numbers in your property.
 - c. Click the F10 Save button to save your work. (The Esc button returns you to the Main menu.) The SendTo pipeline appears.

- i. Click the Display button. The Historical Net/Gross report appears in your default browser window as shown in Figure 12.

Door	Nights	Room wo/TA	Room w/TA	Gross Room	Net Room
100	19	2759.00	0.00	2759.00	2759.00
101	12	1545.00	135.00	1680.00	1666.50
102	15	2145.00	135.00	2280.00	2266.50
103	9	1095.00	135.00	1230.00	1216.50
104	5	545.00	135.00	680.00	666.50
105	1	135.00	0.00	135.00	135.00
106	4	540.00	0.00	540.00	540.00

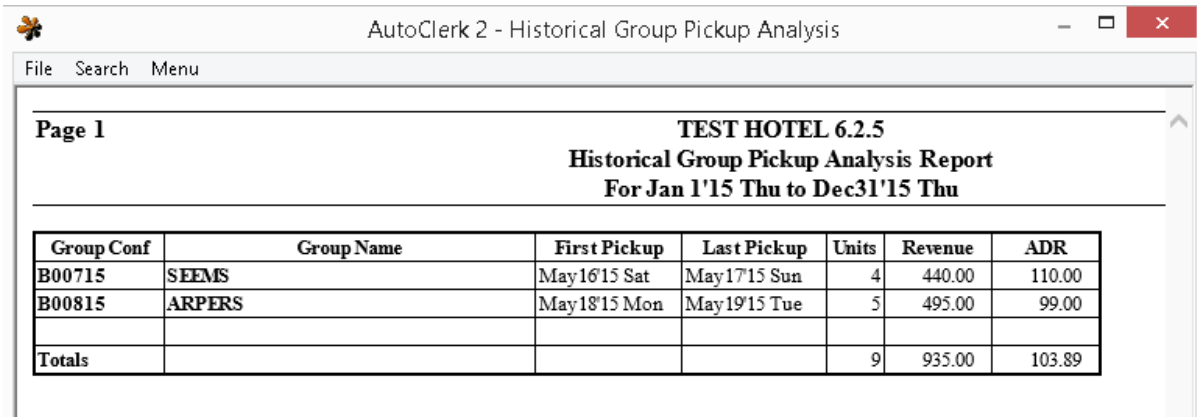
Figure 12: Historical TA Analysis Report

- ii. This report provides all of the room numbers, the nights used, room revenue generated with and without a travel agent, the gross and net room revenues.
 - 1. Gross room revenue is all of the monies from that room. The net room revenue is the gross room revenue minus the travel agent commission.
- 3. After AutoClerk generates the Historical Net/Gross report, you return to the Main menu.

Historical Group Pickup Analysis

Use this report to analyze the impact of group activity at your hotel. This report shows group-related revenues, room rentals, and average daily revenues.

1. Click on the Marketing icon.
2. Select Historical Group Pickup Analysis. The Historical Group Pickup Analysis window appears.
 - a. Enter start and end dates in the Starting and Ending Date fields. The default is the past 7 days. In this report, all data is generated from before the current date.
 - b. Click the F10 Save button to save you work. (The Esc button returns you to the Main menu.) The SendTo pipeline appears.
 - c. Click the Display button. The Historical Group Pickup Analysis appears as shown in Figure 13.



