



AUTOCLERK[®]
Cloud PMS

User Manual

version 1.4

rev. 09/02/2025

Table of Contents

Welcome	9
Logging Into AutoClerk Cloud.....	10
SETUP.....	11
System	11
Hotel	11
Hotel Policies	12
Search Results Page Size.....	14
Timeout Session Duration	15
Default Email Subject Line	15
Check In Time	15
Check Out Time	16
Total Number of Rooms.....	16
Trip Advisor Location ID	16
Enable Housekeeping Services	16
Report Email Addresses	17
Make Mobile Phone Mandatory Setting	17
Make Email Mandatory Setting	18
Bottom Hotel Setup Buttons	18
Users	18
Best Western Branded Hotels-How to Add/Edit a User.....	18
Independent Hotels-How to Add a User	26
Independent Hotels-Editing a User	29
Independent Hotels-Deleting a User.....	29
Independent Hotels-Bottom User Setup Buttons	30
Rooms	30
Room Settings	30
How to Add a Room Type	31
How to Assign a Room Number.....	33
How to Delete a Room Number.....	34
How to Delete a Room Type	35
Postings	35
How to Add Taxes	35
How to Change Taxes.....	37
How to Delete a Tax.....	38
How to Add a Charge Category.....	39
How to Delete a Category	41
How to Edit a Category.....	41
How to Add a Subcategory	42
How to Delete a Subcategory.....	45
How to Edit a Subcategory.....	45
How to Add a Payment Category	47
How to Edit a Payment Category	48
How to Delete a Payment Category	49

How to Add a Payment Subcategory.....	49
How to Edit a Payment Subcategory.....	50
How to Delete a Payment Subcategory.....	52
Extras.....	53
How to Add an Existing Charge.....	53
How to Add a New Charge.....	53
How to Delete a Charge.....	55
Budget.....	56
How to Set Up a Monthly Budget.....	56
How to Delete a Monthly Budget.....	58
Hold Types.....	60
Best Western Hold Types.....	60
CRS Only Hold Types.....	61
Cancellations.....	62
An Overview of Best Western Cancellation Policies.....	62
Revenue Management.....	64
An Overview of Stay Restrictions.....	64
How to Input a Stay Restriction.....	65
How to Change a Stay Restriction.....	67
Rate Plan Guarantee Cancellation.....	69
An Overview of Rate Plan Guarantee Cancellation.....	69
How to Add a Rate Plan Guarantee Cancellation.....	70
How to Edit a Rate Plan Guarantee Cancellation.....	71
Rates.....	72
Overview of Building a Rate Plan and its Settings.....	72
How to Build a Parent Rate Plan.....	74
An Overview of Rate Seasons.....	74
How to Build a Parent Rate Season.....	75
How to Build a Child Rate Plan.....	78
CRS vs Locally Managed Rate Plans.....	79
How to Change the Order of Rate Plans.....	80
Channels.....	80
Overview of Channels.....	80
How to Manage Specific Channel by Rate Level.....	81
Bottom Allotment Setup Buttons.....	82
How to Manage Specific Channel by Room Type.....	82
Rate Levels (Best Western Branded Hotels).....	84
Overview of Rate Levels.....	84
How to Add a Rate Level.....	84
Marketing.....	86
Overview of Letters.....	86
Contact Management.....	87
Company Overview.....	87
How to Setup a Company Account.....	88
How to Edit a Company Account.....	89
How to Delete a Company Account.....	91

Travel Agent Overview	91
How to Setup a Travel Agent	92
How to Edit a Travel Agent.....	93
How to Delete a Travel Agent.....	93
Source Codes Overview	94
How to Add a Source Code	94
How to Edit a Source Code	96
How to Delete a Source Code.....	97
How to Reorder Source Codes	98
Market Codes Overview	100
How to Add a Market Code.....	100
How to Edit a Market Code	101
How to Delete a Market Code	102
Managers Dashboard	103
Overview of the Manager's Dashboard	103
KPI	103
Source and Rate View	104
Revenue and Occupancy View	104
Trip Advisor Widget.....	105
OPERATIONS	106
Front Desk Dashboard.....	106
Cloud Icon	106
Hotel Name	106
Business Date and Logout	107
Search Today	107
Blue Menu Bar	107
Main Menu	107
Reservations	108
Reports	109
Arrivals.....	109
In-House	109
Departures.....	110
Dashboard	110
Shortcuts	110
Summary	111
Availability	112
Quick Search	113
Change Room Status	114
Apply Charge	116
Weather	117
Pass On Log	117
Groups.....	119
Availability / Rates	120
Availability	120
Rates	121
Tape Chart.....	124
Legend	124
Tape Chart Filter.....	125

Rooms and Room Status.....	127
Out of Order	128
New Reservation from the Tape Chart	130
Reservation Options	131
Room Moves and Date Changes.....	132
Rate Calendar	133
Legend	134
Notes.....	135
Groups	135
Available Rooms and Occupancy	135
Middle Occupancy Range.....	135
Set Quick Rate Amounts	136
Daily Overview	137
Edit Rates.....	137
Rates	139
Quick Rates	139
Right-Click: Other Options	140
Add/Edit Notes	140
Stay Restrictions.....	141
Reservations	142
Name, Status, Confirmation Numbers.....	142
Reservation Settings	143
Tax Exempt Checkbox	143
Availability/Rates within a Reservation	143
Guest Data Tab (and comments)	147
Adding a Payment Method	149
Source and Market Codes.....	149
Saving the Reservation	150
Best Western Tab	150
Company Tab and Attaching a Company	151
Group Tab	152
Travel Agent Tab and Attaching a Travel Agent	155
All Notes Tab (and comments)	156
Action Buttons (Check In, No Show, Cancel, Copy Reservation, Re-Instate)	157
Direction Buttons (History, Folio, Letters, Log)	158
Itinerary	159
Best Western Rewards Profile ID Lookup	159
Enrolling in Best Western Rewards	163
Enrolling a Guest in a BWR Promotion	168
Letters	170
Printing Letters.....	171
Screen (HTML) Letters	172
Sending Letters via Email	172
Arrivals / Check-Ins	173
Locating an Arrival	173
Guest Information.....	174
Room Selection.....	174
Updating a Payment Method during Check-In	176
Check-in Button.....	176

Credit Cards	177
Default Payment Method on a Reservation	178
Add CC without Authorization.....	179
Add CC with Authorization.....	180
Edit CC	181
Delete CC.....	184
Splitting Authorizations between Multiple Credit Cards	186
Voice Authorization.....	186
Authorization Settlements	188
Adding Incidental Credit Cards	189
Default Payment Method on a Folio.....	191
Folio Postings and Transfers.....	191
Creating Additional Folios and Routing	192
Posting Charges to a Folio	194
Posting Payments to a Folio	195
Posting a Split or Mixed-Tender Payment	196
Posting Corrections to a Folio	197
Modify amount.....	197
Remove line item	199
Adjustments.....	199
Moving and Transferring Folio Postings	201
Move Charges to Another Folio	201
Transfer Charges to another Folio.....	202
Refunding a Credit/Debit Card	204
Departures / Check Outs.....	205
Locating a Departure	205
Settle the Folio.....	206
Day Use Reservations.....	208
Printing or Emailing a Reservation Folio	208
Example Folio	209
House Accounts.....	210
Creating Additional Folios in the House Accounts	211
Adding a Payment in a House Account	212
Printing or Emailing a House Account Folio	213
Closing a House Account Folio	214
Night Audit.....	215
Preflight Checklist	216
Night Audit Lock	217
Invalid Reservations.....	217
Clear Folios.....	217
Clear Group Folios	217
House Folios	217
Stay Overs	217
No Shows	217
Settle Credit Cards	220
Charge Folios	221
Assign Button.....	221
Increment Date	221
Night Audit Reports	222

Groups	222
Group Wizard	222
Group Room Allotment Set Up	223
Group Data Tab	225
Saving a New Group Reservation	227
Group Folio Tab	227
Availability/Rates Tab	229
Comments Tab	231
Letters Tab	231
Group History Tab	232
Room List Tab	232
Log Tab	232
Entering a Rooming List	233
Attaching a Group to an Existing Reservation	235
Group Check-in	235
Traditional Group Arrival	235
Courtesy Block Arrival	238
Group Check-Out	239
Canceling a Group	241
Group Sync Tool	242
Group Reports	242
Group Meeting Rooms	242
Housekeeping	243
Changing Room Status	243
Front Desk Dashboard	243
Tape Chart	243
Housekeeping Menu	245
Housekeeper Sheets	246
Housekeeping Services	246
City Ledger Accounts	247
Applying a City Ledger Payment to a Folio	247
City Ledger Account Menu	248
Example Statement	249
Example Folio	250
Invoicing	250
Posting Payments to City Ledger Accounts	252
Payments Tab	254
Reports	254
Daily Reports	255
Arrivals	255
Departures	257
In-House	257
Extras	258
Transactions	259
Batch Settlements	261
Cancellation	262
High Balance	263
Reservation Comments	263
Batch Print Reg Cards	265

Do Not Rent Report	266
Offer Best Western Rewards Selected	266
CRS No Host Confirmation Report.....	267
Reservation Error Report	267
Resend Reservation	268
Group Reports	269
Group Summary Report.....	269
Group Revenue	269
Group Detail	270
Group Block	271
Rooming List	271
Housekeeping Reports	272
Housekeeper Sheets.....	272
Turndown.....	272
Vacant Room List.....	273
Room Status.....	274
Out of Order Rooms	275
Manager Reports.....	275
Managers' Report.....	275
Occupancy.....	279
Forecast Report	280
Reservations	281
Revenue.....	282
User Activity	283
Tax Exempt	283
Yield Analysis	284
Accounting Reports	286
Guest Ledger	286
In House Guest Ledger.....	287
City Ledger	287
Advance Deposit Ledger	288
Daily Ledgers Report	289
City Ledger Aging	291
Batch Settlements.....	293
Transactions	293
Transaction Summary	293
Quarterly Report	294
Travel Agent Commissions	295
Interfaces	295
Contact Support and Training.....	296



Welcome

Welcome to AutoClerk's cloud-based property management system: AutoClerk Cloud PMS. This hotel system platform is designed to deliver trusted guest experiences and increase hotel profit.

AutoClerk Cloud is an internet-based web application allowing you to use your PMS from any computer, with just an internet connection, web browser, and a username & password. With over 700 hospitality system integrations, AutoClerk Cloud will allow as many [interface connections](#) as needed to manage your hotel(s). [Support is available 24/7](#) with agents resolving 98% of help tickets within the first call.

We have a growing Facebook community of AutoClerk users who help one another and discuss all things relating to AutoClerk and hotel operations. Our group features all the latest product updates, helpful videos, user feedback and much more! Join at: www.facebook.com/groups/autoclerk

This **Operations Manual** provides step-by-step instructions to get the most out of AutoClerk Cloud allowing you to manage your hotel with ease. Feel free to use the Table of Contents to navigate to a specific topic or use CTRL + F on your keyboard to find specific keywords or phrases.

We hope you enjoy using AutoClerk Cloud as much as we enjoy continuously improving and developing it to be the leading property management system in the industry.

-The AutoClerk Team

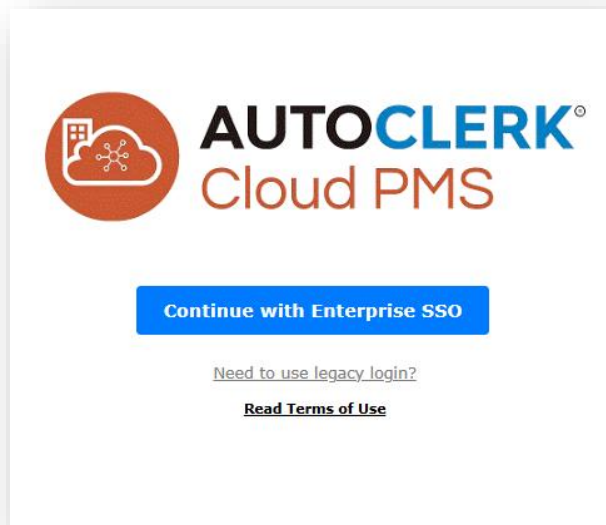
www.autoclerk.com

Logging Into AutoClerk Cloud

The URL for AutoClerk Cloud is <https://www.bwh.autoclerkcloud.com/> for **Best Western Branded Hotels**, and <https://myhms4.com> for our independent properties.

To access AutoClerk Cloud, you'll need a username and password created by a "Hotel Manager" user or higher, who can set a temporary password. Users can only change their own password if the Hotel Manager sets their user to "Force password change on next login".

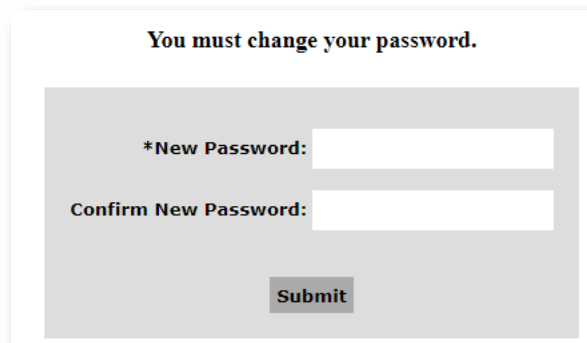
Enter your username and password and click "Login & Accept Terms of Use"; or, **for Best Western Branded Hotels only**, click on the link "Continue with Enterprise SSO" which will prompt you to login with your BWH User ID and password. The Terms of Use are also available via a link.



Independent Hotels: If you are required to change your password on the first login, the next page will ask you to create your own password.

Passwords must meet the following complexity requirements:

1. Password must be of at least 10 characters.
2. Password should not start or end with a space.
3. Password must contain at least 1 special character (such as !@#\$%^).
4. Password must contain at least 1 number.
5. Password must contain at least 1 letter.



SETUP

System

Hotel

The hotel information page can be located under the setup area under the system category. This page will give you the option to enter, edit or view your hotel's general information.

1. **Hotel ID**- This is a unique number assigned to each property by AutoClerk.
2. **Hotel Name**- This is how the name will appear in AutoClerk Cloud.
3. **Identifier**- This is the property number assigned to the hotel. It is used by Best Western to identify individual properties
4. **Toll Free Phone**- If the hotel has a toll-free phone number it can be entered here.
5. **Main Phone**- This is the main phone number for the hotel.
6. **Time Zone**- The hotel's time zone can be selected here.
7. **Address 1 & 2**- The hotel address can be entered here.
8. **Country**- You may select the country of your hotel here.
9. **Zip**- The hotel's zip or postal code.
10. **City**- The hotel's city can be entered here.
11. **State**- The hotel's state can be selected here.
12. **Manager Home Phone**- An optional field, used at the hotel's discretion.
13. **Fax**-This is the fax number for the hotel.
14. **Manager's Cell Phone**- An optional field, used at the hotel's discretion.
15. **Email**- The hotel's property email address where letters and confirmations are sent from. This email can also be used to receive the night audit reports if set up that way.
16. **Enable Auto Email of Confirmation and Cancellation letters**- Checking this box will automatically email out confirmation and cancellation letters.
17. **CC: Email of Confirmation and Cancellation letters** - This is an optional field. If an email address is filled out in this area, it will receive all confirmation and cancellation letters sent out to a guest after a reservation has been made or cancelled.

Hotel ID:	100422
Hotel Name:	XX_Training Team Manual D
Identifier:	ZZ55556
Toll Free Phone:	
Main Phone:	3375142253
Time Zone:	America/Chicago ▼
Identifier Prefix:	ZZ
Address 1:	9565 Egan Highway
Address 2:	
Country:	United States ▼
Zip:	85027
City:	
State:	Arizona ▼
Manager Home Phone:	
Fax:	3375142239
Manager Cell Phone:	
Email:	Trainingteam@gmail.com
Enable Auto Email of Conf and Canc.:	<input type="checkbox"/>
CC: Email of Conf and Canc.:	

Hotel Policies

The hotel's policy information can be located below the hotel's information under the setup area under the system category. In the hotel policies area you will have the option to enter, edit or view your hotel's policies.

Email Subject 1- This field is normally left blank because it will set the subject field in letters, not folios, statements and invoices. There is a place where we can set it for letters, as well as folios, statements, and invoices.

General Policy 1- Hotel's general policies are filled out in this box. These policies will appear on the Confirmation letter and the guest registration card.

Guarantee Policy 1- If you are a Best Western Branded Hotel all your reservations are guaranteed with a Credit Card and that verbiage will be programmed into your letters automatically. This section is only going to be filled out by Independent Hotels using Autoclerk only.

Cancellation Policy 1- If you are a Best Western Branded Hotel your cancellation policies will default to what the specific Rate Plan's cancellation policy has been set up for. The verbiage will be automatically programmed into your letter. This section is only going to be filled out by Independent Hotels using Autoclerk only.

Marketing Message 1- This is typically not used but is useful when creating a group contract or where a property can list their policies that apply to all groups. This field is not used in any other letters.

Hotel Policies

Choose Policies to Edit Hotel Policies 1 ▾

Email Subject 1

General Policy 1

This Property is dedicated to providing its guests, visitors and employees with a safe and healthy environment and is a 100% smoke-free facility. A \$200.00 Smoking fine will be applied if this policy is violated.

Pets up to 30lbs are permitted with an additional \$25 fee per night, max of 1 pet per room. Any unregistered pets will be subject to a Pet fine of \$200.

An Authorization of \$50 per stay will be authorized on a Credit/Debit Card at check. Please be advised if you were to use a debit card it will take approximately 5-7 days for the funds to release.

Guarantee Policy 1

All reservations must be secured with a valid credit card at the time of booking.

Cancellation Policy 1

To avoid a penalty reservations must be canceled within 24 hours by 4pm the day prior to arrival.

Marketing Message 1

The system will support up to three sets of policies with policy 1 being the default. These policies will only work with letters. To change a letter to support a different policy click the drop down next to choose policies to edit and select the policy you would like to apply.

Hotel Policies

Choose Policies to Edit

Hotel Policies 1 ▾
 Hotel Policies 1
 Hotel Policies 2
 Hotel Policies 3

Email Subject

General Policy 1

This Property is dedicated to providing its guests, visitors and employees with a safe and healthy environment and is a 100% smoke-free facility. A \$200.00 Smoking fine will be applied if this policy is violated.

Pets up to 30lbs are permitted with an additional \$25 fee per night, max of 1 pet per room. Any

Guarantee Policy 1

All reservations must be secured with a valid credit card at the time of booking.

Cancellation Policy 1

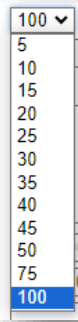
To avoid a penalty reservations must be canceled within 24 hours by 4pm the day prior to arrival.

Marketing Message 1

Search Results Page Size

This will be amount of **search results** that will be displayed on one page when searching for a guest. The maximum amount of search results per page is 100. This amount can be reduced at any time by clicking the drop-down arrow.

Search Result Page Size: 100 ▾



A vertical dropdown menu with a list of numbers. The number 100 is highlighted in blue at the bottom of the list. The numbers in the list are: 5, 10, 15, 20, 25, 30, 35, 40, 45, 50, 75, and 100.

Search Result Page Size:

Timeout Session Duration

The **timeout session duration** is the time that it will take AutoClerk to automatically log a user out of the system after being idle. To set your preferred time, input the amount of time in minutes in the box. If you would like, for example, to set it to 1.5 hours input 90 min the box. The Hotel standard range is between 15 to 30 minutes, but this will be depending on your hotel's policy and how easily your Front Desk can be accessed by a Hotel Guest.

Timeout session duration (minutes)

30

Default Email Subject Line

The **default email subject** line will be the subject line displayed when sending out any hotel letters. This includes confirmations, cancellations, and marketing letters. This subject line can be modified at any time by the hotel.

Default Email Subject

A message from the AutoClerk Cloud University Hotel

Check In Time

The hotel's **check in time** is displayed in military time. This time can be modified by the hotel using the same format.

Check In Time

15:00:00

Check Out Time

The hotel's **check out time** is displayed in military time. This time can be modified by the hotel using the same format.

Check Out Time

12:00:00

Total Number of Rooms

This area identifies the **total number of rooms** the hotel has on the property. This number includes sleeping rooms and any meeting or conference rooms that have been built in.

Total Number of Rooms

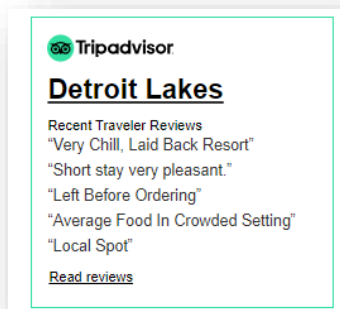
102

Trip Advisor Location ID

The **Trip Advisor location ID** is a unique number specific to your hotel's Trip Advisor page. Entering your hotel's location ID will display a Trip Advisor widget under the hotel's manager **dashboard** allowing you to view all your hotel's most recent reviews.

TripAdvisor Location Id:

81943



Enable Housekeeping Services

Housekeeping Services can be enabled in AutoClerk by checking the **Enable Housekeeping services** box below. Once the services have been enabled, you can input the types of services provided by the hotel.

Enable Housekeeping Services	<input type="checkbox"/>	
Service1:	<input type="text"/>	Default Service
Service2:	<input type="text"/>	
Service3:	<input type="text"/>	
Service4:	<input type="text"/>	

Enable Housekeeping Services	<input checked="" type="checkbox"/>	
Service1:	<input type="text" value="Full Service"/>	Default Service
Service2:	<input type="text" value="Limited Service"/>	
Service3:	<input type="text" value="Towels and Trash Only"/>	
Service4:	<input type="text" value="No Service"/>	

Report Email Addresses

Email addresses can be inputted into this field to receive the three-night audit reports nightly after audit has been completed. These reports include the Manager's Report, Transaction Summary, and Batch Settlements. This field will allow you to enter multiple email addresses by using a comma and space after each email.

Report Email Addresses	<input type="text" value="100000@autoclerk.com,"/>
------------------------	--

Report Email Addresses	<input type="text" value="om, sample@autoclerk.com, "/>
------------------------	---


Make Mobile Phone Mandatory Setting

Hotels can check this box to require a mobile phone number on all reservations. If this will not be a requirement for the hotel this box can be unchecked. **Note: This will not apply to Best Western Branded Hotels as this will automatically be a requirement for all reservations.**

Make Mobile Phone Mandatory	<input type="checkbox"/>
-----------------------------	--------------------------

Make Email Mandatory Setting

Hotels can check this box to require an email address on all reservations. If this will not be a requirement for the hotel, this box can be unchecked.



Make Email Mandatory



Bottom Hotel Setup Buttons

These buttons will be displayed at the very bottom of the hotel settings page.

- **Save**- This button will save your changes while keeping you on the page.
- **Done**- This button will save your changes and bring you back to the dashboard.
- **Undo**- This button will not save any changes you made on the page and bring you back to the dashboard.



Save

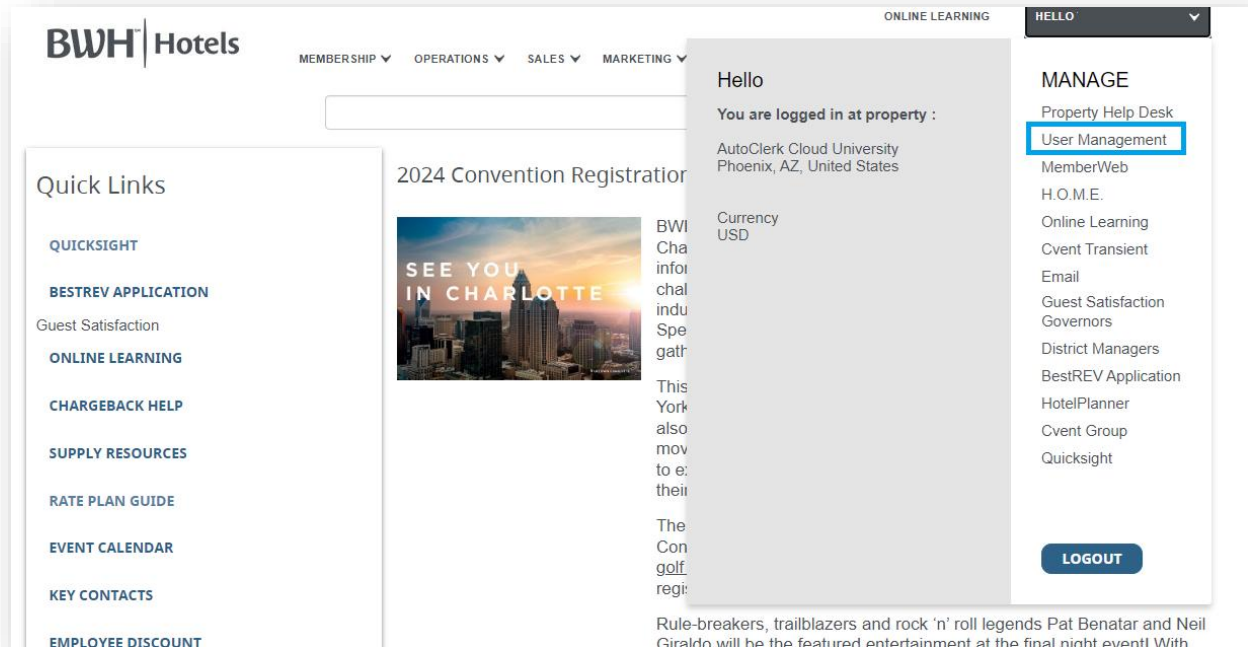
Done

Undo

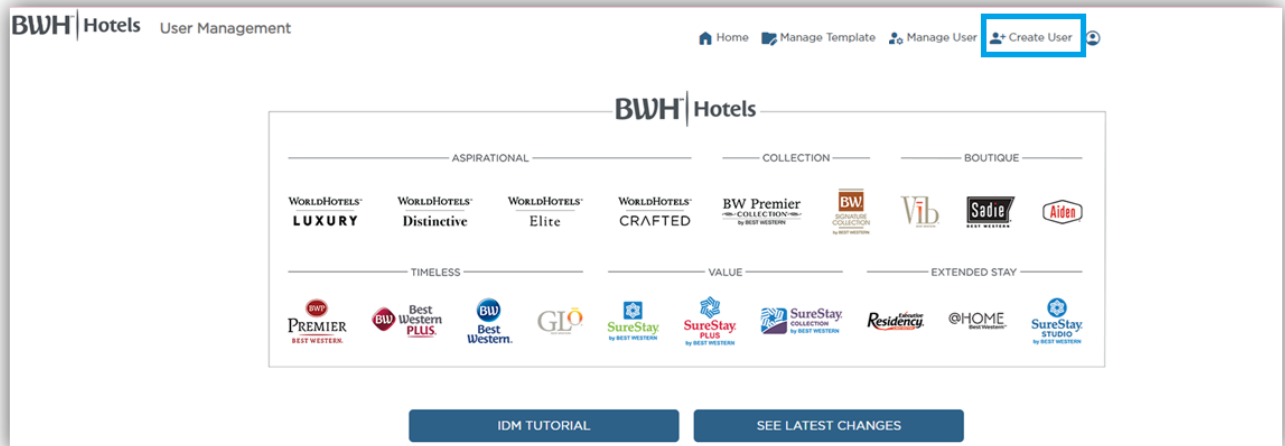
Users

Best Western Branded Hotels-How to Add/Edit a User

To **Add** a new user, start by logging into your Best Western account and selecting “User Management.”



In **User Management**, you will select “Create User.”



Once you have selected **Create User**, you will need to enter the **User Type** and contact information.

Personal Information

User Type *

Property Admin

Property Staff

Last Name *

Initials *

Email *

Property Admin User Role has access to setup user roles, permissions with Best Western. This user can create or manage any user except for another Property Admin User account.

***Usually, the Owner or General Manager of the hotel.**

Property Staff User Roles available are Admin User, Power User, Restricted User, and No User Management

- Admin User- Can create and edit templates. Also, can create or edit a user with or without a template.
 - ***Recommended for Manager roles.**
- Power User- Cannot create or edit templates. But can create or edit a user with or without a template.
 - ***Recommended for Supervisor roles.**
- Restricted User- Cannot create or edit templates. Also, can only create or edit a user using a template.
 - ***Can be a supervisor or Manager role if templates are available, created by a Property Admin or Admin User.**
- No User Management- Does not have user Management privilege. Cannot create or manage users or templates.
 - ***Recommend for all staff members that will not need user management.**

Once a **User Role** and the contact information (Note: an email address is only a required field if creating a Property Admin), verify the property or properties to access and click Next.

