

New Reports and Features

060-002-005-1160 Through 060-002-005-1176

July 2023

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AutoClerk New Reports and Features

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In addition, RevPAR has been updated to be calculated using the property's inventory divided into the day's room revenue. Inventory is all sleeping rooms and does not deduct out-of-order rooms.

This document supplements the What's New document. Note that some reports and features, because of their complexity, also have their own User Guide.

Reservations

New Reservation

• When you go into a new reservation, if your manager has enabled and set up the new Extra Charges feature, you will see an Extra Charges button to the right of the Hide Rates checkbox as seen below:



Figure I: Extra Charges button

- Extra charges allow a manager to set up charges to be posted automatically during the night audit, after Room and Tax have been posted.
- When the user clicks on the Extra Charges button, a new form appears as seen below:

| AutoClerk 2 | | | | | | — | | × |
|---------------------------------|---------------|-------------------------------|------------------|----------|-------------------|----------|-----|---|
| Extra Char Reset to Defaults | | <mark>ns will Post A</mark> r | rival Night Only | | ? | | | |
| Posted | Units | Amount | Comment | | | | | |
| RESORT FEE | e) | | ID: 1 | | Name | Based On | Add | |
| RESORT FEE (FE- Nightly | -o) 1 • \$ | 35.00 | _ | 0 | RESORT FEE | Fixed 1 | | |
| | | | 1 | <u> </u> | OVERNIGHT PARKING | | + | |
| | | | | | PET FEE | Pet | + | |
| | | | | | ROLLAWAY | Rollaway | + | |
| | | | | | BREAKFAST | | + | |
| | | | | | | | | |
| Esc | | | | | J | | OK | 2 |

Figure 2: Extra Charges – New Res

- In this example, Resort Fee has been set up to be automatically added to each reservation, so it is listed on the left side. The right side lists the transactions a user can add and/or the system will add if specific criteria are met.
- If the user had checked the 'Pet' checkbox on the reservation and the guest had a car, the Extra Charges would like the below example:

| CC AutoClerk 2 | | | | | | - C | X C |
|---------------------------------|-------|-------------------|-------------------|---|-------------------|----------|-----|
| Extra Charg | es | Changed | | | ? | | |
| Reset to Defaults | Key | Trans will Post A | rrival Night Only | | <u> </u> | | |
| Posted | Units | Amount | Comment | | | | |
| RESORT FEE RESORT FEE (FE-8) | | | ID: 1 | | Name | Based On | Add |
| Nightly - | | \$ 35.00 | | 0 | RESORT FEE | Fixed 1 | |
| PET FEE | | 1 | ID: 3 | | OVERNIGHT PARKING | | |
| PET FEE (FE-1) | | | | | PET FEE | Pet | |
| Arrival Night 💌 | 1 🔻 | \$ 10.00 | | 0 | ROLLAWAY | Rollaway | + |
| OVERNIGHT PAR | | | ID: 2 | | BREAKFAST | | + |
| OVERNIGHT (PR-1) | | \$ 15.00 | | 0 | | | |
| | 1 💌 | ļ\$ 15.00 | | 0 | | | |
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| | | | | | | | |
| Esc | | | | | | | OK |

Figure 3: New Res with Additional Charges

- Because Pet was checked on the reservation, the Pet fee was added by the system. The clerk manually added Overnight Parking.
- As Extra Charges are added to a reservation, the Stay Total reflects the added charges.
- Please the separate document: User Guide Extra Charges for more details on how to set, configure and use Extra Charges.

Groups

Create a New Group Master

- As of build 1169, non-Best Western properties can enable a new feature that allows the user to select specific room numbers once a group has been created and room type allocations set.
 - If you have enabled the functionality ACConfig, once you have entered in the new group's room type allocations and rates and click ok, you get a room type selection form as seen below:

| Aug 6'22 Sat | | vailable for entire stay d up by reservations | | |
|--|---|--|-----------------------------|-----------------------------|
| Aug 6'22 Sat Aug 6'22 Sat 101 102 103 105 112 114 202 203 210 2215 302 | Show rooms picke JS 100 109 207 209 211 222 307 309 | vailable for entire stay d up by reservations | | |
| N 101 102 103 105 112 114 202 203 210 212 215 302 | 100 109 207 209 211 221 222 307 309 | | | |
| 101 102 103 105 112 114 202 203 210 210 212 215 302 | 100 109 207 209 211 221 222 307 309 | | | |
| 102 103 105 112 114 202 203 210 210 212 215 302 | 109 207 209 211 222 307 309 | | | |
| 310 312 | | | | |
| oc Remain: 3 | Alloc Remain: 5 | | | |
| 0 | c Remain: 3 | c Remain: 3 Alloc Remain: 5 | c Remain: 3 Alloc Remain: 5 | c Remain: 3 Alloc Remain: 5 |

Figure 4: Group Room Allocations – Room Selection

- This form allows you to select the specific rooms you want to attach to the group.
- Once selected, those rooms will be the default when making group individual reservations.
- For more information on this new functionality, please see the separate documentation: User Guide Group Room Selection at <u>www.myautoclerk.com</u>.

Repeat Guests from History

- This new feature allows the user to see which incoming guests have stayed with the property in the past.
 - Set up the criteria for what determines a 'previous stay' and then see who your repeat guests are.
 - You are also able to view the guests' past reservations, past guests' folios and arriving guests' reservations.
- When you first go into the form it looks like the example below:

| Ge AutoClerk 2 | — 🗆 X |
|--|---|
| File Toolbar Menu | |
| Repeat Guests from History | |
| Show Detail Hide Detail | |
| Historical Counts (Note: Folios, Stays and Days are historical folio counts, they do not contain the current arrival info) | |
| Arr Folios Stays Days Conf Last Name First Name Arrival Departure Nights RmType Room | Repeat Guests Options |
| | Arrivals for this Start and End Date |
| | Apr23'20Thu Apr23'20Thu |
| | Search History (Checkouts this date to today) |
| | Apr24'19Wed |
| | Repeat Options |
| | What Identifies a Guest as Previous Stay |
| | Name is Identical AND |
| | Email Address OR |
| | Phone Address OR |
| | ✓ Home Address |
| | Street |
| | ✓ City ✓ State |
| | ✓ State ✓ Zip Code |
| | , |
| | Show Options |
| | Repeat Guest Only |
| | ✓ Show detail on load |
| | Sort Order |
| | Arrival 💽 Last Name |
| | |
| | Load Changes |
| Esc | |

Figure 5: Repeat Guests from History – Initial Form

- Fill out your search criteria on the right-hand side, then click Load Changes.
 - Arrivals Enter the dates of future arrivals you want to be the base.
 - Current inhouse guests will not be included in the search, only guests due to arrive.
 - Only Gtd/Hold/Share reservations are included in the search.
 - The default start and end date are Today.
 - Search History Enter the past date you want to start the search for repeat guests.
 - The default start date is a year in the past.
 - Repeat Options Uncheck the criteria you want to exclude as necessary to be a match.
 - If you uncheck all the fields, then the only criteria for a repeat guest would be an identical name.
 - The more criteria you select, the fewer results may be returned.
 - The results can depend on whether your staff are using Guest Profiles when they make reservations and therefore are not creating new records.
 - Show Options You can select to see all guests due to arrive during the entered time frame or only those that are matches.
 - Show detail on load When checked, will show the repeat guests and all their matches.
 - Once you have loaded a list, you can change the detail showing by clicking the Show Detail/Hide Detail buttons at the top.
 - Sort Order Use the drop-down menus to change the order of the results.
- Once you have set your criteria, click on Load Changes and the result will be displayed as seen below:

| | storica | | | | olios, Stays and I | Days are historic | | | | | | |
|----|---------|--------|----|------------------|--------------------|-------------------|-----------------------|------------|--------|----|--------|--|
| | lios St | tays D | | | | First Name | | Departure | Nights | | e Room | Repeat Guests Options |
| 2 | 1 | 1 | | 21004K | | | 03/12/2021 | | 3 | |] | Arrivals for this Start and End Date |
| | | | | 18005P | | | 11/01/2018 | | 1 | ST | 121a | Mar10'21Wed Mar24'21Wed |
| 2 | 1 | 1 | | | | | 03/12/2021 | | 2 | KN | | , , |
| _ | | | | | | | 01/31/2021 | | 1 | ΚN | 103a | Search History (Checkouts this date to today |
| 2 | 1 | 1 | | | | WOODROW | | | 3 | KN | 102 | Jan01'18Mon |
| | | | | | | WOODROW | | | 1 | KN | 102a | 1 |
| ζ. | 1 | 1 | | | | | 03/14/2021 | | 2 | KN | 136 | Repeat Options |
| 5 | | | | | | | 02/09/2021 | | 1 | KN | 136a | What Identifies a Guest as Previous Stay |
| Y | | - 1 | | 21004T 2000CR | | | 03/15/2021 07/16/2020 | | 2 | KN | 136a | Name is Identical AND |
| | 11 | 11 | | 2000CR 21004G | | | 03/17/2021 | | 2 | KN | 1308 | |
| 4 | | | 20 | 19001V | | | 03/01/2019 | | 2 | KN | 144a | 🔽 Email Address OR |
| | | | | 200007 | | | 01/30/2020 | | 2 | KD | 126a | Phone Address OR |
| - | | | | 20000X | | | 02/03/2020 | | 1 | KN | 137a | ✓ Home Address |
| - | | | | 20006G | | | 03/28/2020 | | 2 | KD | 125a | ▼ Street |
| | | | | 20006 | | | 03/30/2020 | | 6 | KN | 154a | ✓ City |
| - | | | | 20007L | | | 04/01/2020 | | 4 | KK | 115a | ✓ State |
| | | | | 200082 | | | 04/19/2020 | 04/21/2020 | 2 | KN | 103a | ✓ Zip Code |
| | | | | 2000BK | | | 06/04/2020 | | 1 | QF | 221a | |
| 1 | | | | 2000D3 | SIMS | YSABEL | 08/13/2020 | 08/15/2020 | 2 | KN | 143a | Show Options |
| | | | | 2000D9 | SIMS | YSABEL | 08/17/2020 | 08/20/2020 | 3 | KN | 143a | |
| | | | | 21001K | SIMS | YSABEL | 01/26/2021 | 01/28/2021 | 2 | KN | 141a | Repeat Guest Only |
| | 1 | 1 | 1 | 21004L | BLU | BUBBA | 03/19/2021 | 03/22/2021 | 3 | KD | | ☐ Show detail on load |
| | | | | 18005P | BLU | BUBBA | 11/01/2018 | 11/02/2018 | 1 | ST | 121a | Sort Order |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | Arrival 🗾 Last Name |

Figure 6: Repeat Guests from History - Results

- Here are some things you can do with the results:
 - Future Reservations
 - These have a gray background.
 - Click on the magnifying glass to hide the details for that one record.
 - Double click on an incoming reservation to see the reservation form.
 - You can make changes if necessary.
 - Click once on a future reservation and then click on File at the top to see the Advance Deposit Folio, or the reservation form.
 - Historical Reservations/Stays
 - These have a yellow background.
 - Double click on the Historical result to see the original reservation.
 - o Changes to past reservations are not allowed.
 - Single click on a Historical result, then click on File.
 - You can then either see the guest's Historical Folio; or see the original reservation.

• You can also change the criteria on the right and click Load Changes to see new results. You do not have to reload the entire form.

Check in

Bucket Check

- The Bucket Check allows front desk staff to indicate they have done a bucket check, save it for the next shift and/or produce a copy for the manager.
 - When you first go into Bucket Check, the form looks like:

| Bucke | t Ch | neck | Start Ne | w | R | eload | 1 | | | | | | | | | | | | | | | | | | | | | |
|-----------|------|------|------------------|--------|------|------------|------------|------|--------|-------------------|---------|-------------|-------|-------|---------------|--------------|-------|----|-------|--------|------|--------|-----|------|------|------|--------|-------|
| hecked By | Chk | Room | Guest | Conf | eReg | Arrival | Beparture | Bays | Remain | Street | Street2 | City | State | Zip | Country | Phone | Email | RC | A C | I Crib | Roll | Rate | Pay | Src1 | Src2 | Src3 | Billto | check |
| | | 100a | | 200065 | | 04/23/2020 | 04/26/2020 | | | 8423 KELLER AVE | | DIXIANA | | | UNITED STATES | 245-895-6154 | | | | | | | | FF | | | | |
| | | 103a | LONGTERM, | 20004B | | 04/10/2020 | 08/08/2020 | 120 | 107 | | | | | | UNITED STATES | | | MN | 1 0 0 | | | 96.00 | CA | IN | | | | |
| | | 112a | WATSON, JEREMY | 20006X | | 04/23/2020 | 04/27/2020 | 4 | - 4 | 9045 10TH AVE | APT 473 | MARIANNA | FL | 32448 | UNITED STATES | 589-548-2215 | | 3A | 1 1 0 |) | 1 | 108.00 | AM | RG | | | | |
| | | 120a | OWENS, SALLY | 20006T | | 04/23/2020 | 04/25/2020 | 2 | 2 | 7823 WAVERLY AVE | | WINGETT RUN | OH | 45789 | UNITED STATES | 548-895-8956 | | RA | 1 0 0 |) | 1 | 120.50 | AX | RG | | | | |
| | | 201a | HOUSEMAN, SAM | 20006J | | 04/20/2020 | 04/27/2020 | 7 | 4 | 4823 RIVER RD | | WAYNESFIELD | OH | 45896 | UNITED STATES | 258-865-5124 | | RA | 2 0 0 |) | | 0.00 | н | IN | | | | |
| | | 207a | KINGSLEY, ARTHUR | 20006Y | | 04/23/2020 | 04/25/2020 | 2 | 2 | 1842 HAVENWOOD DR | | BARTLETT | IA | 51654 | UNITED STATES | 259-895-4664 | | RA | 2 0 1 | X | 1 | 135.00 | AX | FF | | | | |
| | | 208a | TRAVERS, JAKE | 20006V | | 04/23/2020 | 04/25/2020 | 2 | 2 | 8494 OAK AVE | | SWANTON | MD | 21561 | UNITED STATES | 258-452-5562 | | RA | 1 0 0 |) | | 60.00 | CA | 101 | | | | |
| | | 208b | JACKSON, BLAKE | 20006W | | 04/23/2020 | 04/25/2020 | 2 | 2 | 8494 OAK AVE | | SWANTON | MD | 21561 | UNITED STATES | 258-452-5562 | | RA | 1 0 0 |) | | 60.00 | VI | 101 | | | | |
| | | 219a | GRANGER, TODD | 20003R | | 04/21/2020 | 04/24/2020 | 3 | 1 | 4892 HAVES AVE | | DRESHER | PA | 19025 | UNITED STATES | 215-568-4582 | | SR | 2 0 0 |) | 1 | 108.00 | VI | IN | | | | |
| | | 500a | INTERVIEWS, | 20006R | | 04/21/2020 | 04/24/2020 | 3 | 1 | | | | | | UNITED STATES | | | RA | 3 0 0 | | | 0.00 | CA | RG | | | | |

Figure 7: Bucket Check

- o All the checked in rooms and folios are listed with the default columns.
 - If you want to change the columns on a one-time basis, click on View – Show Fields and deselect the columns you want to hide.
 - If you want to set up a 'permanent' column set-up. Use View Show Fields to set up the columns you want to see.
 - Then save the design and set it up as a Fast Selection.
 - The Fast Selection will be saved under your user id, but other staff can use your setup as a Fast Selection for themselves.
- If you are doing the first bucket check of the day, double click on the first room and folio.
 - You will be re-directed to that inhouse folio.
 - Verify the data as per your property's policy, making changes as necessary and saving the changes, or click on Esc to go back to the Bucket Check form.
 - Click in the 'Chk' checkbox to indicate you have checked the folio.