Page 1

TEST HOTEL 6.2.5
Historical Group Pickup Analysis Report
For Jan 1'15 Thu to Dec31'15 Thu

Group Conf	Group Name	First Pickup	Last Pickup	Units	Revenue	ADR
B00715	SEEMS	May 16'15 Sat	May 17'15 Sun	4	440.00	110.00
B00815	ARPERS	May 18'15 Mon	May 19'15 Tue	5	495.00	99.00
Totals				9	935.00	103.89

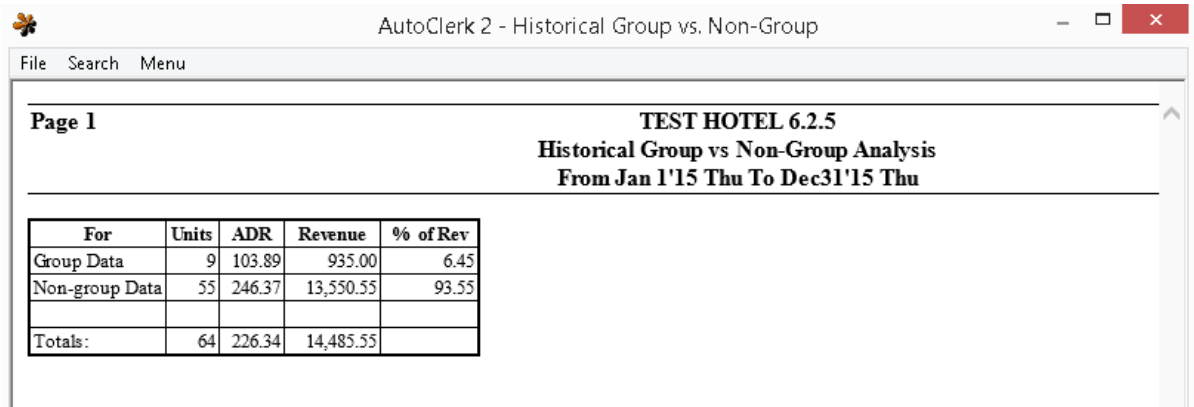
Figure 13: Historical Group Pickup Report

- i. The report includes the group confirmation number and name, the date the first room was picked up, the date the last room was picked up, how many units were rented, the revenue generated, and the average daily rate (ADR) for each group as well as Totals for the selected date range.
3. After AutoClerk generates the Historical Group Pickup Analysis report, you return to the Main menu.

Historical Group vs. Non-Group Analysis

Use this report to compare your non-group revenues to your group revenues.

1. Click on the Marketing icon.
2. Select Historical Group vs. Non-Group Analysis. The Historical Group vs. Non-Group Analysis window appears.
 - a. Enter start and end dates in the Starting and Ending Date fields. In this report, all data is generated from before the current date.
 - b. Click the F10-Save button to save your work. (The Esc button returns you to the Main menu.) The SendTo pipeline appears.
 - i. Click the Display button. The Historical Group vs. Non-Group Analysis appears as shown in Figure 14.



Page 1

TEST HOTEL 6.2.5
Historical Group vs Non-Group Analysis
From Jan 1'15 Thu To Dec31'15 Thu

For	Units	ADR	Revenue	% of Rev
Group Data	9	103.89	935.00	6.45
Non-group Data	55	246.37	13,550.55	93.55
Totals:	64	226.34	14,485.55	

Figure 14: Historical Group vs. Non-Group Report

- ii. You can view the difference between group data vs. non-group data in the categories of units, average daily revenue (ADR), revenue, and percentage of revenue. (For example, group revenue might be 30% and non-group revenue might be 70 %.)
 - iii. The Totals row at the bottom of the report show the combined number of both group and non-group data for the date range you selected.
3. After AutoClerk generates the Historical Group vs. Non-Group Analysis report, you return to the Main menu.

Reservation Denial Report

These reports are generated only if your property has set up Denial Codes for reservations. Once you have set them up, contact AutoClerk Support for report information.

Reservation Denial Report by Month

These reports are generated only if your property has set up Denial Codes for reservations. Once you have set them up, contact AutoClerk Support for report information.

3. Yield Management

Yield Management Analysis Report allows the user to combine data from the past, present and future to get a complete view of room revenue on the books.

1. Click on the Yield Management icon on the Main menu. The Yield Management Analysis Options window opens as shown in Figure 15.