****Note: Depending on the IDM user role they may or may not be able to access multiple properties with their account.**

BWH Hotels User Management

Home Manage Template Manage User Create User

Create User

Use Template

Target Template Group

Fetch Templates

Please enter only one value - either propertyID, affiliate code or 'Multi_Property'

Select a template to choose from

Personal Information

User Type *
Property Staff

User Role *
Admin User

First Name *

Last Name *

Initials *

Email

User Status

Active Date *
May 22 2024

Inactive Date

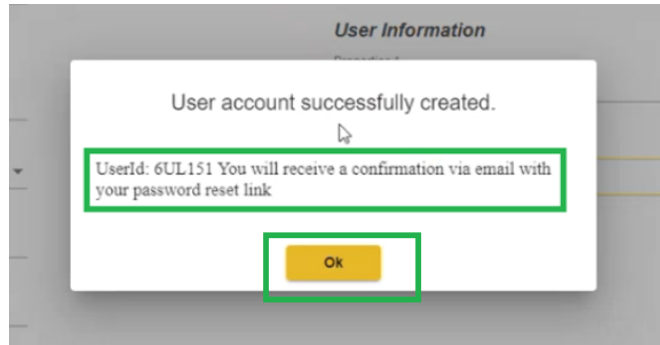
User Information

Properties *

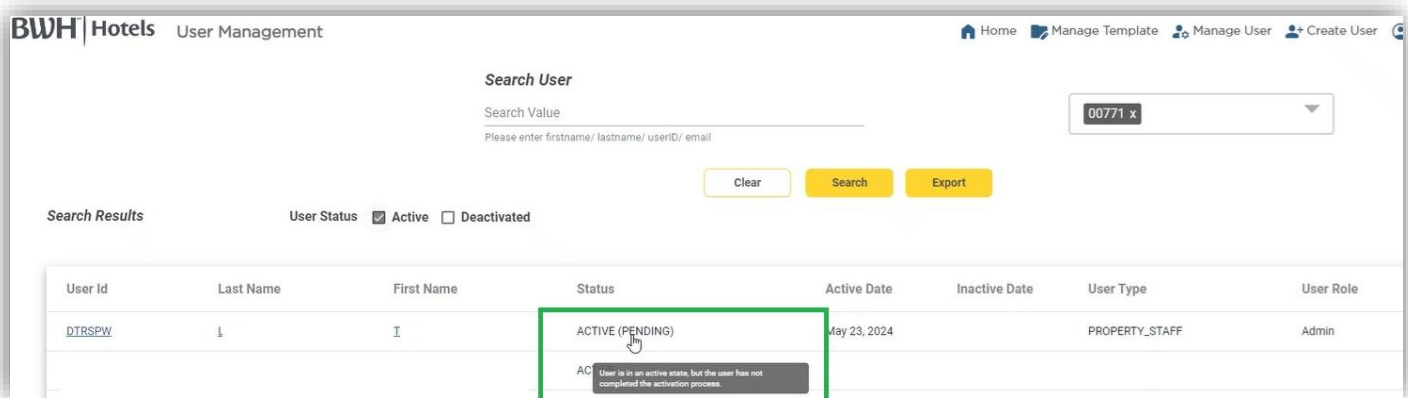
User Groups
click here to select user groups

Clear Next

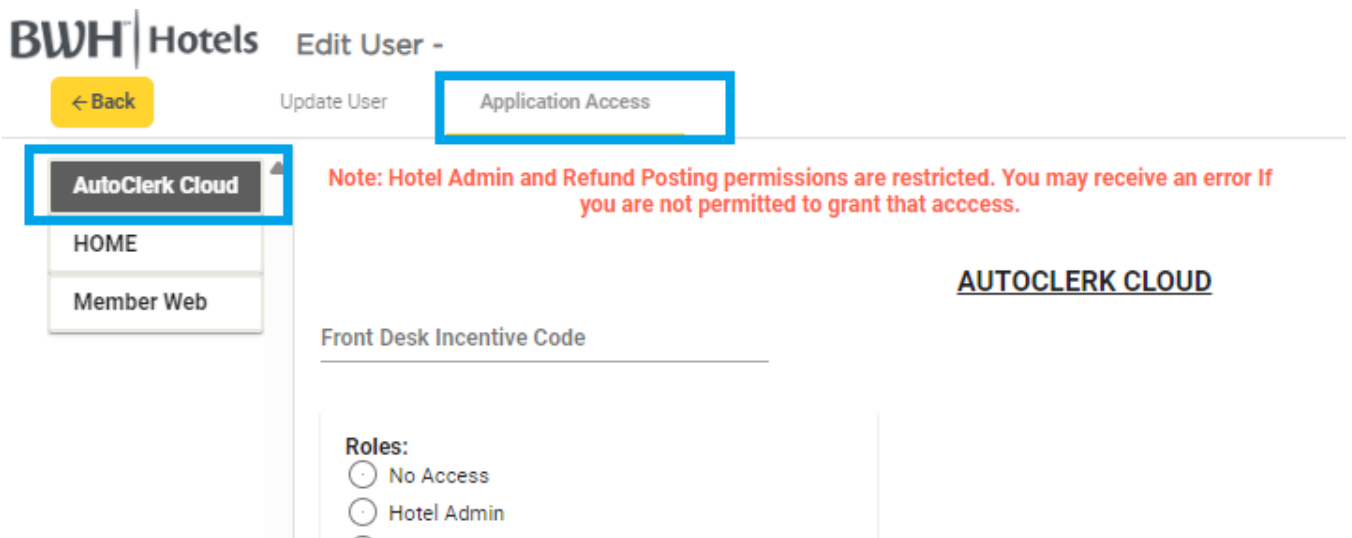
Once you click next, you see the following pop up with the User Id and the user will receive a confirmation email with a password reset link.



Please note: the new user will show as “Active (pending)” until they finish activating their account. Once the user has clicked the link to activate their account and created a password, the manager can assign access to AutoClerk under manager user access.

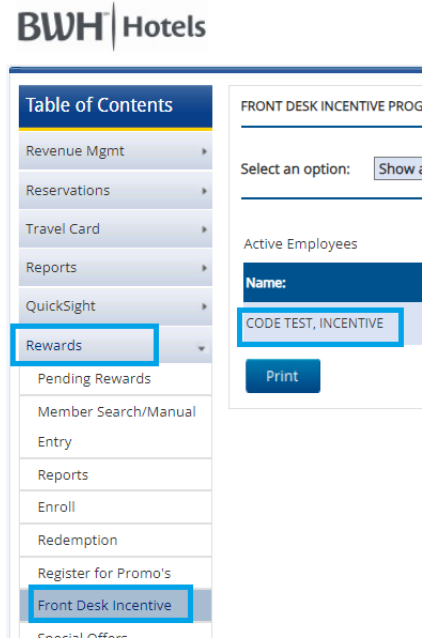


Next, you will select Application Access to give access to multiple areas in BWH. For AutoClerk access, click on the AutoClerk Cloud tab, select role and permissions, click **save** at the bottom of the screen.



In the AutoClerk Cloud tab, you will start entering access for this user. If this user has a front desk incentive code, please enter the last three digits.

*Note this is the user's Insider account number that is property specific, found in Member Web, under **Rewards -> Front Desk Incentive**.



Next, you will select the **Role** in AutoClerk Cloud. Roles and definitions below:

Note: If the user has an existing account in AutoClerk, when logging in the first time with BWH Single Sign on, the user role in IDM and AutoClerk must match (i.e. Hotel Manager in IDM and Hotel Manager in Autoclerk).

Roles:

☒ No Access

-User is Locked out of using AutoClerk Cloud or was never set up with access.

☐ Hotel Admin

-Hotel Admin can perform all hotel operations, hotel Setup, access all reports, and Manager Dashboard.

Note: Highest property role, usually Owner or General Manager. There can be more than one user that has a Hotel Admin role, but if the user has an existing AutoClerk account and signing into BWH Single Sign On for the first time to link accounts, the user role must match. Once the accounts are linked, the user can be changed to the Hotel Admin role in IDM. This is the only role with the ability to assign users the refund posting permission.

- ☐ **Hotel Manager** -Hotel manager can perform all hotel operations, hotel Setup, access all reports, and Manager Dashboard.
Note: Managers and Supervisors of the property should be assigned to this role.
- ☐ **Night Audit** -Night Audit can perform all hotel operations, run night audit and access most reports.
Note: Cannot access hotel Setup or Manager Features.
- ☐ **Staff** -Staff can perform all hotel operations and access limited reports.
Note: This role cannot run the night audit, access hotel Setup, or Manager features.

After selecting the **Role**, you will then check boxes for **Permissions**. List of permissions and definitions below:

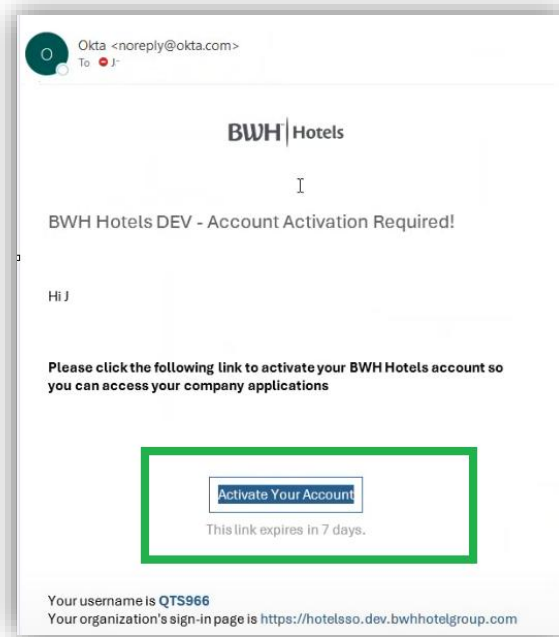
Permissions:

- ☐ **Manual Rate** - Allows a user to manually override a rate as well as any stay restrictions at the hotel.
- ☐ **Over Booking** - Allows a user to overbook a specific room type as well as the overall availability of the property.
- ☐ **Editing On Rate Calendar** - Allows a user to change rates in the Rate Calendar, add notes, and add stay restrictions.
- ☐ **Folio Line Editing** - Allows a user to edit a posting by right click menu to modify, remove, or transfer charges to a different folio or guest.
Note: Caution is recommended as audit trail can be tricky to find.
- ☐ **Group Date Editing** - Allows a user to adjust the calendar on group master to add or remove dates.
- ☐ **Refund Posting** - Allows the user to issue a refund to a credit card that was not used during the stay. They can also issue more back to a credit card than what was originally charged.

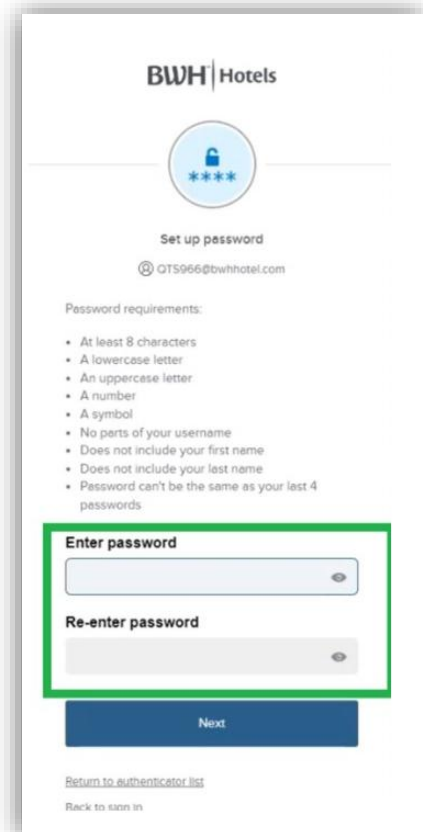
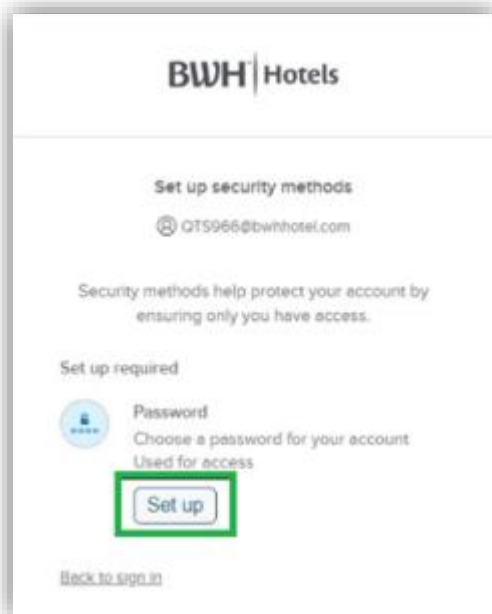
Note: This permission must be assigned by the Hotel Admin.

Once the role and permissions are entered, click save.

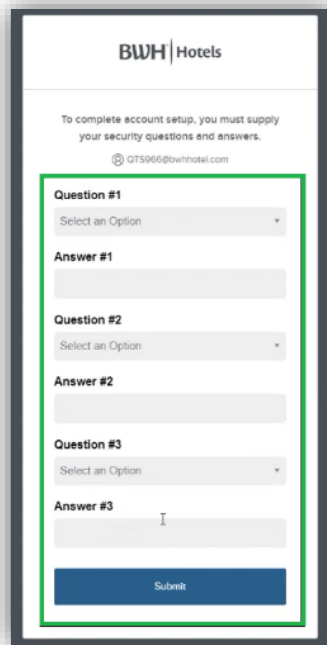
The user will receive an email to **activate their account**.



When the new user clicks on the link it will ask to Set up security methods, then they will click on Set up. The user will then enter a password per the password requirements in Enter password and Re-enter password fields:



To complete account setup, the new user will have to select three Questions for #1 to #3 and enter their answers in the boxes provided in Answer #1 to #3 then click on Submit.



BWH | Hotels

To complete account setup, you must supply your security questions and answers.

QT5966@bwhhotel.com

Question #1

Select an Option

Answer #1

Question #2

Select an Option

Answer #2

Question #3

Select an Option

Answer #3

Submit

Once a user is created in BWH Hotels and given access based on their user role and permissions, the user will login to AutoClerk by selecting “Continue with Enterprise SSO” and using their BWH username or email and password.



AUTOCLERK®
Cloud PMS

Username:

Password:

Login & Accept Terms of Use

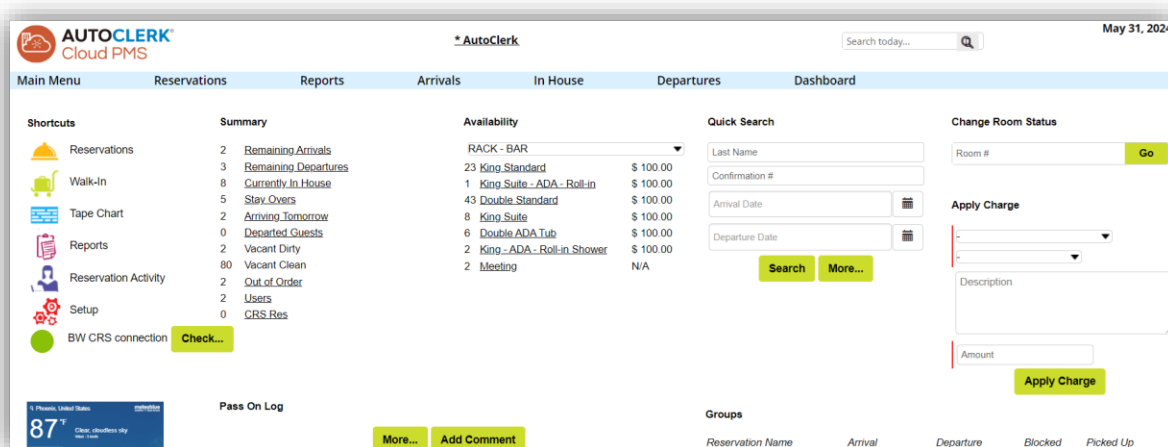
[Read Terms of Use](#)

[Continue with Enterprise SSO](#)

The user will then see the following screen: If the hotel is new to BW and AutoClerk they will select No. If the user already had access to AutoClerk they will select Yes and enter their credentials.



Once either selection has been made, the user will then be logged into AutoClerk and go to the front desk dashboard home page:



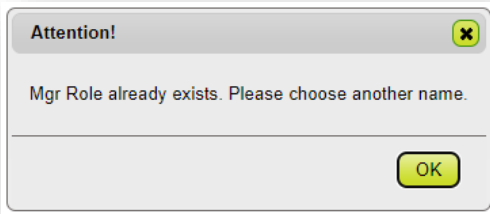
Independent Hotels-How to Add a User

To **Add** a new user, start by selecting add.

Login Name	Full Name	User Level	Locked
<input type="radio"/> <u>adminrole</u>	Admin log on	HTLADM	No
<input type="radio"/> <u>Mgr Role</u>	Manager Role KR	HTLMGR	No
<input type="radio"/> <u>TeamTraining2</u>	TeamTraining 2	HTLMGR	No

Login Name- Once you select add, you need to remove the default user, then create a login name for the new user. It is common to use the first initial and last name. **Note: AutoClerk is a cloud-based system. If a login name is already in use by another property using the AutoClerk**

system, you will receive a popup stating the login name already exists and to choose another name.

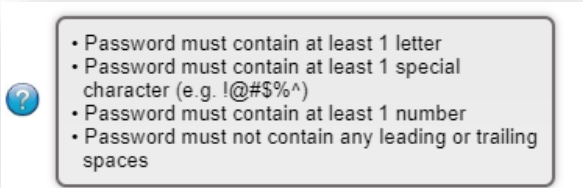


Full Name- Input the full name of the user as required.


Full Name:

Password- Create a password for the user. The password must contain letters, numbers, and a special character. Hovering over the blue question mark will outline the password guidelines.

Password: 



User Role- Assign the new user's role. You can select from Hotel Staff, Night Auditor and Hotel Manager. Any front desk agents who will be working the Night Audit must be assigned the Night Auditor Role.

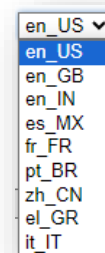
User Role: 
Hotel Staff
Hotel Staff
Night Auditor
Hotel Manager

- **Hotel Staff**- This role will perform your Basic day-to-day functions which include check-ins, check outs, processing refunds to the same credit with an equal or lesser value, and access to limited reports **Note: This role does not have the ability to run the night audit.**
- **Night Auditor**- This role can do everything the hotel staff role can do in addition to running the night audit and having access to most reports. **Note: A staff member will need to be assigned this role to run the properties night audit.**
- **Hotel Manager**- This role can do everything in the system. They will have access to all the reports, the manager dashboard, creating and deleting users and the hotel setup. **Note: Managers and supervisors of the property should be assigned to this role.**
- **Hotel Administrator**- This role has the same privileges as a Hotel Manager in addition to processing refunds to a credit card that was never used at the property or more back to a credit card than what was originally charged. **Note: This role can assign the refund posting person to additional property users.**

User Permissions- Assign the new user their specific permissions based on the hotel's policies and procedures.

- **Permit Manual Rate**- This will allow a user to manually override a rate as well as any stay restrictions at the hotel.
- **Permit Over Booking**- This will allow a user to overbook a specific room type as well as the overall availability of the property.
- **Permit Editing on Rate Calendar**- This will allow a user to make rate changes on the Rate Calendar for a single day or consecutive block of time.
- **Permit Folio Line Editing**- This will allow a user to make edits to a folio posting by clicking on it providing them with a menu to modify, remove, or transfer charges to a different folio or guest. **Note: Caution is recommended when assigning this permission.**
Adjustments using this function can be found on the Transactions report under the description column listed as "null, Invoice".
- **Permit Refund Posting**- This permission is assigned to the designated Hotel Administrator for the property. With this permission, they will be allowed to issue a refund to a credit card that was not used during their stay. They will also be allowed to issue more back to a credit card than what was originally charged. **Note: The Hotel Administrator can decide to give this permission to any user at the property and can even decide not to give themselves this permission as well.**
- **Permit Group Date Editing**- This will allow a user to make changes to group block dates of a stay such as extending them out or shortening them.

Language- If you allow your staff to use Autoclerk in a different language. Select the language preference for the user.



Locked- If a user has attempted multiple failed logins the **locked** box will be checked. This can also be checked intentionally by a member of Hotel Management for any staff member who may be taking a leave or has been suspended.

Locked: ☒

Force Password Change on Next Login- This will automatically be checked when you are creating new users with temporary passwords. This can be intentionally checked if a user has forgotten their password, and a temporary password has been created for them.

Force password change on next login: ☒

Front Desk Incentive Code- This area is for Best Western Branded hotels. This is filled out so a user can earn credit for their enrollments and contribute to the overall property enrollment goal. To receive credit for those enrollments you must enter the last 3-digits of their insider number, which can be looked up in **Member Web**.

Front Desk Incentive Code

Independent Hotels-Editing a User

To make any changes to a user account, select the radio button for the specific user, then click edit or click on the Login name where it is underlined.

Login Name	Full Name	User Level	Locked
<input type="radio"/> <u>adminrole</u>	Admin log on	HTLADM	No
<input type="radio"/> <u>Mgr Role</u>	Manager Role KR	HTLMGR	No
<input checked="" type="radio"/> <u>TeamTraining2</u>	TeamTraining 2	HTLMGR	No

Independent Hotels-Deleting a User

To delete a user account, select the radio button for the specific user, then click delete.

Note: It is critical to delete a user account if employee has been terminated or has resigned from the Hotel.

Login Name	Full Name	User Level	Locked
<input type="radio"/> adminrole	Admin log on	HTLADM	No
<input type="radio"/> Mgr Role	Manager Role KR HTLMGR	HTLMGR	No
<input checked="" type="radio"/> TeamTraining2	TeamTraining 2	HTLMGR	No

Independent Hotels-Bottom User Setup Buttons

- **Save**- This button will save your changes while keeping you on the page.
- **Reset**- This button will reset the page clearing out anything that has been filled out.
- **Done**- This button will save your changes and bring you back to the user setup page.
- **Undo**- This button will not save any changes you made on the page and bring you back to user setup.

Rooms

Room Settings

In this area you can view all the rooms built for your hotel. You can also use the move up and move down buttons to help organize the room types in the order they will appear on the reservation screen.

Note: For Best Western Branded Hotels Only, it is recommended to keep the rooms in the Same Sort order as they are on Memberweb. The Sort Order will be based on the CRS

column.

Title	Name	CRS	Count	Description
<input type="radio"/> <u>K</u>	1 KING BED	K PKJ 1	29	1 KING BED,NSMK,PILLOW,MICRFG,SAFE,CONTINENTAL BREAKFAST
<input type="radio"/> <u>QQ</u>	2 QUEEN BEDS	QQ PKJ 1	43	2 QUEEN BEDS,NSMK,PILLOW,MICRFG,SAFE,CONTINENTAL BREAKFAST
<input type="radio"/> <u>SK</u>	1 KING BED SUITE	SK EYS 1	10	SUITE-1 KING BED,NSMK,PILLOW,MICRFG,SOFBD,CONTINENTAL BREAKFAST
<input type="radio"/> <u>SQQ</u>	2 QUEEN BEDS SUITE	SQQ	10	SUITE-2 QUEEN BEDS,NSMK,SOFBD,CONTINENTAL BREAKFAST
<input type="radio"/> <u>WQQ</u>	ACCESSIBLE - 2 QUEEN BEDS	WQQ	6	ACCESSIBLE - 1 King,MOBACC,BATHTB,MICRFG,NSMK,CONTINENTAL BREAKFAST
<input type="radio"/> <u>WK</u>	ACCESSIBLE - 1 KING BED	WK BPO 1	2	ACCESSIBLE - 1 KING,MOBACC,BATHTB,MICRFG,NSMK,CONTINENTAL BREAKFAST
<input type="radio"/> <u>Banquet Room</u>	BANQUET ROOM		1	Banquet room for 30 people
<div> <div>Move Up</div> <div>Move Down</div> <div>Save Order</div> <div>Phone Extensions</div> </div> <div> <div>Add</div> <div>Edit</div> <div>Delete</div> <div>Done</div> </div>				

Title	Name	CRS	Count	Description
<input type="radio"/> <u>K</u>	1 KING BED	K PKJ 1	29	1 KING BED,NSMK,PILLOW,MICRFG,SAFE,CONTINENTAL BREAKFAST
<input type="radio"/> <u>QQ</u>	2 QUEEN BEDS	QQ PKJ 1	43	2 QUEEN BEDS,NSMK,PILLOW,MICRFG,SAFE,CONTINENTAL BREAKFAST
<input type="radio"/> <u>SK</u>	1 KING BED SUITE	SK EYS 1	10	SUITE-1 KING BED,NSMK,PILLOW,MICRFG,SOFBD,CONTINENTAL BREAKFAST
<input type="radio"/> <u>SQQ</u>	2 QUEEN BEDS SUITE	SQQ	10	SUITE-2 QUEEN BEDS,NSMK,SOFBD,CONTINENTAL BREAKFAST
<input type="radio"/> <u>WQQ</u>	ACCESSIBLE - 2 QUEEN BEDS	WQQ	6	ACCESSIBLE - 1 King,MOBACC,BATHTB,MICRFG,NSMK,CONTINENTAL BREAKFAST
<input type="radio"/> <u>WK</u>	ACCESSIBLE - 1 KING BED	WK BPO 1	2	ACCESSIBLE - 1 KING,MOBACC,BATHTB,MICRFG,NSMK,CONTINENTAL BREAKFAST
<input checked="" type="radio"/> <u>Banquet Room</u>	BANQUET ROOM		1	Banquet Room for 30 People
<div> <div>Move Up</div> <div>Move Down</div> <div>Save Order</div> <div>Phone Extensions</div> </div> <div> <div>Add</div> <div>Edit</div> <div>Delete</div> <div>Done</div> </div>				

How to Add a Room Type

Start by clicking add to be directed to the room type information screen.

Title	Name	CRS	Count	Description
<input type="radio"/> <u>K</u>	1 KING BED	K PKJ 1	29	1 KING BED,NSMK,PILLOW,MICRFG,SAFE,CONTINENTAL BREAKFAST
<input type="radio"/> <u>QQ</u>	2 QUEEN BEDS	QQ PKJ 1	43	2 QUEEN BEDS,NSMK,PILLOW,MICRFG,SAFE,CONTINENTAL BREAKFAST
<input type="radio"/> <u>SK</u>	1 KING BED SUITE	SK EYS 1	10	SUITE-1 KING BED,NSMK,PILLOW,MICRFG,SOFBD,CONTINENTAL BREAKFAST
<input type="radio"/> <u>SQQ</u>	2 QUEEN BEDS SUITE	SQQ	10	SUITE-2 QUEEN BEDS,NSMK,SOFBD,CONTINENTAL BREAKFAST
<input type="radio"/> <u>WQQ</u>	ACCESSIBLE - 2 QUEEN BEDS	WQQ	6	ACCESSIBLE - 1 King,MOBACC,BATHTB,MICRFG,NSMK,CONTINENTAL BREAKFAST
<input type="radio"/> <u>WK</u>	ACCESSIBLE - 1 KING BED	WK BPO 1	2	ACCESSIBLE - 1 KING,MOBACC,BATHTB,MICRFG,NSMK,CONTINENTAL BREAKFAST
<input type="radio"/> <u>Banquet Room</u>	BANQUET ROOM		1	Banquet Room for 30 People
<div> <div>Move Up</div> <div>Move Down</div> <div>Save Order</div> <div>Phone Extensions</div> </div> <div> <div>Add</div> <div>Edit</div> <div>Delete</div> <div>Done</div> </div>				

Note: Anything with a red vertical bar on the room type information screen is a required field when building a room type.

- **Title**- Enter the title of the room, this is how it will appear in AutoClerk Cloud when the front desk goes to select it for a reservation.
- **Room Type Code**- It is recommended to mirror the title, as this is how the room type will appear on reports in Autoclerk. Keeping these the same will make it easy to reference on reports.

- **CRS-** This is how the room type will appear on the booking engines. For Best Western branded hotels, this is the qualifier code which matches your member web. If you need assistance with entering your **CRS Codes-** Please reach out to AutoClerk support. Entering a CRS Code incorrectly could result in out of balance issues for your property in addition to causing connection issues with your CRS. **Note: For independent hotel's using AutoClerk without a CRS this can be determined by the Hotel.**
- **Name-** Entering a name for your room type is optional. Room type names will appear on the reservation form at the very bottom of the page in the guest itinerary and on the guest confirmation letter.
- **Description-** A brief overview of what amenities are in the room. **For example, one king bed, non-smoking, WIFI, microwave, refrigerator, and full breakfast.**
- **Bed Type-** Select which bed type will be in the room from the drop down. For meeting and conference rooms, the bed type will be none.
- **Maximum # of Guests-** Enter the maximum number of guests allowed for the room.
- **# of Beds-** Enter how many beds will be in the room. This includes any sofa beds.
- **Max # of Rollaways-** Enter the maximum number of rollaways allowed for the room.
- **Max # of Cribs-** Enter the maximum number of cribs allowed for the room.
- **Smoking-** Check this box if the room will be a smoking room.
- **Exclude From Occupancy Reports-** Check this box if the room will be a non-sleeping room. **For example a meeting or conference room.**
- **Exclude From Tape Chart-** Check this box if you do not want this room to be visible on the tape chart.
- **Exclude From Housekeeping Reports-** Check this box if you do not want this room to appear on housekeeping reports.

Note: If you add a room type after rate seasons have been created, you will need to manually attach that new room type to all existing Parent rate plan seasons.

When you have finished inputting all your Room Type information click Save.

Room Type

Title

Required Field

Room Type Code

Required Field

CRS Code

Name

Description

Required Field

Long Description(MyRES)

View Description(MyRES)

Bed Type

King

Maximum Number of Guests

0

of Beds

0

Max # of Rollaways

0

Max # of Cribs

0

OK %

0.30

WARN %

0

Smoking

☐

Sort Order

0

Full Image

No Picture

Thumbnail

No Picture

Exclude from Occupancy Reports

☐ (non-Sleeping Room)

Exclude from Tapechart

☐

Exclude from Housekeeping reports

☐

Save

Reset

Done

Undo

Upload

How to Assign a Room Number

Locate the room cell on the right-hand side of the screen. To assign a room number start by selecting add.