- Repeat these steps until all rooms/folios have been checked.
- You could also verify/change each room/folio and use the red arrows in the inhouse folio form to move to the next checked in room/folio.
 - When you have completed going through the folios, click Esc to go back to the Bucket Check form and check the Chk boxes.
- When you are done, click 'ok.'
 - You will be returned to the Main menu and your work will be saved.
 - When you go back into the Bucket Check, you will see your initials, date, and time in the 'Checked By' column as seen below:

🚾 AutoClerk 2

<u>File Edit View T</u>oolbar <u>M</u>enu

| Bucket Che | ck | | Start New | Relo | ad | | | |
|------------------------|-----|--------|------------------|--------|------|------------|------------|------|
| Checked By | Chk | Room 🛡 | Guest | Conf | eReg | Arrival | Departure | Days |
| LC 03/04/2021 15:44:25 | | 100a | GREENE, LINDA | 200068 | | 04/23/2020 | 04/26/2020 | 3 |
| | | 103a | LONGTERM, | 20004B | | 04/10/2020 | 08/08/2020 | 120 |
| LC 03/04/2021 15:44:27 | | 112a | WATSON, JEREMY | 20006X | | 04/23/2020 | 04/27/2020 | 4 |
| | | 120a | OWENS, SALLY | 20006T | | 04/23/2020 | 04/25/2020 | 2 |
| LC 03/04/2021 15:44:43 | | 201a | HOUSEMAN, SAM | 20006J | | 04/20/2020 | 04/27/2020 | 7 |
| LC 03/04/2021 15:44:44 | | 207a | KINGSLEY, ARTHUR | 20006Y | | 04/23/2020 | 04/25/2020 | 2 |
| LC 03/04/2021 15:44:44 | | 208a | TRAVERS, JAKE | 20006V | | 04/23/2020 | 04/25/2020 | 2 |
| LC 03/04/2021 15:44:45 | | 208b | JACKSON, BLAKE | 20006W | | 04/23/2020 | 04/25/2020 | 2 |
| | | 219a | GRANGER, TODD | 20003R | | 04/21/2020 | 04/24/2020 | 3 |
| | | 500a | INTERVIEWS, | 20006R | | 04/21/2020 | 04/24/2020 | 3 |

Figure 8: Partially Completed Bucket Check

• If you do a bucket check at the beginning and end of your shift, this is a good way to see which rooms/folios you have already checked, and which ones remain.

- You can also use this method if your manager wants one report for the day. As each clerk logs in and does their Bucket Check; when saved, their initials, date and time will be logged.
- When you are ready to print or save your completed Bucket Check for the manager, click on File, and then select either Print or Export.
 - When you export the report, it is exported in .csv format.
 - Follow your property's policy for the exports name and save location. The default location is the desktop.
 - You can now clear the report for the next clerk by clicking on 'Start New.'
 - If you forgot to print/export the report, click on Reload, save/print/export, and then click Start New.
 - You can also start a new form by clicking on Edit Start New Shift.

Folio Printing

- The user can now email a guest's folio to 1) multiple addresses; 2) select which email address(es) to send it to; and 3) include employee/corporate email addresses.
- Once you have selected the room number and folio to print and clicked 'ok,' the SendTo pipeline appears. You will see a new option – 'L'- Selection Email, as seen below:

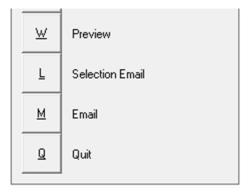


Figure 9: Selection Email

 Click on L-Selection Email, and you are re-directed to a new form as seen below:

| Eile Edit | Clerk 2 : View <u>T</u> oolbar | | | _ | | × |
|-----------|-----------------------------------|---|-------------------------|-------------|--------|--------|
| Email | Selection Add | | | Select All | Select | None |
| Send | JOHNSON, SAMUE | Email Email L holly@autoclerk.com L support@autoclerk.com | Type guest guest2 | | | |
| | | | | | | |
| Additio | nal Email Adr (Plac | ce a semicolon betwee | en addre | sses j@j.co | om;a@a | a.com) |
| - | Contacts Employee Email | 1 | | Select All | Selec | t None |
| | | Í | | | | |
| | | | | | | |
| Esc | | | | | C | ik |

Figure 10: Selection Email Addresses

- In this example, the guest had two (2) email addresses on his folio.
 - If the guest folio has company, group, group planner and or TA email(s), those will be included in the selection list.
- In the form, the guest's primary email address is checked by default. However, the user can deselect and/or select which address(es) to use.
 - In addition, the user can enter an additional email address in the blank field.
 - If a manager has built Hotel Contacts, those are also available for selection.
 - Hotel contacts can be useful if you need to send a folio to a corporate office.

- See the section on Employee Email Addresses on how to set up Hotel Contacts.
- If the guest did not have an email address listed, you can still email the folio by filling in the address in the Additional Email Adr field.
 - Adding an email in this field does NOT add it to the guest record.
- You can also set up a Fast Selection for emails. When you set up a Fast Selection, it will only apply to email addresses listed in the 'Additional Email Adr' section.
- This email feature is also available on the Checkout form, CL Cover Letters, CL Invoicing, CL Billings and Historical Folios.

General Reports

Guest Reports

Extra Charges Report

- This report is produced by default by the Night Audit if the new Extra Charges feature has been enabled.
 - o Printing can be suppressed in ACConfig.
- The report lists the Extra Charges that are either set to post 'tonight' or were posted in the past.
 - The transactions themselves are reported with other similar transactions in the M1 and M2 reports.
- For detailed information on Extra Charges, please refer to the separate documentation: User Guide Extra Charges. It can be found on <u>www.myautoclerk.com</u> in the Documentation section.

Usage Report

- The Usage Report allows the user to see which reservations (past, current, and future) had the Rollaway, Crib, and/or User Defined Checkboxes and Fields checked/filled out.
 - This can help the hotel know if there are enough rollaways/cribs for future use and/or how many guests bring their pets.
 - It can also help track past usage, so hotels know when cribs and/or rollaways need to be replaced.
- When you first run the report, the default is the current day and all the 'Include Columns' checked. An example is seen below:

| | utoCl | lerk 2 | | | | | | | | | _ | | × |
|-------|-------|--------|------------------------|------------|-----------------------|------------|----------|----------|----------|-------|--------------------------|----------|-----|
| ile | View | Tool | oar Menu | | | | | | | | | | |
| Jsa | ade | e Re | port | ? | | | | | | | | | |
| Statu | _ | | Confirmation | | Arrival | Departure | Nights | In-Dates | Cribs Ro | Ĩ | Report | t Dates | |
| les | | 12 | 22004G | OVERTON | 10/02/2022 | 10/04/2022 | 2 | 1 | 0 | | Oct02'2 | 2Sun | |
| | | | | | | | | | | | | | _ |
| | | | | | | | | | | End | Oct02'2 | 2Sun | |
| | | | | | | | | | | 🔽 In | clude Chec | ked Colu | ımn |
| | | | | | | | | | | St St | atus | | |
| | | | | | | | | | | Ro Ro | | | |
| | | | | | | | | | | | onfirmation | | |
| | | | | | | | | | | | lest Name | | |
| | | | | | | | | | | Ar | | | |
| | | | | | | | | | | | eparture | | |
| | | | | | | | | | | ✓ Ni | gnts Dates | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | ollaways | | |
| | | | | | | | | | | Pe | | | |
| | | | | | | | | | | | neck Box 1 | | |
| | | | | | | | | | | V Cł | neck Box 2 | 2 | |
| | | | | | | | | | | VU: | er Field 1 | | |
| | | | | | | | | | | V.Us | ser Field 2 | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | Filte | r by: | | |
| | | | | | | | | | | Cr | | | |
| - | | | | | | | | | | | ollaways | | |
| | | | C | Current N | Ctored D . | E-d D-c | Martin | In D. (| > | | | | |
| Statu | IS | Room | Confirmation Totals | Guest Name | Start Date 10/02/2022 | End Date | Nights 2 | | Cribs Ro | | | | |
| | | | Totals | | 10/02/2022 | 10/02/2022 | 2 | 1 | U | | eck Box 2 ser Field 1 | | |
| | | | | | | | | | | | ser Field 1 | | |
| | | | | | | | | | > | | Sel Fleid Z | | |
| - | Esc | 1 | | | | | | | | 1 | [| oad | |

Figure 11: Usage Report – Default

- The bottom of the report shows totals for the Checked Columns.
- To run the report with different parameters:
 - Change the start and end dates.
 - You can enter past, current and/or future dates.
 - Check/uncheck the checkboxes next to the fields listed in 'Include Columns.' The report will only include data for the checked boxes.
 - If your property has changed the default labels of the User Defined Checkboxes and or User Fields in ACConfig, then those labels will be listed. Otherwise, the default label will show. For example, Check Box 3 has been relabeled 'Pet'.

- If one of these fields'/checkboxes label has been removed, then it will not appear in the list.
- You can filter the results by checking a box(es) in the 'Filter' list.
 - If you leave all the checkboxes unchecked, the report will include ALL guests in an A folio and/or with a reservation status of Gtd/Hold during the defined time frame.
 - For example, if you only want to see guests with the 'Rollaway' checkbox checked, then click on Rollaway in the Filter by field.
 - If you select more than 1 item, the report uses the 'Or' criteria. This means that you check Crib and Pet; the report will show those guests who had/have either Crib or Pet checked but not both.
- o Once you set your parameters, click Load.
- Below is an example of a report run for 90 days to include past, current, and future guests, and all 'Include Column' checkboxes checked.

| Usag | je Re | | ? | | | | | | | | | |
|--------|-------|--------------|----------------|------------|------------|--------|----|---|-----------|----|-------------|-------------------------|
| Status | Room | Confirmation | Guest Name | Arrival | | | | | Rollaways | _ | Check Box 1 | Report Dates |
| Res | | 22004D | ADAMS, CHARLIE | 11/01/2022 | 11/04/2022 | 3 | 3 | 0 | 0 | 0 | - | Start Jul15'22Fri |
| Res | | 220048 | , | | 11/04/2022 | 3 | 3 | 0 | 0 | 0 | 0 | End Nov09'22Wed |
| Res | | 220049 | EDWARDS, KIM | | 11/04/2022 | 3 | 3 | 0 | 3 | 0 | 0 | Lind 110003 22/red |
| Res | | 220047 | FOSTER, ADAM | 11/01/2022 | | 3 | 3 | 0 | 0 | 0 | 0 | 🔽 Include Checked Colum |
| Res | 325 | 220032 | HASLETT | | 10/25/2022 | 2 | 2 | 0 | 0 | 0 | 0 | ✓ Status |
| Res | 118 | 220040 | HAVENS | | 10/25/2022 | 2 | 2 | 0 | 0 | 0 | 0 | Room |
| Res | | 220042 | HAYES, HENRY | 11/01/2022 | | 3 | 3 | 0 | 0 | 0 | 0 | Confirmation |
| Res | | 22003V | JONES | 10/05/2022 | | 2 | 2 | 0 | 0 | 0 | 0 | Guest Name |
| Out | 112a | 22004H | MAYS | 10/01/2022 | 10/02/2022 | 1 | 1 | 0 | 0 | 0 | 0 | ✓ Arrival |
| Res | 112 | 22004G | OVERTON | 10/02/2022 | 10/04/2022 | 2 | 2 | 0 | 2 | 2 | 0 | ✓ Departure |
| Res | 120 | 22002J | OWENS, FRANK | 10/23/2022 | 10/25/2022 | 2 | 2 | 0 | 0 | 0 | 0 | ✓ Nights |
| Out | 209a | 22003M | PATTON, GEORGE | 07/13/2022 | 07/20/2022 | 7 | 5 | 0 | 5 | 5 | 0 | ✓ In-Dates |
| Res | 105 | 22002H | PELL, JULIE | 10/23/2022 | 10/25/2022 | 2 | 2 | 0 | 0 | 0 | 0 | ✓ Cribs |
| Res | | 220041 | PELL, JULIE | 11/01/2022 | 11/04/2022 | 3 | 3 | 0 | 0 | 0 | 0 | ✓ Cribs ✓ Rollaways |
| Res | | 220045 | QUIGLEY, SAM | 11/01/2022 | 11/04/2022 | 3 | 3 | 0 | 0 | 3 | 0 | Pet |
| Res | | 22004C | SIMMS, PAUL | 11/01/2022 | 11/04/2022 | 3 | 3 | 0 | 0 | 0 | 0 | Check Box 1 |
| Res | 315 | 220033 | SINGLETON | 10/23/2022 | 10/25/2022 | 2 | 2 | 0 | 0 | 0 | 0 | Check Box 1 |
| Res | | 22003W | SMITH | 10/09/2022 | 10/11/2022 | 2 | 2 | 0 | 0 | 0 | 0 | |
| Res | | 22004B | WALTERS, ANNE | 11/01/2022 | 11/04/2022 | 3 | 3 | 0 | 0 | 0 | 0 | ✓ User Field 1 |
| Out | 103a | 22003N | WILLIS | 07/15/2022 | 07/20/2022 | 5 | 5 | 5 | 5 | 5 | 0 | ✓ User Field 2 |
| Res | 117 | 220031 | WILSON | 10/23/2022 | 10/25/2022 | 2 | 2 | 0 | 0 | 0 | 0 | |
| Res | | 22003X | WILSON | 10/08/2022 | 10/09/2022 | 1 | 1 | 0 | 0 | 1 | 0 | |
| | | | | | | | | | | | | Filter by: |
| | | | | | | | | | | | | Cribs |
| | | | | | | | | | | | | Rollaways |
| < | | | | | | | | | | | > | Pet 🗌 |
| Status | Room | Confirmation | Guest Name | Start Date | End Date | Nights | | | Rollaways | _ | Check Box 1 | Check Box 1 |
| | | Totals | | 07/15/2022 | 11/09/2022 | 59 | 57 | 5 | 15 | 16 | 0 | Check Box 2 |
| | | | | | | | | | | | | User Field 1 |
| | | | | | | | | | | | | User Field 2 |

Figure 12: 90 Day Usage Report

| USage Report ? Status Room Confirmation Guest Name Arrival Departure Nights In-Dates Cribs Rollaways Pet Check Box 1 Status Status Status 10/02/2022 10/04/2022 3 3 0 3 0 0 Status Julis':22F1 End Julis':22F1 End Mov09':22Wed Vulis':22F1 End Nov09':22Wed Vulis':22F1 End Nov | Room | Confirmation | | | | | | | | | | |
|--|------|--------------|------------|------------|------------|--------|----------|-------|-----------|-----|-------------|---|
| es 220049 EDWARDS, KIM 11/01/2022 11/04/2022 3 3 0 3 0 0 0 Stat es 112 2204G OVERTON 10/02/2022 10/04/2022 2 2 0 2 0 | | | | | | | | | | | | |
| es 112 22004G OVERTON 10/02/2022 10/04/2022 2 2 2 0 2 0 2 2 0 ut 209a 22003M PATTON, GEORGE 07/13/2022 07/20/2022 7 5 0 5 5 0 0 ut 103a 22003N WILLIS 07/15/2022 07/20/2022 5 5 5 5 0 0 ✓ Include Checked Column ✓ Status © Confirmation © Guest Name ✓ Arrival © Departure ✓ Nights ✓ In-Dates ✓ Cribs ✓ Rollaways ♥ Pet ✓ Check Box 1 ✓ Check Box 2 ✓ User Field 1 | 112 | | | 1 | | | | Cribs | | | Check Box 1 | |
| ut 209a 22003M PATTON, GEORGE 07/13/2022 07/20/2022 7 5 0 5 5 0 ut 103a 22003N WILLIS 07/15/2022 07/20/2022 5 5 5 5 5 5 5 0 ✓ Include Checked Column ✓ Status Confirmation ✓ Guest Name ✓ Arrival ✓ Departure ✓ Nights ✓ In-Dates ✓ Cribs ✓ Rollaways ✓ Pet ✓ Check Box 1 ✓ Check Box 2 ✓ User Field 1 | 112 | | | | | | | | | | | |
| at 2003 PARTON, GLONGE 0/1/13/2022 0/1/13/2022 1 3 0 3 5 0 ✓ Include Checked Column ut 103a 22003N WILLIS 07/15/2022 07/20/2022 5 5 5 5 0 ✓ Include Checked Column ✓ Status ✓ Status ✓ Status ✓ Status ✓ Confirmation ✓ Guest Name ✓ Arrival ✓ Departure ✓ Nights ✓ In-Dates ✓ Cribs ✓ Rollaways ✓ Pet ✓ Check Box 1 ✓ Check Box 2 ✓ User Field 1 ✓ | | | | | | | | | | | - | End in concern t |
| ✓ Retracted could ✓ Status ✓ Room ✓ Confirmation ✓ Guest Name ✓ Arrival ✓ Departure ✓ Nights ✓ In-Dates ✓ Cribs ✓ Rollaways ✓ Pet ✓ Check Box 1 ✓ Check Box 2 ✓ User Field 1 | | | | | | | | | | | • | |
| ✓ Status ✓ Room ✓ Confirmation ✓ Guest Name ✓ Arrival ✓ Departure ✓ Nights ✓ In-Dates ✓ Cribs ✓ Rollaways ✓ Pet ✓ Check Box 1 ✓ Check Box 2 ✓ User Field 1 | 103a | 22003N | WILLIS | 07/15/2022 | 07/20/2022 | 5 | 5 | 5 | 5 | 5 | 0 | ✓ Include Checked Colur |
| | | | | | | | | | | | | Confirmation Guest Name Arrival Departure Nights Cribs Rollaways Pet Check Box 1 Check Box 2 User Field 1 |
| | | | | | | | | | | | | |
| | | | | | | | | | | | > | |
| Rollaways | Room | Confirmation | Guest Name | Start Date | End Date | Nights | In-Dates | Cribs | Rollaways | Pet | Check Box 1 | |
| ■ Rollaways □ Pet | | | | | | 17 | | 5 | | | | |
| Status Room Confirmation Guest Name Start Date End Date Nights In-Dates Cribs Rollaways Pet Status Room Confirmation Guest Name Start Date End Date Nights In-Dates Cribs Rollaways Pet Check Box 1 | | | | | | | | - | | | | |
| Kollaways Status Room Confirmation Guest Name Start Date End Date Nights In-Dates Cribs Rollaways Pet Totals 07/15/2022 11/09/2022 17 15 5 15 12 0 Check Box 2 | | | | | | | | | | | | User Field 2 |
| Kollaways Status Room Confirmation Guest Name Start Date End Date Nights In-Dates Cribs Rollaways Pet Totals 07/15/2022 11/09/2022 17 15 5 15 12 0 Check Box 2 User Field 1 | | | | | | | | | | | > | |
| | | | | | | | | | | | | Room Confirmation Guest Name Start Date End Date Nights In-Dates Cribs Rollaways Pet Check Box 1 Totals 07/15/2022 11/09/2022 17 15 5 15 12 0 |

• The below report is the 90-day report filtered by Rollaways

Figure 13: Usage Report with Filter for Rollaway

- A few things to note:
 - The report is based ONLY on A folios for inhouse and past guests. So, if Crib was checked on a guest's B-D folios, it will NOT be counted or reported.
 - Report numbers are based upon the Start and End dates. If the requested start and end dates are January 1st to January 2nd and a guest with a crib stayed December 31st to January 4th, the number of reported cribs will be 2 because this is the number of crib nights that were used during the requested time period.
 - "In-Dates" is the number of days a guest was/is/will be in house during the requested period. This lets you know how the number of items is calculated. So, if the number of "In-Dates" is 3, and Crib is checked as a filter, then the number of cribs will be 3 even if the guest's stay was 5 days.