Figure 15: Yield Management Analysis Options

2. Enter a date in the Starting Date field. The default for the date in this field is today's date. However, you can enter past, present, or future dates in this field. This date span can cover past, present and future all in the same report. You can enter the date in MM/DD/YY format or enter the number of days in the future you want the report to begin.
 - a. Once you exit the field, AutoClerk displays the first three letters of the month, the two digits of the date within the month, the last two digits of the year and the first three letters of the day of the week.
 - b. Enter a date in the Ending Date field. The default for the date in this field is one month from today's date.

same merge number. You can merge as many rate classes as you wish.

- ii. When you run the report, those rate classes with the same Merge number have their detail merged together. The details in the report are labeled Merge 1, Merge 2, etc.
 - iii. The bottom of the report lists which rate class(es) combined in to which Merge number
 - iv. This is unchecked by default.
- f. Include Daily Totals Unchecked = Summary Only: If checked, the report shows detail and totals for each day of the date range.
- i. If un-checked, this means that you only get totals for the entire date span.
 - ii. This is checked by default.
- g. Include Today's Posting: If checked, this report includes and room revenue postings on the current day.
- i. This is unchecked by default.
- h. Show All Columns: This works only if you have chosen a Market Categories of Room type of one of the Sources.
- i. If unchecked, the report does not include any data columns that have zero stays and zero dollars.
 - ii. This is checked by default.
- i. Print Zero Rate Class: If checked, then all rate classes, regardless of whether they have any data for the requested time frame or not, will be reported.
- i. If unchecked, then only those rate classes with data will be reported.
 - ii. This is checked by default.
5. After completing your detail choices, click the OK button. The Yield Management Analysis Report window opens as shown in Figure 16.