Rooms

Move Up

Move Down

Save Order

Add

Delete

In this area you will input the room number you would like to add in the **Title, CRS code, and Room Number boxes**. All three boxes must match.

Remarks- Enter any remarks regarding the room. For example, this room has a lakeview. Anything noted here can be seen on the Tape chart.

Connecting Rooms- Click the drop down and select the room number the room connects to. If the room connects to multiple rooms, click the second drop down and choose the room number the room connects to.

The screenshot shows a form for configuring a room. The fields are as follows:

- Title: 100
- CRS Code: 100
- Room Number: 100
- Remarks: (empty)
- Connecting Rooms: Select Room connected 1 (dropdown menu is open showing room numbers 101-134)
- Has Stair: (checkbox)
- Has Disabled Access: (checkbox)
- Has View: (checkbox)
- View Description: (text area)
- Sort Order: (checkbox)
- Full Image: (checkbox)
- Thumbnail: (checkbox)
- Buttons: Save, Reset, Done (highlighted), Undo, Upload

Note: If you would like your room numbers to appear in a different order. Select the radio button to the left of the room number and use the move up and move down buttons to create your order. Once you have finished select save order.

The 'Rooms' window displays a list of room numbers with radio buttons for selection:

- ☒ 100
- ☐ 104

At the bottom, there are buttons for 'Move Up', 'Move Down', 'Save Order' (highlighted), 'Add', and 'Delete'.

How to Delete a Room Number

To delete a room number from a room type, Select the room number by clicking the radio button to the right. Then click on the radio button for the room number you wish to delete and select delete.

Rooms

☒ 100
☐ 104

Move Up Move Down Save Order

Add Delete

How to Delete a Room Type

To delete a room type, first go into the specific room type and delete all room numbers associated with it. Then select the Radio button next to the left of the room title and click delete.

Title	Name	CRS	Count	Description
<input type="radio"/> <u>K</u>	1 KING BED	K PKJ 1	29	1 KING BED,NSMK,PILLOW,MICRFG,SAFE,CONTINENTAL BREAKFAST
<input type="radio"/> <u>QQ</u>	2 QUEEN BEDS	QQ PKJ 1	43	2 QUEEN BEDS,NSMK,PILLOW,MICRFG,SAFE,CONTINENTAL BREAKFAST
<input type="radio"/> <u>SK</u>	1 KING BED SUITE	SK EYS 1	10	SUITE-1 KING BED,NSMK,PILLOW,MICRFG,SOFBD,CONTINENTAL BREAKFAST
<input type="radio"/> <u>SQQ</u>	2 QUEEN BEDS SUITE	SQQ	10	SUITE-2 QUEEN BEDS,NSMK,SOFBD,CONTINENTAL BREAKFAST
<input type="radio"/> <u>WQQ</u>	ACCESSIBLE - 2 QUEEN BEDS WQQ	WQQ	6	ACCESSIBLE - 1 King,MOBACC,BATHTB,MICRFG,NSMK,CONTINENTAL BREAKFAST
<input type="radio"/> <u>WK</u>	ACCESSIBLE - 1 KING BED WK BPO 12	WK BPO 12		ACCESSIBLE - 1 KING,MOBACC,BATHTB,MICRFG,NSMK,CONTINENTAL BREAKFAST
<input checked="" type="radio"/> <u>Banquet Room</u>	BANQUET ROOM		1	Banquet Room for 30 People

Move Up Move Down Save Order Phone Extensions

Add Edit Delete Done

Title	Name	CRS	Count	Description
<input type="radio"/> <u>K</u>	1 KING BED	K PKJ 1	29	1 KING BED,NSMK,PILLOW,MICRFG,SAFE,CONTINENTAL BREAKFAST
<input type="radio"/> <u>QQ</u>	2 QUEEN BEDS	QQ PKJ 1	43	2 QUEEN BEDS,NSMK,PILLOW,MICRFG,SAFE,CONTINENTAL BREAKFAST
<input type="radio"/> <u>SK</u>	1 KING BED SUITE	SK EYS 1	10	SUITE-1 KING BED,NSMK,PILLOW,MICRFG,SOFBD,CONTINENTAL BREAKFAST
<input type="radio"/> <u>SQQ</u>	2 QUEEN BEDS SUITE	SQQ	10	SUITE-2 QUEEN BEDS,NSMK,SOFBD,CONTINENTAL BREAKFAST
<input type="radio"/> <u>WQQ</u>	ACCESSIBLE - 2 QUEEN BEDS WQQ	WQQ	6	ACCESSIBLE - 1 King,MOBACC,BATHTB,MICRFG,NSMK,CONTINENTAL BREAKFAST
<input type="radio"/> <u>WK</u>	ACCESSIBLE - 1 KING BED WK BPO 12	WK BPO 12		ACCESSIBLE - 1 KING,MOBACC,BATHTB,MICRFG,NSMK,CONTINENTAL BREAKFAST

Move Up Move Down Save Order Phone Extensions

Add Edit Delete Done

Postings

How to Add Taxes

To add taxes select the button for Tax and then click Edit Sub Types.

Home >> Setup >> Postings (Charges, Payments)

Categories		
Name	Report Name	
<input type="radio"/> Room	Room	Edit Sub Types
<input checked="" type="radio"/> Tax	Tax	Edit Sub Types
<input type="radio"/> Misc	Misc	Edit Sub Types
<input type="radio"/> Sundry Shop	Sundry Shop	Edit Sub Types
<input type="radio"/> Phone	Phone	Edit Sub Types

Move down Save Order

Add Edit Delete Done

Next, Select the Add button at the bottom of the screen.

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Tax

Name	Title	Percentage	Flat	Tax Exempt after
<input type="radio"/> OCCTAX1	Occupancy Tax	4.0000	0.00	0
<input type="radio"/> OCCTAX2	Tourism Tax	5.0000	0.00	0
<input type="radio"/> PARISHTAX	Parish Tax	5.5000	0.00	0
<input type="radio"/> SALESTAX	State Sales Tax	4.4500	0.00	0

Move up Move down Save order

Add Edit Delete Done

Two blank cells will appear where you will enter the **Name** of the tax and the **Title** of the tax. The **Name** of the tax is how it will appear on reports. The **Title** of the tax is how it will appear on the folio.

Next, enter the tax percentage or flat tax amount. If the tax becomes exempt after a certain amount of days, enter that number, and click save. When you have finished select done.

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Tax

Name	Title	Percentage	Flat	Tax Exempt after	
<input type="radio"/> OCCTAX1	Occupancy Tax	4.0000	0.00		0
<input type="radio"/> OCCTAX2	Tourism Tax	5.0000	0.00		0
<input type="radio"/> PARISHTAX	Parish Tax	5.5000	0.00		0
<input type="radio"/> SALESTAX	State Sales Tax	4.4500	0.00		0
<input checked="" type="radio"/> BAQTX	Banquet Tax	2.20	0.00		0

Move up Move down Save order

Add Edit Delete Done

Save

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Tax

	Name	Title	Percentage	Flat	Tax Exempt after
<input type="radio"/>	<u>OCCTAX1</u>	Occupancy Tax	4.0000	0.00	0
<input type="radio"/>	<u>OCCTAX2</u>	Tourism Tax	5.0000	0.00	0
<input type="radio"/>	<u>PARISHTAX</u>	Parish Tax	5.5000	0.00	0
<input type="radio"/>	<u>SALESTAX</u>	State Sales Tax	4.4500	0.00	0
<input checked="" type="radio"/>	<u>BAQTX</u>	Banquet Tax	2.2000	0.00	0

How to Change Taxes

To change taxes select the button for Tax and then click Edit Sub Types.

Home >> Setup >> Postings (Charges, Payments)

Categories

	Name	Report Name	
<input type="radio"/>	<u>Room</u>	<u>Room</u>	<input type="button" value="Edit Sub Types"/>
<input checked="" type="radio"/>	<u>Tax</u>	<u>Tax</u>	<input type="button" value="Edit Sub Types"/>
<input type="radio"/>	<u>Misc</u>	<u>Misc</u>	<input type="button" value="Edit Sub Types"/>
<input type="radio"/>	<u>Sundry Shop</u>	<u>Sundry Shop</u>	<input type="button" value="Edit Sub Types"/>
<input type="radio"/>	<u>Phone</u>	<u>Phone</u>	<input type="button" value="Edit Sub Types"/>

Select the tax you would like to edit by clicking on specific Tax Underlined.

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Tax

Name	Title	Percentage	Flat	Tax Exempt after
<input type="radio"/> OCCTAX1	Occupancy Tax	4.0000	0.00	0
<input type="radio"/> OCCTAX2	Tourism Tax	5.0000	0.00	0
<input type="radio"/> PARISHTAX	Parish Tax	5.5000	0.00	0
<input type="radio"/> SALESTAX	State Sales Tax	4.4500	0.00	0
<input checked="" type="radio"/> BAQTX	Banquet Tax	2.2000	0.00	0

Remove the percentage or flat tax you would like to change then enter your new amounts. Click save. When you have finished select done at the bottom.

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Tax

Name	Title	Percentage	Flat	Tax Exempt after
<input type="radio"/> OCCTAX1	Occupancy Tax	4.0000	0.00	0
<input type="radio"/> OCCTAX2	Tourism Tax	5.0000	0.00	0
<input type="radio"/> PARISHTAX	Parish Tax	5.5000	0.00	0
<input type="radio"/> SALESTAX	State Sales Tax	4.4500	0.00	0
<input checked="" type="radio"/> BAQTX	Banquet Tax	<input type="text" value="3.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>

How to Delete a Tax

To delete a tax select the button for Tax and then click Edit Sub Types.

Home >> Setup >> Postings (Charges, Payments)

Categories

Name	Report Name	
<input type="radio"/> Room	Room	<input type="button" value="Edit Sub Types"/>
<input checked="" type="radio"/> Tax	Tax	<input type="button" value="Edit Sub Types"/>
<input type="radio"/> Misc	Misc	<input type="button" value="Edit Sub Types"/>
<input type="radio"/> Sundry Shop	Sundry Shop	<input type="button" value="Edit Sub Types"/>
<input type="radio"/> Phone	Phone	<input type="button" value="Edit Sub Types"/>

Select the tax you would like to delete by clicking on the radio button to the left of the name and selecting delete at the bottom. When you are finished click done.

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Tax

	Name	Title	Percentage	Flat	Tax Exempt after
<input type="radio"/>	OCCTAX1	Occupancy Tax	4.0000	0.00	0
<input type="radio"/>	OCCTAX2	Tourism Tax	5.0000	0.00	0
<input type="radio"/>	PARISHTAX	Parish Tax	5.5000	0.00	0
<input type="radio"/>	SALESTAX	State Sales Tax	4.4500	0.00	0
<input checked="" type="radio"/>	BAQTX	Banquet Tax	3.0000	0.00	0

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Tax

	Name	Title	Percentage	Flat	Tax Exempt after
<input type="radio"/>	OCCTAX1	Occupancy Tax	4.0000	0.00	0
<input type="radio"/>	OCCTAX2	Tourism Tax	5.0000	0.00	0
<input type="radio"/>	PARISHTAX	Parish Tax	5.5000	0.00	0
<input checked="" type="radio"/>	SALESTAX	State Sales Tax	4.4500	0.00	0

Note: If you would like your Taxes to appear in a different order. Select the radio button to the left of the Tax Name and use the move up and move down buttons to create your order. Once you have finished select save order.

How to Add a Charge Category

To add a Charge category start by selecting add at the Bottom.

Home >> Setup >> Postings (Charges, Payments)

Categories		
Name	Report Name	
<input type="radio"/> Room	Room	Edit Sub Types
<input type="radio"/> Tax	Tax	Edit Sub Types
<input type="radio"/> Misc	Misc	Edit Sub Types
<input type="radio"/> Sundry Shop	Sundry Shop	Edit Sub Types
<input type="radio"/> Phone	Phone	Edit Sub Types
Move down		Save Order
Add	Edit	Delete Done

Two blank cells will appear where you will enter the name of the charge category and the report name of the charge category. These names commonly mirror each other. After entering the name and report name for the charge category click save. When you have finished select done.

Home >> Setup >> Postings (Charges, Payments)

Categories		
Name	Report Name	
<input type="radio"/> Room	Room	Edit Sub Types
<input type="radio"/> Tax	Tax	Edit Sub Types
<input type="radio"/> Misc	Misc	Edit Sub Types
<input type="radio"/> Sundry Shop	Sundry Shop	Edit Sub Types
<input type="radio"/> Phone	Phone	Edit Sub Types
<input checked="" type="radio"/> F & B	Food and Beverage	Save
Move down		Save Order Undo
Add	Edit	Delete Done

Home >> Setup >> Postings (Charges, Payments)

Categories		
Name	Report Name	
<input type="radio"/> Room	Room	Edit Sub Types
<input type="radio"/> Tax	Tax	Edit Sub Types
<input type="radio"/> Misc	Misc	Edit Sub Types
<input checked="" type="radio"/> Sundry Shop	Sundry Shop	Edit Sub Types
<input type="radio"/> Phone	Phone	Edit Sub Types
<input type="radio"/> F & B	Food and Beverage	Edit Sub Types
Move down		Save Order
Add	Edit	Delete Done

Note: If you would like your charge categories to appear in a different order. Select the radio button to the left of the category and use the move down button to customize your order. Once you have finished select save order.

How to Delete a Category

To delete a charge category select the button next to the charge category and click delete. A pop will appear asking you to confirm if you want to delete the charge category.

Home >> Setup >> Postings (Charges, Payments)

Categories		
Name	Report Name	
<input type="radio"/> <u>Room</u>	<u>Room</u>	Edit Sub Types
<input type="radio"/> <u>Tax</u>	<u>Tax</u>	Edit Sub Types
<input type="radio"/> <u>Misc</u>	<u>Misc</u>	Edit Sub Types
<input type="radio"/> <u>Sundry Shop</u>	<u>Sundry Shop</u>	Edit Sub Types
<input type="radio"/> <u>Phone</u>	<u>Phone</u>	Edit Sub Types
<input checked="" type="radio"/> <u>F & B</u>	<u>Food and Beverage</u>	Edit Sub Types

www.bwh.autoclerkcloud.com says

Do you really want to delete a category?

How to Edit a Category

To edit a charge category select the radio button next to the Charge Category and click edit or click directly on the name underlined.

Home >> Setup >> Postings (Charges, Payments)

Categories		
	Name	Report Name
<input type="radio"/>	Room	Room
<input type="radio"/>	Tax	Tax
<input type="radio"/>	Misc	Misc
<input checked="" type="radio"/>	Market	Market
<input type="radio"/>	Phone	Phone

Remove the charge category name you would like to change then enter your new name and report name then click save. When you are finished select done at the bottom.

Home >> Setup >> Postings (Charges, Payments)

Categories		
	Name	Report Name
<input type="radio"/>	Room	Room
<input type="radio"/>	Tax	Tax
<input type="radio"/>	Misc	Misc
<input checked="" type="radio"/>	Sundry	Sundry
<input type="radio"/>	Phone	Phone

How to Add a Subcategory

To add a subcategory for a charge category start by selecting the charge category and click edit sub types. Next, select Add.

Home >> Setup >> Postings (Charges, Payments)

Categories		
Name	Report Name	
<input type="radio"/> Room	Room	Edit Sub Types
<input type="radio"/> Tax	Tax	Edit Sub Types
<input type="radio"/> Misc	Misc	Edit Sub Types
<input checked="" type="radio"/> Sundry	Sundry	Edit Sub Types
<input type="radio"/> Phone	Phone	Edit Sub Types
Move down		Save Order
Add	Edit	Delete Done

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Sundry		
Name	Title	
<input type="radio"/> Beverages	Beverages	
<input type="radio"/> Sundries	Sundries	
Move up	Move down	Save order
Add	Edit	Delete Done

Two blank cells will appear where you will enter the **name** of the charge and the **title** of charge. These names commonly mirror each other. After entering the names of the charge click save. If you do not need to apply taxes to the charge, select done at the bottom when finished.

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Sundry		
Name	Title	
<input type="radio"/> Beverages	Beverages	
<input type="radio"/> Sundries	Sundries	
<input type="radio"/> Hot Meals	Hot Meals	Save
Move up	Move down	Save order
Add	Edit	Delete Done

To apply taxes select the radio button next to the subcategory and click edit or click on the charge underlined. A Tax Application Table will appear to the right. Click the drop down and select the tax to apply. **Click Add.** The tax will appear on the application table. If you are applying taxes to multiple charges, select save after you complete each one. When you are finished select done at the bottom of the screen.

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Sundry Shop

Name	Title
<input type="radio"/> Beverages	Beverages
<input checked="" type="radio"/> Hot Meals	Hot Meals
<input type="radio"/> Sundries	Sundries

Save

Move up Move down Save order

Add Edit Delete Done

Tax Application Table

Occupancy Tax ▼

Occupancy Tax

State Sales Tax

Tourism Tax

Parish Tax

Delete

Tax Application Table

State Sales Tax ▼

Add

Delete

Tax Application Table

☐ State Sales Tax

Occupancy Tax ▼

Add

Delete

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Sundry

Name	Title
<input type="radio"/> Beverages	Beverages
<input checked="" type="radio"/> Hot Meals	Hot Meals
<input type="radio"/> Sundries	Sundries

Save

Move up Move down Save order

Add Edit Delete Done

How to Delete a Subcategory

To delete a subcategory select the Radio button next to the subcategory and click Edit Sub Types.

Home >> Setup >> Postings (Charges, Payments)

Categories		
	Name	Report Name
<input type="radio"/>	Room	Room
<input type="radio"/>	Tax	Tax
<input type="radio"/>	Misc	Misc
<input checked="" type="radio"/>	Sundry	Sundry
<input type="radio"/>	Phone	Phone

Select the radio button next to the charge and click delete. When finished select done at the bottom of the screen.

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Sundry

Name	Title
<input type="radio"/> Beverages	Beverages
<input checked="" type="radio"/> Hot Meals	Hot Meals
<input type="radio"/> Sundries	Sundries

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Sundry Shop

Name	Title
<input type="radio"/> Beverages	Beverages
<input type="radio"/> Sundries	Sundries

How to Edit a Subcategory

To edit a subcategory select the radio button next to the charge and click edit sub types.

Home >> Setup >> Postings (Charges, Payments)

Categories

Name	Report Name	
<input type="radio"/> Room	Room	Edit Sub Types
<input type="radio"/> Tax	Tax	Edit Sub Types
<input checked="" type="radio"/> Misc	Misc	Edit Sub Types
<input type="radio"/> Sundry	Sundry	Edit Sub Types
<input type="radio"/> Phone	Phone	Edit Sub Types

Select the Radio button next to the subcategory and click edit or click the underlined on the subcategory. Remove the charge **Name** and **Title** you would like to change then enter your new **Name** and **Title**. Click save. When you are finished select done at the bottom.

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Misc

Name	Title
<input type="radio"/> <u>SMKFEE</u>	Smoking Fee
<input type="radio"/> <u>PET VIO</u>	Pet Violation
<input type="radio"/> <u>PRTYDMG</u>	Property Damage
<input checked="" type="radio"/> <u>SHIP</u>	Shipping And Handling
<input type="radio"/> <u>MISCTAX</u>	Misc Taxable
<input type="radio"/> <u>MISCNOTAX</u>	Misc Non-Taxable

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Misc

Name	Title
<input type="radio"/> <u>SMKFEE</u>	Smoking Fee
<input type="radio"/> <u>PET VIO</u>	Pet Violation
<input type="radio"/> <u>PRTYDMG</u>	Property Damage
<input checked="" type="radio"/> <u>SHIP</u>	Shipping And Handling
<input type="radio"/> <u>MISCTAX</u>	Misc Taxable
<input type="radio"/> <u>MISCNOTAX</u>	Misc Non-Taxable

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Misc

Name	Title
<input type="radio"/> <u>SMKFEE</u>	Smoking Fee
<input type="radio"/> <u>PET VIO</u>	Pet Violation
<input type="radio"/> <u>PRTYDMG</u>	Property Damage
<input checked="" type="radio"/> <u>POSTAGE</u>	Postage
<input type="radio"/> <u>MISCTAX</u>	Misc Taxable
<input type="radio"/> <u>MISCNOTAX</u>	Misc Non-Taxable

Home >> Setup >> Postings (Charges) >> Charge Types

types under category: Misc

Name	Title
<input type="radio"/> SMKFE	Smoking Fee
<input type="radio"/> PET VIO	Pet Violation
<input type="radio"/> PRTYDMG	Property Damage
<input checked="" type="radio"/> POSTAGE	Postage
<input type="radio"/> MISCTAX	Misc Taxable
<input type="radio"/> MISCNOTAX	Misc Non-Taxable

Move up Move down Save order

Add Edit Delete Done

Note: If you would like your subcategories to appear in a different order. Select the radio button to the left of the category and use the move up and move down buttons to customize your order. Once you have finished select save order.

How to Add a Payment Category

Select payments on the top of the postings screen.

Home >> Setup >> Postings (Charges Payments)

Categories

Name	Report Name	
<input type="radio"/> Room	Room	Edit Sub Types
<input type="radio"/> Tax	Tax	Edit Sub Types
<input type="radio"/> Misc	Misc	Edit Sub Types
<input type="radio"/> Sundry	Sundry	Edit Sub Types
<input type="radio"/> Phone	Phone	Edit Sub Types

Move down Save Order

Add Edit Delete Done

To add a new payment category select add at the bottom.

Home >> Setup >> Postings (Charges Payments)

Payment Categories

Name	Report Name	
<input type="radio"/> Cash	Cash	Edit Sub Types
<input type="radio"/> Credit Cards	Credit Cards	Edit Sub Types
<input type="radio"/> Accounts	Accounts	Edit Sub Types

Move down Save Order

Add Edit Delete Done

Two blank cells will appear where you will enter the **Name** of the payment category and the **Report Name**. These names commonly mirror each other. After entering the **Name** and **Report Name** click save. When you have finished select done.

Home >> Setup >> Postings (Charges, Payments)

Payment Categories		
Name	Report Name	
<input type="radio"/> <u>Cash</u>	<u>Cash</u>	Edit Sub Types
<input type="radio"/> <u>Credit Cards</u>	<u>Credit Cards</u>	Edit Sub Types
<input type="radio"/> <u>Accounts</u>	<u>Accounts</u>	Edit Sub Types
<input checked="" type="radio"/> <u>Wire Transfers</u>	<u>Wire Transfers</u>	Save

[Move down](#) [Save Order](#) [Undo](#)
[Add](#) [Edit](#) [Delete](#) [Done](#)

How to Edit a Payment Category

To edit a payment category select the radio button next to the payment category and click edit or click on the specific underlined of the payment category

Home >> Setup >> Postings (Charges, Payments)

Payment Categories		
Name	Report Name	
<input type="radio"/> <u>Cash</u>	<u>Cash</u>	Edit Sub Types
<input type="radio"/> <u>Credit Cards</u>	<u>Credit Cards</u>	Edit Sub Types
<input type="radio"/> <u>Accounts</u>	<u>Accounts</u>	Edit Sub Types
<input checked="" type="radio"/> <u>Wire Transfers</u>	<u>Wire Transfers</u>	Edit Sub Types

[Move down](#) [Save Order](#)
[Add](#) [Edit](#) [Delete](#) [Done](#)

Remove the payment **Name** and **Report Name** you would like to change then enter your new **Name** and **Report Name**. Click save. When you are finished select done at the bottom.

Home >> Setup >> Postings (Charges, Payments)

Payment Categories		
Name	Report Name	
<input type="radio"/> <u>Cash</u>	<u>Cash</u>	Edit Sub Types
<input type="radio"/> <u>Credit Cards</u>	<u>Credit Cards</u>	Edit Sub Types
<input type="radio"/> <u>Accounts</u>	<u>Accounts</u>	Edit Sub Types
<input checked="" type="radio"/> <u>Wire Transfers</u>	<u>Wire Transfers</u>	Save Edit Sub Types

[Move down](#) [Save Order](#)
[Add](#) [Edit](#) [Delete](#) [Done](#)

Home >> Setup >> Postings (Charges, Payments)

Payment Categories		
Name	Report Name	
<input type="radio"/> <u>Cash</u>	<u>Cash</u>	Edit Sub Types
<input type="radio"/> <u>Credit Cards</u>	<u>Credit Cards</u>	Edit Sub Types
<input type="radio"/> <u>Accounts</u>	<u>Accounts</u>	Edit Sub Types
<input checked="" type="radio"/> <u>Direct Deposits</u>	<u>Direct Deposits</u>	Save Edit Sub Types

[Move down](#) [Save Order](#)
[Add](#) [Edit](#) [Delete](#) [Done](#)

Home >> Setup >> Postings (Charges, Payments)

Payment Categories

Name	Report Name	
<input type="radio"/> Cash	Cash	Edit Sub Types
<input type="radio"/> Credit Cards	Credit Cards	Edit Sub Types
<input checked="" type="radio"/> Accounts	Accounts	Edit Sub Types
<input type="radio"/> Direct Deposits	Direct Deposits	Edit Sub Types

Note: If you would like your payment categories to appear in a different order. Select the radio button to the left of the payment category and use the move down button to customize your order. Once you have finished select save order.

How to Delete a Payment Category

To delete a payment category select the button next to the category and click delete at the bottom of the screen.

Home >> Setup >> Postings (Charges, Payments)

Payment Categories

Name	Report Name	
<input type="radio"/> Cash	Cash	Edit Sub Types
<input type="radio"/> Credit Cards	Credit Cards	Edit Sub Types
<input type="radio"/> Accounts	Accounts	Edit Sub Types
<input checked="" type="radio"/> Direct Deposits	Direct Deposits	Edit Sub Types

www.bwh.autoclerkcloud.com says

Do you really want to delete a category?

How to Add a Payment Subcategory

To add a subcategory for a payment category start by selecting the payment category and click edit sub types. Next select Add.

Home >> Setup >> Postings (Charges, Payments)

Payment Categories

Name	Report Name	
<input type="radio"/> Cash	Cash	Edit Sub Types
<input type="radio"/> Credit Cards	Credit Cards	Edit Sub Types
<input checked="" type="radio"/> Accounts	Accounts	Edit Sub Types

Move down Save Order

Add Edit Delete Done

Home >> Setup >> Postings (Payments) >> Payment Types

Payment types under category: Accounts

Name	Title	Guarantee Method
<input type="radio"/> DIRECTBILL	Direct Bill	false
<input type="radio"/> GIFT CARD	GIFT CARD	false
<input type="radio"/> BW STMT	Best Western Statement	false
<input type="radio"/> TC WOFF	Travel Card Write Off	false
<input type="radio"/> WOFF	Write Off	false
<input type="radio"/> COMP	Complimentary Per Manager	false
<input type="radio"/> VISA	VISA*****1234	false

Move up Move down Save order

Add Edit Delete Done

Two blank cells will appear where you will enter the **Name** of the payment type and **Title**. After entering the **Name** and **Title** check the box if this will be a guaranteed payment method. **Click Save**. When you have finished select done.

Note: A guaranteed payment method will appear as an option on the reservation screen when creating a reservation.

Home >> Setup >> Postings (Payments) >> Payment Types

Payment types under category: Accounts

Name	Title	Guarantee Method
<input type="radio"/> DIRECTBILL	Direct Bill	false
<input type="radio"/> GIFT CARD	GIFT CARD	false
<input type="radio"/> BW STMT	Best Western Statement	false
<input type="radio"/> TC WOFF	Travel Card Write Off	false
<input type="radio"/> WOFF	Write Off	false
<input type="radio"/> COMP	Complimentary Per Manager	false
<input type="radio"/> VISA	VISA*****1234	false
<input checked="" type="radio"/> PROMO	Promotional	<input type="checkbox"/>

Move up Move down Save order

Add Edit Delete Done

Save

How to Edit a Payment Subcategory

To edit a Payment subcategory select the Radio button next to the payment subcategory and click edit sub types.

Home >> Setup >> Postings (Charges, Payments)

Payment Categories

Name	Report Name	
<input type="radio"/> <u>Cash</u>	Cash	Edit Sub Types
<input type="radio"/> <u>Credit Cards</u>	Credit Cards	Edit Sub Types
<input checked="" type="radio"/> <u>Accounts</u>	Accounts	Edit Sub Types

Move down Save Order

Add Edit Delete Done

Select the button next to subcategory and click edit or click on the payment subcategory underlined. Remove the payment **Name** and **Title** you would like to change then enter your new **Name** and **Title**. Click save. When you are finished select done at the bottom.