- The check boxes and text fields report what the 'current' status of the field is for the requested dates. For example, a guest checked in for 3 nights. Crib is checked for only the first night. As the current status for the Crib is unchecked, it will NOT be reported as having had a crib. acPMS does not know about changes to checkboxes during a guest's stay.
- Cribs and Rollaways are indicated in acPMS by a check box. If a guest needs and gets two cribs, acPMS does not know this. All it knows is the box has been checked and will report one.
- Although the User Defined fields are included, the way they are reported varies. If the field contains just a number, then that number will be reported. If the field contains just text, then a 'one' will be reported. If the field contains text and a number, then a 'one' is reported.
- If there are certain parameters you consistently want reported, you can set up a Fast Selection to use.
 - If you set up a Fast Report, the dates will load based on the number of days from 'today.'
 - Please contact Support for more information on how to create and use Fast Reports.
- The report can be printed and/or exported using the File dropdown. The printed version includes the totals at the bottom of the displayed report.

Room Status

House Standings

- The House Standings Report is like the House Status Report, but it allows you to view multiple days and includes additional room and reservation data.
- It produces data for the current day and future days only.
- It is not automatically produced as part of the Night Audit.
- By default, the report shows data for 'Today' and the following the (10) days, with detail for each room type.
- If you select Options in the SendTo Pipeline you can select:
 - Which day(s) in the future to report.
 - Whether to include Room Type Detail.
 - Whether to include a separate section for Today.
 - If you select a start date other than the current day, the Today section is not included.
- The report for Today and the next day including Today, and Room Type Detail is seen below:

YOUR 804 HOTEL

House Standings

Hotel Date: Jan-13-2021

| Date | | Departed | Vacant Clean | Vacant Dirty | Total Vacant | Occupied Clean | Occupied Dirty | | Posted Rm Cnt | Res Taken | Cancels Taken | Wait List |
|-------|----|----------|-----------------|-----------------|-----------------|-------------------|-------------------|---|------------------|--------------|------------------|--------------|
| Today | | 1 | 95 | 1 | 96 | 3 | 0 | 3 | 0 | 19 | 0 | 0 |
| | KN | 0 | 24 | 0 | 24 | 1 | 0 | 1 | 0 | 2 | 0 | 0 |
| | QN | 0 | 19 | 0 | 19 | 1 | 0 | 1 | 0 | 8 | 0 | 0 |
| | KA | 0 | 2 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | SK | 0 | 14 | 0 | 14 | 0 | 0 | 0 | 0 | 4 | 0 | 0 |
| | KD | 0 | 10 | 0 | 10 | 0 | 0 | 0 | 0 | 2 | 0 | 0 |
| | ST | 1 | 4 | 1 | 5 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | КК | 0 | 11 | 0 | 11 | 1 | 0 | 1 | 0 | 2 | 0 | 0 |
| | QF | 0 | 11 | 0 | 11 | 0 | 0 | 0 | 0 | 1 | 0 | 0 |
| | CF | 0 | 2 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

| Date | Total Rms | | Room Inventory | GTD | Hold | Unused Groups | Groups | Non- Groups | People | Arrivals | Departs | Proj. Occup. | Avail | Pet | Crib | Roll |
|-----------|--------------|---|-------------------|-----|------|------------------|--------|----------------|--------|----------|---------|-----------------|-------|-----|------|------|
| Today | 99 | 0 | 99 | 3 | 0 | 0 | 0 | 6 | 12-0-0 | 3 | 0 | 6 | 93 | 0 | 0 | 0 |
| KN | 25 | 0 | 25 | 0 | 0 | 0 | 0 | 1 | 2-0-0 | 0 | 0 | 1 | 24 | 0 | 0 | 0 |
| QN | 20 | 0 | 20 | 2 | 0 | 0 | 0 | 3 | 6-0-0 | 2 | 0 | 3 | 17 | 0 | 0 | 0 |
| KA | 2 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0-0-0 | 0 | 0 | 0 | 2 | 0 | 0 | 0 |
| SK | 14 | 0 | 14 | 0 | 0 | 0 | 0 | 0 | 0-0-0 | 0 | 0 | 0 | 14 | 0 | 0 | 0 |
| KD | 10 | 0 | 10 | 0 | 0 | 0 | 0 | 0 | 0-0-0 | 0 | 0 | 0 | 10 | 0 | 0 | 0 |
| ST | 5 | 0 | 5 | 0 | 0 | 0 | 0 | 0 | 0-0-0 | 0 | 0 | 0 | 5 | 0 | 0 | 0 |
| KK | 12 | 0 | 12 | 1 | 0 | 0 | 0 | 2 | 4-0-0 | 1 | 0 | 2 | 10 | 0 | 0 | 0 |
| QF | 11 | 0 | 11 | 0 | 0 | 0 | 0 | 0 | 0-0-0 | 0 | 0 | 0 | 11 | 0 | 0 | 0 |
| CF | 2 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0-0-0 | 0 | 0 | 0 | 2 | 0 | 0 | 0 |
| 01/14 Thu | 99 | 0 | 99 | 3 | 1 | 0 | 0 | 6 | 11-0-0 | 3 | 3 | 6 | 93 | 0 | 0 | 0 |
| KN | 25 | 0 | 25 | 1 | 0 | 0 | 0 | 2 | 4-0-0 | 1 | 0 | 2 | 23 | 0 | 0 | 0 |
| QN | 20 | 0 | 20 | 0 | 0 | 0 | 0 | 0 | 0-0-0 | 0 | 3 | 0 | 20 | 0 | 0 | 0 |
| KA | 2 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0-0-0 | 0 | 0 | 0 | 2 | 0 | 0 | 0 |
| SK | 14 | 0 | 14 | 1 | 0 | 0 | 0 | 1 | 2-0-0 | 1 | 0 | 1 | 13 | 0 | 0 | 0 |
| KD | 10 | 0 | 10 | 0 | 0 | 0 | 0 | 0 | 0-0-0 | 0 | 0 | 0 | 10 | 0 | 0 | 0 |
| ST | 5 | 0 | 5 | 0 | 0 | 0 | 0 | 0 | 0-0-0 | 0 | 0 | 0 | 5 | 0 | 0 | 0 |
| KK | 12 | 0 | 12 | 1 | 0 | 0 | 0 | 2 | 4-0-0 | 0 | 0 | 2 | 10 | 0 | 0 | 0 |
| QF | 11 | 0 | 11 | 0 | 1 | 0 | 0 | 1 | 1-0-0 | 1 | 0 | 1 | 10 | 0 | 0 | 0 |
| CF | 2 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0-0-0 | 0 | 0 | 0 | 2 | 0 | 0 | C |

Figure 14: House Standing Report – Default

- The top Today section is a snapshot of the house including housekeeping status, arrivals, departures, and reservation activity.
 - There is detail for each room type.

- In the top Today section, column header clarification:
 - Departed Rooms that have checked out when the report is run.
 - Posted Rm Cnt Room charges that that have been posted and the occupancy count has been affected.
 - For example, you check in a day use room, post the room charge and tax(es), and say 'Yes' to increase the room count. This would result in a Posted Rm Cnt of one.
 - If you post room charges in Historical Folios, regardless of how you answer the occupancy count question, it will NOT be included in the specific room type row as Historical Folio postings are not associated to a specific room/room type. However, it will be counted in the top Today row's data.
 - Wait List The number of Wait list reservations due to arrive.
- In the body of the report, column clarification:
 - GTD and Hold The number of rooms expected in-house that day.
 - Unused Groups Group rooms that have not been picked up if the group has allocations for that day.
 - Specific group information can be seen in the Forecast Report.
 - Groups Total number of group rooms for that day. This number includes any Unused Group Rooms.
 - Proj. Occup. This number includes Unused Group Rooms.
 - Pet This 'property' has labelled Checkbox 3 as Pet in ACConfig.
 - Whatever you have labelled this checkbox will appear as the column header.
 - If the box is checked and the room/reservation will be inhouse, it is counted.
 - Rooms due to check out are not included.
- The report without Room Type Detail, is shown below:

YOUR 804 HOTEL

House Standings

Hotel Date: Jan-13-2021

| Date | | Depart | | /acant Clean | | t Total Vacant | | ccupied Clean | Occupied Dirty | | Poste Rm Ci | | Res Taken | Cancels Taken | t. Ç | Wait List |
|-----------|--------------|--------|-------------------|-----------------|---|-------------------|--------|------------------|-------------------|----------|----------------|-----------------|--------------|------------------|---------|--------------|
| Today | | | 1 | 95 | 1 | 96 | | 3 | 0 | 3 | | 0 | 19 | 0 | ð 2 | 0 |
| Date | Total Rms | 000 | Room Inventory | GTD | | Unused Groups | Groups | Non- Groups | | Arrivals | Departs | Proj. Occup. | Avail | Pet | Crib | Roll |
| Today | 99 | 0 | 99 | 3 | 0 | 0 | 0 | 6 | 12-0-0 | 3 | 0 | 6 | 93 | 0 | 0 | 0 |
| 01/14 Thu | 99 | 0 | 99 | 3 | 1 | 0 | 0 | 6 | 11-0-0 | 3 | 3 | 6 | 93 | 0 | 0 | 0 |
| 01/15 Fri | 99 | 0 | 99 | 2 | 0 | 0 | 0 | 2 | 5-0-0 | 1 | 5 | 2 | 97 | 0 | 0 | 0 |
| 01/16 Sat | 99 | 0 | 99 | 2 | 0 | 0 | 0 | 2 | 5-0-0 | 0 | 0 | 2 | 97 | 0 | 0 | 0 |

Figure 15: House Standings Report – No Detail

Advanced Reports

This new Reports section contains a variety of reports that managers can use for revenue information, staffing and other hotel data.

Once you get into many of the reports, if you click on the red question mark, an imbedded help document will appear.

You can also print most of the reports by clicking on the Print button.

Manager Tools

Arrivals vs Booking Date Data

- This tool is an extension of the Booking Patterns Report/Tool, the Days Out/No Show tab.
 - It reports on different 'sources,' such as rate class, clerk, channel; in conjunction with date of arrival and how far in advance a reservation was booked.
- The report's defaults are: 1) First day of current month to current day; 2) Channel as the 'Type'; and all Days Out time frames.
 - o The initial report is seen below:

| File Toolbar Menu Arrivals VS Booking Date Data Arrivals Start Date 05/01/20 End Date May17*20Sun Type Channel Load Reservation Counts Code Same Day 1.7 days 8-14 days 15-30 days 61-90 days 91-120 days Over 120 days Selected % Avg Da Include for Days-Out 0 10 20 14 2 1 0 0 0 100.00% All None V Same Day V 1.7 days V 8-14 days V 1.5 30 day V 31-60 days V 91-120 days V 0.ver 120 d | G AutoClerk 2 - Zip Look | - | | × |
|--|--|---|-------------------------------------|-----|
| Arrivals Start Date 05/01/20 End Date May17*20Sun Type Channel Load Reservation Counts 0 16 26 14 2 1 0 0 100.00% All None Same Day 1-7 days 8-14 days 1-7 days 8-14 days 1-7 days 8-14 days 1-7 days 8-14 days 1-7 days 9-16-00 days 9-1120 days 9-120 days 9-130 days 9-1120 days 9-14 days 9-120 days | | | | |
| Reservation Counts Code Same Day 1-7 days Include for Days-Out 0 16 26 14 2 1 0 0 100.00% All None V Same Day V 14 2 1 0 0 100.00% All None | Arrivals vs Booking Date Data | | | |
| Reservation Counts Code Same Day 1-7 days Include for Days-Out 0 16 26 14 2 1 0 0 100.00% All None V Same Day V 14 2 1 0 0 100.00% All None V Same Day V 1-7 days V 8-14 days V 1-7 days V 1-17 days V 1-120 days V 1-120 days V 1-120 days V 9 1-120 days V 9 1-120 days V 0 Over 120 days V 0 Over 120 days | Arrivals Start Date 05/01/20 End Date May17'20Sun Type Channel | | | |
| Code Same Day 1-7 days 8-14 days 15-30 days 31-60 days 91-120 days Over 120 days Selected % Avg Da Include for Days-Out 0 18 26 14 2 1 0 0 100.00% All None ✓ Same Day ✓ 1.7 days ✓ 8.14 days ✓ 1.7 days ✓ 8.14 days ✓ 1.70 days ✓ 1.70 days ✓ 1.70 days ✓ 1.70 days ✓ 8.14 days ✓ 1.70 days ✓ 8.14 days ✓ 1.70 days ✓ 1.10 days ✓ 0.100.00% ✓ 0.100.00% ✓ 0.170.00% | | | | |
| 0 16 26 14 2 1 0 0 100.00% All None ✓ Same Day ✓ 1.7 days ✓ 1.7 days ✓ 1.7 days ✓ 1.4 days ✓ 91.120 days ✓ 91.120 days ✓ 91.120 days ✓ 0.4 days | | include fo | r Davs-(| Dut |
| ▼ 1-7 days ▼ 8-14 days ♥ 1-5-30 day ♥ 31-60 days ♥ 91-120 days ♥ Over 120 days ♥ Over 120 days | | | | |
| | | 1-7 days 8-14 day 15-30 da 31-60 da 61-90 da 91-120 da | s ys ay ays ays days | |

Figure 16: Arrivals vs Booking Date Data – Initial Report

- Click on the Type drop down to get reports on different criteria.
 - The dropdown choices are Channel, Clerk, Rate Class, Room Type, Source 1, Source 2, and Source 3.
 - Clerk is based on the initials of the clerk that is logged onto the computer and not necessarily the clerk who took the reservation.
- The user can change the Start and End as needed. These dates are the reservations' arrival dates.
 - Click on the dropdown for Type and select the type you want reported.
 - If you only want to see specific Days Out, uncheck the date spans you do not want to see.
- Once you have set your parameters click Load.
 - An example of arrivals by Rate Class is shown below:

| | | ite prese | 1'20Wed | End Dat | e Apr30'2 | OThu | Type Rate C | class 💌 🔄 | Load | | | |
|----------|----|-----------|---------|---------|-----------|------|-------------|---------------|---------|------|------------------------|------|
| | | tion Cou | | | | | | | | | | |
| Code | | | | | | | | Over 120 days | | | | |
| R | 3 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 100.00% | 2.40 | All | None |
| P | 9 | 6 | 0 | 0 | 0 | 0 | 0 | 0 | 100.00% | 1.60 | Same D | |
| | 30 | 15 | 2 | 0 | 0 | 0 | 0 | 0 | 100.00% | 1.32 | ✓ 1-7 day | |
| | 5 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 100.00% | 0.17 | ✓ 8-14 day | |
| ` | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 100.00% | 0.00 | ✓ 15-30 d ✓ 31-60 d | |
| > | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 100.00% | 0.00 | ✓ 51-80 d | |
|) | 5 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 100.00% | 0.33 | ♥ 91-120 | |
| | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 100.00% | 0.00 | ✓ Over 12 | |
| ' | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 100.00% | 0.00 | | |
| 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 100.00% | 0.00 | | |
| | | | | | | | | | | | | |

Figure 17: Arrivals vs Booking Date Data by Rate Class

- Each column is a time frame of how far out from the arrival date a reservation was booked.
 - The numbers represent how many reservations/folios fall into that bracket.
 - Only reservations with a status of guaranteed or hold reservations and are for a sleeping room are counted.
 - If a reservation has already come and gone, only the A folios are counted from Historical Folios.
- The right-side column allows the user to deselect time frames to be included in the totals for Selected % and Avg Days-Out.
 - Be sure to click Load once you have deselected and/or selected time frames to refresh the grid.