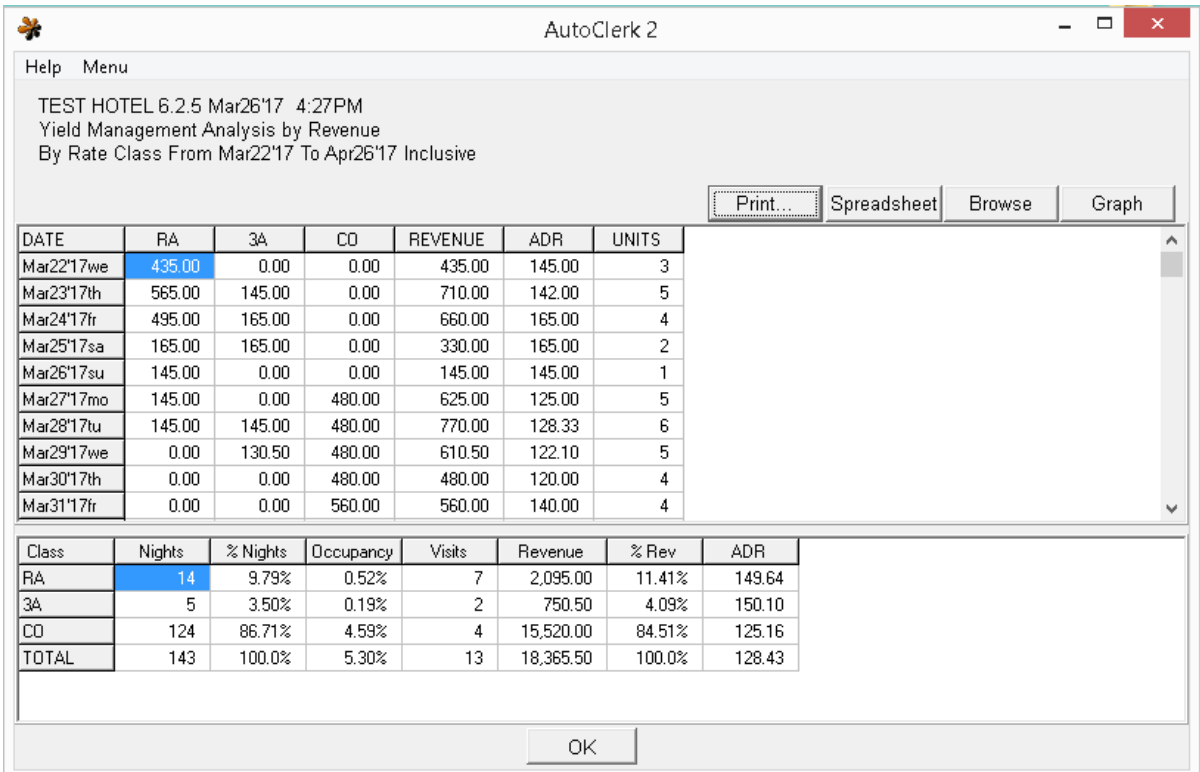


Figure 16: Yield Management Report

- a. In Figure 16, Print Zero Rate Classes was unchecked so only the rate classes with data are being reported.
- b. The Yield Management report is separated into two sections.
 - i. The top section is by date and rate class (If rate class is the selected market Category).
 - ii. The bottom section displays the accumulation of the data from the top section and reports nights, occupancy percentage, visits, revenue generated, and the average daily rate (ADR) per rate class.
- c. There are 4 output options from the browser:
 - i. Print – Opens a SendTo pipeline.
 - 1. Select the appropriate printer.
 - ii. Spreadsheet – opens in a .csv format which can then be saved and opened in a spreadsheet program.
 - iii. Browser – this sends the report to your default browser.

1. If your browser is already open, the report appears in another tab. A new window won't necessarily open.
- iv. Graph – opens the results in a graphical format.
- v. Click the Esc button or the Quit button, or close the browser window as appropriate to return to the report.
6. Click the OK button to return to the Main menu.

Table of Figures

Figure 1: Tape Chart	5
Figure 2: Tape Chart – Past Days	6
Figure 3: Reservations to be Assigned	14
Figure 4: Room Number Assignment Selection	15
Figure 5: Historical Marketing Reports Generator	17
Figure 6: Profile Market Survey	20
Figure 7: Stack Report	23
Figure 8: Stack Report Results	24
Figure 9: Historical Source Code Analysis	25
Figure 10: Historical Source Code Analysis Report	26
Figure 11: Historical Production Analysis Report	27
Figure 12: Historical TA Analysis Report	28
Figure 13: Historical Group Pickup Report	29
Figure 14: Historical Group vs. Non-Group Report	30
Figure 15: Yield Management Analysis Options	31
Figure 16: Yield Management Report	34

Index of AutoClerk V9 Tape Chart, Marketing and Yield Management Icons, Menus, and Commands

A

Assigning a Room to a Reservation, 14
AutoClerk, 3

B

Blocked
Yellow Cells, 11

C

Clean, Vacant, Not Blocked
White Cells, 9

D

Date Header Cells, 9

H

Historical Group Pickup Analysis, 28
Historical Group vs. Non-Group Analysis, 29
Historical Production Analysis by Class/Company, 26
Historical Source Code Analysis, 25
Historical TA Impact Analysis, 27

I

Inhouse
Blue Green Cells, 10
Inhouse Column, 8

M

Marketing, 17
Marketing Report Generator, 17
Menu Bar, 6

O

Out-of-Order
Red Cells, 12

P

Past Inhouse
Olive Green Cells, 12
Past Transferred Room
Blue Cells, 13
Past Unoccupied Room
Black Cells, 14
Permanent Reservations, 18
Profile Survey Generator, 19

R

Reservation Denial Report, 30
Reservation Denial Report by Month, 30
Room Stack Reports (Yearly and Monthly), 22
Room Status Column, 8

S

Setting Tape Chart Parameters, 4

T

Tape Chart, 4
Tape Chart Descriptions, Cell Colors, Features, 8

Y

Yield Management, 31