Home >> Setup >> Postings (Payments) >> Payment Types

Payment types under category: Accounts

Name	Title	Guarantee Method
<input type="radio"/> <u>DIRECTBILL</u>	Direct Bill	false
<input checked="" type="radio"/> <u>PROMO</u>	Promotional	false
<input type="radio"/> <u>GIFT CARD</u>	GIFT CARD	false
<input type="radio"/> <u>BW STMT</u>	Best Western Statement	false
<input type="radio"/> <u>TC WOFF</u>	Travel Card Write Off	false
<input type="radio"/> <u>WOFF</u>	Write Off	false
<input type="radio"/> <u>COMP</u>	Complimentary Per Manager	false
<input type="radio"/> <u>VISA</u>	VISA*****1234	false

Move up Move down Save order

Add **Edit** Delete Done

Home >> Setup >> Postings (Payments) >> Payment Types

Payment types under category: Accounts

Name	Title	Guarantee Method
<input type="radio"/> <u>DIRECTBILL</u>	Direct Bill	false
<input checked="" type="radio"/> <u>PROMO</u>	Promotional	<input type="checkbox"/>
<input type="radio"/> <u>GIFT CARD</u>	GIFT CARD	false
<input type="radio"/> <u>BW STMT</u>	Best Western Statement	false
<input type="radio"/> <u>TC WOFF</u>	Travel Card Write Off	false
<input type="radio"/> <u>WOFF</u>	Write Off	false
<input type="radio"/> <u>COMP</u>	Complimentary Per Manager	false
<input type="radio"/> <u>VISA</u>	VISA*****1234	false

Move up Move down Save order

Add Edit Delete Done

Save

Home >> Setup >> Postings (Payments) >> Payment Types

Payment types under category: Accounts

Name	Title	Guarantee Method
<input type="radio"/> <u>DIRECTBILL</u>	Direct Bill	false
<input checked="" type="radio"/>		<input type="checkbox"/>
<input type="radio"/> <u>GIFT CARD</u>	GIFT CARD	false
<input type="radio"/> <u>BW STMT</u>	Best Western Statement	false
<input type="radio"/> <u>TC WOFF</u>	Travel Card Write Off	false
<input type="radio"/> <u>WOFF</u>	Write Off	false
<input type="radio"/> <u>COMP</u>	Complimentary Per Manager	false
<input type="radio"/> <u>VISA</u>	VISA*****1234	false

Move up Move down Save order

Add Edit Delete Done

Save

Home >> Setup >> Postings (Payments) >> Payment Types

Payment types under category: Accounts

Name	Title	Guarantee Method
<input type="radio"/> DIRECTBILL	Direct Bill	false
<input checked="" type="radio"/> VOUCHER	Voucher	<input type="checkbox"/>
<input type="radio"/> GIFT CARD	GIFT CARD	false
<input type="radio"/> BW STMT	Best Western Statement	false
<input type="radio"/> TC WOFF	Travel Card Write Off	false
<input type="radio"/> WOFF	Write Off	false
<input type="radio"/> COMP	Complimentary Per Manager	false
<input type="radio"/> VISA	VISA*****1234	false

Home >> Setup >> Postings (Payments) >> Payment Types

Payment types under category: Accounts

Name	Title	Guarantee Method
<input type="radio"/> DIRECTBILL	Direct Bill	false
<input checked="" type="radio"/> VOUCHER	Voucher	false
<input type="radio"/> GIFT CARD	GIFT CARD	false
<input type="radio"/> BW STMT	Best Western Statement	false
<input type="radio"/> TC WOFF	Travel Card Write Off	false
<input type="radio"/> WOFF	Write Off	false
<input type="radio"/> COMP	Complimentary Per Manager	false
<input type="radio"/> VISA	VISA*****1234	false

Note: If you would like your payment subcategories to appear in a different order. Select the radio button to the left of the category and use the move up and move down buttons to customize your order. Once you have finished select save order.

How to Delete a Payment Subcategory

To delete a payment subcategory select the Radio button next to the payment category and click edit sub types.

Home >> Setup >> Postings (Charges, Payments)

Payment Categories

Name	Report Name
<input type="radio"/> Cash	Cash
<input type="radio"/> Credit Cards	Credit Cards
<input checked="" type="radio"/> Accounts	Accounts

To delete a payment type select the button next to the payment type and click delete at the bottom of the screen.

Home >> Setup >> Postings (Payments) >> Payment Types

Payment types under category: Accounts

Name	Title	Guarantee Method
<input type="radio"/> DIRECTBILL	Direct Bill	false
<input checked="" type="radio"/> VOUCHER	Voucher	false
<input type="radio"/> GIFT CARD	GIFT CARD	false
<input type="radio"/> BW STMT	Best Western Statement	false
<input type="radio"/> TC WOFF	Travel Card Write Off	false
<input type="radio"/> WOFF	Write Off	false
<input type="radio"/> COMP	Complimentary Per Manager	false
<input type="radio"/> VISA	VISA*****1234	false

Extras

How to Add an Existing Charge

For Rollaways and Cribs, start by entering the cost for the item and how many you have in your inventory. Next, select if this will be a reoccurring nightly charge or a one-time charge for the guest stay. Then select the category under which the charge can be selected under the folio setup and which category the revenue will be recorded under. Once you have finished click save at the bottom.

Home >> Setup >> Extras

Extras - System

Reservation Label	Folio Description	Cost Per	Max Inventory	Nightly or Per Stay	Category
<input checked="" type="radio"/> Rollaways	Rollaways	15.0	2	<input checked="" type="radio"/> <input type="radio"/>	Misc
<input type="radio"/> Cribs	Cribs	15.0	1	<input type="radio"/> <input checked="" type="radio"/>	Misc

Extras - User Definable

Reservation Label	Folio Description	Cost Per	Quantity or Checkbox	Nightly or Per Stay	Max Per Room	Category
-------------------	-------------------	----------	----------------------	---------------------	--------------	----------

How to Add a New Charge

To add a new charge click add at the bottom. Enter the name of the charge type you would like to add under reservation label which will appear on the Reservation form and reports. For folio description enter how you would like the description of this charge to appear on the guest folio. Next enter the cost for the Charge and select quantity or checkbox.

Home >> Setup >> Extras

Extras - System

Reservation Label	Folio Description	Cost Per	Max Inventory	Nightly or Per Stay	Category
<input type="radio"/> Rollaways	Rollaways	15.0	2	<input checked="" type="radio"/> <input type="radio"/>	Misc
<input type="radio"/> Cribs	Cribs	15.0	1	<input checked="" type="radio"/> <input type="radio"/>	Misc

Extras - User Definable

Reservation Label	Folio Description	Cost Per	Quantity or Checkbox	Nightly or Per Stay	Max Per Room	Category
<input type="radio"/> Pet Fee	Pet Fee	15.0	<input checked="" type="radio"/> <input type="radio"/>	<input type="radio"/> <input type="radio"/>	2	Misc
<input checked="" type="radio"/> Early Check-In	Early Check-In	10.00	<input type="radio"/> <input checked="" type="radio"/>	<input type="radio"/> <input checked="" type="radio"/>	1	Room

Selecting checkbox will have the item appear on the reservation form as a box to check.

Arrive: 02/28/2023, Nights: 1, Depart: Wed Mar 1 2023

Availability / Rates, Room: Auto, Type: K, Adults: 1, Children: 0, Infants: 0

Rate Plan: RACK- FLEXIBLE RATE, Rate: \$45.00, Confidential Rate: ☐, Stay Total: \$53.53, Balance: \$ 0.00, Tax Exempt: ☐

Rollaways: 0, Cribs: 0, Pet Fee: 0, Early Check-In: ☐

Selecting quantity will display a drop down for how many of the item will be added to the reservation.

Arrive: Tue Feb 28 2023, Nights: 1, Depart: Wed Mar 1 2023

Availability / Rates, Room: Auto, Type: K, Adults: 1, Children: 0, Infants: 0

Rate Plan: RACK- FLEXIBLE RATE, Rate: \$45.00, Confidential Rate: ☐, Stay Total: \$53.53, Balance: \$ 0.00, Tax Exempt: ☐

Rollaways: 0, Cribs: 0, Pet Fee: 0, Early Check-In: ☐

Guest, Best Western, Company, Group, Travel Agent, All Notes

Pet Fee: 0, 1, 2

Next select if this will be a reoccurring nightly charge or a one-time charge for the guest stay. Then select the category under which the charge can be selected under the folio setup and which category the revenue will be recorded under. Once you have finished click save at the bottom.

Home >> Setup >> Extras

Extras - System

Reservation Label	Folio Description	Cost Per	Max Inventory	Nightly or Per Stay	Category
<input type="radio"/> Rollaways	Rollaways	15.0	2	<input checked="" type="radio"/> <input type="radio"/>	Misc
<input type="radio"/> Cribs	Cribs	15.0	1	<input checked="" type="radio"/> <input type="radio"/>	Misc

Extras - User Definable

Reservation Label	Folio Description	Cost Per	Quantity or Checkbox	Nightly or Per Stay	Max Per Room	Category
<input type="radio"/> Pet Fee	Pet Fee	15.0	<input checked="" type="radio"/> <input type="radio"/>	<input type="radio"/> <input type="radio"/>	2	Misc
<input checked="" type="radio"/> Early Check-In	Early Check-In	10.0	<input type="radio"/> <input checked="" type="radio"/>	<input type="radio"/> <input checked="" type="radio"/>	1	Room

To apply taxes select the Charge type. Next click the drop-down on the tax application table to select the tax that will be applied. Then hit add. Click save at the bottom of the screen.

Home >> Setup >> Extras

Extras - System

Reservation Label	Folio Description	Cost Per	Max Inventory	Nightly or Per Stay	Category
<input type="radio"/> Rollaways	Rollaways	15.0	2	<input checked="" type="radio"/> <input type="radio"/>	Misc
<input type="radio"/> Cribs	Cribs	15.0	1	<input checked="" type="radio"/> <input type="radio"/>	Misc

Extras - User Definable

Reservation Label	Folio Description	Cost Per	Quantity or Checkbox	Nightly or Per Stay	Max Per Room	Category
<input type="radio"/> Pet Fee	Pet Fee	15.0	<input checked="" type="radio"/> <input type="radio"/>	<input type="radio"/> <input type="radio"/>	2	Misc
<input checked="" type="radio"/> Early Check-In	Early Check-In	10.0	<input type="radio"/> <input checked="" type="radio"/>	<input type="radio"/> <input checked="" type="radio"/>	1	Room

Add Delete

Save & Exit Save Escape

Tax Application Table

Occupancy Tax

Add

Tax Application Table

Occupancy Tax

Occupancy Tax

State Sales Tax

Tourism Tax

Parish Tax

Home >> Setup >> Extras

Extras - System

Reservation Label	Folio Description	Cost Per	Max Inventory	Nightly or Per Stay	Category
<input type="radio"/> Rollaways	Rollaways	15.0	2	<input checked="" type="radio"/> <input type="radio"/>	Misc
<input type="radio"/> Cribs	Cribs	15.0	1	<input checked="" type="radio"/> <input type="radio"/>	Misc

Extras - User Definable

Reservation Label	Folio Description	Cost Per	Quantity or Checkbox	Nightly or Per Stay	Max Per Room	Category
<input type="radio"/> Pet Fee	Pet Fee	15.0	<input checked="" type="radio"/> <input type="radio"/>	<input type="radio"/> <input type="radio"/>	2	Misc
<input checked="" type="radio"/> Early Check-In	Early Check-In	10.0	<input type="radio"/> <input checked="" type="radio"/>	<input type="radio"/> <input checked="" type="radio"/>	1	Room

Add Delete

Save & Exit Save Escape

How to Delete a Charge

To delete a charge select the radio button next to the charge and click delete. Click save & exit when you are finished on the page.

Note: Rollaways and Cribs are hard coded in AutoClerk. If you will not be using these items, make sure the Cost Per and Inventory fields have a zero.

Home >> Setup >> Extras

Extras - System

Reservation Label	Folio Description	Cost Per	Max Inventory	Nightly or Per Stay			Category
<input type="radio"/> Rollaways	Rollaways	15.0	2	<input checked="" type="radio"/>	<input type="radio"/>		Misc ▼
<input type="radio"/> Cribs	Cribs	15.0	1	<input checked="" type="radio"/>	<input type="radio"/>		Misc ▼

Extras - User Definable

Reservation Label	Folio Description	Cost Per	Quantity or Checkbox	Nightly	or Per	Stay	Max Per Room	Category
<input type="radio"/> Pet Fee	Pet Fee	15.0	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	2 ▼	Misc ▼
<input checked="" type="radio"/> Early Check-In	Early Check-In	10.0	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	1 ▼	Room ▼

Add

Delete

Save & Exit

Save

Escape

Home >> Setup >> Extras

Extras - System

Reservation Label	Folio Description	Cost Per	Max Inventory	Nightly or Per Stay			Category
<input checked="" type="radio"/> Rollaways	Rollaways	15.0	2	<input checked="" type="radio"/>	<input type="radio"/>		Misc ▼
<input type="radio"/> Cribs	Cribs	15.0	1	<input checked="" type="radio"/>	<input type="radio"/>		Misc ▼

Extras - User Definable

Reservation Label	Folio Description	Cost Per	Quantity or Checkbox	Nightly	or Per	Stay	Max Per Room	Category
<input type="radio"/> Pet Fee	Pet Fee	15.0	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	2 ▼	Misc ▼

Add

Delete

Save & Exit

Save

Escape

Budget

How to Set Up a Monthly Budget

To set up a monthly budget start by clicking the plus symbol on the bottom left.

MM/YY	ActualRooms	RoomsSold	RoomRev

Page 1 of 1 No records to view

Start by inputting the two-digit month and two-digit year for your budget. For actual rooms you will take the number of days in the month multiplied by the number of rooms at your hotel. Rooms sold will be your property goal for how many total projected rooms you would like to sell for that month. Room revenue will be your property goal for how much total projected revenue you are looking to earn for that month. Once you have filled in all boxes click submit.

Column Definitions:

MMYY- month and year combination. Use 2 digits for the month and 4 digits for the year separated by /. For example: 01/2016 would be used for January 2016.

ActualRooms- The number of built rooms available x the number of nights in that month. For example at a 200 room hotel for a February with 28 days the value would be $28 \times 200 = 5600$

RoomsSold- The number of rooms you expect to sell for that month. For example, if you expect 70% occupancy at a 200 room hotel the number for a 28 day February would be $(28 \times 200) \times .80 = 4480$

RoomsRevenue- If you expect an ADR of \$125.00 then multiple the number of rooms you expect to sell by the ADR. For example $4480 \times 125.00 = 560000$ (Do not include \$ signs or commas or cents use only whole dollar amounts)

The screenshot shows a web application interface. A modal dialog box titled "Add Record" is open in the foreground. It contains four input fields: "MM/YY", "ActualRooms", "RoomsSold", and "RoomRev". Below these fields are two buttons: "Submit" and "Cancel". In the background, a table is visible with two columns: "Sold" and "RoomRev". The "RoomRev" column contains the value "200000". At the bottom of the screen, a status bar shows "Page 1 of 1" and "View 1 - 1 of 1".

Sold	RoomRev
	200000

This screenshot shows the same "Add Record" dialog box, but now the input fields are populated with data: "MM/YY" is "08/20", "ActualRooms" is "2573", "RoomsSold" is "1500", and "RoomRev" is "50000". The "Submit" button is highlighted with a green border. The background table is now empty. The status bar at the bottom indicates "Page 1 of 1" and "No records to view".

Sold	RoomRev
------	---------

How to Delete a Monthly Budget

To delete a monthly budget entry select the row you would like to delete and select the trash bin on the bottom left. Then select Delete.

Budget Data			
MM/YY	ActualRooms	RoomsSold	RoomRev
11/20	2490	2170	200000
08/20	2573	1500	50000

Delete

Delete selected record(s)?

Delete

Cancel

RoomsSold	RoomRev
2170	200000
500	50000

Hold Types

Best Western Hold Types

This information is for branded Best Western properties Only. This provides you with what the different hold types look like when you make reservations directly through your property.

Best Western Hold Types

CC-GTD - Reservation is guaranteed, Credit Card required.

CC-DEP - Reservation is guaranteed, first night is charged on the guest's Credit Card.

CC-FULLPAY - Reservation is guaranteed, entire stay amount is charged on the guest's Credit Card.

COMPANY - Guarantee by Company Address.

DEP - Sent 1st night payment for deposit.

FULLPAY - Send payment for entire stay to hotel.

PROP PRE-PD - Prepaid at the hotel, obtain refund from destination hotel with cancellation number

GROUPPAY - Guarantee by Group Master

CRS Only Hold Types

This information is for branded Best Western properties. This provides you with what the different hold types look like when the reservations come delivered from Best Western CRS.

CRS Only Hold Types

CENTRAL BILL - Reservation is guaranteed to "CENTRAL BILL". Must not be used on PMS sourced reservations. Since payment is made by original company based on the original booking, in most cases the guest must make changes with the originating booking source only.

TA - Reservation is guaranteed. Travel Agent profile included. Must not be used on PMS sourced reservations.

CORP - Reservation is guaranteed. Corporate profile included. Must not be used on PMS sourced reservations.

VC - Must not be used on PMS sourced reservations.

FIT CB - FIT Central Bill - Must not be used on PMS sourced reservations.

HOLD-GTD - Guarantee waived to a 4PM to 6PM hold time.

PAID - Final Guarantee - Must not be used on PMS sourced reservations.

CC-OCP - Online Credit Card guarantee - Must not be used on PMS sourced reservations.

GTD - Reservation is guaranteed

Cancellations

An Overview of Best Western Cancellation Policies

This information is for branded Best Western properties only. This provides you with what the different cancellation policies look like when reservations are booked. When making a reservation locally or when a reservation delivers from the CRS, the Cancellation code will default to whichever cancellation policy has been set up for the specific Rate Plan.

Note: A 1y Cancellation policy will be make that reservation non-refundable.

Code	Description	Letter Verbiage
<input type="radio"/> 4PM	non-GTD 4pm Hold	Non-Guaranteed Reservation that will be cancelled at 4:00pm hotel local time.
<input type="radio"/> 6PM	non-GTD 6pm Hold	Non-Guaranteed Reservation that will be cancelled at 6:00pm hotel local time.
<input type="radio"/> 24H	24 Hour Cancellation	Guaranteed Reservation. Must be cancelled by 4:00pm the day before arrival date or the Credit card will be charged for the first night Room and Tax.
<input type="radio"/> 48H	48H Hour Cancellation	Guaranteed Reservation. Must be cancelled by 4:00pm 2 days before arrival date or the Credit card will be charged for the first night Room and Tax.
<input type="radio"/> 72H	72H Hour Cancellation	Guaranteed Reservation. Must be cancelled by 4:00pm 3 days before arrival date or the Credit card will be charged for the first night Room and Tax.

Continues Best Western Cancellation Policies

<input type="radio"/>	07D	7 Day Cancellation	Guaranteed Reservation. Must be cancelled by 4:00pm one week (7-days) before arrival date or the Credit card will be charged for the first night Room and Tax.
<input type="radio"/>	14D	14 Day Cancellation	Guaranteed Reservation. Must be cancelled by 4:00pm two week (14-days) before arrival date or the Credit card will be charged for the first night Room and Tax.
<input type="radio"/>	21D	21 Day Cancellation	Guaranteed Reservation. Must be cancelled by 4:00pm three week (21-days) before arrival date or the Credit card will be charged for the first night Room and Tax.
<input type="radio"/>	30D	30 Day Cancellation	Guaranteed Reservation. Must be cancelled by 4:00pm 30 days before arrival date or the Credit card will be charged for the first night Room and Tax.
<input type="radio"/>	60D	60 Day Cancellation	Guaranteed Reservation. Must be cancelled by 4:00pm 60 days before arrival date or the Credit card will be charged for the first night Room and Tax.
<input type="radio"/>	90D	90 Day Cancellation	Guaranteed Reservation. Must be cancelled by 4:00pm 90 days before arrival date or the Credit card will be charged for the first night Room and Tax.
<input type="radio"/>	01Y	1 YEAR Cancellation	Guaranteed Reservation. Must be cancelled by 4:00pm 365 days before arrival date or the Credit card will be charged for the first night Room and Tax.

Revenue Management

An Overview of Stay Restrictions

Best Western Branded Hotels: Implementing stay restrictions allows you to control the types of bookings you accept for certain dates and/or rate levels. This could mean applying a stay restriction to a specific rate level only or managing the length of stay guests can book during high- and low-demand periods for all rate levels.

Independent Hotels: Implementing stay restrictions allows you to control the types of bookings you accept for certain dates and/or rate plans. This could mean applying a stay restriction to a specific rate plan only or managing the length of stay guests can book during high- and low-demand periods for all rate plans.

The Different Types of Stay Restrictions

CLOSE- To close out the hotel entirely for any new reservations to be booked during a certain time.

Close to Arrival- Close to Arrival means that the customer cannot arrive on a specific date, regardless of the planned length of stay.

MinLOS- Minimum length of stay guests are given a minimum number of nights that they must book if they want to arrive on a specific day.

SoftLOS- Soft length of stay guests are given a minimum number of nights that they must book if they want to stay on a specific day. **Note: It does not have to be the arrival date, it could be any day of the stay but must be the required number of total stay days.**

OPEN- To open the hotel back up when a close restriction is in place.

MaxLos- **This is for our independent hotels.** Maximum length of stay guests are given a maximum number of consecutive nights that they can stay at the hotel before having to checkout.

Best Western Branded Users:

The screenshot shows the 'Stay Restriction Setup' form. It includes fields for Title, Begin Date, End Date, Type (with a dropdown menu showing options like CLOSE, Close to Arrival, MinLOS, SoftLOS, and OPEN), Days (with checkboxes for Tue, Wed, Thr, Fri, Sat), Apply to (with checkboxes for All, K, QQ, SK, SQQ, WQQ, WK, and Banquet Room), and And Rate Level (with checkboxes for LEVEL A through LEVEL H). A note states: '*Note: any Stay Restrictions applied to Level A will apply to all Levels A through H and to all Rate Plans'. At the bottom, there are buttons for 'Save & Exit' and 'Escape'.

Independent Users:
How to Input a Stay Restriction

To create a stay restriction start by selecting Add.

- First start by entering a title for the restriction. This will be the reason why the restriction is being applied. Next select your beginning and ending dates for the restriction.
- Next select the type of restriction being applied from the type drop down. This is how the restriction will appear on the rate calendar and in the Availability/Rates screen in AutoClerk Cloud.
- Next select the number of days you would like this restriction applied for as well of the days of the week. Selecting All will only apply the restriction to the selected dates.
- Lastly select the room types and rate levels or rate plans if you are an independent hotel, this restriction will apply to. Selecting Level A will apply to all rate levels. Once you have finished click save and exit.

Best Western Branded Users:

Stay Restriction Setup

Title:

Begin Date:

End Date:

Type:

length:

Days: ☒ All
☒ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thr ☒ Fri ☒ Sat

Apply to Room Types: ☒ All
☒ K ☒ QQ ☒ SK ☒ SQQ ☒ WQQ ☒ WK

**Note: any Stay Restrictions applied to Level A will apply to all Levels A through H and to all Rate Plans.*

And Rate Level:

<input checked="" type="checkbox"/> LEVEL A	BAR and Locally Negotiated Rates
<input checked="" type="checkbox"/> LEVEL B	Rates that have a 15% Discount
<input checked="" type="checkbox"/> LEVEL C	Other Discounts
<input checked="" type="checkbox"/> LEVEL D	Advance Purchase and 20% Discount
<input checked="" type="checkbox"/> LEVEL E	Government Rates
<input checked="" type="checkbox"/> LEVEL F	LEVEL F
<input checked="" type="checkbox"/> LEVEL G	Group Rates
<input checked="" type="checkbox"/> LEVEL H	25% Off Rack

Save & Exit **Escape**

The restriction will appear on the main screen when completed.

☒ View Future Restrictions ☐ View Past Restrictions Date:

Title	Begin Date	End Date	Type	Rate Levels	Applied To
<input type="radio"/> Music Festival	2/28/23	3/1/23	MinLOS 1	A - H	All Room Types
<input checked="" type="radio"/> Music Festival	2/28/23	3/1/23	MinLOS 2	A - H	All Room Types
<input type="radio"/> Close to arrival Test	3/1/24	3/3/24	Close to Arrival 1	A - H	All Room Types
<input type="radio"/> Open	7/6/23	7/8/23	OPEN	A - H	All Room Types
<input type="radio"/> Close	7/6/23	7/8/23	CLOSE 2	A - H	Some Room Types

Add **View** **Escape**

**You must add a new Stay Restriction to modify or override an existing Stay Restriction*

Independent users:

Stay Restriction Setup

Title:

Begin Date:

End Date:

Type:

length:

Days: ☒ All
☒ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thr ☒ Fri ☒ Sat

Apply to Room Types: ☒ All
☒ SQQ ☒ SK ☒ DBLDBL ☒ SQ ☒ ADA ☒ NSKH ☒ KQH ☒ KS ☒ AWS ☒ CONF

And Rate Plan:

☒ All

☒ RACK ☒ 3A ☒ AC ☒ WIR ☒ FX ☒ FX2 ☒ GOV ☒ 3 par ☒ FF ☒ AutoClerk ☒ 10611 ☒ 8769 ☒ GrpROTF ☒ group ☒ GRPCode

☒ FLASHSALE20 ☒ SC ☒ EMP ☒ OTAFLEX2 ☒ RateTest ☒ TA ☒ Long ☒ Toyota ☒ EXPC ☒ SUMM2020 ☒ WKND ☒ NR ☒ ADV ☒

AA ☒ SB2020 ☒ COMP ☒ CLC ☒ AWS ☒ UTR ☒ BKG

Save & Exit **Escape**

The restriction will appear on the main screen when completed.

Home >> Setup >> Stay Restrictions

<input checked="" type="radio"/> View Future Restrictions		<input type="radio"/> View Past Restrictions		Date	<input type="text" value="6/27/24"/>	<input type="button" value="Go"/>
Title		Begin Date	End Date	Type	Applied To	
<input type="radio"/> Music Festival		2/28/23	3/1/23	MinLOS 1	All Room Types	
<input checked="" type="radio"/> Music Festival		2/28/23	3/1/23	MinLOS 2	All Room Types	
<input type="radio"/> CLOSE SWITCH TEST		6/22/20	6/22/20	CLOSE 1	All Room Types	
<input type="radio"/> C		6/20/20	6/20/20	CLOSE 1	All Room Types	
<input type="radio"/> Close		5/17/24	5/17/24	CLOSE 1	All Room Types	
<input type="radio"/> Open		6/19/20	6/21/20	MinLOS 1	All Room Types	

How to Change a Stay Restriction

To change a restriction you must create a new restriction to override the current one. Start by clicking Add.

Note: You must add a new Stay Restriction to modify or override an existing Stay Restriction.

View Future Restrictions		View Past Restrictions		Date			Go
Title	Begin Date	End Date	Type	Rate Levels	Applied To		
<input type="radio"/> Music Festival	2/28/23	3/1/23	MinLOS 1	A - H	All Room Types		
<input type="radio"/> Music Festival	2/28/23	3/1/23	MinLOS 2	A - H	All Room Types		
<input type="radio"/> Close to arrival Test	3/1/24	3/3/24	Close to Arrival 1	A - H	All Room Types		
<input type="radio"/> Open	7/6/23	7/8/23	OPEN	A - H	All Room Types		
<input type="radio"/> Close	7/6/23	7/8/23	CLOSE 2	A - H	Some Room Types		

*You must add a new Stay Restriction to modify or override an existing Stay Restriction

- First start by entering the same title for the restriction you are changing. This will be the reason why the restriction is being applied.
- Next select the same beginning and ending dates for the restriction being changed.
- Next select the type of restriction that will now be applied from the type drop down. This is how the restriction will appear on the rate calendar and in the Availability/Rates screen in AutoClerk Cloud.
- Next select the number of days you would like this restriction applied for as well of the days of the week. Selecting All will only apply the restriction to the selected dates.
- Lastly select the room types and Rate Levels or Rate Plans if you are an independent hotel, this restriction will apply to. Selecting Level A will apply to all rate levels. For independent hotels select room types and rate plans. Once you have finished click save and exit.

Note: To override a MinLOS for 2 nights you must create a new MinLOS for 1 night selecting the same date range.

Note: To override a CLOSE stay restriction you must create a new restriction for the same date range and select OPEN.

Best Western Branded Users:

Stay Restriction Setup

Title

Begin Date

End Date

Type

length

Days ☒ All
☒ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thr ☒ Fri ☒ Sat

Apply to Room Types ☒ All
☒ K ☒ QQ ☒ SK ☒ SQQ ☒ WQQ ☒ WK

**Note: any Stay Restrictions applied to Level A will apply to all Levels A through H and to all Rate Plans.*

And Rate Level

<input checked="" type="checkbox"/> LEVEL A	BAR and Locally Negotiated Rates
<input checked="" type="checkbox"/> LEVEL B	Rates that have a 15% Discount
<input checked="" type="checkbox"/> LEVEL C	Other Discounts
<input checked="" type="checkbox"/> LEVEL D	Advance Purchase and 20% Discount
<input checked="" type="checkbox"/> LEVEL E	Government Rates
<input checked="" type="checkbox"/> LEVEL F	LEVEL F
<input checked="" type="checkbox"/> LEVEL G	Group Rates
<input checked="" type="checkbox"/> LEVEL H	25% Off Rack

Save & Exit **Escape**

Once a new restriction is created it will display on the main screen. The current active restriction will always appear above the old one.