Booking Patterns

• The Booking Patterns tool gives you four (4) reports to help you understand your reservations based on when they were booked.

- The reports' initial ending date is the previous day so when you see data for 'Today,' it is yesterday.
 - You can change the date by clicking on Edit, then Change Date.
 - Remember the date you enter is the creation date for reservations.

Booked & Stayed

• When you first run Booking Patterns, the Booked & Stayed data is displayed, as seen below:

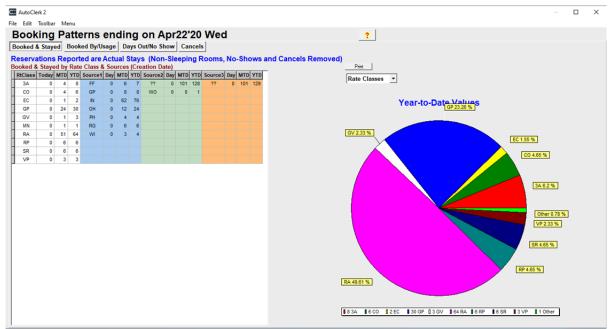
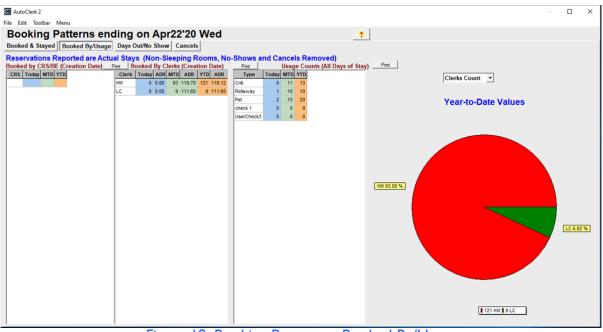


Figure 18: Booking Patterns – Booked and Stayed

- Booked & Stayed counts reservations 1) made on the requested date (Today); 2) MTD to the requested date; and 3) YTD to the requested date. So, if today is February 19th and you request this to show February 10th the data will be based on reservations created from the 1st of January to the 10th of February.
 - The data reported is sorted by Rate Class and the three (3) Source Codes.
- The pie chart on the right shows only Year-to-Date values.
 - o Use the drop down to change the category you want to see.
 - Each color shows the code for the data represented and the percentage.
 For example, if you are looking at rate classes, you may see RA 67% which indicates your Rack rate class accounted for 67% of the reservations for the year.
 - A bar at the bottom shows the codes with the number of reservations for that code.
- You can print the report, without color, by clicking on the Print button.

Booked By/Usage

• Booked By/Usage includes information on where your reservations came from: a CRS and specific staff; as well as crib, rollway, and checkbox usage.



• The initial report is shown below:

Figure 19: Booking Patterns – Booked By/Usage

- If you have multiple CRSs, each will be listed separately along with the reservation data.
- o Clerk data is based on the clerk who is logged onto the computer.
 - If your property procedure is that clerks also use one of the Source code boxes for their initials, that data will not be reflected here.
- If you have labelled your configurable user check boxes in ACConfig, then that label will appear. Otherwise, it will say UserCheck 1, 2, and/or 3.

Days Out/No Show

- Days Out/No Show provides data on 1) how far out, on average, your guests are booking, and which days have the most no shows.
- The report is shown below:

| AutoClerk 2 | | | | | | | | | × |
|-------------------------|------------|-----------|---------------------------------------|------------|---------|---------------------------------------|-----|------------------------|---|
| File Edit Toolba | r Menu | | | | | | | | |
| Booking | Patte | rns ei | nding on A | pr22'20 | Wed | ? | | | |
| | | | e Days Out/No Sh | | | | | | |
| | | | F | | | | | | |
| Days Out = (A | Arrival Da | te - Crea | tion date) These Print No Shows by | are YTD Fi | gures | | | | |
| Avg Days Out B Month | Hotel | CRS | Day | MTD | YTD YTD | | | | |
| Totals | 2.05 | 0.00 | Sunday | MID | 0 | Days Out Hotel | | | |
| January | 0.00 | 0.00 | Monday | 6 | 6 | | | | |
| February | 16.00 | 0.00 | Tuesday | 0 | 0 | | | | |
| March | 1.00 | 0.00 | Wednesday | 4 | 4 | | | | |
| April | 0.68 | 0.00 | Thursday | 0 | 0 | | | | |
| May | 0.00 | 0.00 | Friday | 3 | 3 | | | | |
| June | 0.00 | 0.00 | Saturday | 0 | 0 | | | | |
| July | 0.00 | 0.00 | | | | | | | |
| August | 0.00 | 0.00 | | | | | | | |
| September | 0.00 | 0.00 | | | | | | | |
| October | 0.00 | 0.00 | | | | | | | |
| November | 0.00 | 0.00 | | | | | | | |
| December | 0.00 | 0.00 | | | | February 90.5 % | / _ | ril 3.85 % h 5.66 % | |
| | | | | | | 🔳 16 February 🕽 1 March 🛛 🛢 0.68 Apri | | | |

Figure 20: Booking Patterns – Days Out

- Bookings are broken down by month as well as by reservations taken by the hotel vs made through a CRS.
- No shows are only counted as a no show if the reservation was not checked in when the night audit was run.
- If you want more information on days out booked, navigate to Advanced Reports

 Manager Tools Arrivals vs Booking Date Data.
 - This tool is explained above in this document.

Cancels

- Cancels show by rate class, how many reservations were canceled and how much revenue was lost due to the cancellations.
 - The report is shown below:

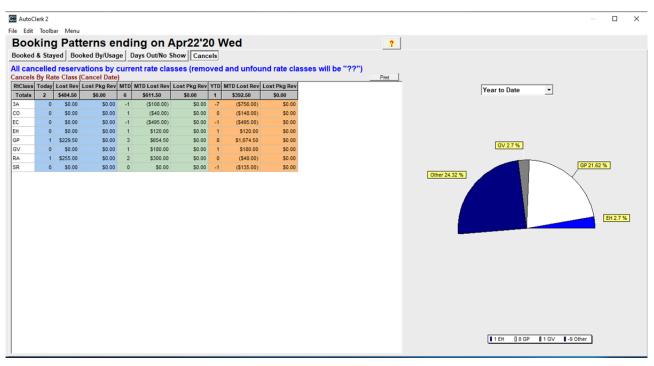


Figure 21: Booking Patterns – Cancels

- The report counts the cancelled reservations, regardless of when they were due to arrive.
- Lost revenue vs. package revenue is split out because the room rate is kept for a non-package reservation, but the total package amount is kept for those package reservations.
 - You can see the room rate revenue you lost, or the total package revenue lost.

Daily Manager Report/Form

- This is the Daily Manager Report as found in Manager Reports, with additional Tools to get you more information from the report.
- An example of the full report and tools page is shown below:

| Change Date | | | | | | ? | |
|------------------------|----------|-------------|-------------|-----------|--------|--------|---|
| Variable | Today | MTD | YTD | Last Year | LY MTD | LY YTD | Room Revenue (Today) |
| Room Count | 75 | 1660 | 8475 | 75 | 1650 | 8432 | Room Count Revenue ADR Detail |
| Ion Sleeping Rms | 1 | 7 | 7 | 0 | 0 | 0 | Posted To Room 5 444.00 88.80 |
| Dut-of-Order | 7 | 72 | 120 | 0 | 0 | 0 | Adjustment to Room 0 0.00 0.00 |
| Occupied | 5 | 147 | 200 | 0 | 0 | 0 | Posted To History/Ticket 0 0.00 0.00 |
| Jnoccupied | 63 | 1431 | 8155 | 75 | 1650 | 8432 | Adjustment to History/Ticket 0 0.00 0.00 |
| Stay Overs | 5 | 76 | 101 | 0 | 0 | 0 | Top Values Print |
| Arrivals | 0 | 82 | 110 | 0 | 0 | 0 | RC CT Rate Class ADR S1 CT Source 1 ADR S2 CT Source 2 ADR S3 CT Source 3 ADR |
| Comp Rooms | 1 | 5 | 6 | 0 | 0 | 0 | 1 CO 1 120.00 120.00 N 5 444.00 88.80 ?? 5 444.00 88.80 ?? 5 444.00 88.80 |
| House Rooms | 1 | 5 | 5 | 0 | 0 | 0 | 2 SR 1 108.00 108.00 RG 0 0.00 0.00 |
| Adults | 9 | 254 | 342 | 0 | 0 | 0 | 3 MN 1 96.00 96.00 |
| Children | 1 | 17 | 34 | 0 | 0 | 0 | 4 RA 2 120.00 60.00 |
| nfants | 0 | 6 | 8 | 0 | 0 | 0 | Other Revenue (Today) |
| Check-Ins | 0 | 49 | 66 | 0 | 0 | 0 | Transaction Tax Charges Adjustments Tax% Detail. |
| Nalk-Ins | 0 | 33 | 44 | 0 | 0 | 0 | T1 (CITY TAX) . 2 19.98 0.00 4.50% |
| No Shows | 1 | 14 | 24 | 0 | 0 | 0 | TX (STATE TAX) . 🖌 44.40 0.00 10.00% |
| Cancels Arriving Today | 0 | 7 | 12 | 0 | 0 | 0 | |
| Canceled Today | 0 | 7 | 12 | 0 | 0 | 0 | Avg Length of Stay YTD (Arrival Date) |
| Check-outs | 10 | 77 | 105 | 0 | 0 | 0 | All Information is based upon Historical Folios by Check-out Date Print |
| ength of Stay Nights | 135 | 1867 | 1976 | 0 | 0 | 0 | RC Rate Class S1 Source 1 S2 Source 2 S3 Source 3 CH Channel |
| Room Revenue | \$444.00 | \$16,987.00 | \$23,244.50 | \$0.00 | \$0.00 | \$0.00 | 1 MN 120.00 IN 3.67 ?? 2.83 ?? 2.81 |
| Other Revenue | \$64.38 | \$9,288.67 | \$10,591.83 | \$0.00 | \$0.00 | \$0.00 | 2 GP 2.10 GP 2.00 WO 1.00 |
| fotal Revenue | \$508.38 | \$26,275.67 | \$33,836.33 | \$0.00 | \$0.00 | \$0.00 | 3 VP 2.67 OH 1.91 |
| Avg Length of Stay | 27.00 | 12.70 | 9.88 | 0.00 | 0.00 | 0.00 | 4 GV 2.00 FF 1.57 |
| Occupancy % | 6.67 | 8.91 | 2.36 | 0.00 | 0.00 | 0.00 | 5 EC 2.00 RG 1.83 |
| ADR | 88.80 | 115.56 | 116.22 | 0.00 | 0.00 | 0.00 | 6 RA 1.57 WI 1.00 |
| RevPAR | 5.92 | 10.30 | 2.74 | 0.00 | 0.00 | 0.00 | 7 3A 1.75 PH 1.00 |
| Adults per Room | 1.80 | 1.73 | 1.71 | 0.00 | 0.00 | 0.00 | 8 CO 1.67 |
| wg RoomRev per Adult | 49.33 | 66.88 | 67.97 | 0.00 | 0.00 | 0.00 | 9 RP 1.50 |

Figure 22: Daily Manager Report and Form

- The default day is yesterday as today has not closed. You can change the date either when you first access the report, or by clicking on 'Change Date' once you are in the report.
- The 'Variables' column gives you data on your past guests' stays.
 - o 'Today's' figures are calculated from the Night Audit.
 - The figures are built each night on the audit and then make up the data for MTD and YTD.
 - Adults/Children/Infants Counts people in all folios in sleeping rooms.
 - This uses the Inhouse Guest Listing and Historical Folios for day use rooms for the count. It does NOT look at the daily transactions, so the number may differ from the Inhouse Statistics Report.
 - No Shows Reservations due to arrive that are not checked in at the time the Night Audit is run.
 - If you process your No-Show reservations in a different way, this count may not be what you expect.
 - Length of Stay Nights Adds up all nights of in–house A folios in sleeping rooms.
 - Room Revenue 'Room' postings less adjustments.

- If you post 'Room' to non-sleeping rooms, or Post to No Room/Post a Ticket, that amount will be included in this amount.
- o Other Revenue Taxes and other charges posted that day.
 - Other charges could include parking, pets, banquet room, etc.
- Avg Length of Stay Only counts sleeping room nights.
- The Daily Manger Report found in Advanced Reports Manager Reports has additional 'variable' data.
- The left side of the report has three (3) additional tools to get additional information on the report's data
 - Click on the yellow bar for the drop down to appear. The panels are as follows:
 - Room Revenue –Posted Room revenue and adjustments made to rooms, tickets and/or historical folios. This is only for the 'current' day and does not give MTD or YTD figures.
 - Below the totals is a breakdown by rate class of what and how much was posted. It includes data for sources as well.
 - Click on Detail and you are re-directed to the day's M1/Zout Room postings.
 - You can use this to research the day's reported totals.
 - Other Revenue Posted transactions other than Room, broken out by Taxes and non-taxes (Incidentals).
 - The charges' posting code and description are included as well as the tax percentage, if applicable.
 - Click on Detail are you are re-directed to the day's M1/Zout.
 - Avg Length of Stay YTD (Arrival Date) This looks at the YTD figures, by rate class and source code(s), and reports the Average Length of Stay.
 - Sources and/or Rate Classes with ?? means 1) the code/class has been deleted; or 2) was not defined.

Google MyMaps Export

- Google MyMaps export is a way to export guest location information and import it into the Google MyMaps program.
 - Once in MyMaps, you can see where your guests are coming from based on the data you imported.
- The acPMS function only exports the data. AutoClerk Support does not have the ability or knowledge to troubleshoot issues with Google MyMaps once the data has been imported.

- We chose Google MyMaps to document the exports because it is a free map maker program, the maps become shareable at your discretion, and is the largest mapping program.
- We do not know if the exported data will work in other similar mapping programs.
- When you first go into the export, you see the below form:

| CC AutoClerk 2 | | | \times |
|---|------------|--------|----------|
| Google MyMap Exports | | ? | 1 |
| Choose the export information you want to see on | the map | | _ |
| Data Type Arrival Date | | | |
| Start Date Apr01'20Wed End Date A | pr23'20T | hu | |
| Guest ⊂ Company C Company C Company C | Travel Age | ency | |
| Choose the fields you want exported. While the we suggest that you only include the Zip code an Name Street Street 2 City State Zip Export | | to you | Ι, |
| Esc | | | |

Figure 23: Google MyMaps Export Form

- Select the Data Type, Start and End dates, where the address is coming from: Guest/Company/Travel Agency, and fields you want exported.
 - The fields you select depend on the data you want to see.
 - These will make up the map 'points' once imported into MyMaps.

- You can export different data and then layer them in one map; however, you do need to export them separately.
- Once you have made your selections, click on Export.

| CC MyMap Expo | ort | | | | × |
|---|-----------------------------|--|---|--|---------------------------------------|
| Save in: | Documents | | • | - 🗈 📸 🎟 | |
| Quick access Desktop Libraries This PC | Fax Outlook | Office Templates Files Documents | | Date modified 10/23/2020 11:24 AM 1/27/2021 9:44 AM 3/5/2021 1:36 PM 1/27/2021 9:44 AM | Type File fc File fc File fc |
| | < | | | | > |
| | File name: Save as type: | Comma Separated Variable | | | ave |
| | ouro do type. | Joonnia Separated Valiable | | | |

• You will then get:

Figure 24: Google MyMaps Export location

- Name and save the export in location you have access to.
- Click ok at the Complete popup.
- You now need to import that file into Google MyMaps.
- Open a browser and navigate to <u>https://www.google.com/mymaps</u>.
 - If you do not have an account, open a free account.
 - Once you are at the Maps page, click on Create a New Map.
 - Import the file you just saved, following the prompts on naming conventions.
- Once you have the map and the points, you can save it to your account, add more layers, change colors, etc.

• For detailed help with importing into Google MyMaps and using the data, click on the question mark in the MyMaps Export form.