☒ View Future Restrictions ☐ View Past Restrictions Date

Title	Begin Date	End Date	Type	Rate Levels	Applied To
<input checked="" type="radio"/> Music Festival	2/28/23	3/1/23	MinLOS 1	A - H	All Room Types
<input type="radio"/> Music Festival	2/28/23	3/1/23	MinLOS 2	A - H	All Room Types
<input type="radio"/> Close to arrival Test	3/1/24	3/3/24	Close to Arrival 1	A - H	All Room Types
<input type="radio"/> Open	7/6/23	7/8/23	OPEN	A - H	All Room Types
<input type="radio"/> Close	7/6/23	7/8/23	CLOSE 2	A - H	Some Room Types

Add **View** **Escape**

**You must add a new Stay Restriction to modify or override an existing Stay Restriction*

Independent Users:

Stay Restriction Setup

Title

Begin Date

End Date

Type

length

Days ☒ All ☒ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thr ☒ Fri ☒ Sat

Apply to Room Types ☒ All ☒ SQQ ☒ SK ☒ DBLDBL ☒ SQ ☒ ADA ☒ NSKH ☒ KQH ☒ KS ☒ AWS ☒ CONF

And Rate Plan ☒ All ☒ RACK ☒ 3A ☒ AC ☒ WIR ☒ FX ☒ FX2 ☒ GOV ☒ 3 par ☒ FF ☒ AutoClerk ☒ 10611 ☒ 8769 ☒ GrpROTF ☒ group ☒ GRPCode ☒ FLASHSALE20 ☒ SC ☒ EMP ☒ OTAFLEX2 ☒ RateTest ☒ TA ☒ Long ☒ Toyota ☒ EXPC ☒ SUMM2020 ☒ WKND ☒ NR ☒ ADV ☒ AA ☒ SB2020 ☒ COMP ☒ CLC ☒ AWS ☒ UTR ☒ BKG

Save & Exit **Escape**

Once a new restriction is created it will display on the main screen. The current active restriction will always appear above the old one.

Home >> Setup >> Stay Restrictions

☒ View Future Restrictions ☐ View Past Restrictions Date Go

Title	Begin Date	End Date	Type	Applied To
<input checked="" type="radio"/> Music Festival	2/28/23	3/1/23	MinLOS 1	All Room Types
<input type="radio"/> Music Festival	2/28/23	3/1/23	MinLOS 2	All Room Types
<input type="radio"/> CLOSE SWITCH TEST	6/22/20	6/22/20	CLOSE 1	All Room Types
<input type="radio"/> C	6/20/20	6/20/20	CLOSE 1	All Room Types
<input type="radio"/> Close	5/17/24	5/17/24	CLOSE 1	All Room Types
<input type="radio"/> Open	6/19/20	6/21/20	MinLOS 1	All Room Types

Rate Plan Guarantee Cancellation

An Overview of Rate Plan Guarantee Cancellation

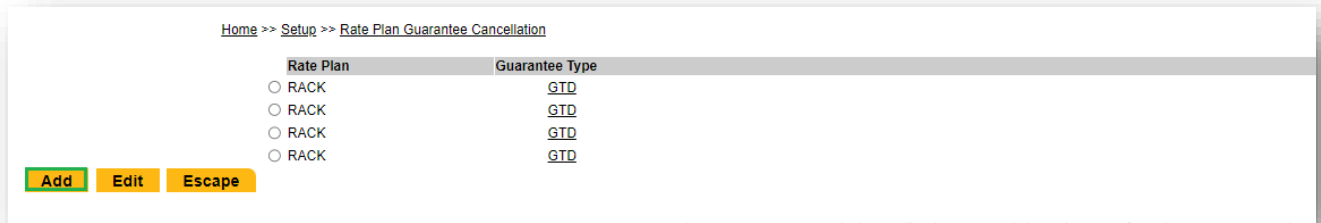
Note: All rate plans have default guarantee and cancellation policies established.

Implementing rate plan guarantee cancellations allows you to set a different policy related to how reservations are guaranteed and allow you to change the cancellation policy. These policies can be changed during stay restriction dates or overall periods of high demand using the rate plan guarantee cancellation.

Note: Rate Plan Guarantee Cancellations will only apply to CRS reservations. Reservations booked locally must have the new cancellation policy manually applied.

How to Add a Rate Plan Guarantee Cancellation

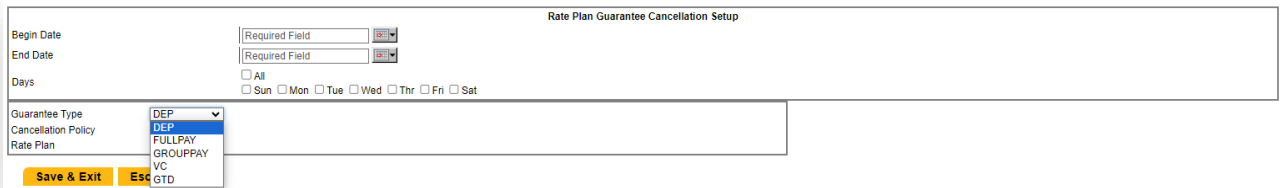
To create a rate plan guarantee cancellation policy start by selecting Add.



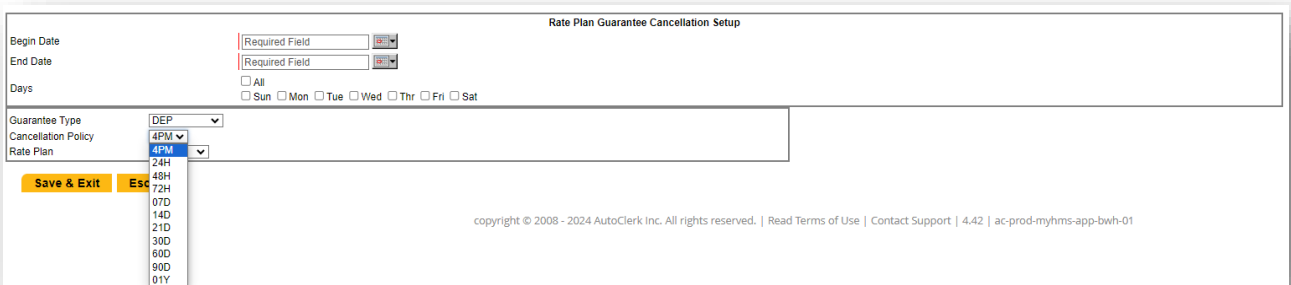
Start by entering the beginning and end dates for the policy. Next select days of the week you would like this policy applied to. Selecting **All** days will only apply the policy to the selected dates.

Next click the drop down for the **Guarantee** type of the policy and select which policy will apply.

- DEP- Deposit
- FULLPAY- Full Pay
- GROUPPAY- Group Pay
- VC- Voucher
- GTD- Guarantee by credit card



Then, click the drop down and select the cancellation policy you will be applying.



Lastly, select the rate plan you will have the guarantee and cancellation policy applied to.

Rate Plan Guarantee Cancellation Setup

Begin Date
End Date
Days ☐ All ☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thr ☐ Fri ☐ Sat

Guarantee Type
Cancellation Policy
Rate Plan

Group 20
Training2
Training
BW
VR
GM
3A
RP
MR
FX
2U
2UB
15A
15D
ABBN
BBRN
BBSN
BC1
BC9

copyright © 2008 - 2024 AutoClerk Inc. All rights reserved. | Read Terms of Use | Contact Support | 4.42 | ac-prod-myhms-app-bwh-01

Click Save & Exit when finished.

Rate Plan Guarantee Cancellation Setup

Begin Date
End Date
Days ☒ All ☒ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thr ☒ Fri ☒ Sat

Guarantee Type
Cancellation Policy
Rate Plan

Once the rate plan guarantee and cancellation is created it will display on the main screen.

Home >> Setup >> Rate Plan Guarantee Cancellation

Rate Plan	Guarantee Type	Cancellation Policy	Begin Date	End Date
<input type="radio"/> RACK	<u>GTD</u>	4PM	7/6/23	7/8/23
<input type="radio"/> RACK	<u>GTD</u>	4PM	4/5/23	4/7/23
<input checked="" type="radio"/> RACK	<u>GTD</u>	07D	2/28/23	3/1/23
<input type="radio"/> RACK	<u>GTD</u>	4PM	3/2/23	3/4/23

Note: You will have to do this process for each rate plan you would like to change the guarantee or cancellation policy terms. For Rate Plan Guarantee Cancellation policies to apply on the CRS, the rules for the Rate Plan must allow them to be changed.

How to Edit a Rate Plan Guarantee Cancellation

To edit a **Rate Plan Guarantee Cancellation**, select the button next to the policy you would like to change and select edit at the bottom or click on the “guarantee type” underlined.

Home >> Setup >> Rate Plan Guarantee Cancellation

Rate Plan	Guarantee Type	Cancellation Policy	Begin Date	End Date
<input type="radio"/> RACK	<u>GTD</u>	4PM	7/6/23	7/8/23
<input type="radio"/> RACK	<u>GTD</u>	4PM	4/5/23	4/7/23
<input checked="" type="radio"/> RACK	<u>GTD</u>	07D	2/28/23	3/1/23
<input type="radio"/> RACK	<u>GTD</u>	4PM	3/2/23	3/4/23

Once you have made the changes to the policy select save and exit.

Rate Plan Guarantee Cancellation Setup

Begin Date: 2/28/23
 End Date: 3/1/23
 Days: ☒ All
☒ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thr ☒ Fri ☒ Sat

Guarantee Type: GTD
 Cancellation Policy: 4PM
 Rate Plan: RACK

Save & Exit **Escape**

Once the rate plan guarantee and cancellation changes have been save it will display on the main screen.

Home >> Setup >> Rate Plan Guarantee Cancellation

Rate Plan	Guarantee Type	Cancellation Policy	Begin Date	End Date
<input type="radio"/> RACK	GTD	4PM	7/8/23	7/8/23
<input type="radio"/> RACK	GTD	4PM	4/5/23	4/7/23
<input checked="" type="radio"/> RACK	GTD	4PM	2/28/23	3/1/23
<input type="radio"/> RACK	GTD	4PM	3/2/23	3/4/23

Add **Edit** **Escape**

Rates

Overview of Building a Rate Plan and its Settings

Upon entering Rates under Revenue Management you will see this screen. There are three different types of display options available on this screen.

- **Locally Managed**- Local Rates built by the property and sold only by the property.
- **CRS**- Rates managed by BW and sold through the BW CRS.
- **All**- All Local and CRS rate plans combined.

Home >> Setup >> Rates

Show: ☒ Locally Managed ☐ CRS ☐ All

Rate Plans	Code	Title	Parent	CRS Code	Rate Level	CRS Only	Description
<p>Move Up Move Down Save Order</p> <p>Add Edit Delete Escape</p>							

Here you will see the Rate plan settings screen.

Home >> Setup >> Rate

Rate Plan

Title Required Field

Rate Code Required Field

CRS Code

Description

Parent (optional)

Discount By %

☒ By Percentage ☐ By Dollar Amount

Confidential Rate ☐

Allow FrontDesk to use this rate? ☐

CRS Rate ☐

Default Market Segment

Make Rate Plan Tax Exempt ☐

Rate Plan Inactive Date

Rate Level

Default Guarantee Policy

Default Cancellation Policy

Send Guarantee/Cancel Policy Updates to CRS ☐

Send Status/Allocation Updates to CRS ☐

Save & Exit **Save** **Escape**

- **Title**- This is the full Title of the rate plan and how it will appear on the reservation form.
- **Rate Code**- How the rate code will be displayed in the system and on reports.
- **CRS Code**- This is how the rate code plan links to the Best Western CRS. When building local rate plans the CRS Code box should be left blank.
- **Description**- This field can be used to enter any notes about the rate. The description can be seen by clicking on Availability / Rates on the reservation form and hovering over the Rate Plan name on the table.
- **Parent**- This will be used when one rate discount value is based off another rate.
- **Confidential Rate**- This box can be checked if the rate will be hidden from the guest. This will suppress the rates from the Confirmation letter and Registration form.
- **Allow Front Desk to use this Rate?** - This box can be checked if the front desk will be allowed to book the rate.
- **CRS Rate**- This box can be checked if this rate will be offered through the Best Western Central reservation system. This should only be selected if it must link to the CRS reservation system.
- **Default Market Segment**- Optional for a market segment to be applied when the Rate Plan is selected.
- **Make Rate Plan Tax Exempt**- If the rate plan will be tax exempt this box can be checked to withhold all or specific taxes.
- **Rate Plan Inactive Date**- A date can be entered if you will only be running this rate plan for a specific time.
- **Rate Levels**- This is the level where that specific rate plan will be living. **Note: This is for Best Western Branded Hotels only.**
- **Default Guarantee Policy**- This is where you will select the guarantee policy for the rate plan. **Note: This is for Best Western Branded Hotels only.**
- **Default Cancellation Policy**- This is where you will select the cancellation policy for the rate plan. **Note: This is for Best Western Branded Hotels only.**
- **Send Guarantee/Cancel Policy Updates to CRS**- CRS rate settings set by Best Western.
- **Send Status/Allocation Updates to CRS**- CRS rate settings set by Best Western.

How to Build a Parent Rate Plan

To build a parent rate plan start by selecting Add.

- Start by entering a title for your rate plan and a Rate Code.
- Enter the CRS code if this will be sold by BW. This code links to the Best Western CRS. When building local rate plans to be sold only by the property the CRS Code box should be left blank.
- Next add any notes in the description box about this rate plan if applicable.
- The parent will be left blank. Only select a parent if the discount value is based off another rate.
- Check the box for Allow Front Desk to use this rate.
- Select the rate level this rate plan will be living. **Note: This is for Best Western Branded Hotels only.**
- Select the Default Guarantee Policy for this rate plan. **Note: This is for Best Western Branded Hotels only.**
- Select the Cancellation policy for this rate plan. **Note: This is for Best Western Branded Hotels only.**
- Click Save.

An Overview of Rate Seasons

After a Parent Rate Plan is built, you will need to create rate seasons. This is where you will input all your hotel rates over certain time periods. Seasons are only built for Parent Rate Plans.

How to Build a Parent Rate Season

To begin creating a new season start by selecting the lime green button New Season.

Home >> Setup >> Rate

Rate Plan

Title: Training

Rate Code: Training

CRS Code:

Description: Training 79.00 Rate

Parent (optional):

Discount By: % 0

☒ By Percentage ☐ By Dollar Amount

Confidential Rate: ☐

Allow FrontDesk to use this rate?: ☒

Allow myRES to use this Rate?: ☐

CRS Rate: ☐

Default Market Segment:

Make Rate Plan Tax Exempt: ☐

Rate Plan Inactive Date:

Rate Level: LEVEL A-BAR

Default Guarantee Policy: CC-GTD

Default Cancellation Policy: 24H

Send Guarantee/Cancel Policy Updates to CRS: ☐

Send Status/Allocation Updates to CRS: ☐

View Past Seasons ☐

Enter a title for your season. For example Winter Season. Next enter the beginning and end dates for this rate season then click Save & Exit.

Note: Seasons can only be built for up to 365 days.

Season Setup

Title: Required Field

Begin Date: Required Field

End Date: Required Field

Season Setup

Title

Begin Date 

End Date 

Save & Exit **Escape**

Once the season is created you can now start inputting your rates. To begin select the lime green button titled Create.

View Past Seasons ☐

New Season

Season	Begin Date	End Date	Lowest Rate	Highest Rate	Last Modified By	Rates
Winter Season	12/2/23	12/31/23			EMills 06-07-2024 11:36:28	create Edit Season

On the top of the season page, you will have the Rate Plan displayed along with the name of the season and dates.

Rate Plan: Training Season: Winter Season Dates: 12-02-2023 to 12-31-2023

Single Rule Adjust rates: (Plus) Flat Alter Rates

☒ All ☒ K ☒ QQ ☒ SK ☒ SQQ ☒ WQQ ☒ WK

<input checked="" type="checkbox"/> Base Rate	<input type="text" value="79"/>	<input type="text" value="79"/>	<input type="text" value="79"/>	<input type="text" value="79"/>	<input type="text" value="79"/>	<input type="text" value="79"/>
<input checked="" type="checkbox"/> Additional Adult	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/> Additional Child	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/> Additional Infant	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/> # Included Adults	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>
<input checked="" type="checkbox"/> Total People Included	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>

Sunday ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday ☒

Save & Exit **Escape**

Also, on the top of the page there are settings for adjusting rates and room types. There is also an Enable **Weekend Rule** that can be enabled if your hotel has rates that are different on Friday and Saturday. Enabling this feature will require you to create separate rates for Sunday through Thursday, Friday and Saturday. If this feature is not enabled, you will have the same rates for Sunday through Saturday.

Note: Once the Weekend Rule feature is enabled it cannot be disabled.

Rate Plan: Training Season: Winter Season Dates: 12-02-2023 to 12-31-2023

Single Rule Adjust rates: (Plus) Flat Alter Rates

☒ All ☒ K ☒ QQ ☒ SK ☒ SQQ ☒ WQQ ☒ WK

<input checked="" type="checkbox"/> Base Rate	<input type="text" value="79"/>	<input type="text" value="79"/>	<input type="text" value="79"/>	<input type="text" value="79"/>	<input type="text" value="79"/>	<input type="text" value="79"/>
<input checked="" type="checkbox"/> Additional Adult	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/> Additional Child	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/> Additional Infant	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/> # Included Adults	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>
<input checked="" type="checkbox"/> Total People Included	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>	<input type="text" value="2"/>

Sunday ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday ☒

Save & Exit **Escape**

Room Type	Base Rate	Additional Adult	Additional Child	Additional Infant	# Included Adults	Total People Included
K	79.00	0.00	0.00	0.00	2	2
QQ	79.00	0.00	0.00	0.00	2	2
SK	79.00	0.00	0.00	0.00	2	2
SQQ	79.00	0.00	0.00	0.00	2	2
WQQ	79.00	0.00	0.00	0.00	2	2
WK	79.00	0.00	0.00	0.00	2	2

Displayed in the center are your room types and rates. On the left-hand side you will see the boxes for Base Rate, Additional Adult, Additional Child, Additional Infant, # of Included Adults, and Total People Included. On the bottom of the page there are options for selecting the day of the week.

Room Type	Base Rate	Additional Adult	Additional Child	Additional Infant	# Included Adults	Total People Included
K	79.00	0.00	0.00	0.00	2	2
QQ	79.00	0.00	0.00	0.00	2	2
SK	79.00	0.00	0.00	0.00	2	2
SQQ	79.00	0.00	0.00	0.00	2	2
WQQ	79.00	0.00	0.00	0.00	2	2
WK	79.00	0.00	0.00	0.00	2	2

Start by selecting the room types you will be inputting rates for. Enter the rate for each specific room type in the base rate box. If you would like to add additional charges for adults and children, you may enter those amounts in the boxes. The difference between the # included adults and the total people included will be charged an additional adult charge of \$10.00, see example below. The SK room type can have up to 4 people included in the room, if more than 2 people are selected on the reservation, the system will add \$10.00 for the third person and add \$10.00 for the fourth person, per night, plus applicable taxes. Select Save & Exit when finished.

Note: If a room type is not selected for a specific rate plan, that room type will not be available to be booked.

Room Type	Base Rate	Additional Adult	Additional Child	Additional Infant	# Included Adults	Total People Included
K	79.00	0.00	0.00	0.00	2	2
QQ	79.00	0.00	0.00	0.00	2	2
SK	79.00	0.00	0.00	0.00	2	2
SQQ	79.00	0.00	0.00	0.00	2	2
WQQ	79.00	0.00	0.00	0.00	2	2
WK	79.00	0.00	0.00	0.00	2	2

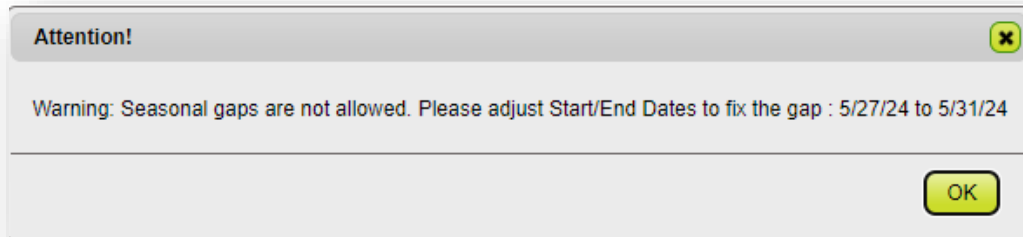
The rate season will now be displayed at the bottom of your rate plan screen.

View Past Seasons ☐

New Season

Season	Begin Date	End Date	Lowest Rate	Highest Rate	Last Modified By	Rates
Winter Season	12/2/23	12/31/23	K \$ 79.00	K \$ 79.00	EMills 06-07-2024 11:43:44	Edit Rates Edit Season

Rate seasons do not allow gaps in dates. If there is a gap between seasons you will receive a warning pop up stating to adjust the Start/End dates to fix the gap.



Note: To view past rate seasons, Select the box View Past Seasons.

View Past Seasons ☒

How to Build a Child Rate Plan

To build a Child Rate Plan start by selecting Add.

Home >> Setup >> Rates

Show: ☒ Locally Managed ☐ CRS ☐ All

Rate Plans Code	Title	Parent	CRS Code	Rate Level	CRS Only	Description
<div> Move Up Move Down Save Order </div> <div> Add Edit Delete Escape </div>						

- Start by entering a title for your rate plan and a Rate Code. Next add some notes in the description box about this rate plan.
- Selecting a parent rate plan the discount value is based off for the rate plan.
- Enter the discount percentage.
- Check the box for Allow Front Desk to use this rate.
- Select the rate level this rate plan will be living. **Note: This is for Best Western Branded Hotels only.**
- Select the Default Guarantee Policy for this rate plan. **Note: This is for Best Western Branded Hotels only.**
- Select the Cancellation policy for this rate plan. **Note: This is for Best Western Branded Hotels only.**
- Click Save.

The season will automatically be created for the rate plan displaying the discounted rate.

Note: Only the red fields are required but you will need to select the Parent Rate Plan, and the Discount Percentage or Dollar Amount the Rate Plan will be discounted by.

Home >> Setup >> Rate

Rate Plan

Title: Training

Rate Code: Training

CRS Code: 18% Off Rack

Description: 18% Off Rack

Parent (optional): RACK-FLEXIBLE RATE

Discount By: % 10.00

☒ By Percentage ☐ By Dollar Amount

Confidential Rate: ☐

Allow FrontDesk to use this rate?: ☒

Allow myRES to use this Rate?: ☐

CRS Rate: ☐

Default Market Segment: -

Make Rate Plan Tax Exempt: ☐

Rate Plan Inactive Date:

Rate Level: LEVEL A-BAR

Default Guarantee Policy: CC-GTD

Default Cancellation Policy: 24H

Send Guarantee/Cancel Policy Updates to CRS: ☐

Send Status/Allocation Updates to CRS: ☐

[Save & Exit](#) [Save](#) [Escape](#)

View Past Seasons ☐

[New Season](#)

Season	Begin Date	End Date	Lowest Rate	Highest Rate	Last Modified By	Rates
Winter Season	12/2/23	12/31/23	K \$ 79.00	K \$ 79.00	EMills 06-07-2024 11:43:44	Edit Rates Edit Season

CRS vs Locally Managed Rate Plans

Locally Managed Rate Plans will be all local rates built by the property.

Home >> Setup >> Rates

Show: ☒ Locally Managed ☐ CRS ☐ All

Code	Title	Parent	CRS Code	Rate Level	CRS Only	Description
<input type="radio"/> Training	Training	RACK		LVLA	<input type="checkbox"/>	10% Off Rack

[Move Up](#) [Move Down](#) [Save Order](#)

[Add](#) [Edit](#) [Delete](#) [Escape](#)

CRS Managed Rate Plans are rates managed by BW but does not mean they can only be booked on Bestwestern.com.

Home >> Setup >> Rates

Show: ☐ Locally Managed ☒ CRS ☐ All

Code	Title	Parent	CRS Code	Rate Level	CRS Only	Description
<input type="radio"/> RACK	RACK-FLEXIBLE RATE		RACK	LVLA	<input checked="" type="checkbox"/>	
<input type="radio"/> BW	BW- REWARDS MEMBER FLEXIBLE RATE	RACK	BW	LVLA	<input checked="" type="checkbox"/>	
<input type="radio"/> VR	VR- REWARDS - 1,000 BONUS POINTS PER NIGHT	RACK	VR	LVLA	<input checked="" type="checkbox"/>	
<input type="radio"/> GM	GM- GOVERNMENT MILITARY	RACK	GM	LVLA	<input checked="" type="checkbox"/>	
<input type="radio"/> 3A	3A- AAA-AND CAA MEMBERS	RACK	3A	LVLA	<input checked="" type="checkbox"/>	

How to Change the Order of Rate Plans

To change the order display for the rate plans. Select the button next to the rate plan you would like to move and use the move up and move down buttons located at the bottom of the screen.

<input type="radio"/> BK9	BK9- BOOKING COM BOOK EARLY AND SAVE	BACK	BK9	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> EC1	EC1- EXPEDIA COLLECT FOR RACK	BACK	EC1	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> EC9	EC9- EXPEDIA COLLECT FOR BOOK EARLY AND SAVE	BACK	EC9	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> EP	EP- EMPLOYEE RATE	BACK	EP	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> EX1	EX1- HOTEL COLLECT FOR RACK	BACK	EX1	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> FF	FF- FRIENDS AND FAMILY RATE	BACK	FF	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> FX2	FX2-PAY WITH POINTS	BACK	FX2	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> GECN	GECN- GENERAL ELECTRIC PREFERRED	BACK	GECN	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> HB1	HB1- HOTELBEDS LEISURE RATE	BACK	HB1	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> HB2	HB2- HOTELBEDS LEISURE RATE 2	BACK	HB2	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> HB9	HB9- HOTELBEDS COLLECT FOR BOOK EARLY AND SAVE	BACK	HB9	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> LC	LC- SPECIAL PROMOTION	BACK	LC	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> LP1	LP1- LEISURE PROGRAM NET RATE	BACK	LP1	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> LP2	LP2- LEISURE PROGRAM NET RATE 2	BACK	LP2	LVLB	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> OI	OI- EXCLUSIVE EMAIL RATE	BACK	OI	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> RPC	RPC- EXPEDIA COLLECT FOR AARP	BACK	RPC	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> SIEN	SIEN- SIEMENS CORPORATION PREFERRED NET	BACK	SIEN	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> SR1	SR1- SELL RATE FOR RACK	BACK	SR1	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> SR9	SR9- SELL RATE FOR BOOK EARLY AND SAVE	BACK	SR9	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> XN	XN- BBW PREFERRED RATE-NET	BACK	XN	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> XW	XW- BBW PREFERRED RATE-COMMISSIONABLE	BACK	XW	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> XZ	XZ- PREFERRED TRAVEL AGENCY RATE	BACK	XZ	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> Z2	Z2- SECONDARY PREFERRED	BACK	Z2	LVLB	<input checked="" type="checkbox"/>
<input type="radio"/> Z7	Z7- BUSINESS ADVANTAGE	BACK	Z7	LVLB	<input checked="" type="checkbox"/>

Points + Cash| Points have already been allocated. Rate on reservation is paid by guest.

Move Up Move Down Save Order

Add Edit Delete Escape

Once you have finished select save order at the bottom of the screen.

Channels

Overview of Channels

The Channels area allows Best Western branded hotel's to control their hotel's Rate Level allotments directly from AutoClerk.

CRS Code	Title
<input type="radio"/> FRONTDESK	Front Desk
<input type="radio"/> BESTWESTERNCRS	BESTWESTERNCRS

Add Edit Delete Done

How to Manage Specific Channel by Rate Level

To manage your allotments by Rate Level start by selecting the radio button next to BESTWESTERNCRS and select edit or clicking directly on the BESTWESTERNCRS underlined.

CRS Code	Title
<input type="radio"/> FRONTDESK	Front Desk
<input checked="" type="radio"/> <u>BESTWESTERNCRS</u>	<u>BESTWESTERNCRS</u>

To Add a new Rate Level Allotment start by selecting Add.

CRS Code:
 Title:
 Default Source:

☐ RACK- FLEXIBLE RATE RACK

	Allotment Title	Rate Level	Set by	Start Date	End Date
<input type="checkbox"/>	<u>Level B</u>	LEVEL B	LEVEL	7/12/23	7/12/25
<input type="checkbox"/>	<u>Level B</u>	LEVEL B	ROOM TYPE	7/12/23	7/12/25
<input type="checkbox"/>	<u>Level F</u>	LEVEL F	LEVEL	7/12/23	7/12/25
<input type="checkbox"/>	<u>Level F</u>	LEVEL F	ROOM TYPE	7/12/23	7/12/25

Allotment Setup
 Allotment Title:
 Begin:
 End:
 Rate Level:
 Do Allotment By: ☐ Room Type ☒ Rate Level
 Overall Allotment:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

First start by inputting an Allotment title for your rate level. **Note: It is recommended to use the Rate Level name to mirror Member Web.**

Next, set the Beginning and End dates for the allotment period. **Note: These may also be set up as seasons for the rate allotments for any specific period. It is required to have at least 18 months of allotments built out.**

Next, select the rate level you will be setting the allotments for. After you have selected the Rate Level click on the radio below titled Rate Level.

Lastly, in the Overall Allotment area input the total number of rooms you will allocate to the Rate Level.

Once finished select Done.

Bottom Allotment Setup Buttons

- **Save**- This button will save your changes while keeping you on the page.
- **Reset**- This button will reset the page clearing out anything that has been filled out.
- **Done**- This button will save your changes and bring you back to the user setup page.
- **Undo**- This button will not save any changes you made on the page and bring you back to Channel page.