Occupancy Heat Map

- The Occupancy Heat Map is a color grid representation of your Occupancy.
- The initial report is seen below:

| AutoClerk 2 | | | |
|--|----------------|----------------|-------|
| File Edit Toolbar Menu | | | |
| Occupancy Heat Map Past days are based upon room postings ? | | | |
| | Save My Design | Load My Design | Reset |
| Month 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 9 20 21 22 23 24 25 26 27 28 29 30 31 | | | |
| March 2020 | | | |
| | | | |
| | | | |
| June 2020 | | | |
| Juby 2020 | | | |
| | | | |
| September 2020 | | | |
| | | | |
| November 2020 | | | |
| December 2020 | | | |
| January 2021 | | | |
| February 2021 | | | |
| | | | |

Figure 25: Occupancy Heat Map

- The default time frame displayed is the month prior to the current month through the next twelve (12) months.
 - o The current day's cell has a 'T.'
 - Once the report is displayed, click on Edit Change Date to see a different time frame.
 - When you change the start date, the day you selected is indicated by '***' in the cell. The report's dates will be the month of the day you selected, for the next twelve (12) months.
- The cells' colors are determined by the occupancy percentage legend at the top.
 - If you want to set your own color scheme, click on a color on the legend and then select the color you want to use.
 - You can then save your design or reset back to the default.
- By default, Fri and Sat are checked and therefore have a gray border.
 - Use the day of the week check boxes to change which day(s) have a border.
- When you hold your mouse over a cell, a pop-up appears showing that day's occupancy percentage and number of rooms occupied as seen below:

| C AutoClerk 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-----------------------------|-----------|--------|-------|--------|------|-------------|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|-----|-------|------|-------|--------|------|-------|--------|------------|
| File Edit Toolba | ar N | lenu | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Occupanc Past days are b | | | | | post | ings | | | | | | | | | | | | | | | | | | | | | | | | ? | | |
| 0 1-20 21-40 41-6 | 0 61-80 8 | 81-100 | sun m | on tue | | u #i 🗸 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Month | 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 | |
| March 2020 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| April 2020 | | | | | | | | | | | | | | | | | | | | | | | Т | | | | | | | | | |
| May 2020 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| June 2020 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| July 2020 | | | | | | | | | | | | | | | | | | | | | | | | - × | o% (0 | 5/24 | /2020 |) - 0(| ccup | ed:42 |) "Mer | norial Day |
| August 2020 | | | | | | | | | | _ | | | | | | 1 | | | | | | | | _ | | | | | | | _ | |

Figure 26: Occupancy Heat Map – Day's Statistics

- The statistics also show at the bottom of the form in the bar.
- If you click on a cell, a grid with the day's statistics by room types appears at the bottom as seen below:

| Date | Туре | KG | QN | DD | KH | KQ | JS | KJ | BQ | CF | Total | % | OE |
|--------------|--------------|----------|----------|----------|----------|----------|----------|----------|--------|--------|-------|--------|----|
| May24'20 Sun | Capacity | 24 | 15 | 15 | 2 | 4 | 10 | 5 | 2 | 2 | 75 | 100.0% | |
| | Reservations | 15 | 9 | 10 | 0 | 2 | 6 | 0 | 0 | 0 | 42 | 56.0% | |
| | Rates | \$120.00 | \$120.00 | \$120.00 | \$120.00 | \$135.00 | \$135.00 | \$165.00 | \$0.00 | \$0.00 | | | |
| | LOS Rules | m03 | | | | | |

Figure 27: Occupancy Heat Map – Room Type Statistics

- The grid shows each room type's capacity, how many reservations are on the books, the rate for 1 person, and the LOS rule, if applicable.
 - Reservations include all group rooms that have been allocated, regardless of pickup.
- The room types are in the order set in ACConfig.
 - If you click on a past day, the room types are in alphabetical order.
 - If a room type is overbooked for that day, it will be noted in the OB column.
- If you want to set a Special Day, right click on the day's cell, and then click on Special Dates.

I

| 0 1-20 21-40 41-6 | 0 61-80 8 | 1-100 | sun m | on tue (| wed thu | | ot 7 | | | | | |
|-------------------|-----------|-------|-------|----------|---------|-------|---------|-------|---|----|----|----|
| Month | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| March 2020 | | | | | | | | | | | | |
| April 2020 | | | | | | | | | | | | |
| May 2020 | | | | | | | | | | | | |
| June 2020 | | | | | | | | | | | | |
| July 2020 | | | | | | | | | | | | |
| August 2020 | | | | | Sp | ecial | Date | es. | | | | |
| September 2020 | | | | C | 1 | ad C | lerk [| Desig | n | | | |
| October 2020 | | | | Γ., | | au c | | Jesig | | | _ | |
| November 2020 | | | | | | | | | | | | |
| December 2020 | | | | | | | | | | | | |
| January 2021 | | | | | | | | | | | | |
| February 2021 | | | | | | | | | | | | |

Figure 28: Occupancy Heat Map – Special Dates

- A new form opens allowing you to enter one or multiple Special Dates.
 - This can be useful if you want to see how special events/days affect your Occupancy.

| AutoClerk 2 | | | | | | × |
|---------------|------------|--------------|--------|--|------|---|
| Hot | Spot Spe | ecial Dates | | | | |
| | Date | | Reason | | | |
| <u>Delete</u> | 05/24/2020 | Memorial Day | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
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| | | | | | | |
| 0.7 | 10,1,200 | | | | | 1 |
| 077 | 04/20 | - | | | Add | |
| | | | | | | |
| E | sc | | | | Save | • |

Figure 29: Occupancy Heat Map – Set Special Dates

• If you are in the report and want help, click on the yellow question mark.

Manager Reports

Daily Manager Report

- The Daily Manager Report shows room status, reservation activity, and revenue and stay information for 'Today,' MTD, YTD and the same time frames in the Previous Year.
- The first time you run the report, acPMS gathers data from various files and reports, including Transactions, Historical Folios, Inhouse Statistics, and the Year files.
 - The report is then written and is updated each night on the audit.

| | | | G DATASET nager Renoi | nt | | | | | |
|---|------------------------|--------------------------|--------------------------|------------------|------------------|----------------|--|--|--|
| Daily Manager Report Hotel Date: Apr-23-2020 | | | | | | | | | |
| | | Hotel Dat | C. Api-20-2020 | | | | | | |
| Date 04/20/2020 Monday | | | | Previous Year | | | | | |
| | Today | MTD | YTD - | Today | MTD | YTI | | | |
| Room Count | 75 | 1500 | 8325 | 75 | 1500 | 828 | | | |
| Non Sleeping Rms | 0 | 5 | 5 | 0 | 0 | 1 | | | |
| Out-of-Order | 7 | 58 | 106 | 0 | 0 | | | | |
| Occupied | 16 | 126 | 179 | 0 | 0 | 1 | | | |
| Vacant Rooms | 52 | 1316 | 8040 | 75 | 1500 | 828 | | | |
| Stay Overs | 4 | 58 | 83 | 0 | 0 | 1 | | | |
| Arrivals | 12 | 79 | 107 | 0 | 0 | 1 | | | |
| Comp Rooms | 1 | 3 | 4 | 0 | 0 | | | | |
| House Rooms | 1 | 3 | 3 | 0 | 0 | | | | |
| Adults | 29 | 218 | 306 | 0 | 0 | 1 | | | |
| Children | 3 | 12 | 29 | 0 | 0 | 1 | | | |
| Infants | 2 | 4 | 6 | 0 | 0 | 1 | | | |
| Check-ins | 8 | 47 | 64 | 0 | 0 | | | | |
| vValk-ins | 4 | 32 | 43 | 0 | 0 | 1 | | | |
| No Shows | 0 | 13 | 23 | 0 | 0 | | | | |
| Cancels Arriving Today | 0 | 5 | 10 | 0 | 0 | 1 | | | |
| Canceled Today | 1 | 6 | 11 | 0 | 0 | | | | |
| Check-outs | 2 | 63 | 91 | 0 | 0 | | | | |
| Length of Stay Nights | 156 | 1576 | 1685 | 0 | 0 | 1 | | | |
| Room Revenue | \$1,547.75 | \$14.985.00 | \$21,242,50 | \$0.00 | \$0.00 | \$0.0 | | | |
| Room Posting | \$1,547.75 | \$15,130.00 | \$21,387.50 | \$0.00 | \$0.00 | \$0.0 | | | |
| Adjusted Rn Posting | \$0.00 | (\$145.00) | (\$145.00) | \$0.00 | \$0.00 | \$0.0 | | | |
| Other Revenue | \$86.70 | \$9,012.87 | \$10,316.03 | \$0.00 | \$0.00 | \$0.00 | | | |
| Taxes Incidentals | \$224.45 (\$137.75) | \$2,142.87 \$6,870.00 | \$3,025.53 \$7,290.50 | \$0.00 \$0.00 | \$0.00 \$0.00 | \$0.0 \$0.0 | | | |
| Total Revenue | \$1,634.45 | \$23,997.87 | \$31,558.53 | \$0.00 | \$0.00 | \$0.0 | | | |
| Avg Length of Stay | 9.75 | 12.51 | 9.41 | 0.00 | 0.00 | 0.0 | | | |
| Occupancy % | 23.53% | 8.74% | 2.18% | 0.00% | 0.00% | 0.00% | | | |
| ADR | \$96.73 | \$118.93 | \$118.67 | \$0.00 | \$0.00 | \$0.0 | | | |
| RevPAR | \$20.64 | \$9.99 | \$2.55 | \$0.00 | \$0.00 | \$0.0 | | | |
| | | | | | | | | | |
| Adults per Room | 1.81 | 1.73 | 1.71 | 0.00 | 0.00 | | | | |
| Avg RoomRev per Adult | \$53.37 | \$68.74 | \$69.42 | \$0.00 | \$0.00 | \$0.0 | | | |

• An example of the report is below:

Figure 30: Daily Manager Report

- By default, the report is for the previous day, so 'Today' is yesterday.
 - If you select Options in the SendTo pipeline, you can select another past day as well as select specific day(s) of the week.
 - By selecting specific days of the week, you can, for example, see how you did on weekends.
- Today's figures are calculated from the Night Audit.

- Adults/Children/Infants Counts people in all folios in sleeping rooms.
 - This uses the Inhouse Guest Listing and Historical Folios for day use rooms for the count. It does NOT look at the daily transactions, so the number may differ from the Inhouse Statistics Report.
- No Shows Reservations due to arrive that are not checked in at the time the Night Audit is run.
 - If you process your No-Show reservations in a different way, this count may not be what you expect.
- Length of Stay Nights Adds up all nights of in-house A folios in sleeping rooms.
- Room Revenue 'Room' postings less adjustments.
 - If you post 'Room' to non-sleeping rooms, or Post to No Room/Post a Ticket, that amount will be included in this amount.
- Taxes All taxes posted: occupancy and sales.
 - If a tax percentage changed during the time frame (MTD, YTD, and Previous Year), the change will be reflected.
 - If a tax transaction code has been deleted, then those amounts will show in Incidentals.
- Avg Length of Stay Only counts sleeping room nights.

Daily Manager Report Export

- The Export can include one or many past days' data.
 - The default is one day (yesterday), but the user can enter a date span and/or specific days of the week to be included, as seen below:

| CC AutoClerk 2 | | × |
|---|-------------------------|----------------------|
| Toolbar | | |
| Manager Options | | |
| Start Date 02/04/18 | | |
| End Date Feb04'185 | un | |
| Include Sundays | | |
| Include Mondays | V | All |
| Include Tuesdays | v | |
| Include Wednesdays | $\overline{\checkmark}$ | Weekends |
| Include Thursdays | | Weekdays |
| Include Fidays | | |
| Include Saturdays | V | |
| By NOT including days of the week, included in the MTD/YTD information to only show Wednesdays, only the selected will be counted. | on. In other | words, if you choose |
| Esc | | ОК |

Figure 31: DMR Export – Options

- Once the export options have been set, the user selects the location and name of the file.
 - The default location is the Desktop, and the default file type is .csv.

| CC Save Manage | er Export | | × |
|----------------|--|-----------|-------------|
| Save in: | Desktop 💌 | - 🛍 💣 📰 - | r - |
| 4 | Name | Size | Date modi ^ |
| Quick access | 🖾 test.csv | 4 KB | 1/6/2021 2 |
| QUICK DCCESS | 🖾 sdd.csv | 1 KB | 12/7/2020 |
| | 1160 Reports Screenshots | | 1/6/2021 2 |
| Desktop | default | | 1/6/2021 1 |
| - | 19120402_blank | | 1/6/2021 1 |
| - | 1160 Documentation | | 1/6/2021 8 |
| Libraries | Training-Support Docs | | 1/6/2021 8 |
| | myCRS docs | | 1/5/2021 1 |
| | 060.002.005.1160 | | 12/21/2020 |
| This PC | Toe1160 | | 12/7/2020 |
| 1 | Spec docs | | 11/13/2020 |
| Network | 060.002.005.1155 | | 10/29/2020 |
| The the the | Documentation Screen Shots | | 9/22/2020 ¥ |
| | < | | > |
| | File name: | - | Save |
| | Save as type: CSV (Comma Separated Variable) | • | Cancel |

Figure 32: DMR Export – Save

- As it is saved as a .csv, it can be opened in a spreadsheet program.
- If the user has selected multiple days, each day is a row in the spreadsheet.
 - o Column headers are automatically included in the export.

Labor Management Report

- This report looks back at the hotel's check-in, check-out, and reservation activity so management can see when they are busiest. This can be helpful for scheduling at the front desk as well as housekeeping.
- The default date range is the first day of the current month to today.
 - The user can change the date range when they first access the report.
- The report includes color charts showing Activity by Day as well as Activity by Hour as seen below:

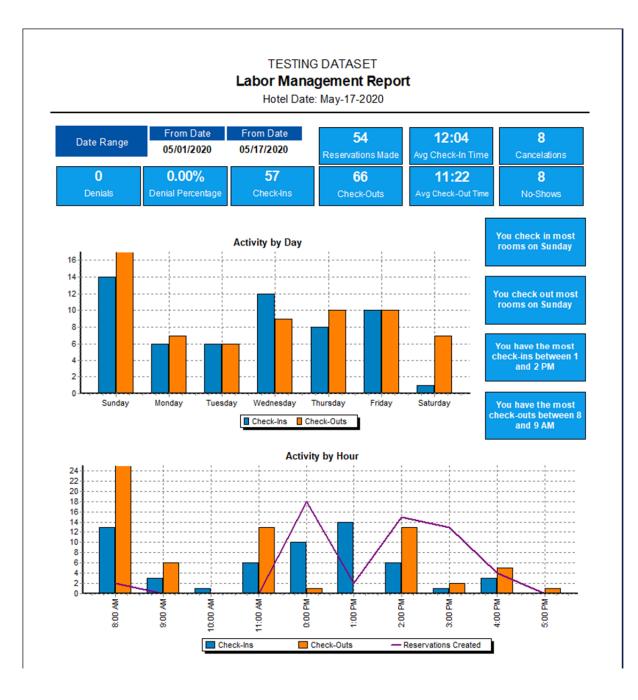


Figure 33: Labor Management Report

• Data for Denials and Denials Percentage will only populate if you have Reservation Denials enabled.

- If you do not have denials as mandatory, this data will be incomplete as a clerk could escape from entering a denial code.
- If you are interested in setting up Denials, please contact AutoClerk Support during normal business hours at (925) 284-1005, option 2.

Out-of-Order Report

- This lists, by date, which rooms were out-of-order on that day including the reason.
- The default date span is current day back 10 days.
 - Click on Options in the pipeline to change the date span you want to report.
 - You can enter any past or future dates for the report.
- There is a total for each day as well as a total for the selected date range.
- If you have put a room out-of-order and then back in order on the same day, it will not show in the report. This is by design as the OOO has been cleared.
- Below is an example of the report:

TESTING DATASET

Out of Order Report

Hotel Date: Apr-12-2020

| Room | Clerk | Reason | |
|----------|----------|-----------------|--|
| Date: 04 | /03/2020 | | |
| 108 | HM | CARPET CLEANING | |
| 121 | HM | CARPET CLEANING | |
| 122 | HM | CARPET CLEANING | |
| 203 | HM | CARPET CLEANING | |
| 210 | HM | CARPET CLEANING | |
| 217 | HM | CARPET CLEANING | |
| Count 6 | | Rooms 6 | |
| Date: 04 | /04/2020 | | |
| 108 | HM | CARPET CLEANING | |
| 122 | HM | CARPET CLEANING | |
| 203 | HM | CARPET CLEANING | |
| 210 | HM | CARPET CLEANING | |
| 217 | HM | CARPET CLEANING | |
| Count 5 | | Rooms 5 | |
| Date: 04 | /05/2020 | | |
| 108 | НМ | CARPET CLEANING | |
| 122 | HM | CARPET CLEANING | |
| 203 | HM | CARPET CLEANING | |
| 210 | HM | CARPET CLEANING | |
| 217 | НM | CARPET CLEANING | |
| Count 5 | | Rooms 5 | |
| Count 16 | i | Rooms 16 | |

Figure 34: Out of Order Report

Past Cancel Patterns Report

- This report shows you data for the nights and revenue lost due to cancellations. The user can select/filter which cancellations should be counted and provide totals.
- The form is blank when you first access it.
 - o Enter the start and end dates you want to see cancelation records for.
 - Remember these are the cancellation dates and not the creation or arrival dates for the reservations.
 - If you want to see cancelations by arrival date, you will need to set the starting cancel dates far in the past to capture the most data possible.