How to Manage Specific Channel by Room Type

To manage your allotments by Room Type start by selecting the radio button next to BESTWESTERNCRS and select edit or clicking directly on the BESTWESTERNCRS hyperlink.

To add Allotments to a Rate Level by Room Type start by selecting Add.

CRS Code

Title

Default Source

Rate Allocation

☐ RACK- FLEXIBLE RATE RACK

	Allotment Title	Rate Level	Set by	Start Date	End Date
<input type="checkbox"/>	<u>Level B</u>	LEVEL B	LEVEL	7/12/23	7/12/25
<input type="checkbox"/>	<u>Level B</u>	LEVEL B	ROOM TYPE	7/12/23	7/12/25
<input type="checkbox"/>	<u>Level F</u>	LEVEL F	LEVEL	7/12/23	7/12/25
<input type="checkbox"/>	<u>Level F</u>	LEVEL F	ROOM TYPE	7/12/23	7/12/25

Allotment Setup

Allotment Title

Begin

End

Rate Level

Do Allotment By: ☒ Room Type ☐ Rate Level

Room Type	Total Rooms	Hard
K	29	
QQ	43	
SK	10	
SDQ	10	
WOO	6	
VRK	2	

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

First start by inputting an Allotment title for your rate level. **Note: It is recommended to use the Rate Level name to mirror Member Web.**

Next, set the Beginning and End dates for the allotment period. **Note: These may also be set up as seasons for the rate allotments for any specific period. It is required to have at least 18 months of allotments built out.**

Next, select the rate level you will be setting the allotments for. After you have selected the Rate Level click on the radio below titled Room Type.

Below you will see a list of all the room types for your hotel. In the column labeled **Hard** will indicate how many rooms you would like to allocate for each room type for that Rate Level based on the total allocations for that Rate Level.

Once finished select Done.

Allotment Setup

Allotment Title:
 Begin:
 End:
 Rate Level:
 Do Allotment By: ☒ Room Type ☐ Rate Level

Room Type	Total Rooms	Hard
K	29	10
QD	43	10
SK	10	2
SDQ	10	2
WQD	8	1
WK	2	1

Sunday ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☒ Saturday ☒

Rate Levels (Best Western Branded Hotels)

Overview of Rate Levels

Rate levels create a simplified approach to managing the availability of your hotel by grouping similar rate plans together into one rate level, or "bucket". These levels, or "buckets," then allow you to manage availability for all rate plans in a level at one time instead of updating each individual rate plan separately.

In this area you will find all the Rate Levels active for your hotel.

Description (50 Character Max)		
LEVEL A	<input type="text" value="BAR"/>	<input type="text" value="BAR and Locally Negotiated Rates"/>
LEVEL B	<input type="text" value="Leisure"/>	<input type="text" value="Rates that have a 15% Discount"/>
LEVEL C	<input type="text" value="Other"/>	<input type="text" value="Other Discounts"/>
LEVEL D	<input type="text" value="AdvPur - 20%"/>	<input type="text" value="Advance Purchase and 20% Discount"/>
LEVEL E	<input type="text" value="Government"/>	<input type="text" value="Government Rates"/>
LEVEL F	<input type="text" value="LEVEL F"/>	<input type="text" value="LEVEL F"/>
LEVEL G	<input type="text" value="Groups"/>	<input type="text" value="Group Rates"/>
LEVEL H	<input type="text" value="None"/>	<input type="text" value="None"/>

On the left-hand side you will see the Rate Level name displayed and on the right-hand side will be an additional description about that rate level.

How to Add a Rate Level

To add a rate level start by creating the level name to the left and then enter a brief description about that level on the right. Click save.

Note: Rate levels must be created on the Best Western side prior to adding them in AutoClerk.

Description (50 Character Max)		
LEVEL A	BAR	BAR and Locally Negotiated Rates
LEVEL B	Leisure	Rates that have a 15% Discount
LEVEL C	Other	Other Discounts
LEVEL D	AdvPur - 20%	Advance Purchase and 20% Discount
LEVEL E	Government	Government Rates
LEVEL F	LEVEL F	LEVEL F
LEVEL G	Groups	Group Rates
LEVEL H	None	None

Save & Exit Save Escape

Below you can see the new rate level displayed.

Description (50 Character Max)		
LEVEL A	BAR	BAR and Locally Negotiated Rates
LEVEL B	Leisure	Rates that have a 15% Discount
LEVEL C	Other	Other Discounts
LEVEL D	AdvPur - 20%	Advance Purchase and 20% Discount
LEVEL E	Government	Government Rates
LEVEL F	LEVEL F	LEVEL F
LEVEL G	Groups	Group Rates
LEVEL H	25% Off Rack	25% Off Rack

Save & Exit Save Escape

To change a rate level start by removing the level name and description.

Description (50 Character Max)		
LEVEL A	BAR	BAR and Locally Negotiated Rates
LEVEL B	Leisure	Rates that have a 15% Discount
LEVEL C	Other	Other Discounts
LEVEL D	AdvPur - 20%	Advance Purchase and 20% Discount
LEVEL E	Government	Government Rates
LEVEL F	LEVEL F	LEVEL F
LEVEL G	Groups	Group Rates
LEVEL H	25% Off Rack	25% Off Rack

Save & Exit Save Escape

Description (50 Character Max)		
LEVEL A	BAR	BAR and Locally Negotiated Rates
LEVEL B	Leisure	Rates that have a 15% Discount
LEVEL C	Other	Other Discounts
LEVEL D	AdvPur - 20%	Advance Purchase and 20% Discount
LEVEL E	Government	Government Rates
LEVEL F	LEVEL F	LEVEL F
LEVEL G	Groups	Group Rates
LEVEL H	None	None

Save & Exit Save Escape

Next, enter your new level name and description then click save.

Description (50 Character Max)		
LEVEL A	BAR	BAR and Locally Negotiated Rates
LEVEL B	Leisure	Rates that have a 15% Discount
LEVEL C	Other	Other Discounts
LEVEL D	AdvPur - 20%	Advance Purchase and 20% Discount
LEVEL E	Government	Government Rates
LEVEL F	LEVEL F	LEVEL F
LEVEL G	Groups	Group Rates
LEVEL H	15% discount	15% discount

Save & Exit Save Escape

To remove a rate level start by removing the level name and description. These fields will remain blank. Then click save.

Description (50 Character Max)		
LEVEL A	BAR	BAR and Locally Negotiated Rates
LEVEL B	Leisure	Rates that have a 15% Discount
LEVEL C	Other	Other Discounts
LEVEL D	AdvPur - 20%	Advance Purchase and 20% Discount
LEVEL E	Government	Government Rates
LEVEL F	LEVEL F	LEVEL F
LEVEL G	Groups	Group Rates
LEVEL H	15% discount	15% discount

Save & Exit Save Escape

Description (50 Character Max)		
LEVEL A	BAR	BAR and Locally Negotiated Rates
LEVEL B	Leisure	Rates that have a 15% Discount
LEVEL C	Other	Other Discounts
LEVEL D	AdvPur - 20%	Advance Purchase and 20% Discount
LEVEL E	Government	Government Rates
LEVEL F	LEVEL F	LEVEL F
LEVEL G	Groups	Group Rates
LEVEL H	None	None

Save & Exit Save Escape

Marketing

Overview of Letters

In this area you will find all your pre-set letters that have been loaded for your property. If you are part of the Best Western brand, letters have been loaded per your assigned brand.

In this area you will also find your Batch Print Reg Card, Auto Confirmation and Auto Cancellation settings.

Letters are coded in HTML and will require support assistance to be edited.

Letters							
Style	Type	File Type	myResConfirmation	Batch Print	Reg Card	Auto Confirmation	Auto Cancellation
<input type="radio"/> Best Western - Confirmation	CONFIRMATION	HTML	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="radio"/> Best Western - Registration No Comments	REGCARD	HTML		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/> Best Western - Registration	REGCARD	HTML		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/> Best Western - eReg	E-REG CARD	HTML		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/> Best Western - Cancellation	CANCELLATION	HTML		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="radio"/> Best Western - Thank You	THANKYOU	HTML		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/> Best Western - Group Block	CONFIRMATION	HTML	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/> Best Western - Group Rooming List	CONFIRMATION	HTML	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/> Best Western - Group Cancellation	CANCELLATION	HTML		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/> BWR English Welcome Letter	BWWelcomeLetterEnglish	HTML		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/> BWR Spanish Welcome Letter	MARKETING	HTML		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/> BWR French Welcome Letter	BWWelcomeLetterFrench	HTML		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="button" value="Move Up"/> <input type="button" value="Move Down"/> <input type="button" value="Save Order"/>							
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Update"/> <input type="button" value="Save & Exit"/> <input type="button" value="Undo"/>							

Letter

Style

Best Western - Confirmation

Type

CONFIRMATION

Content

```

<meta http-equiv="Content-Type" content="text/html;
charset=UTF-8"><meta charset="utf-8"><meta
name="viewport" content="width=device-width, initial-
scale=1.0">
<style><!--
#outlook a {padding: 0;}      .ReadMsgBody {width: 100%;}
.ExternalClass {width: 100%;} .ExternalClass,
.ExternalClass p, .ExternalClass span,
.ExternalClass font, .ExternalClass td, .ExternalClass
div {line-height: 100%;}      body, table, td, a {-
webkit-text-size-adjust: 100%; -ms-text-size-adjust:
100%;}      table, td {mso-table-lspace: 0pt; mso-table-
rspace: 0pt;}      img {-ms-interpolation-mode: bicubic;}
body {margin: 0; padding: 0;}      img {border: 0;
height: auto; line-height: 100%; outline: none; text-
decoration: none;}      table {border-collapse: collapse
!important;}      body {height: 100% !important; margin:
0; padding: 0; width: 100% !important;}

```

Download

File Type

HTML

Save

Reset

Save & Exit

Undo

Contact Management

Company Overview

In this area you will build your companies for your Hotel's City Ledger Accounts.

Company Name	Rate Code	Contact Name	Location	Business Phone
<input type="radio"/> <u>Acme Supply</u>		Coyote, Wylie	Los Angeles, CA	213-555-1234
<input type="radio"/> <u>BW Free Nights FX</u>	FX	,	, XX	623-780-6000
<input type="radio"/> <u>BW Pay with Points FX2 FX2</u>		,	, XX	623-780-6000
<input type="radio"/> <u>BW Travel Card</u>		,	, XX	1
<input type="radio"/> <u>Corporate Lodging</u>		,	, XX	x

How to Setup a Company Account

To set up a company account for direct bill start by selecting Add.

Company Name	Rate Code	Contact Name	Location	Business Phone
<input type="radio"/> <u>Acme Supply</u>		Coyote, Wylie	Los Angeles, CA	213-555-1234
<input type="radio"/> <u>BW Free Nights FX</u>	FX	,	, XX	623-780-6000
<input type="radio"/> <u>BW Pay with Points FX2 FX2</u>		,	, XX	623-780-6000
<input type="radio"/> <u>BW Travel Card</u>		,	, XX	1
<input type="radio"/> <u>Corporate Lodging</u>		,	, XX	x

Next you will enter the Company Name, Company Code, Contact Information, Any Remarks you would like to add regarding the company, the credit limit you established with the company, and the preferred Rate Plan (If Applicable). Once finished select done.

Note: Any line with a vertical red bar is a mandatory field.

Note: For any account to become utilized as a direct bill, a credit limit must be set. If an account reaches their credit limit you will be unable to bill that account until the limit is increased or a payment is posted.

Note: Credit Limits can be left at zero if you choose to attach the company rate without direct bill privileges. This will allow the company to use their preferred method of payment.

Company Name	<input type="text"/>
Company Code	<input type="text"/>
Contact Last Name	<input type="text"/>
Contact First Name	<input type="text"/>
Tax ID Number	<input type="text"/>
Remarks	<input type="text"/>
Address 1	<input type="text"/>
Address 2	<input type="text"/>
Country	<input type="text"/>
Zip Code	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Business Phone	<input type="text"/>
Business Fax	<input type="text"/>
Email	<input type="text"/>
Credit Limit	<input type="text"/>
Preferred Rate Plan	<input type="text"/>

Save Reset **Done** Undo

Company Name	Training Account
Company Code	Training
Contact Last Name	Smith
Contact First Name	John
Tax ID Number	
Remarks	Direct Bill
Address 1	7000 W. Main St
Address 2	
Country	
Zip Code	90210
City	Los Angeles
State	California
Business Phone	800-999-1000
Business Fax	
Email	
Credit Limit	5000.00
Preferred Rate Plan	RACK- FLEXIBLE RATE

Save Reset Done Undo

How to Edit a Company Account

To edit a company account select the radio button to left of the company and click edit or click on the company name hyperlink.

Company Name	Rate Code	Contact Name	Location	Business Phone
<input type="radio"/> <u>Acme Supply</u>		Coyote, Wylie	Los Angeles, CA	213-555-1234
<input type="radio"/> <u>BW Free Nights FX</u>	FX	,	, XX	623-780-6000
<input type="radio"/> <u>BW Pay with Points FX2</u>	FX2	,	, XX	623-780-6000
<input type="radio"/> <u>BW Travel Card</u>		,	, XX	1
<input type="radio"/> <u>Corporate Lodging</u>		,	, XX	x
<input checked="" type="radio"/> <u>Training Account</u>	RACK	Smith, John	Los Angeles, CA	800-999-1000

Next, make the necessary changes to the account and select Done when finished.

Company Name	<input type="text" value="Training Account"/>
Company Code	<input type="text" value="Training"/>
Contact Last Name	<input type="text" value="Smith"/>
Contact First Name	<input type="text" value="John"/>
Tax ID Number	<input type="text"/>
Remarks	<input type="text" value="Direct Bill"/>
Address 1	<input type="text" value="7000 W. Main St"/>
Address 2	<input type="text"/>
Country	<input type="text" value=""/>
Zip Code	<input type="text" value="90210"/>
City	<input type="text" value="Los Angeles"/>
State	<input type="text" value="California"/>
Business Phone	<input type="text" value="800-999-1000"/>
Business Fax	<input type="text"/>
Email	<input type="text"/>
Credit Limit	<input type="text" value="1000.00"/>
Preferred Rate Plan	<input type="text" value="RACK- FLEXIBLE RATE"/>

Company Name	Rate Code	Contact Name	Location	Business Phone
<input type="radio"/> <u>Acme Supply</u>		Coyote, Wylie	Los Angeles, CA	213-555-1234
<input type="radio"/> <u>BW Free Nights FX</u>	FX	,	, XX	623-780-6000
<input type="radio"/> <u>BW Pay with Points FX2</u>	FX2	,	, XX	623-780-6000
<input type="radio"/> <u>BW Travel Card</u>		,	, XX	1
<input type="radio"/> <u>Corporate Lodging</u>		,	, XX	x
<input type="radio"/> <u>Training Account</u>	RACK	Jackson, John	Los Angeles, CA	800-999-1000

How to Delete a Company Account

To delete a company account select the radio button to left of the company and click delete.

Company Name	Rate Code	Contact Name	Location	Business Phone
<input type="radio"/> <u>Acme Supply</u>		Coyote, Wylie	Los Angeles, CA	213-555-1234
<input type="radio"/> <u>BW Free Nights FX</u>	FX	,	, XX	623-780-6000
<input type="radio"/> <u>BW Pay with Points FX2</u>	FX2	,	, XX	623-780-6000
<input type="radio"/> <u>BW Travel Card</u>		,	, XX	1
<input type="radio"/> <u>Corporate Lodging</u>		,	, XX	x
<input checked="" type="radio"/> <u>Training Account</u>	RACK	Smith, John	Los Angeles, CA	800-999-1000

Company Name	Rate Code	Contact Name	Location	Business Phone
<input type="radio"/> <u>Acme Supply</u>		Coyote, Wylie	Los Angeles, CA	213-555-1234
<input type="radio"/> <u>BW Free Nights FX</u>	FX	,	, XX	623-780-6000
<input type="radio"/> <u>BW Pay with Points FX2</u>	FX2	,	, XX	623-780-6000
<input type="radio"/> <u>BW Travel Card</u>		,	, XX	1
<input type="radio"/> <u>Corporate Lodging</u>		,	, XX	x

Travel Agent Overview

Any Travel Agents built locally by the property can be found in this area.

Travel Agents			
Input new iata or agent name			
Agent Name	IATA	Contact Name	Phone
<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Done"/>			

How to Setup a Travel Agent

Start by typing in the IATA number or the Travel Agent name in box then select Add.

The screenshot shows the 'Travel Agents' input form. At the top, there is a header bar with the text 'Travel Agents' and 'Input new iata or agent name'. Below this, there is a table with columns: 'Agent Name', 'IATA', 'Contact Name', and 'Phone'. The 'Add' button is highlighted with a green box. Below the table, there are buttons for 'Edit', 'Delete', and 'Done'.

Next, you will enter the Manager Name, Contact Information, Commission Percentage, and Any Remarks you would like to add regarding the Travel Agent. Once finished select done.

Note: Any line with a vertical red bar is a mandatory field.

The screenshot shows the 'Travel Agent' details form. It contains various input fields for the agent's information. The fields are: Company Name (Training Travel), IATA, Manager First Name, Manager Last Name, Address (123 Travel Lane), Country (United States), Zip (81032), City (Phoenix), State (Arizona), Phone (623-780-6000), Fax, Email (travel1@me.com), Contact First Name, Contact Last Name, Commission Flat, Commission Percentage, Contact Business Phone, Contact Email, and Remarks. The 'Done' button is highlighted with a green box.

The travel agent will now appear displayed.

The screenshot shows the 'Travel Agents' list. The table now displays the newly added agent: 'Training Travel' under the 'Agent Name' column, 'Training Travel' under the 'IATA' column, and 'Training Travel' under the 'Contact Name' column. The 'Phone' column is empty. The 'Add' button is still present. Below the table, there are buttons for 'Edit', 'Delete', and 'Done'.

How to Edit a Travel Agent

To edit a Travel Agent select the radio button to left of the Agent and click edit or click on the hyperlink.

Agent Name	IATA	Contact Name	Phone
<input checked="" type="radio"/> Training Travel	Training Travel		

Buttons: Edit (highlighted), Delete, Done

Next, make any necessary changes and click done when you are complete.

Company Name: Training Travel

IATA: Training Travel

Manager First Name: Johnson

Manager Last Name: Tammy

Address: [Empty]

Country: United States

Zip: [Empty]

City: [Empty]

State: Arizona

Phone: [Empty]

Fax: [Empty]

Email: [Empty]

Contact First Name: [Empty]

Contact Last Name: [Empty]

Commission Flat: 0.00

Commission Percentage: 10.00

Contact Business Phone: [Empty]

Contact Email: [Empty]

Remarks: [Empty]

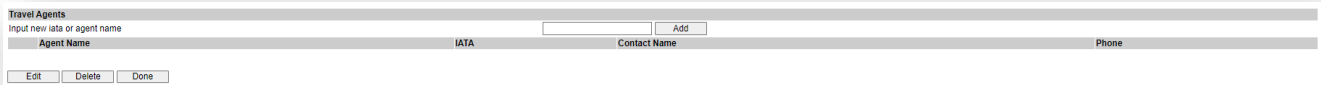
Buttons: Save, Reset, Done (highlighted), Undo

How to Delete a Travel Agent

To delete a Travel Agent select the radio button to left of the Agent and click delete.

Agent Name	IATA	Contact Name	Phone
<input checked="" type="radio"/> Training Travel	Training Travel	Tammy Johnson	

Buttons: Edit, Delete (highlighted), Done



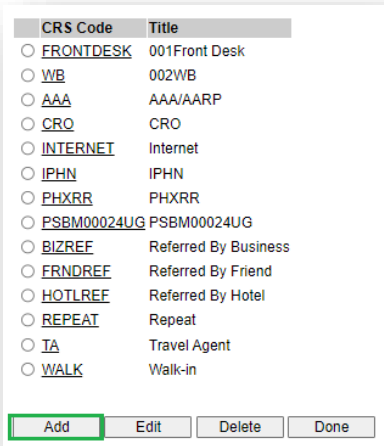
Source Codes Overview

How to Add a Source Code

To Add a source code, start by clicking add at the bottom of the list.

A source code tracks how the reservation came to be and is required on every reservation. This is a list of source codes that come pre-loaded with auto clerk.

Note: Never edit or change anything related to the WALK source code or it will break your link on the dashboard under walk in reservation.



Enter in a name for your source in the CRS Code box. Next, enter in a title of your source code for how it will appear in AutoClerk Cloud. When finished click done



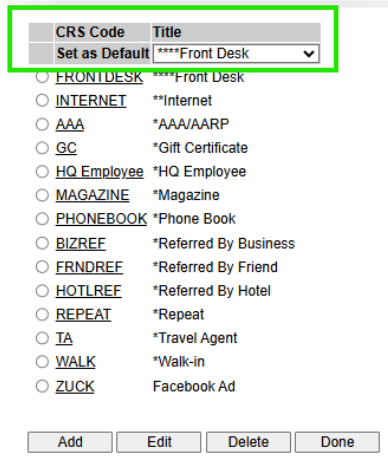


CRS Code: SOCIAL

Title: Social Media

Buttons: Save, Reset, Done, Undo

Set Default Source Code in Setup: Users are now able to set a Default Source Code in the Source Code Setup that will pre-populate when making a new reservation.



CRS Code	Title
Set as Default	****Front Desk
<input type="radio"/> FRONTDESK	****Front Desk
<input type="radio"/> INTERNET	**Internet
<input type="radio"/> AAA	*AAA/AARP
<input type="radio"/> GC	*Gift Certificate
<input type="radio"/> HQ Employee	*HQ Employee
<input type="radio"/> MAGAZINE	*Magazine
<input type="radio"/> PHONEBOOK	*Phone Book
<input type="radio"/> BIZREF	*Referred By Business
<input type="radio"/> FRNDREF	*Referred By Friend
<input type="radio"/> HOTLREF	*Referred By Hotel
<input type="radio"/> REPEAT	*Repeat
<input type="radio"/> TA	*Travel Agent
<input type="radio"/> WALK	*Walk-in
<input type="radio"/> ZUCK	Facebook Ad

Buttons: Add, Edit, Delete, Done

CRS Code	Title
<input type="radio"/> FRONTDESK	001Front Desk
<input type="radio"/> WB	002WB
<input type="radio"/> AAA	AAA/AARP
<input type="radio"/> CRO	CRO
<input type="radio"/> INTERNET	Internet
<input type="radio"/> IPHN	IPHN
<input type="radio"/> PHXRR	PHXRR
<input type="radio"/> PSBM00024UG	PSBM00024UG
<input type="radio"/> BIZREF	Referred By Business
<input type="radio"/> FRNDREF	Referred By Friend
<input type="radio"/> HOTLREF	Referred By Hotel
<input type="radio"/> REPEAT	Repeat
<input checked="" type="radio"/> SOCIAL	Social Media
<input type="radio"/> TA	Travel Agent
<input type="radio"/> WALK	Walk-in

How to Edit a Source Code

To edit a Source Code select the radio button to left of the source code and click edit or click on the source code word hyperlink.

CRS Code	Title
<input type="radio"/> FRONTDESK	001Front Desk
<input type="radio"/> WB	002WB
<input type="radio"/> AAA	AAA/AARP
<input type="radio"/> CRO	CRO
<input type="radio"/> INTERNET	Internet
<input type="radio"/> IPHN	IPHN
<input type="radio"/> PHXRR	PHXRR
<input type="radio"/> PSBM00024UG	PSBM00024UG
<input type="radio"/> BIZREF	Referred By Business
<input type="radio"/> FRNDREF	Referred By Friend
<input type="radio"/> HOTLREF	Referred By Hotel
<input type="radio"/> REPEAT	Repeat
<input checked="" type="radio"/> SOCIAL	Social Media
<input type="radio"/> TA	Travel Agent
<input type="radio"/> WALK	Walk-in

Next, make any necessary changes to your source code and click done when finished.

CRS Code	FACEBOOK
Title	Facebook

Rate Allocation	
add	RACK- FLEXIBLE RATE ▼

CRS Code	Title
<input type="radio"/> FRONTDESK	001Front Desk
<input type="radio"/> WB	002WB
<input type="radio"/> AAA	AAA/AARP
<input type="radio"/> CRO	CRO
<input checked="" type="radio"/> FACEBOOK	Facebook
<input type="radio"/> INTERNET	Internet
<input type="radio"/> IPHN	IPHN
<input type="radio"/> PHXRR	PHXRR
<input type="radio"/> PSBM00024UG	PSBM00024UG
<input type="radio"/> BIZREF	Referred By Business
<input type="radio"/> FRNDREF	Referred By Friend
<input type="radio"/> HOTLREF	Referred By Hotel
<input type="radio"/> REPEAT	Repeat
<input type="radio"/> TA	Travel Agent
<input type="radio"/> WALK	Walk-in

How to Delete a Source Code

To delete a Source Code, select the radio button to left of the source code and click delete.

Note: Source Codes can only be deleted by a System Administrator.

CRS Code	Title
<input type="radio"/> FRONTDESK	001Front Desk
<input type="radio"/> WB	002WB
<input type="radio"/> AAA	AAA/AARP
<input type="radio"/> CRO	CRO
<input checked="" type="radio"/> FACEBOOK	Facebook
<input type="radio"/> INTERNET	Internet
<input type="radio"/> IPHN	IPHN
<input type="radio"/> PHXRR	PHXRR
<input type="radio"/> PSBM00024UG	PSBM00024UG
<input type="radio"/> BIZREF	Referred By Business
<input type="radio"/> FRNDREF	Referred By Friend
<input type="radio"/> HOTLREF	Referred By Hotel
<input type="radio"/> REPEAT	Repeat
<input type="radio"/> TA	Travel Agent
<input type="radio"/> WALK	Walk-in

CRS Code	Title
<input type="radio"/> FRONTDESK	01Front Desk
<input type="radio"/> AAA	AAA/AARP
<input type="radio"/> CRO	CRO
<input type="radio"/> INTERNET	Internet
<input type="radio"/> IPHN	IPHN
<input type="radio"/> PHXRR	PHXRR
<input type="radio"/> PSBM00024UG	PSBM00024UG
<input type="radio"/> BIZREF	Referred By Business
<input type="radio"/> FRNDREF	Referred By Friend
<input type="radio"/> HOTLREF	Referred By Hotel
<input type="radio"/> REPEAT	Repeat
<input type="radio"/> TA	Travel Agent
<input type="radio"/> WALK	Walk-in
<input type="radio"/> WB	WB

How to Reorder Source Codes

Source codes are sorted alphabetically by the title. To display your most used source codes at the top, start by selecting the radio button to the left of the source code you would like to use and selecting edit, or clicking on the source code hyperlink.

Note: Best Western branded hotels will have a source code attached to the reservation when it comes downloaded from the CRS.

CRS Code	Title
<input type="radio"/> FRONTDESK	001Front Desk
<input type="radio"/> AAA	AAA/AARP
<input type="radio"/> CRO	CRO
<input type="radio"/> INTERNET	Internet
<input type="radio"/> IPHN	IPHN
<input type="radio"/> PHXRR	PHXRR
<input type="radio"/> PSBM00024UG	PSBM00024UG
<input type="radio"/> BIZREF	Referred By Business
<input type="radio"/> FRNDREF	Referred By Friend
<input type="radio"/> HOTLREF	Referred By Hotel
<input type="radio"/> REPEAT	Repeat
<input type="radio"/> TA	Travel Agent
<input type="radio"/> WALK	Walk-in
<input checked="" type="radio"/> WB	WB

CRS Code	WB
Title	WB

Rate Allocation	
add	RACK- FLEXIBLE RATE

In front of the Title name input a numerical value or symbol. Once you have finished click done. This source code will now be displayed towards the top of the source list.

CRS Code	WB
Title	002WB

Rate Allocation	
add	RACK- FLEXIBLE RATE

CRS Code	Title
<input type="radio"/> FRONTDESK	001Front Desk
<input checked="" type="radio"/> WB	002WB
<input type="radio"/> AAA	AAA/AARP
<input type="radio"/> CRO	CRO
<input type="radio"/> INTERNET	Internet
<input type="radio"/> IPHN	IPHN
<input type="radio"/> PHXRR	PHXRR
<input type="radio"/> PSBM00024UG	PSBM00024UG
<input type="radio"/> BIZREF	Referred By Business
<input type="radio"/> FRNDREF	Referred By Friend
<input type="radio"/> HOTLREF	Referred By Hotel
<input type="radio"/> REPEAT	Repeat
<input type="radio"/> TA	Travel Agent
<input type="radio"/> WALK	Walk-in

Market Codes Overview

A Market code tracks the demographic the guest belongs to and is required on every reservation. This is a list of Market Codes that come pre-loaded with auto clerk.

CRS Code	Title
<input type="radio"/> CORP	Corporate
<input type="radio"/> FANDE	Friends and Family
<input type="radio"/> LOCAL	Locals
<input type="radio"/> TOURIST	Tourist

How to Add a Market Code

To add a Market Code start by clicking add at the bottom of the list.