 Click Load. acPMS gathers the data and the page refreshes with the report as seen below. The report shown below has been cropped for visibility. The actual report has columns in the top section for each of the 'Totals Types' listed in the bottom section.

| _ | toClerk 2 <u>H</u> elp <u>M</u> enu | 1 | | | | | | | | - | | × |
|-------|--|-------------|-----------|----------------------|---------|-----------|--------------|----------|--------|---------------------|----------|----------|
| _ | | els Patte | rn R | eport | | | | | | | | |
| | | | | Start Date | End Dat | e | | | | | 8 | |
| | Ca | ncel Date W | ithin: | Jan01'20Wed | Apr23' | 20Thu | Loa | ad | | E | | • |
| СК | DataType | CancelDate | | CancelReason | Conf | | LastName | | F | irstName | Arriva | <u> </u> |
| | reshist | 04/04/2020 | PLANS | CHANGED | 20002V | HERNY | | | JAI | VIES (| 04/06/20 |)20 |
| | reshist | 04/04/2020 | | | 20002W | MONTGO | OMERY | | TR | AVERS (| 04/07/20 |)20 |
| | reshist | 04/07/2020 | | | 20003H | HASKILL | - | | INC | RID (| 04/08/20 |)20 |
| | reshist | 04/08/2020 | AGAIN | | 20003K | LOCKE | | | BE | RNIE | 04/08/20 |)20 |
| | reshist | 04/09/2020 | CUZ | | 20001L | WILSON | | KIN | 4 (| 04/17/20 |)20 | |
| | reshist | 04/21/2020 | LATE C | XL, KNOWS OF CHARGE | 20006B | KINNER | | JAI | VIES (| 04/21/20 |)20 🗸 | |
| < | | | | | | | | | | | | > |
| Cheo | Check All Date Type | | | | |)e | | | Num | ber Type | | |
| | Stay Within Dates | | | | | Reason | | - | Nigh | ts | | • |
| Chec | k None g | Start Date | | End Date | Text Fi | eld Conta | ains | | | | | _ |
| | | Feb23'2051 | ın | Jun22'20Mon | | | | | ۲ | n <= 0 🔿 | n > 0 | |
| | | Check | Unche | eck | Cheo | k Ur | ncheck | | | Check Ur | ncheck | |
| Tot | als Type | | | oad | | | | | | | A | |
| | | | | Code | Nights | Rates | Group Nights | Group Ra | tes | Total Nights | Total I | Rate ^ |
| | ncel Reaso ncel Clerk | in | | Totals > | 11 | 1260.00 | 46 | 4777.0 | 0 | 57 | 603 | 7.00 |
| | ncel Date | | Group | B00220 Cancellation | 0 | 0.00 | 10 | 1020 | 0.00 | 10 | 10 | 20.0 |
| C Rat | te Class | | PLAN: | S CHANGED | 2 | 180.00 | 0 | (| 0.00 | 2 | 1 | 80.0 |
| | Room Type | | | 5 | 600.00 | 0 | (| 0.00 | 5 | 6 | 00.0 | |
| | urce 1 urce 2 | | AGAIN | I | 2 | 240.00 | 0 | (| 0.00 | 2 | 2 | 240.0 |
| | urce 3 | | CUZ | | 0 | 0.00 | 2 | 221 | 1.00 | 2 | 2 | 21.0 |
| C Sta | | | LATE | CXL, KNOWS OF CHARGE | 2 | 240.00 | 0 | (| 0.00 | 2 | 2 | 40.0 |
| | stal Code ginal Statu | 0 | CANT | MAKE IT | 0 | 0.00 | 2 | 204 | 4.00 | 2 | 2 | 204.0 |
| | oup Conf | 2 | TEST < | | l n | 0 00 | 2 | 229 | 9.50 | 2 | 2 | 29 f ¥ |

Figure 35: Past Cancels Pattern Report

- The reservations that were canceled during the selected time frame are listed in the top section, by cancellation date.
- In the top section, when the data is first loaded, all reservations are checked to be counted.

- You can click on any of the column headers to sort the data per that column. For example, Last Name, Number of Nights, etc.
- Non-sleeping room and/or non-GTD/Hold reservations will have 0 as the number of nights.
- Use the fields underneath the list of reservations to further filter your results and totals. You do not need to re-load the data.
 - The fields are:
 - Data type This section allows you to auto check only those cancels which correspond to the type of dates you want. So, if you want arrivals between 02/01/2020 and 02/28/202 you would choose "Arrival" in the dropdown and then enter these dates and choose check.
 - Text Type Allows you to see cancellations for a specific reason. For example, you only want records that have "COVID" in the Cancel Reason. Choose "Cancel Reason" in the drop down, and then put "Covid" in the "Text Field Contains" box. Choose the "Check" button and it will automatically check only those with "Covid" as part of the reason.
 - The field is not case sensitive but will search for exactly what you enter. If you search for 'can,' the results may include cancel, Canada or scan depending on what was entered at the time of cancellation.
 - Number Type Use this if you only want those cancelations for people who would have stayed more than 1 night. Choose Nights and then choose the "n > 0" radio button.
 - Only checked records are used to calculate the Totals in the bottom. Before running a filter to get totals, it is a good idea to click 'Check None,' set your filter and then click on 'Check' for the specific filter to see the results in the Totals in the bottom section.
 - If you do not see the numbers you expect, uncheck all the reservations, then run your filter again.
 - The buttons at the top right allow you to print the report and/or save it as a .csv export.
 - You can also use the print and export options under File.
 - You can also hide the top or bottom sections.
 - The Totals section at the bottom will refresh with new Totals if you have used the filters in the top section.
 - Use the radio buttons on the left side to see the Totals filtered by the types listed.
 - As with the top section, you can re-sort the bottom columns by clicking on any of the column headers.

- There are buttons in the top right of each section that allow you to print and/or export the data.
 - You can also hide the top or bottom section.

Year Comparison Charts

- This report shows bar charts of the hotel's Occupancy %, ADR and RevPAR by month, for two (2) years.
- When you first access the report, you are asked to enter the year you want to compare:

| AutoClerk 2 - Year for | Chart Comparison |
|------------------------|-----------------------------------|
| Which year do yo | u want to compare? |
| , | 021 year with the previous one |
| Escape | OK |

Figure 36: Year Comparison Charts - Parameter

- The year you enter will be compared against the previous year.
- Click ok and the report is generated as shown below:

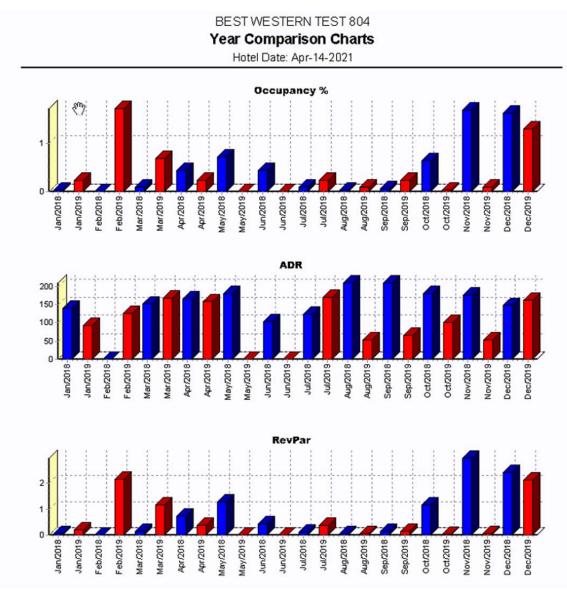


Figure 37: Year Comparison Charts - Results

Accounting Reports

Room Tax Comparison Report

- The Room Tax Comparison (RTC) Report lists all the Room revenue and Occupancy Tax posted during the selected time frame.
- The report ONLY looks at taxes that have been set up as an Occupancy Tax in ACConfig.

- If you have a Sales tax that posts with Room charges, those transactions will not be included in the report.
- If you have a tax that is active during the requested time frame, but is not set to post with Room charges, it will still be listed in the report.
- The default time frame is the past month.
 - When you first go into the report, there is no data loaded so you can select the time frame you want to see.

| CC s | | | | | | | | | | - | | \times |
|-------|-----------------|--------|-------------------------|---------------------|-----------|------------------------------|-----------------|---------------------|-----------------------|-------------------------|---------|----------|
| Help | Menu | | | | | | | | | | | |
| Roo | m Tax | Com | nparison l | Report | Ĩ | ∭ Grid <u>C</u> SV | 1 5 F | Report <u>G</u> rid | 🕞 Grid <u>T</u> otals | 🕞 Totals by Ta <u>x</u> | 🕵 Orpha | n Trans |
| | t Date 01/20 | | End Date Apr30'20Thu | Load | On "Sa | ly transacti ales Tax" ar | ons u re use | sed in Tax d. | k Setup which a | are not marked as | 8 | |
| , | | | | | | | | | | | | |
| Date | TransIDs | Room | Room Amount | TX(STATE TAX) | % | T1(CITY T | AX) | % | | | | |
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| | - | | | | | | | | | | | |
| Note: | Transactio | ons do | not know abou | t other transaction | s, so t | the taxes as | ssocio | cated with | the room here, | are our best gue | SS. | |
| | | | | | | Esc | | | | | | |
| | | | | Figure 38: | RTO | C Redor | rt - S | Start | | | | |

• Once you have entered the date range you want, click Load. A sample of the report is below:

| CCC s | | | | | | | | | | | | | - 0 |
|------------|------------|--------------|----------|---------------|----------|--------------|------------------|--------|--------------|---------------------------|--------------------------------------|---|---|
| Help Mer | | | | | | | | | | | | _ | |
| | | npari | son Repo | ort | | li su li | Grid <u>C</u> SV | 6 | Report Grid | Report Grid 🕞 Grid Totals | Report Grid 🗗 🗊 Grid Iotals 🕼 Totals | Report Grid 🕞 Grid Totals 🕞 Totals by Tax | Report Grid 🕞 Grid Iotals 🔀 Totals by Tax 🔂 Orpho |
| Start Dat | | • End Dat | | | v tranca | | | | | ch are not marked as | | | |
| Apr01'2 | 20Wed | Apr30' | 20Thu | | | are used. | an Octu | / 1111 | on are not i | and not marked as | are not marked as | are not marked as | |
| | | | | | | | | | | | | | |
| Date | TransIDs | | | TX(STATE TAX) | % | T1(CITY TAX) | % | | | | | | |
| 04/02/2020 | | 103a | 130.00 | | 10.0000 | | 4.5000 | | | | | | |
| 04/02/2020 | | 105a | 102.00 | | 10.0000 | | 4.5000 | | | | | | |
| 04/02/2020 | | 118a | 102.00 | | 10.0000 | | 4.5000 | | | | | | |
| 04/03/2020 | | 103a | 130.00 | | 10.0000 | | 4.5000 | | | | | | |
| 04/03/2020 | | 105a | 102.00 | | 10.0000 | | 4.5000 | | | | | | |
| 04/03/2020 | | 110a | 120.00 | | 10.0000 | | 4.5000 | | | | | | |
| 04/03/2020 | | 112a | 120.00 | | 10.0000 | | 4.5000 | | | | | | |
| 04/03/2020 | | 114a | 120.00 | | 10.0000 | | 4.5000 | | | | | | |
| 04/03/2020 | 47/49/50 | 118a | 102.00 | 10.20 | 10.0000 | 4.59 | 4.5000 | | | | | | |
| 04/03/2020 | 53/55/56 | 207a | 126.00 | 12.60 | 10.0000 | 5.67 | 4.5000 | | | | | | |
| 04/03/2020 | 57/59/60 | 315a | 120.00 | 12.00 | 10.0000 | 5.40 | 4.5000 | | | | | | |
| 04/04/2020 | 71/73/74 | ? | -25.00 | -2.50 | 10.0000 | -1.13 | 4.5200 | | | | | | |
| 04/04/2020 | 86/88/89 | 101a | 135.00 | 13.50 | 10.0000 | 6.08 | 4.5037 | | | | | | |
| 04/04/2020 | 90/92/93 | 102a | 135.00 | 13.50 | 10.0000 | 6.08 | 4.5037 | | | | | | |
| 04/04/2020 | 94/96/97 | 103a | 130.00 | 13.00 | 10.0000 | 5.85 | 4.5000 | | | | | | |
| 04/04/2020 | 98/100/101 | 105a | 102.00 | 10.20 | 10.0000 | 4.59 | 4.5000 | | | | | | |
| 04/04/2020 | 66/68/69 | 110a | 120.00 | 12.00 | 10.0000 | 5.40 | 4.5000 | | | | | | |
| 04/04/2020 | 9/11/12 | 112a | 120.00 | 12.00 | 10.0000 | 5.40 | 4.5000 | | | | | | |
| 04/04/2020 | 63/62/61 | 112a | -120.00 | -12.00 | 10.0000 | -5.40 | 4.5000 | | | | | | |

Figure 39: RTC – Data loaded

- The column headers are as follows:
 - Date The date of the posting. The report lists each day in the requested time frame and then each posting on that day.
 - Trans ID The transaction number of the day for the postings and a reference to research a posting.
 - For example, the first line, TransID is 32/34/35. If you look at the M1/Zout for that day, in the Room posting section, you will see that the room posting to room 103, folio A was the 32nd transaction of the day, the state tax was 34th and the city tax the 35th.
 - Room The room number and folio of the postings. If the room number is '?', then the posting was done in Historical Folios or to a Ticket/Post to No Room.
 - Room Amount How much room revenue was posted.

- TX [State Tax] This is the transaction code and description of the first occupancy tax. (In my example, the transaction code TX is called State Tax.)
 - The column lists how much tax was posted to each room/folio
- % This indicates the tax is a percentage. The column states the percentage amount posted.
- These two (2) columns repeat for as many Occupancy Taxes as you have.
 - If a tax is a Flat amount, the second column will be headed '\$,' but the amount is only listed under the tax description.
- If a room and folio was marked as Tax Exempt, then the amount cell for the exempt tax(es) will be blank.
 - An example of tax-exempt postings is shown below:

| Room T | Tax Com | ipari | son Repo | ort 📃 | Grid <u>C</u> S | V 🛐 Report <u>G</u> ri | id 👩 G | rid <u>T</u> otals | 😭 Totals by Ta <u>x</u> | 🚯 Orpha | n Tra |
|------------|-------------|---------|-------------|---------------|-----------------|------------------------|---------|--------------------|-------------------------|---------|-------|
| Start Dat | e E | Ind Dat | e | Only | y transa | ctions used in T | ax Setu | which a | re not marked as | ; | |
| Apr01'2 | 20Wed A | pr30' | 20Thu | Load "Sa | les Tax" | are used. | | | | | |
| Date | TransIDs | Room | Room Amount | TX(STATE TAX) | % | T1(CITY TAX) | % | | | | |
| 04/07/2020 | 73/75/76 | 222a | 121.50 | 12.15 | 10.0000 | 5.47 | 4.5021 | | | | |
| 04/07/2020 | 78/80/81 | 225a | 114.00 | 11.40 | 10.0000 | 5.13 | 4.5000 | | | | |
| 04/08/2020 | 25/27/28 | 102a | 108.00 | 10.80 | 10.0000 | 4.86 | 4.5000 | | | | |
| 04/08/2020 | 33/35/36 | 106a | 120.00 | 12.00 | 10.0000 | 5.40 | 4.5000 | | | | |
| 04/08/2020 | 29/31/32 | 106a | 120.00 | 12.00 | 10.0000 | 5.40 | 4.5000 | | | | |
| 04/08/2020 | 37/39/40 | 112a | 102.00 | 10.20 | 10.0000 | 4.59 | 4.5000 | | | | |
| 04/08/2020 | 43/45/46 | 119Ь | 102.00 | 10.20 | 10.0000 | 4.59 | 4.5000 | | | | |
| 04/08/2020 | 47/49/50 | 120a | 102.00 | 10.20 | 10.0000 | 4.59 | 4.5000 | | | | |
| 04/08/2020 | 51/53/54 | 204a | 106.25 | 10.63 | 10.0047 | 4.78 | 4.4988 | | | | |
| 04/08/2020 | 56/0/0 | 219a | 114.00 | | 0.0000 | | 0.0000 | | | | |
| 04/09/2020 | 18/20/21 | 106a | 120.00 | 12.00 | 10.0000 | 5.40 | 4.5000 | | | | |
| 04/09/2020 | 22/24/25 | 106a | 120.00 | 12.00 | 10.0000 | 5.40 | 4.5000 | | | | |
| 04/09/2020 | 27/0/0 | 219a | 114.00 | | 0.0000 | | 0.0000 | | | | |
| 04/10/2020 | 17/19/20 | 101a | 145.00 | 14.50 | 10.0000 | 6.53 | 4.5034 | | | | |
| 04/10/2020 | 79/81/82 | 102a | 135.00 | 13.50 | 10.0000 | 6.08 | 4.5037 | | | | |
| 04/10/2020 | 119/121/122 | 103a | 108.00 | 10.80 | 10.0000 | 4.86 | 4.5000 | | | | |
| 04/10/2020 | 87/89/90 | 103a | 110.00 | 11.00 | 10.0000 | 4.95 | 4.5000 | | | | |
| 04/10/2020 | 124/126/127 | 107a | 128.25 | 12.83 | 10.0039 | 5.77 | 4.4990 | | | | |
| 04/10/2020 | 22/24/25 | 119a | 110.00 | 11.00 | 10.0000 | 4.95 | 4.5000 | | | | |
| 04/10/2020 | 129/131/132 | 119a | 135.00 | 13.50 | 10.0000 | 6.08 | 4.5037 | | | | |