CRS Code	Title
<input type="radio"/> CORP	Corporate
<input type="radio"/> FANDE	Friends and Family
<input type="radio"/> LOCAL	Locals
<input type="radio"/> TOURIST	Tourist

Enter in a name for your Market in the CRS Code box. Next enter in the title of your Market code for how It will appear in AutoClerk Cloud. When finished click done.

This screenshot shows the 'Add Market Code' form. It has three input fields: 'CRS Code', 'Title', and 'Comments'. The 'CRS Code' and 'Title' fields are small text boxes, while 'Comments' is a larger text area. At the bottom, there are four buttons: 'Save', 'Reset', 'Done' (highlighted with a green border), and 'Undo'.

This screenshot shows the same form after data entry. The 'CRS Code' field contains 'GROUPS' and the 'Title' field contains 'Groups'. The 'Comments' field is empty. The 'Done' button remains highlighted with a green border.

How to Edit a Market Code

To edit a Market Code select the radio button to left of the Market code and click edit or select the Market Code name hyperlink.

This screenshot shows a list of market codes. Each entry consists of a radio button, a CRS Code (underlined), and a Title. The 'GROUPS' entry is selected, indicated by a blue dot in the radio button and a green border around the entire row. Below the list are four buttons: 'Add', 'Edit' (highlighted with a green border), 'Delete', and 'Done'.

CRS Code	Title
<input type="radio"/> <u>CORP</u>	Corporate
<input type="radio"/> <u>FANDE</u>	Friends and Family
<input checked="" type="radio"/> <u>GROUPS</u>	Groups
<input type="radio"/> <u>LOCAL</u>	Locals
<input type="radio"/> <u>TOURIST</u>	Tourist

CRS Code	GROUPS
Title	Sports Groups
Comments	

Save Reset **Done** Undo

CRS Code	Title
<input type="radio"/> CORP	Corporate
<input type="radio"/> FANDE	Friends and Family
<input type="radio"/> LOCAL	Locals
<input checked="" type="radio"/> GROUPS	Sports Groups
<input type="radio"/> TOURIST	Tourist

Add Edit Delete Done

How to Delete a Market Code

To delete a Market Code select the radio button to left of the Market code and click delete.

CRS Code	Title
<input type="radio"/> CORP	Corporate
<input type="radio"/> FANDE	Friends and Family
<input type="radio"/> LOCAL	Locals
<input checked="" type="radio"/> GROUPS	Sports Groups
<input type="radio"/> TOURIST	Tourist

Add Edit **Delete** Done

CRS Code	Title
<input type="radio"/> CORP	Corporate
<input type="radio"/> FANDE	Friends and Family
<input type="radio"/> LOCAL	Locals
<input type="radio"/> TOURIST	Tourist

Add Edit Delete Done

Managers Dashboard

Overview of the Manager's Dashboard

The Manager's Dashboard allows you to view your hotel's performance.

KPI

The icon below allows you to select the period you would like to view for your hotel's KPI (**Key Performance Indicators**) trends.


- **Day**- This will display the performance trend from the previous day.
- **MTD (Month to Date)**- This will display the performance trend from the previous month.
- **YTD (Year to Date)**- This will display the performance trend from the previous year.

Dashboard:	Manager ▾
Period:	Day ▾ 02-27-2023
Type:	Source/Rate ▾ <input type="button" value="Show"/>

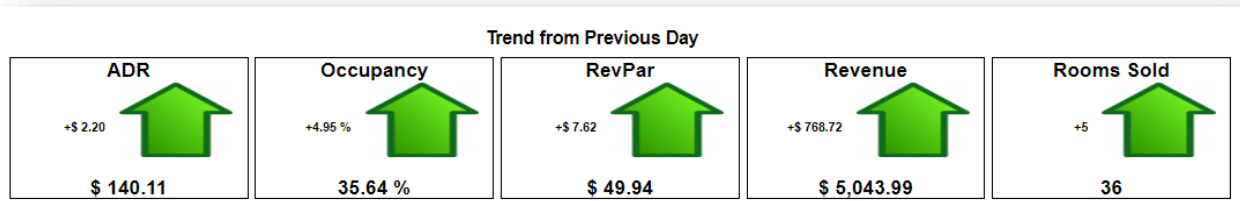
Displayed you will find Key Performance Indicators.

- **ADR**- Average Daily Rate
- **Occupancy**
- **RevPar**- Revenue Per Available Room
- **Revenue**
- **Rooms Sold**

Red down arrows displayed mean your hotel is down from the previous day.

Trend from Previous Day				
ADR <div>\$ -26.94 </div> <div>\$ 99.70</div>	Occupancy <div>-2.41 % </div> <div>7.23 %</div>	RevPar <div>\$ -5.19 </div> <div>\$ 7.21</div>	Revenue <div>\$ -430.91 </div> <div>\$ 598.20</div>	Rooms Sold <div>-2 </div> <div>6</div>

Green up arrows displayed mean your hotel is up from the previous day.



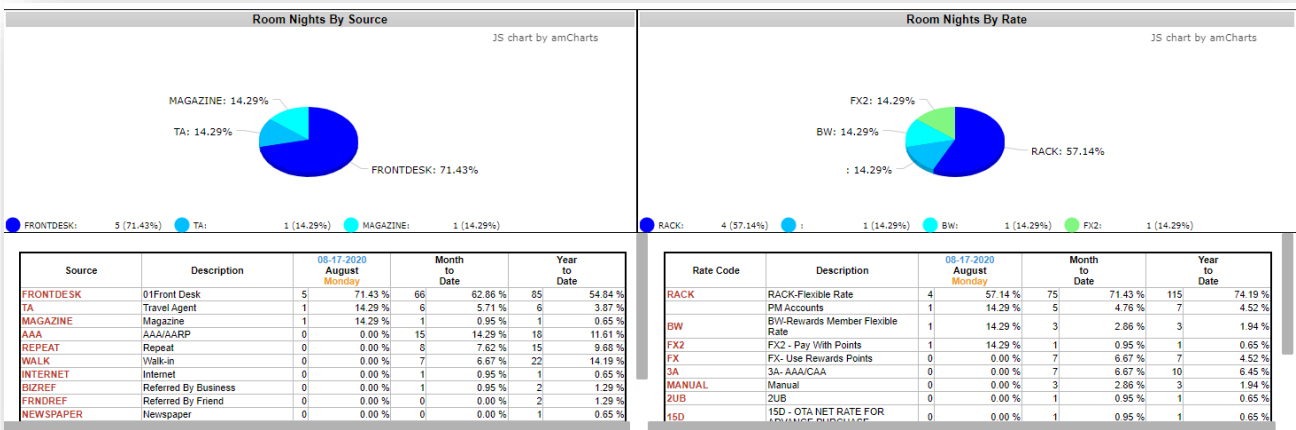
Source and Rate View

Selecting Source/Rate as your type will provide you with some graphs with Room nights by Source and Room nights by Rate. It will also provide a list for both source and rate breaking down each source and rate codes performance by Day, Month to Date and Year to Date.

Dashboard: Manager ▼

Period: Day ▼

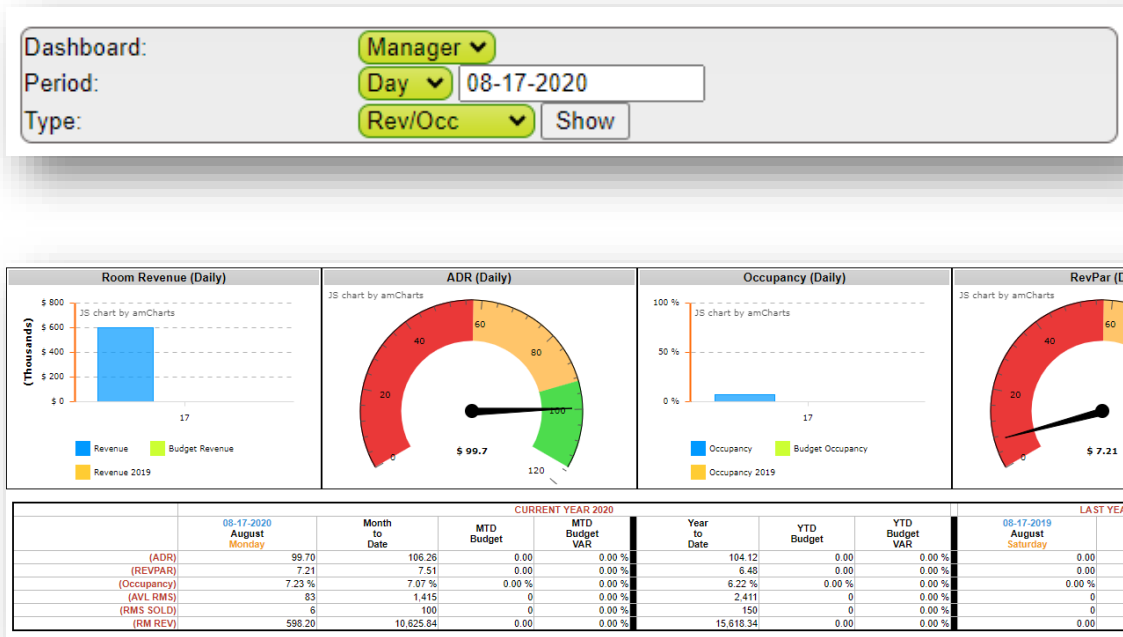
Type: Source/Rate ▼ Show



Revenue and Occupancy View

Selecting Rev/Occ as your type will provide you with some graphs and speedometers with Daily numbers. It will be broken down into Room Revenue Daily, ADR Daily, Occupancy Daily, and RevPAR Daily performance by Day, Month to Date and Year to Date. If your property has created a Budget for the month, that data will also be displayed for comparisons.

If you have been live with AutoClerk you will also be able to view last year statistics



Trip Advisor Widget

The hotel Trip Advisor widget will be displayed allowing you quick access to read your hotel's most recent reviews. Clicking on the Read reviews link will open a new window taking you directly into the Trip Advisor website where you can view the full review and respond.

Victoria

Recent Traveler Reviews

"Not the cleanest"

"Pick a different restaurant"

"Many updates to facility and rooms"

"Dinner was good, and the service was..."

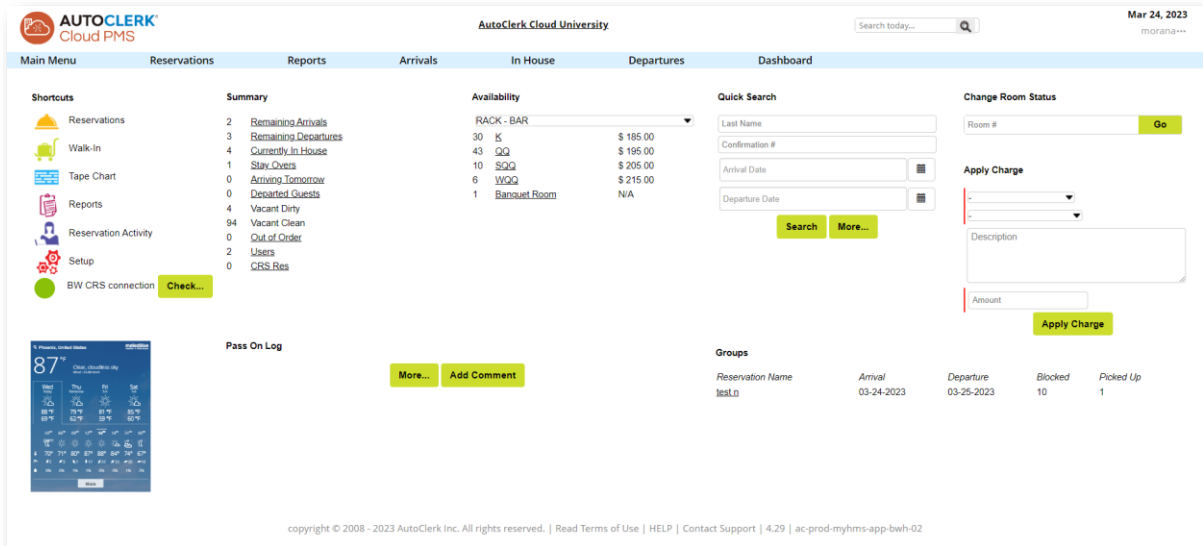
"Amazing brunch. Highly recommend..."

[Read reviews](#)

OPERATIONS

Front Desk Dashboard

After logging in you'll be taken to the Front Desk Dashboard. The Dashboard is the homepage of AutoClerk Cloud and is where you will access the various areas of the system needed for daily hotel operations.



Cloud Icon

The AutoClerk Cloud logo is in the upper left corner of every page. When you “click on the cloud” you will be returned to the Front Desk Dashboard or the homepage. This button will follow you wherever you go in the system. **Note: it is not recommended to use the browser’s “Refresh” or “Back” buttons. The application will function best when using all on-screen navigation.**



Hotel Name

The Hotel Name is displayed at the top center of every page. If your hotel is part of a group which all use AutoClerk Cloud, *and* your user role allows, you can click the hotel name to open a drop-down menu of all the hotels in the group, allowing you to switch hotels.

AutoClerk Cloud University

**Without Group Login

AutoClerk Cloud University

AutoClerk Cloud University Hotel

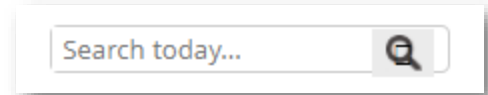
**With Group Login

Business Date and Logout

The current hotel business date displays in the top right-hand corner with your username and ellipses (three dots). To logout, click the ellipses and click "Logoff".

Search Today

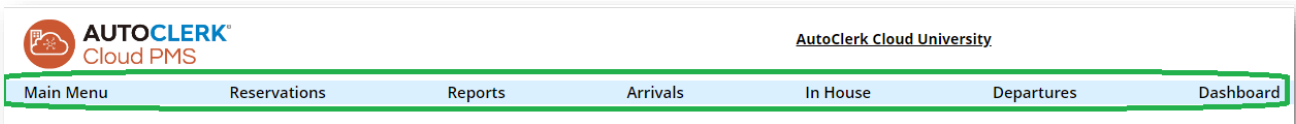
The Search Today field will allow you to look up any guest that is currently arriving, in-house, departing, or checked out on the current hotel date by entering the room number or a portion of the last or first name.

A search bar with the placeholder text "Search today..." and a magnifying glass icon on the right.

If only one match is found for an arriving guest, you will be taken directly to the reservation's Guest Data screen. If more than one record matching the search criteria is found, it will display a results list.

If only one match is found for an in-house, departing, or checked out guest, you will be taken directly to the guest's folio. If more than one record matching the search criteria is found, it will display a results list.

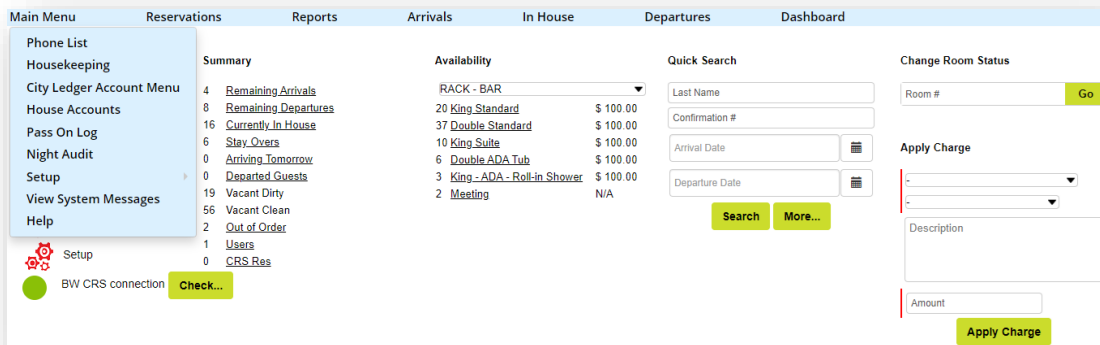
Blue Menu Bar



The blue menu bar runs across the top of the page just under the Cloud Icon, the Hotel Name, the Search Today field, Hotel Date, and User Menu. Each item on the blue menu bar will allow you to navigate to different areas of the system as well as perform tasks.

Main Menu

This menu provides access to key areas of the system. Note that a few of these areas may only be available to specific user roles (Night Audit and Setup).

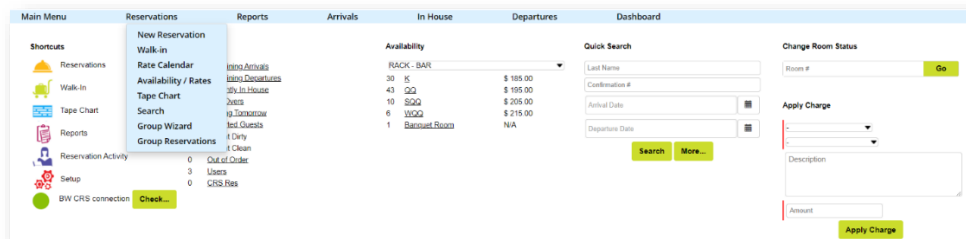


- **Phone List** – a list of guests in-house, arriving, and departing
- **Housekeeping** – opens the housekeeping area to create housekeeper sheets and change room status
- **City Ledger Account Menu** – opens the Direct Billing area to create and manage City Ledger accounts
- **House Accounts** – all non-guest and non-group master folios used for charges and payments
- **Pass On Log** – all Pass on Log messages
- **Night Audit** – opens the Night Audit pre-flight checklist (only visible to Night Audit users and higher)
- **Setup** – opens the hotel's Setup area (only visible to Hotel Manager users and higher)
- **View System Messages** – the history of system messages (official updates/communication from the AutoClerk Cloud team)
- **Help** – the system's Support area, also found at the bottom of the screen under [Contact Support](#):

copyright © 2008 - 2024 AutoClerk Inc. All rights reserved. | [Read Terms of Use](#) | [Contact Support](#) | 4.40 | ac-prod-myhms-app-bwh-01

Reservations

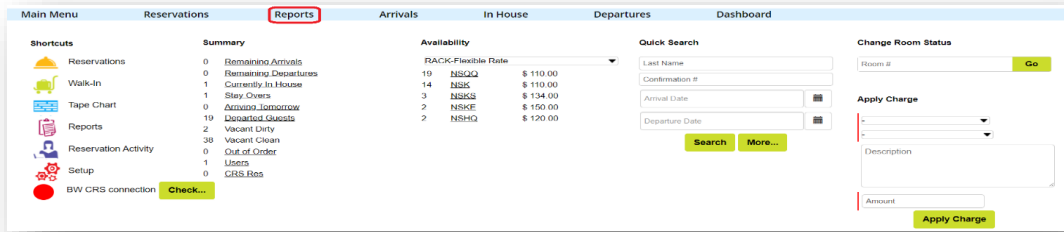
This menu will provide access to guest and group reservation functions and features.



- **New Reservation** – creates a new reservation, taken over the phone or for future dates
- **Walk-In** – creates a new reservation as a walk-in, auto-populating the Source Code “Walk-In”
- **Rate Calendar** – opens the Rate Calendar tool
- **Availability/Rates** – access to the system's Availability/Rates chart
- **Tape Chart** – opens the Tape Chart, an interactive visual of the hotel's rooms status with hotel operations functions.
- **Search** – opens the Advanced Search area
- **Group Wizard** – creates a new group profile and/or and makes a new group reservation
- **Group Reservations** – allows you to view and manage existing group blocks and their reservations

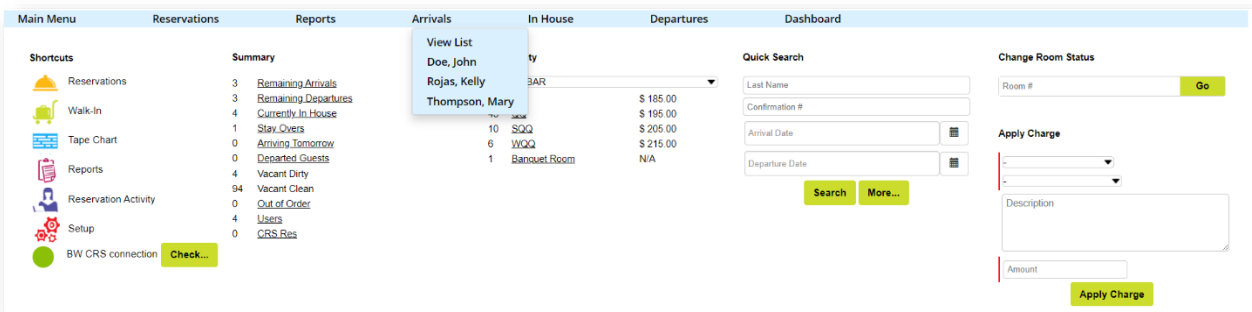
Reports

This will take you directly to the reports area. Some of these reports and report categories may only be [available to specific user roles](#). “Reports” does not have a drop-down menu.



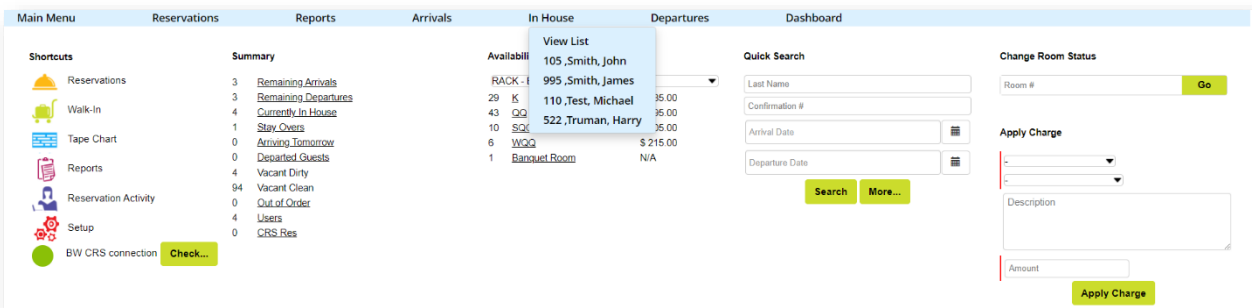
Arrivals

This drop-down menu allows you to **View List** of all remaining arrivals for the current hotel date, or to click a reservation name to navigate directly to a reservation's Guest Data screen and process a check-in.



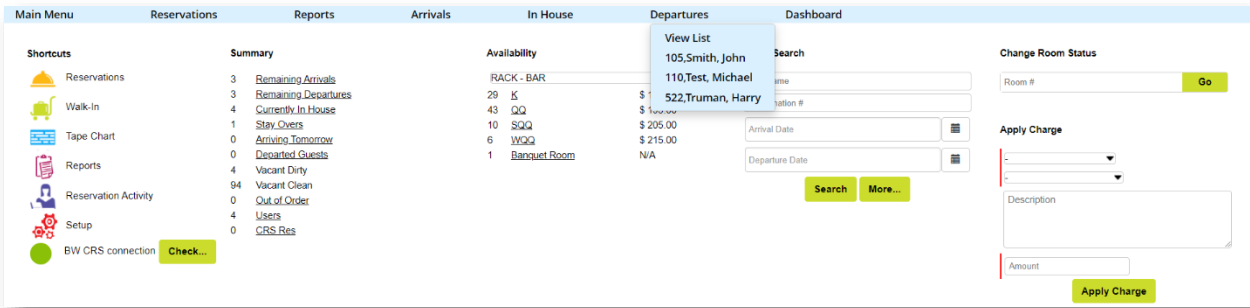
In-House

This drop-down menu allows you to **View List** of all current in-house guests including those still waiting to depart, or to click on any name to navigate directly to a reservation's folio.



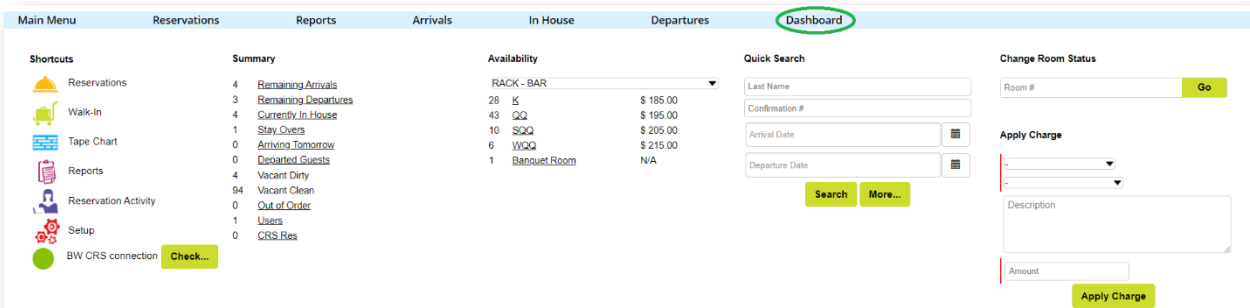
Departures

This drop-down menu allows you to **View List** of remaining departures for the current hotel date, or to click on any name to navigate directly to a reservation's folio and process a check-out.



Dashboard

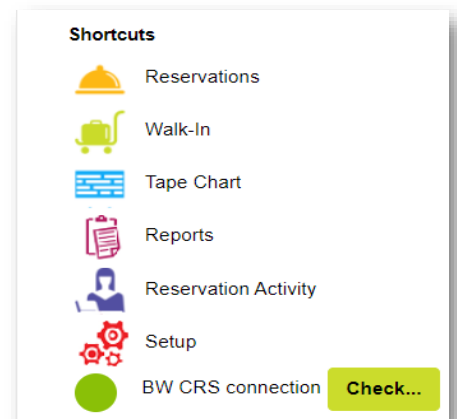
This will navigate to the Manager's Dashboard for current hotel performance data and is only available if your User Role is set to Hotel Manager or higher. "Dashboard" does not have a drop-down menu.



Shortcuts

The Shortcuts section on the far-left side of the Front Desk Dashboard features quick links to the most used areas of the system, and a BW CRS Connection indicator providing real time status of the connection.

- **Reservations** – Creates a new reservation taken over the phone.
- **Walk-In** – Creates a new reservation as a walk-in, auto-populating the Source Code "Walk-In"
- **Tape Chart** – Opens the Tape Chart, an interactive visual of the hotel's rooms status with hotel operations functions.
- **Reports** – Opens the Reports area. Some reports and categories will only be available to specific user roles.



- **Reservation Activity** – Displays a list of all reservations in order of the most recent activity first.
- **Setup** – Opens the hotel's Setup area. Only visible and available to the Hotel Manager user role or higher.
- **BW CRS Connection** – This indicates the status of the connection to Best Western's Two-Way Central Reservation System (CRS). Use the Cloud icon to refresh the screen and check for the latest status. **Green** indicates the hotel is connected, and **Red** indicates the hotel is not connected, which may require help from [AutoClerk Cloud Support](#) to re-establish the connection.

Summary

The **Summary** section will provide counts for common daily statistics and interactive links. The first three links will access the same lists as the "View List" menu selection in the Arrivals, In-House, and Departures of the blue menu bar.

Remaining Arrivals: Opens the remaining arrivals in alphabetical order for the current hotel date. Clicking on any guest name hyperlink will take you to the Guest Data screen to check-in.

Remaining Departures: Opens the remaining departures in alphabetical order for the current hotel date. Clicking on any guest name hyperlink will take you to the folio to checkout.

Currently In House: Opens the list of in-house guests in alphabetical order for the current hotel date. Clicking on any guest name hyperlink will take you to the folio to post any charges or payments.

Stay Overs: Opens the list of in-house guests that will not be departing for the current hotel date. Clicking on any guest name hyperlink will take you to the folio to post any charges or payments.

Arriving Tomorrow: Opens the list of arrivals in alphabetical order for the next hotel date. Clicking on any guest name hyperlink will take you to the reservation to modify it if necessary.

Departed Guests: Opens the list of checked out guests in alphabetical order for the current hotel date. Clicking on any guest name hyperlink will take you to the folio modify it if necessary.

Vacant Dirty and Vacant Clean: These are statistics only, indicating the number of dirty and clean rooms for the current hotel date.

Out of Order: Generates an "Out of Order Rooms" report for the current hotel date. (This report can also be generated from the Reports area shortcut or the Reports menu in the blue menu bar.)

Users: Shows a list of users that are currently logged into the system with their log-in time and date.

CRS Res: This link is used to access a list of all reservations that were downloaded into your system from the Best Western Two-Way Central Reservation System (CRS). Clicking on any reservation link will take you to the reservation to modify it.

Summary	
0	Remaining Arrivals
4	Remaining Departures
7	Currently In House
3	Stay Overs
1	Arriving Tomorrow
0	Departed Guests
1	Vacant Dirty
27	Vacant Clean
1	Out of Order
1	Users
0	CRS Res

Availability

Availability

RACK- FLEXIBLE RATE		
27	K	\$ 79.00
43	QQ	\$ 89.00
10	SK	\$ 99.00
10	SQQ	\$ 109.00
6	WQQ	\$ 119.00
2	WK	\$ 129.00
1	Banquet Room	\$ 0.00

The **Availability** section will display each room type's availability and price points for the current hotel date, based on the selected rate plan from the drop-down menu.

The Availability will default to the rate plan at the top in "Rates" section of Hotel Setup. When using the Best Western Two-Way Interface, it is recommended that the Hotel Manager sets "RACK", "BAR" or "Flexible Rate" as the rate plan that appears first.