Figure 40: RTC – Tax Exempt Postings

- On the top right side are buttons which give you more detail and tools on the taxes:
 - Grid CSV Allows you to save the report in .csv format so it can be imported into a spreadsheet program of your choosing.

| CC AutoClerk 2 | | | × |
|---|--|--|---|
| Save jn: | Desktop 💌 | + 🗈 💣 📰 ◄ | |
| Quick access Desktop Libraries This PC | Name 1160 pics 1163_buttons_mainmenu 19120402_blank AutoClerks myCRS myCRS docs p Releases Test plans Toe1160 Training-Support Docs ist test | Date modified 3/3/2021 10:45 AM 2/5/2021 3:28 PM 1/6/2021 10:17 AM 1/7/2021 3:07 PM 8/26/2020 9:26 AM 1/5/2021 11:31 AM 7/26/2019 11:18 AM 2/4/2021 12:57 PM 2/19/2021 4:57 PM 12/7/2020 12:33 PM 2/25/2021 11:31 AM 2/25/2021 1:43 PM | Type File folder File folder |
| | < File name: | - | > Save |
| | Save as type: Comma Separated Variable (CSV) | | Cancel |

Figure 41: RTC-Grid CSV

- Report Grid Produces a printable form of the report.
- Grid Totals Reports the daily totals for room and each tax.

C AutoClerk 2 - RT Comp: Grid Totals

File Search Menu

TESTING DATASET Page 1 **RT Comp: Grid Totals** Date TX(STATE TAX) % T1(CITY TAX) % Room Amount 15.03 4.5000 04/02/2020 10.0000 334.00 33.40 04/03/2020 940.00 94.00 10.0000 42.30 4.5000 04/04/2020 1389.00 138.90 10.0000 62.53 4.5018 04/05/2020 1010.00 101.00 10.0000 45.45 4.5000 04/06/2020 933.50 93.35 10.0000 42.01 4.5003 887.75 04/07/2020 88.78 10.0006 39.95 4.5001 04/08/2020 874.25 76.03 8.6966 34.21 3.9131 04/09/2020 354.00 6.7797 10.80 3.0508 24.00 04/10/2020 1269.50 114.13 8.9902 51.38 4.0473 10.0000 04/11/2020 628.00 62.80 28.28 4.5032 04/12/2020 462.50 46.25 10.0000 20.82 4.5016 04/13/2020 1856.00 185.60 10.0000 83.53 4.5005 04/14/2020 761.00 76.10 10.0000 34.25 4.5007 04/15/2020 216.00 21.60 10.0000 9.72 4.5000 04/16/2020 219.00 21.90 10.0000 9.86 4.5023 04/17/2020 231.00 23.10 10.0000 10.40 4.5022 04/18/2020 108.00 10.80 10.0000 4.86 4.5000 04/19/2020 963.75 96.38 10.0005 43.38 4.5012 04/20/2020 1547.75 154.78 10.0003 69.67 4.5014 1558.00 04/21/2020 145.80 9.3582 65.62 4.2118 04/22/2020 444.00 44.40 10.0000 19.98 4.5000 04/23/2020 1298.50 129.85 10.0000 58.43 4.4998 04/24/2020 1160.00 116.00 10.0000 52.21 4.5009 04/25/2020 1454.50 145.45 10.0000 65.50 4.5033 04/26/2020 924.00 92.40 10.0000 41.58 4.5000 04/27/2020 96.00 9.60 10.0000 4.32 4.5000 584.50 58.45 10.0000 26.31 4.5013 04/28/2020 04/29/2020 533.50 44.35 8.3130 19.96 3.7413 24561.00 2392.50 9.7411 1076.85 4.3844 Totals: < >

Figure 42: RTC – Grid Totals

• Totals by Tax – Breaks out the Occupancy tax(es) and provides detail on posting adjustments as well as singular postings.

| Page 1 | | | _ | TESTING DATASET | | |
|-------------------------|-------------|------------|--------|--------------------------------------|--|--|
| | | | I | otals By Tax (04/02/2020-04/12/2020) | | |
| Tax Types | | | | | | |
| TX(STATE TAX) | Room Amount | Tax Amount | % | | | |
| Room & Tax Postings | 8871.25 | 887.14 | 10.00% | | | |
| Adj Room & Tax Postings | -145.00 | -14.50 | 10.00% | | | |
| Room Postings Only | 356.25 | 0.00 | | | | |
| Adj Room Postings Only | 0.00 | 0.00 | | | | |
| Tax Postings Only | 0.00 | 0.00 | | | | |
| Adj Tax Postings Only | 0.00 | 0.00 | | | | |
| | | | | | | |
| T1(CITY TAX) | Room Amount | | % | | | |
| Room & Tax Postings | 8871.25 | | 4.50% | | | |
| Adj Room & Tax Postings | -145.00 | | 4.50% | | | |
| Room Postings Only | 356.25 | 0.00 | | | | |
| Adj Room Postings Only | 0.00 | 0.00 | | | | |
| Tax Postings Only | 0.00 | 0.00 | | | | |
| Adj Tax Postings Only | 0.00 | 0.00 | | | | |
| | | | | | | |

Figure 43: RTC-Totals by Tax

• Orphan Trans – Reports on the 'Orphan' transactions. Orphan transactions are room charges without tax(es), and tax postings without room.

| Page 1 | | | | | TES | STING DATAS | SET | | |
|------------|----------|------|-------------|---------------|--------|---------------|--------|---|--|
| | | | | Re | oom an | d Tax Unusual | Postin | 3 | |
| Date | TransIDs | Room | Room Amount | TX(STATE TAX) | % | T1(CITY TAX) | % | | |
| 04/08/2020 | 56/0/0 | 219a | 114.00 | | 0.0000 | | 0.0000 | | |
| 04/09/2020 | 27/0/0 | 219a | 114.00 | | 0.0000 | | 0.0000 | | |
| 04/10/2020 | 138/0/0 | 219a | 128.25 | | 0.0000 | | 0.0000 | | |
| 04/21/2020 | 53/0/0 | 110a | 100.00 | | 0.0000 | | 0.0000 | | |
| 04/22/2020 | 44/0/0 | 201a | 0.00 | 12.00 | | 5.40 | | | |
| 04/22/2020 | 50/0/0 | 500a | 0.00 | 8.50 | | 3.83 | | | |

Figure 44: RTC-Orphan Transactions

Transactions Comparisons Report

- The report allows the user to compare a date to a date, a month to another month and/or a year to a year.
- Only transactions that were used during the requested time are listed.
 - If a transaction has been deleted, the data will appear but only with the transaction's ID number.
 - If a transaction is changed to break out into 50 sub types, or sub types are removed, the report may show the code with a 0 sub transaction or a transaction without a sub transaction depending on what has been done.
 - Negative numbers are in red.
- When you first access the report, it looks like the below example:

| C AutoClerk 2 | > |
|--|---|
| File Menu | |
| Transactions Comparisons Report | : |
| | Compare Days Sep30'22Fri Oct01'22Sat |
| | Compare Days Compare Months September 2022 October 2022 Compare Months |
| | Compare Years 2021 2022 Compare Years |
| Esc | |

Figure 45: Transactions Comparisons Report

- Depending on the date parameter you select, the report will look like one of the following: Days, Month, Year.
 - The default 'Days' are the prior two (2) days, because the current day has not closed.
 - The default 'Month' is the current month and the past month.
 - The default 'Year' is the current year and last year.

| CC A | utoClerk 2 | | | |
|-------|--------------|--------------|--------------|------------|
| File | Menu | | | |
| Tra | nsaction | s Compa | risons | Report |
| Tra | saction Type | Jul14'22 Thu | Jul15'22 Fri | Difference |
|)1 RC | MO | 317.50 | 329.00 | -11.50 |
|)2 ST | ATE TAX | 20.00 | 22.15 | -2.15 |
|)3 CI | Y TAX | 9.00 | 9.52 | -0.52 |
|)7:01 | PET FEE | 10.00 | 30.00 | -20.00 |
|)7:08 | RESORT FEE | 70.00 | 70.00 | 0.00 |
| | ROLLAWAY | 0.00 | 10.00 | -10.00 |
| 08:01 | OVERNIGHT | 50.00 | 15.00 | 35.00 |
| | BREAKFAST | 0.00 | 22.50 | -22.50 |
| 16 SA | LES TAX | 5.12 | 1.54 | 3.58 |
| 21 CA | SH | -264.00 | -555.56 | 291.56 |
| 24 AN | 1EX | -1,135.52 | 0.00 | -1,135.52 |
| | | | | |
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| | | | | |
| | | | | |
| F | Esc | | | |
| | | | | |

Figure 46: Transactions Comparisons Report – Days

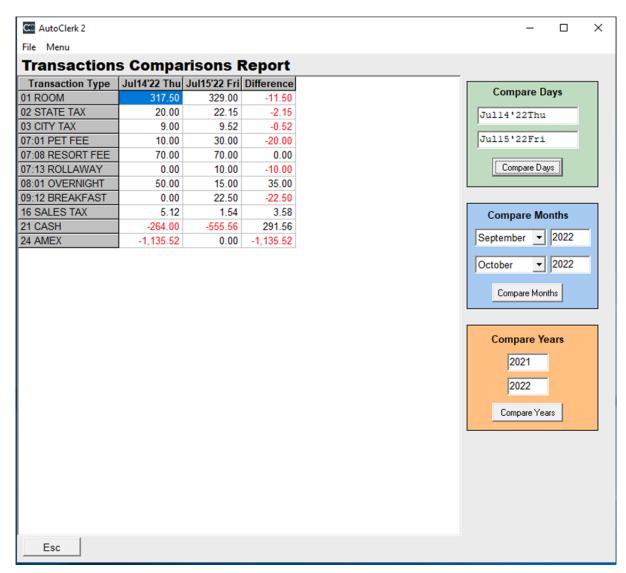


Figure 47: Transactions Comparisons Report – Months

| Transactions | 2021 | 2022 | Difference |
|------------------------|-----------|-----------|------------|
| 01 ROOM | | | -13,456.50 |
| 02 STATE TAX | 471.80 | | |
| 03 CITY TAX | 212.38 | 793.22 | -580.84 |
| 06 MISC | 0.00 | 54.24 | -54.24 |
| 07:01 PET FEE | 51.00 | 150.00 | -99.00 |
| 07:03 LATE C/O FEE | 0.00 | 60.00 | -60.00 |
| 07:06 ROOM DAMAGES | 0.00 | 1,000.00 | -1,000.00 |
| 07:07 CL INTEREST | 0.00 | 223.03 | -223.03 |
| 07:08 RESORT FEE | 0.00 | 1,190.00 | -1,190.00 |
| 07:13 ROLLAWAY | 0.00 | 80.00 | -80.00 |
| 08:00 PARKING | 0.00 | 0.00 | 0.00 |
| 08:01 OVERNIGHT | 195.00 | 390.00 | -195.00 |
| 09:01 FLOWERS | 60.00 | 0.00 | 60.00 |
| 09:12 BREAKFAST | 0.00 | 75.00 | -75.00 |
| 11:01 CLEANING | 0.00 | 25.00 | -25.00 |
| 11:02 MAINTENANCE | 0.00 | 15.00 | -15.00 |
| 11:03 MONTHLY FEE | 0.00 | 550.00 | -550.00 |
| 16 SALES TAX | 19.98 | 39.74 | -19.76 |
| 21 CASH | -1,533.61 | | |
| 22 VISA | -3,342.84 | | 282.39 |
| 24 AMEX 25 DISCOVER | -177.25 | -5,575.93 | |
| | | 1,679.98 | -2,001.04 |

Figure 48: Transactions Comparisons Report - Years

Marketing

Exports

Checkout Email Export

- This exports information on guests who checked out 'today' who had an email address their folio.
 - This can be used by marketing companies such as Medallia.

- The feature must be enabled in two (2) places in ACConfig.
 - Please see the ACConfig sections below for instructions on how to enable the function.
- The exported data includes Guest first and last name; email; check-in and checkout dates; property name; reservation confirmation number; and room number.
 - All checked out folios with an email address are exported.
 - TA information is not exported.
 - Guests without an email address are not exported.
- Use this function to export the data outside of the audit process.
 - When you use the export here, you can export multiple days at a time as you are asked to enter a date range when you first access the export:

| AutoClerk 2 | | × |
|--------------|-------------|----|
| Toolbar | | |
| Email Checko | out Export | |
| Start Date | 05/17/20 | |
| End Date | May17'20Sun | |
| | | |
| 1 | | |
| Esc | | OK |

Figure 49: Email Checkout Export – Date Selection

• Once you have entered the start and end dates, click ok and you can select the name and location for the export:

| CC Save CSV Ex | xport | × |
|----------------|----------------------|-------|
| Save in: | n: 📃 Desktop 💽 🔶 🛅 🕶 | |
| Quick access | Holly McGlothlin | ^ |
| Desktop | This PC | |
| Libraries | Libraries | |
| This PC | Network | |
| Network | 1160 Documentation | |
| | File name: | ave |
| | | incel |
| | | |

Figure 50: Email Checkout Export – Save

• Once exported, whether here or through the Night Audit, if enabled, the .csv file can be imported into a spreadsheet program.

Utilities

Historical Reports

Historical Daily Pace Report

- This report is like the Forecast Report but is for past days. It takes a snapshot of the hotel information at the start of the day and then uses the transactions during the day to the end of the day to show the user daily start and end of day data but for past days
 - The default report is for the past seven (7) days and for each day, gives start and end of day data for categories such as Inventory, Arrivals, Departures, OOO, Occupancy and Groups.
 - The report is configurable by selecting Options in the SendTo pipeline.
 - A sample report for three (3) days is seen below:

C AutoClerk 2 - Historical Daily Pace Report

File Search Menu

| Page 1 TESTING DATA Historical Daily Pace | | | | | | | | | | | |
|--|----|----|----|----|----|----|----|----|----|-------|--------|
| - | | | | | | | | | 67 | | - |
| Туре | DD | JS | KG | KH | KJ | KQ | QN | BQ | CF | Total | Total% |
| May 9'20 Sat | | | | | | | | | | | |
| Proj Occupancy | 0 | 0 | 5 | 0 | 1 | 0 | 4 | 0 | 0 | 10 | 13% |
| Act Occupancy | 0 | 0 | 8 | 0 | 1 | 0 | 1 | 0 | 0 | 10 | 13% |
| Proj Departs | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1% |
| Act Departs | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1% |
| Proj Arrivals | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Act Arrivals | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Proj Group Inhouse | 0 | 0 | 5 | 0 | 0 | 0 | 3 | 0 | 0 | 8 | 11% |
| Act Group Inhouse | 0 | 0 | 5 | 0 | 0 | 0 | 3 | 0 | 0 | 8 | 11% |
| May10'20 Sun | | | | | | | | | | | |
| Proj Occupancy | 0 | 1 | 1 | 0 | 1 | 0 | 1 | 0 | 0 | 4 | 5% |
| Act Occupancy | 0 | 1 | 1 | 0 | 1 | 0 | 1 | 0 | 0 | 4 | 5% |
| Proj Departs | 0 | 0 | 5 | 0 | 0 | 0 | 3 | 0 | 0 | 8 | 11% |
| Act Departs | 0 | 0 | 5 | 0 | 0 | 0 | 3 | 0 | 0 | 8 | 11% |
| Proj Arrivals | 0 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 3% |
| Act Arrivals | 0 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 3% |
| Proj Group Inhouse | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Act Group Inhouse | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| May11'20 Mon | | | | | | | | | | | |
| Proj Occupancy | 0 | 1 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 3 | 4% |
| Act Occupancy | 0 | 1 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 3 | 4% |
| Proj Departs | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 1 | 1% |
| Act Departs | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 1 | 1% |
| Proj Arrivals | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Act Arrivals | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Proj Group Inhouse | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Act Group Inhouse | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |

Figure 51: Historical Daily Pace Report

- For each section of data, 'Proj' is the start of day data and 'Act' is the figure at the end of the day, after the Night Audit has run.
- When you are first updated to the build that has this report, you will need to have run one (1) audit for the Start of Day numbers to correctly calculate.
- When you select Options in the SendTo pipeline, you can configure the report for that one-time printing/display, as seen below:

| CC AutoClerk | 2 | | × |
|---------------|---|-------------------------|------------|
| File Toolbar | | | |
| Historica | I Daily Pace Repo | rt | |
| | Date: 05/09/20 Date: May16'20Sat | (Includ | led) |
| Report Data: | Include Start of Day | $\overline{\mathbf{v}}$ |] |
| | Include End of Day | $\overline{\mathbf{v}}$ | |
| Report Parts: | Include Inventory Include Out-of-Order Include Occupancy Include Departures Include Arrivals Include Group Totals Include Group Details | | |
| <u>E</u> sc | | | <u>0</u> K |

Figure 52: Historical Pace Report Options

- When you select Options, the checked boxes indicate the default fields for the report. However, the user can select whichever box(es) he wants to see for that occurrence of the report.
- The fields are:
 - o Dates: As the report is historical, only past dates can be entered.
 - Report Data: Unchecking one of these boxes removes that line of data from the report so you would only see the start or end of day figures.
 - Start of day is projections and end of day is actual as the numbers are taken from the Night Audit.
 - Report Parts: Checking and unchecking a box adds or removes that row of data from the report. The rows are:
 - Inventory: The number of rooms that have been configured for each room type. It does not factor in out-of-order rooms. If room numbers are changed during the day, for example a King bedded room is changed to a Queen bedded room, then the numbers will be affected.

- Out-of-Order: The number of OOO rooms for the day. If a room is set to come back in order that day, it will NOT be counted.
- Occupancy: As with other Occupancy reports in acPMS, the end of day number depends on the posting of room charges and the 'increase/decrease room count'
 - If you post a room charge adjustment in Historical Folios and say 'yes' to decrease the room count, then the actual (end of day) figure will be reduced by 1.
- Departures: The number of rooms due to check out vs the number that did check out. A voided checkout decreases the number for checkouts.
- Arrivals: The number of expected arrivals vs. actual arrivals. Walkins, cancels, and no shows will all affect the end of day number.
- Group Totals: This is the number of 'picked up' rooms and does NOT include unused group rooms.
 - If there were multiple groups in that day, the totals for all the groups are listed here.
- Group Detail: Like the Forecast when you include group detail, when checked, if there was a group inhouse that day, i.e., had 'picked up' rooms, then it will be listed.
 - There is only one line for each group and the numbers are the "end of day" numbers.
 - If there were multiple groups in on a day, you will see the figures for each group.
- An example of the report with all options checked is below:

C AutoClerk 2 - Historical Daily Pace Report

File Search Menu

| Page 1 | | | | | | | | | Т | ESTIN | G DATA |
|--------------------|----------|----------|----|----|--------|----|----------|----|----|----------|-----------|
| | | | | | | | | | | | aily Pace |
| | | | | | | | | | | | |
| Туре | DD | JS | KG | KH | КJ | KQ | QN | BQ | CF | Total | Total% |
| May 9'20 Sat | | | | | | | | - | - | | |
| Start Inventory | 15 | 10 | 24 | 2 | 5 | 4 | 15 | 2 | 2 | 75 | 100% |
| End Inventory | 15 | 10 | 24 | 2 | 5 | 4 | 15 | 2 | 2 | 75 | 100% |
| Proj Out-of-Order | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Act Out-of-Order | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Proj Occupancy | 0 | 0 | 5 | 0 | 1 | 0 | 4 | 0 | 0 | 10 | 13% |
| Act Occupancy | 0 | 0 | 8 | 0 | 1 | 0 | 1 | 0 | 0 | | 13% |
| Proj Departs | 1 | - | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1% |
| Act Departs | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1% |
| Proj Arrivals | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | - | 0 | 0% |
| Act Arrivals | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Proj Group Inhouse | 0 | 0 | 5 | 0 | 0 | 0 | 3 | 0 | 0 | 8 | 11% |
| Act Group Inhouse | 0 | 0 | 5 | 0 | 0 | 0 | 3 | 0 | 0 | 8 | 11% |
| B00820 | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| B00K20 | 0 | 0 | 3 | 0 | 0 | 0 | 3 | 0 | 0 | 6 | |
| May10'20 Sun | 15 | 10 | 24 | 2 | 6 | | 16 | 2 | 2 | 26 | 1000/ |
| Start Inventory | 15 15 | 10 10 | 24 | 2 | 5 | 4 | 15 15 | 2 | 2 | 75 75 | 100% |
| End Inventory | | | | 2 | 0 0 | 4 | | 2 | 2 | | 100% |
| Proj Out-of-Order | 0 | 0 | 0 | 0 | - | 0 | 0 | 0 | 0 | 0 | 0% |
| Act Out-of-Order | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Proj Occupancy | 0 | 1 | 1 | 0 | 1 | 0 | 1 | 0 | 0 | | 5% |
| Act Occupancy | 0 | 1 | 1 | 0 | 1 | 0 | 1 | 0 | 0 | | 5% |
| Proj Departs | 0 | 0 | 5 | 0 | 0 | 0 | 3 | 0 | 0 | 8 | 11% |
| Act Departs | 0 | 0 | 5 | 0 | 0 | 0 | 3 | 0 | 0 | 8 | 11% |
| Proj Arrivals | 0 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 3% |
| Act Arrivals | 0 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 3% |
| Proj Group Inhouse | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Act Group Inhouse | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| May11'20 Mon | 10 | 10 | 24 | 2 | 6 | | 10 | 2 | 2 | 26 | 1000/ |
| Start Inventory | 15 | 10 | 24 | 2 | 5 | 4 | 15 | 2 | 2 | | 100% |
| End Inventory | 15 | 10 | 24 | 2 | | 4 | 15 | | _ | 75 | 100% |
| Proj Out-of-Order | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Act Out-of-Order | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Proj Occupancy | 0 | 1 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 3 | 4% |
| Act Occupancy | 0 | 1 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | | 4% |
| Proj Departs | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | | 1% |
| Act Departs | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 1 | 1% |
| Proj Arrivals | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Act Arrivals | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Proj Group Inhouse | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Act Group Inhouse | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| < | | | | | | | | | | | |

Figure 53: Historical Daily Pace Report – All Options

 \Box \times

ACConfig

Rates

Rate Class Setup

- Rate Classes can be set up to be Tax-Exempt.
 - This can be useful for Government Rate Classes as well as certain OTA rate classes where the OTA is paying the tax(es).
 - When Creating a New or Modifying an Existing Rate Class, there is a Tax-Exempt button to the right of the Package checkbox.
 - Click on the button and a new window opens which is identical to the Tax-Exempt window in a Reservation and Inhouse Folio, as seen below:

| AutoClerk 2 | × |
|--|---|
| <u>E</u> ile <u>H</u> elp | |
| | As Tax Exempt |
| Rates Fixed Rates Linked Status set on Allocation by CRS on CRS CRS Base | Call AutoClerk to reset Rack Status Base Rate Base |
| CRS Discount Type None (109 Tax Exemptions: | Uednesday - □ × hursday riday aturday |
| SALES TAX [Sales Tax | - |
| Options | NON-SMOKING E-DOUBLE |
| ✓ Active ✓ Allow New Use □ Local □ Delete at NA | RENCE ROOM F THE HOUSE |
| Esc | |

Figure 54: Rate Class Tax Exemption

- Enter a Reason, select the tax(es) to be exempt, and click ok.
 - Once you have installed the changes, when this rate class is used locally, it will be Tax Exempt.

- Any reservation coming in from a CRS using this rate class will also be Tax-Exempt.
- The Reason will appear on the Tax-Exempt Report as the reason why the room/folio was exempt.
- You MUST modify any existing reservations, groups and/or inhouse folios using that Rate Class, and mark them as Tax Exempt, if not already set. The installation of the change will not retroactively change them.
- If you add a new tax and you want it to be tax-exempt on a rate class, you need to modify the tax-exempt setting for that rate class(es).
- You can now set default source code(s) to be used on a rate class.
 - The Source Code fields are below the Options section on the Rate Class main form as seen below:

| CC / | AutoClerk 2 | | | | | > |
|--------------|--|--|---------------------------|--|---|------|
| <u>F</u> ile | <u>H</u> elp | | | | | |
| 2 | Code Description | | Rack Packag | e Tax Exe | mpt | |
| | by CRS on CRS CRS Discount Type Percent (10) (10) | .00 % \$ | mount .00 - Amount) | Rate Base RA Reset ALL Rates Availab V KG S V QN S V KJ K | Available for D Sunday Monday Tuesday Wednesday Wednesday Friday Saturday All Ie for Room Type Single KING Single QUEEN CING BED W/JACK | None |
| | ✓ Active ✓ Allow New Use Local Delete at NA | ☐ Zero Rate O ☐ Occupancy ☐ Hide Rates ☑ Send GTD/0 | by Class | ✓ DD 2 ✓ JS J ✓ KQ K | ING HANDICAP DOUBLE BEDS UNIOR SUITE ING/QUEEN ANQUET ROOM | |
| | Sources: | | | | None | · · |

Figure 55: Rate Class Source Code

- o There are certain rules for entering Source Codes.
 - The Source Code(s) must already exist.

- On existing reservations, the sources will only change if you modify the reservation and change the rate class to one that has different sources.
- If you have set up Default Source Codes for a CRS interface, those codes will not be overwritten by the Rate Class source codes.
- Once you have set up source codes, when you make a reservation for that rate class, the source code(s) will auto-populate, even if you do not have sources as a mandatory field.

Extra Charges Setup

- As of build 1174, a manager to set up transactions to be posted during the Night Audit, after room and tax are posted, on a folio-by-folio basis. The charges are posted on the guest folios without having to create a room rate package.
- The initial setup form is seen below:

| AutoClerk | | | | | | | | | | |
|-----------|-----------------------|---------------|---------------|-----------------|---|----------------|----------|--|--|--|
| | Active Automatic Save | Setup | | | Note: Reservations created by an interface will NOT automatically have required charges set up until Extra Charges are modified by a clerk. | | | | | |
| | | Cost Per Unit | Folio Comment | Max Quantity | Post On | Selection Name | Re-Order | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
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| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| Esc | | | | | | | O | | | |

Figure 56: Extra Charge Setup – Initial

- A manager then activates the feature, adds in transactions to be added to reservations and/or inhouse folios and installs the configuration.
 - The transactions can be set up to always be applied, applied per defined criteria, such as the Rollaway checkbox being checked, or just listed for the user to apply.

| CC AutoClerk 2 | | | | | | | | | _ | | × |
|----------------|---|----------|---------------|---|-----------------|-------------|------|-------------------|----------|----|---|
| | arge Type Se ctive equire clerk to ente | - | narges if no | Note: Reservations created by an interface will NOT automatically have required charges set up until Extra Charges are modified by a clerk. | | | | | | | |
| Add Item | Charge Sub | Cost Per | tem | Folio Comment | Max Quantity | Post On | | Selection Name | Re-Order | | |
| 1 | FE V 8 V RESORT FEE | \$ | 35.00 | | 1 | Nightly | - | RESORT FEE | | 0 | |
| | Preselect Extra Ch | arges: 🔽 | always. Us | ing this many units | | • 1 | | | | | |
| 2 | PR • 1 • | Ş | 15.00 | | 4 | Nightly | • | OVERNIGHT PARKING | | 0 | |
| | OVERNIGHT Preselect Extra Ch | arges: 🗆 | always. Us | ing this many units | | v | | | | | |
| 3 | FE 🕶 1 💌 | Ş | 10.00 | | 3 | Arrival Nig | ht 👻 | PET FEE | | 0 | |
| | PET FEE Preselect Extra Ch | arges: 🔽 | if the Pet ch | eckbox is marked | | • | | | | | |
| 4 | | \$ | 15.00 | | 2 | Nightly | - | ROLLAWAY | | 0 | |
| | ROLLAWAY Preselect Extra Ch | arges: 🔽 | if the Rolla | way checkbox is marked | | - | | | | | |
| 5 | GS 🔻 12 💌 | \$ | 7.50 | | 9 | Nightly | • | BREAKFAST | | 0 | |
| | BREAKFAST Preselect Extra Ch | arges: 🗆 | always. Us | ing this many units | | ~ | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| Esc | | | | | | | | | | Oł | |

• A completed setup is below:

Figure 57: Completed Extra Charges Setup

 Please see separate documentation: User Guide – Extra Charges for details on how to set up and use this feature. The Guide can be found at <u>www.myautoclerk.com</u> in the Documents section

Defaults/Options

Options

• At the bottom of the page is the checkbox to enable the nightly export of checked-out guests with an email address.



Figure 58: Daily Checkout Export Setup

- The first step is to check the box labelled 'Daily Checkout Export,' and then click ok 2 times.
- Then navigate to Defaults/Options Night Audit Report Suppression.
 - See that section below for instructions.

Night Audit Report Suppression

- There are two (2) new reports/functions that can be suppressed.
 - o The Daily Email Checkout Export.
 - You must have already checked the checkbox in Defaults-Options/Options for this item to appear.
 - Leave the checkbox unchecked and add in the email address(es) you want the export to go to.
 - The export will be in a .csv format so it can be imported into many spreadsheet programs.
 - Print Extra Charges Report
 - Even I the report is suppressed on the Audit, you can still see it in Utilities – View Past Night Audit Reports.
 - You can also produce the report for current and future dates through Gen Reports Guest Reports Extra Charges

| | Daily Checkout Export | | |
|---|----------------------------|-------------------|---|
| | Print Extra Charges Report | $\mathbf{\nabla}$ | |
| E | | | ` |

Figure 59: Night Audit Suppression Additions

| Figure 1: Extra Charges button 3 |
|---|
| Figure 2: Extra Charges – New Res <u>4</u> 4 |
| Figure 3: New Res with Additional Charges <u>5</u> 5 |
| Figure 4: Group Room Allocations – Room Selection |
| Figure 5: Repeat Guests from History – Initial Form |
| Figure 6: Repeat Guests from History - Results |
| Figure 7: Bucket Check |
| Figure 8: Partially Completed Bucket Check |
| Figure 9: Selection Email |
| Figure 10: Selection Email Addresses |
| Figure 11: Usage Report – Default |
| Figure 12: 90 Day Usage Report |
| Figure 13: Usage Report with Filter for Rollaway |
| Figure 14: House Standing Report – Default |
| Figure 15: House Standings Report – No Detail |
| Figure 16: Arrivals vs Booking Date Data – Initial Report |
| Figure 17: Arrivals vs Booking Date Data by Rate Class |
| Figure 18: Booking Patterns – Booked and Stayed |
| Figure 19: Booking Patterns – Booked By/Usage |
| Figure 20: Booking Patterns – Days Out |
| Figure 21: Booking Patterns – Cancels |
| Figure 22: Daily Manager Report and Form |
| Figure 23: Google MyMaps Export Form |
| Figure 24: Google MyMaps Export location |
| Figure 25: Occupancy Heat Map |
| Figure 26: Occupancy Heat Map – Day's Statistics |
| Figure 27: Occupancy Heat Map – Room Type Statistics |
| Figure 28: Occupancy Heat Map – Special Dates |
| Figure 29: Occupancy Heat Map – Set Special Dates |
| Figure 30: Daily Manager Report |
| Figure 31: DMR Export – Options |
| Figure 32: DMR Export – Save |
| Figure 33: Labor Management Report |

| Figure 34: Out of Order Report |
|--|
| Figure 35: Past Cancels Pattern Report |
| Figure 36: Year Comparison Charts - Parameter |
| Figure 37: Year Comparison Charts - Results |
| Figure 38: RTC Report - Start |
| Figure 39: RTC – Data loaded |
| Figure 40: RTC – Tax Exempt Postings |
| Figure 41: RTC-Grid CSV |
| Figure 42: RTC – Grid Totals <u>52</u> 52 |
| Figure 43: RTC-Totals by Tax |
| Figure 44: RTC-Orphan Transactions |
| Figure 45: Transactions Comparisons Report |
| Figure 46: Transactions Comparisons Report – Days |
| |
| Figure 47: Transactions Comparisons Report – Months |
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