The drop-down menu allows you to select the rate plan and will then display the rates per room type based on the selected rate. **Note: the drop-down menu will only contain rate plans that are allowed to be sold by the Front Desk, as defined in Setup under each rate.**

Availability

RACK- FLEXIBLE RATE		
RACK- FLEXIBLE RATE		
BW- REWARDS MEMBER FLEXIBLE RATE		
VR- REWARDS - 1,000 BONUS POINTS PER NIGHT		
GM- GOVERNMENT MILITARY		
3A- AAA AND CAA MEMBERS		
RP- AARP/SENIOR		
MR- MANAGERS SPECIAL		
group 20		
FX-USE REWARDS POINTS		
2U- BOOK EARLY AND SAVE		
2UB- REWARDS MEMBER BOOK EARLY AND SAVE		
Summer 2023		

Availability

3A- AAA AND CAA MEMBERS		
27	K	\$ 75.05
43	QQ	\$ 84.55
10	SK	\$ 94.05
10	SQQ	\$ 103.55
6	WQQ	\$ 113.05
2	WK	\$ 122.55
1	Banquet Room	\$ 0.00

After clicking on a room type, you'll be taken to the filtered Tape Chart for that room type. Each cell will display a number which represents the total number of available rooms for that room type for that date. **Note: The Tape Chart will represent total availability, regardless of rate plan.** From here you may change the date at the top to search future availability.

Tape Chart Filter

Room Type: WQQ

Start Date: 3/23/23

7

Default

Refresh

Click Refresh to view the full Tape Chart

Date	Thu 3/23	Fri 3/24	Sat 3/25	Sun 3/26	Mon 3/27	Tue 3/28	Wed 3/29	Thu 3/30
Total	6	6	6	6	6	6	6	6
103(WQQ)	6	6	6	6	6	6	6	6
401(WQQ)	6	6	6	6	6	6	6	6
402(WQQ)	6	6	6	6	6	6	6	6
404(WQQ)	6	6	6	6	6	6	6	6
405(WQQ)	6	6	6	6	6	6	6	6
406(WQQ)	6	6	6	6	6	6	6	6

To create a new reservation or place a room out-of-order, find the room number you'd like, then you can either click the cells for each night or you can select a range by clicking the first and last night. Then right-click to select the action.

Room Type:

WQQ

Start Date:

3/23/23

▼

7

Default

Refresh

Click Refresh to view the full Tape Chart

Date	Thu 3/23	Fri 3/24	Sat 3/25	Sun 3/26	Mon 3/27	Tue 3/28	Wed 3/29	Thu 3/30
Total	6	6	6	6	6	6	6	6
<div><div>103(WQQ)</div></div>	6	6	6	<div><div>New Reservation</div><div>Out of Order</div></div>	6	6	6	6
<div><div>401(WQQ)</div></div>	6	6	6	6	6	6	6	6
<div><div>402(WQQ)</div></div>	6	6	6	6	6	6	6	6
<div><div>404(WQQ)</div></div>	6	6	6	6	6	6	6	6
<div><div>405(WQQ)</div></div>	6	6	6	6	6	6	6	6
<div><div>406(WQQ)</div></div>	6	6	6	6	6	6	6	6

Quick Search

Quick Search

First Name
Last Name
Phone #
Confirmation #
Arrival Date
Departure Date

Search **More...**

Quick Search allows you to quickly search for any past, present, or future reservation in your hotel. Search options include full or partial first name, last name, phone number, confirmation number, arrival and/or departure date. You can use multiple fields to narrow your search results.

If you are unable to find the reservation with the Quick Search options, click the **"More..."** button for an advanced search. This feature also can export

the results to a .CSV file, which can be imported to a spreadsheet program and contains more even detail about the reservation(s) than the displayed search results, such as creation date and time, address, revenue, source, market, driver's license, and more. **Note: The date range search options are limited to 2 years of history at a time for efficient and quick data retrieval. Date ranges longer than 2 years should be queried in 2-year segments.**

The results will either return a matching reservation or return a list of matching reservations. The list may be organized by clicking the column title, e.g. by Rate Plan, Room, etc.

Search Results
23 items found, displaying all items 1

Grp	Guest Name	BWR #	BWR Tier	Confirmation #	CRS Confirmation	Arrive	Depart	Status	Company	Type	Room	Avg Rate	# Guests	Pymt Type	Rate Plan	Balance
(G)	X Moore_Group			ZZ10079478117		1/29/24	1/30/24	Checked		King Standard	232	\$109.99	1/0/0	Cash	RACK	0.00
(G)	X Moore_Group			ZZ10082930620		2/5/24	2/6/24	Checked		King Suite - ADA - Roll-In	0564	\$0.00	1/0/0	Cash	RACK	0.00
	X Moore_Nicole			ZZ10060165312		6/19/23	6/11/23	Checked	BW Pay with Points FX2	King Standard	235	\$225.00	1/0/0	Cash	FX2 -	0.00
	X Moore_Roger			ZZ038926095		1/10/23	1/11/23	Checked		Double Standard	106 pet	\$110.00	1/0/0	Cash	RACK	0.00
	X Moore_Zach			ZZ10077090867		1/21/24	1/22/24	Checked		Double ADA Tub	103	\$150.00	1/0/0	Cash	RACK	0.00

Once you make updates to a reservation, you will be returned to the home page of AutoClerk Cloud, where you can perform another search in Quick Search.

Change Room Status

The **Change Room Status** section of the Front Desk Dashboard will quickly display and change the housekeeping status of a room.

Change Room Status

Room #
Go

After entering a room number, click “Go”.

Change Room Status

100
Go

Room: 100
Current status: Vacant Dirty
Set Clean

The current room status will be displayed, and you can change the status by clicking “Set Clean” or “Set Dirty”.

Change Room Status

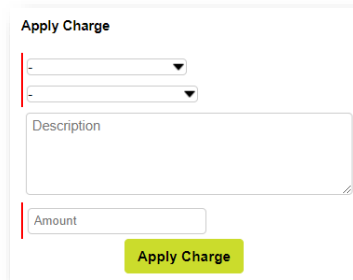
100
Go

Room: 100
Current status: Vacant Clean
Set Dirty

Note: Out of Order (OOO) rooms will display as Vacant Dirty. Flipping them to Vacant Clean will not delete the OOO status, and OOO rooms will always automatically flip to dirty when released.

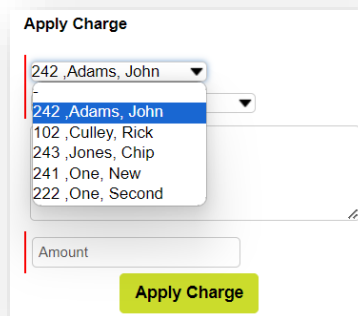
Apply Charge

The **Apply Charge** section lets you quickly post a charge to a guest folio from the Front Desk Dashboard.



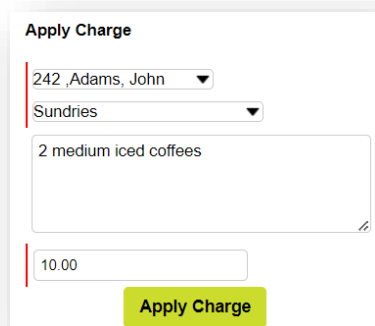
The screenshot shows the 'Apply Charge' form with the following fields: a first drop-down menu, a second drop-down menu, a 'Description' text area, and an 'Amount' text field. A green 'Apply Charge' button is at the bottom.

The first drop-down menu is used to select the in-house guest. The second drop-down menu is used to select the charge type to apply.



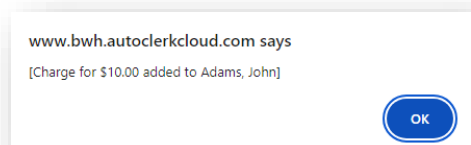
The screenshot shows the 'Apply Charge' form with the first drop-down menu open, displaying a list of guest names: '242 ,Adams, John', '102 ,Culley, Rick', '243 ,Jones, Chip', '241 ,One, New', and '222 ,One, Second'. The second drop-down menu is still empty.

Add a description, if necessary (which will show on the guest's printed folio), and the amount to post.



The screenshot shows the 'Apply Charge' form with the first drop-down menu set to '242 ,Adams, John', the second drop-down menu set to 'Sundries', the 'Description' field containing '2 medium iced coffees', and the 'Amount' field containing '10.00'. The green 'Apply Charge' button is at the bottom.

After clicking “Apply Charge”, the message “Charge for (amount) added to (Guest Name)” will appear. Click OK, and then you will be returned to the Front Desk Dashboard. The taxes will be applied automatically according to your hotel's posting setup.



Weather

The **Weather Widget** lets the Front Desk provide forecast information to your guests, and is interactive, allowing you to toggle between different dates. It will always display in Fahrenheit.

For more weather information, or if you need to search for weather in another location, click the “More” button to open a new browser tab to MeteoBlue.com for detailed forecasts.



Pass On Log

The **Pass on Log** allows all users to post important messages for all other users for the current hotel date. The messages are archived when Night Audit is completed so messages from past dates are available to be reviewed.

To post a new message, click “Add Comment”.

Pass On Log

More...
Add Comment

Enter a “Title” and a message in the “Content” section, then click “Save”.

Title

Call for Taxi

Content

Please call a taxi to Gibson's Italia for room 105 at 7:00pm. ZM

Save
Cancel
Delete

The saved message will appear on the Dashboard with the user, date, and time.

Pass On Log

Call for Taxi

Zmoore at 4/29/24 02:28 PM

Please call a taxi to Gibson's Italia for room 105 at 7:00pm. ZM

More...
Add Comment

To review archived messages, click “More...”. You may repost an archived message to today’s date by clicking into the message and clicking “Save”. That message will then be reposted to the Dashboard.

<input type="radio"/>	2021-04-07	Support from AutoClerk Cloud Notice	AutoClerk Cloud Technicians will be contacting all ATC Cloud hotels over the next 7 days to update a file used for your Credit Card devices. The process should take about 20-30 minutes per computer. Please allow our technicians to complete these updates. These files need to be replaced before April 29th or your Credit Card devices will stop working. Please feel free to contact AutoClerk Support if you have any questions.
<input type="radio"/>	2021-02-20	Towel	Please help with towels - KR
<input type="radio"/>	2020-09-29	Showing Example	Hi there hope your having a nice day. KR done
<input type="radio"/>	2020-09-24	Sign Ups	Get 5 sign ups for BWR :)
<input type="radio"/>	2020-09-14	BWR Sign-ups	Hi everyone! If we hit our goal for new sign-ups this week, pizza on me!
<input type="radio"/>	2020-09-14	Parking Lot Maintenance	Parking lot will be repaved on Monday and Tuesday

Add Edit Delete Escape

Title

Towel

Content

Please help with towels - KR

Save

Cancel

Delete

Pass On Log

Towel

morana at 5/22/23 02:55 PM

Please help with towels - KR

More...

Add Comment

To edit a message, click on the hyperlink of the message to open the editor.

	Date	Title	Message
<input type="radio"/>	2020-08-09	Maintenance 08/10/2020	Maintenance coming to replace the toilet in 109 @10am
<input type="radio"/>	2020-08-09	Wake up call	111 would like a 4pm wake up call
<input checked="" type="radio"/>	2020-08-09	Taxi	Mr. Green in 210 would like a taxi called at 6pm this evening
<input type="radio"/>	2020-08-08	PAINTING	panting from 9AM to 5PM.
<input type="radio"/>	2020-08-08	group arrival	needs extra amenities

Add Edit Delete Escape

You may also select the circular radio button to the left of the message and then click “Edit”.

	Date	Title	Message
<input type="radio"/>	2020-08-09	<u>Maintenance 08/10/2020</u>	Maintenance coming to replace the toilet in 109 @10am
<input type="radio"/>	2020-08-09	<u>Wake up call</u>	111 would like a 4pm wake up call
<input checked="" type="radio"/>	2020-08-09	<u>Taxi</u>	Mr. Green in 210 would like a taxi called at 6pm this evening
<input type="radio"/>	2020-08-08	<u>PAINTING</u>	panting from 9AM to 5PM.
<input type="radio"/>	2020-08-08	<u>group arrival</u>	needs extra amenities
<div> Add Edit Delete Escape </div>			

After editing, clicking "Save" will move the message up to the top of the Pass On Log on the Front Desk Dashboard.

Title

Taxi

Content

Mr. Green in 210 would like a taxi called at 7:30pm this evening

Save

Cancel

Delete

To delete a message, go to the archived list and select the message by with the circular radio button to left of the message and then click "Delete" at the bottom. **Note: once messages are deleted, they cannot be retrieved, and you will need to type out the message once again if needed.**

<input type="radio"/>	2021-04-08	Support from AutoClerk Cloud Notice	Support from AutoClerk Cloud Notice AutoClerk Cloud Technicians will be contacting all ATC Cloud hotels over the next 7 days to update a file used for your Credit Card devices. The process should take about 20-30 minutes per computer. Please allow our technicians to complete these updates. These files need to be replaced before April 29th or your Credit Card devices will stop working. Please feel free to contact AutoClerk Support if you have any questions.
<input type="radio"/>	2021-04-07	Support from AutoClerk Cloud Notice	AutoClerk Cloud Technicians will be contacting all ATC Cloud hotels over the next 7 days to update a file used for your Credit Card devices. The process should take about 20-30 minutes per computer. Please allow our technicians to complete these updates. These files need to be replaced before April 29th or your Credit Card devices will stop working. Please feel free to contact AutoClerk Support if you have any questions.
<input checked="" type="radio"/>	2020-09-29	Showing Example	Hi there hope your having a nice day. KR done
<input type="radio"/>	2020-09-24	Sign-Ups	Get 5 sign ups for BWR :)
<input type="radio"/>	2020-09-14	BWR Sign-ups	Hi everyone! If we hit our goal for new sign-ups this week, pizza on me!
<input type="radio"/>	2020-09-14	Parking Lot Maintenance	Parking lot will be repaved on Monday and Tuesday
<div> Add Edit Delete Escape </div>			

Groups

The **Groups** section of the Front Desk Dashboard will display any groups that are arriving, in-house, or departing from your hotel over the current hotel date. The information displayed includes the group Reservation Name, the Arrival and Departure dates, and room nights Blocked and Picked Up.

Groups				
Reservation Name	Arrival	Departure	Blocked	Picked Up
<u>Soccer Group</u>	01-30-2023	02-01-2023	6	2

Click on the Reservation Name hyperlink to go to the Group Reservation page for editing, posting to the Group Folio, editing group Availability and Rates, reviewing or picking-up rooms for the group, and more. Groups are covered fully in the [Groups](#) section.

Soccer Group - Soccer ZZ10000213668G

Group Data | Group Folio | Availability / Rates | Comments | Letters | Group History | Room List | Log

Group Name: Soccer Group
 Group Booking Name: Soccer
 Contact Last Name: Stevens
 Contact First Name: Bill
 Business Phone: 222-999-6231
 e-mail / Type: BUSINESS
 Phone:
 Fax:
 Address 1: 12 Happy Street BUSINESS
 Address 2:
 Country: United States
 State: California
 Zip:
 City: Phoenix
 Lead ID:
 Confirmation # ZZ10000213668G
 Projected income \$ 750.00
 Projected Tax \$ 86.25
 Arrival 6/12/23
 Departure 6/16/23
 Group Comments
 Reservation Comments
 Status ACTIVE
 Company
 Travel Agent
 Source Front Desk
 Channel Front Desk
 Market Corporate
 Tax Exempt?
 Guaranteed By Cash
 Credit Card Action - Go
 Group Guarantee Code DEP
 Group Cancel Policy 4PM
 CRS - Group ID N57ZM2M9
 CRS Rate Plan 0161
 CRS Url https://www.bestwestern.com/en_US/book/hotel-rooms.00599.html?groupid=N57ZM2M9
 Group Type OTHER
 Group Sync Tool Cancel Group Reservation
 Done Save Undo Refresh Back to Group Reser

Availability / Rates

Aside from the [Availability section](#) of the Front Desk Dashboard and [within a reservation](#), you can view detailed availability by rate plan with the **Availability / Rates** feature. For Best Western branded hotels, this can be useful for availability/inventory checks between AutoClerk Cloud and MemberWeb to make sure the two systems are synced and in balance.

Availability

From the Front Desk Dashboard on the blue menu bar, click the Reservations drop-down menu and select Availability / Rates.

Main Menu | Reservations | Reports | Arrivals | In House | Departures | Dashboard

Shortcuts
 Reservations
 Walk-in
 Tape Chart
 Reports
 Reservation Activity
 Setup
 BW CRS connection

Reservations
 New Reservation
 Walk-in
 Rate Calendar
 Availability / Rates
 Tape Chart
 Search
 Group Wizard
 Group Reservations

Reports
 Arrivals
 In House
 Departures
 Tape Chart
 Search
 Group Wizard
 Group Reservations

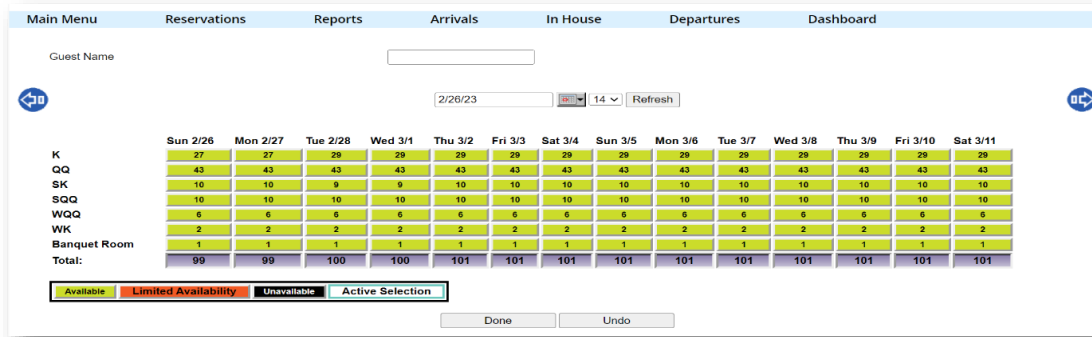
Arrivals
 In House
 Departures

In House
 Availability
 RACK - BAR
 9 K \$ 185.00
 40 QQ \$ 195.00
 8 SQ \$ 205.00
 6 WQQ \$ 215.00
 1 Banquet Room N/A

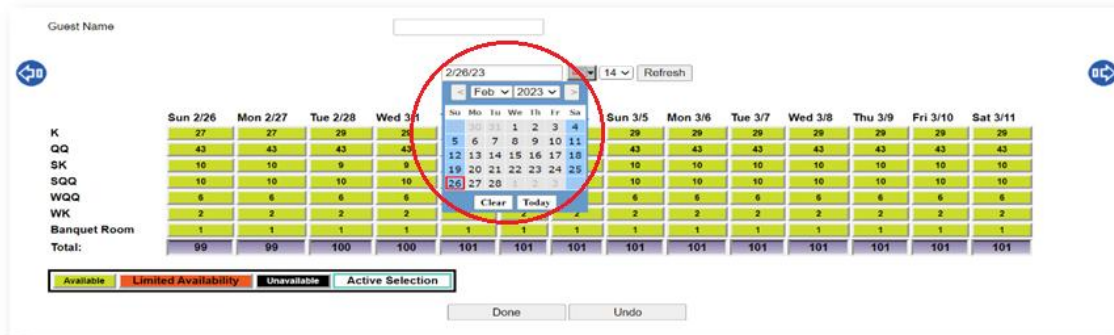
Departures
 Quick Search
 Last Name
 Confirmation #
 Arrival Date
 Departure Date
 Search More

Dashboard
 Change Room Status
 Room #
 Go
 Apply Charge
 Amount
 Apply Charge

A chart will display your hotel's room types in the far-left column, and fourteen (14) days of availability per room type. Each cell will display a number which represents the total number of available rooms for that room type for that date. **Note: There will be separate lines for all room types, including any non-sleeping rooms such as Meeting Rooms. This will add to the overall total.**

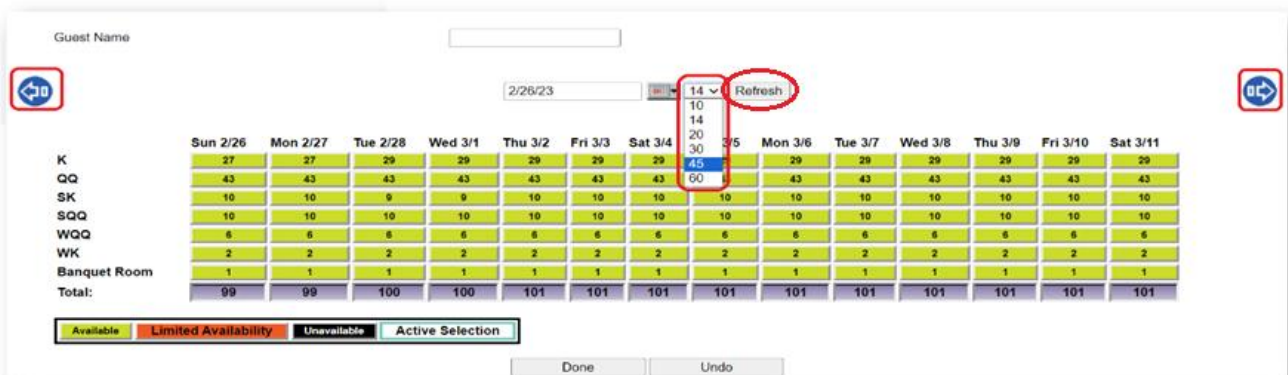


To change the date, use the date field at the top of the chart. You can type in the date (MM/DD/YYYY format) or select from the calendar icon and click Refresh.



The default view is 14 days. You can change the view to a minimum of 10 days or a maximum of 60 days, and then click Refresh.

On the left and right are blue arrows you can use to reverse or advance the dates by the chosen date range.



Rates

Rates are visible and more easily accessed from [within a reservation](#). However, you may also use the Availability / Rates feature to determine rates for a single date, a range of dates, and for future dates.

Once the chart displays the guest's desired stay dates, select room type and the date. You can select a multiple-night stay by clicking on each individual date, or by clicking on the first and last dates. **Note: Only one room type can be booked for each reservation confirmation number. After reservation creation, guests may move rooms or room types when assigning a room.** Click "Done".

The next page will display the plans available for this room type on the arrival date of the potential reservation. The rates will be color coded per their availability:

- **Green** – Available to book
- **Orange** – Not available later in the stay due to room availability, a stay restriction, or a sold-out rate plan
- **Red** – Not available for that night due to room availability, a stay restriction, or a sold-out rate plan
- **Black** – Not available during the entire stay

Note: as part of making a reservation with this method you must choose a Source at the upper left of the screen before proceeding. You may also set the Adults/Children/Infants occupancy counts at this time. The "Travel Agent" and "Company" are optional fields.

If you wish to see the rates for the remaining nights of the reservation, first choose a rate for the arrival date and source, then click on the date above the chart to see the rate for the following night(s).

The system will apply the Rate Plan chosen for the first night to the following nights. However, if you choose to view any of the following night's rates, the system will then require you to choose the rate for each night of the stay before continuing.

The screenshot displays the AutoClerk Cloud reservation interface. At the top, there are input fields for 'Source' (set to 'Front Desk'), 'Travel Agent', and 'Company'. Below these are dropdown menus for '# Adults' (set to 1), '# Children' (set to 0), and '# Infants' (set to 0). The main area features a date selection chart with a horizontal bar. The bar is labeled 'RACK - BAR' and 'Manual'. The date range 'Sun 3/24' to 'Mon 3/25' is highlighted, with 'Mon 3/25' circled in green. The rate '\$180.00' is displayed next to the date range. Below the chart, there are four status indicators: 'Available' (yellow), 'Not Available Later' (red), 'Not Available Now' (red), and 'Not Available During Stay' (black). The 'Done' button is circled in green, and other buttons like 'Save', 'Undo', and 'Refresh' are also visible.

Once a rate and source are chosen, click “Done” and you will be taken to the reservation page to complete and save the reservation.

Tape Chart

The **Tape Chart** is a versatile graphic visualization of your hotel resembling a spreadsheet. You can view the status of each room in the hotel, reservations blocked to room numbers, and availability per room type. You can also place rooms out-of-order and perform other reservation tasks.

The Tape Chart may be accessed from the Front Desk Dashboard's shortcuts or through the blue menu bar by selecting the drop-down Reservations menu and click Tape Chart.

Date	Thu 3/23	Fri 3/24	Sat 3/25	Sun 3/26	Mon 3/27	Tue 3/28	Wed 3/29	Thu 3/30
Total	99	62	68	74	75	65	35	60
100(K)	29	Richardson			15	15	Out of Order	
101(K)	29	7	11	14	15	15	Out of Order	0
102(QQ)	43	40	40	43	43	33	Out of Order	43
103(WQQ)	6	6	6	6	6	6	6	6
105(K)	Smith	7	11	14	15	15	Out of Order	0
106(QQ)	43	40	40	43	43	33	Out of Order	43
107(QQ)	43	40	40	43	43	33	Out of Order	43
108(SK)	9	0	2	2	2	2	Out of Order	2
109(SQQ)	10	8	8	8	8	8	Out of Order	8
110(K)	29	Out of Order	11	14	15	15	Out of Order	0
111(K)	29	7	11	14	15	15	Out of Order	0
112(K)	29	7	11	14	15	15	Out of Order	0
114(K)	Test	7	11	14	15	15	Out of Order	0
115(K)	29	Jacobson		14	15	15	Out of Order	0
116(K)	29	7	11	14	15	15	Out of Order	0
117(QQ)	43	40	40	43	43	33	Out of Order	43
118(QQ)	43	40	40	43	43	33	Out of Order	43
120(K)	29	7	11	14	15	15	Out of Order	0
121(WK)	2	0	0	0	0	0	Out of Order	0
123(SK)	9	0	2	2	2	2	Out of Order	2

As a default, from left to right the Tape Chart columns show each room number, its type, if it is a connecting room, the previous night (gray and shaded), the current hotel date, and the following dates per the Tape Chart Filter. Each cell under the dates will either display the available rooms for that date per room type, a reservation blocked to that room number, or an Out of Order status.

Legend

At the bottom of the Tape Chart is a Legend that will identify the meaning of the colors.

Reservations	Room Status	Availability
<div>Checked Out</div> <div>Checked In</div> <div>New</div>	<div>Clean</div> <div>Dirty</div> <div>Out Of Order</div>	<div>Available</div> <div>Unavailable</div> <div>Before Today</div> <div>Active Selection</div>

Tape Chart Filter

There are filters at the top of the Tape Chart that allow you to customize your view. By default, all room types are displayed with the Start Date as the current hotel date. The Tape Chart will always display the previous night to the left of the current hotel date.

The Room Type drop-down menu allows you choose to isolate and display one or more room types.

Tape Chart Filter				
Room Type: K	Start Date: 3/23/23	7	Default	Refresh
Date	select all	Thu 3/23	Fri 3/24	Sat 3/25
Total		99	62	68
<input checked="" type="checkbox"/> K		29	Richardson	
<input type="checkbox"/> QQ		29	7	11
<input type="checkbox"/> SK		43	40	40
<input type="checkbox"/> SQQ		6	6	6
<input type="checkbox"/> WK		Smith	7	11
<input type="checkbox"/> WQQ		43	40	40
<input type="checkbox"/> Banquet Room		43	40	40
<input type="checkbox"/> Connecting Rooms		9	0	2
		10	8	8
	110(K)	29	Out of Order	11









Choose the room type(s) you want to display and click “Refresh”. When the Tape Chart refreshes, it will only show rooms of the selected room type(s).

Tape Chart Filter				
Room Type: K	Start Date: 3/23/23	7	Default	Refresh
Date	Thu 3/23	Fri 3/24	Sat 3/25	Sun 3/26
Total	28	7	11	14
<input checked="" type="checkbox"/> 100(K)	29	Richardson		
<input type="checkbox"/> 101(K)	29	7	11	14
<input checked="" type="checkbox"/> 105(K)	Smith	7	11	14
<input checked="" type="checkbox"/> 110(K)	29	Out of Order	11	14
<input type="checkbox"/> 111(K)	29	7	11	14
<input type="checkbox"/> 112(K)	29	7	11	14
<input type="checkbox"/> 114(K)	Test	7	11	14
<input type="checkbox"/> 115(K)	29	Jacobson		14
<input type="checkbox"/> 116(K)	29	7	11	14
<input type="checkbox"/> 120(K)	29	7	11	14

You can also choose to display just the connecting (adjoining) rooms in your hotel.

Room Type: Connecting Rooms

Start Date: 3/23/23 7 Default Refresh

Date	Thu 3/23	Fri 3/24	Sat 3/25	Sun 3/26
Total	0	0	0	0
 100(K)	29	Richardson		
 109(SQQ)	10	8	8	8
 102(QQ)	43	40	40	43
 103(WQQ)	6	6	6	6
 105(K)	Smith	7	11	14
 107(QQ)	43	40	40	43
 108(SK)	9	0	2	2
 110(K)	29	Out of Order	11	14

The Start Date field allows you change the view to a future date to view availability, blocking, and status of rooms. You can also view past dates to view room blocking, Out of Order status, and find past reservations.

Room Type:

Select Room Type

Start Date:

3/2/23

7

Default

Refresh

Tape Chart Filter

Date							
Total							68
<div><div></div></div> 100(K)							
<div><div></div></div> 101(K)							
<div><div></div></div> 102(QQ)							
<div><div></div></div> 103(WQQ)							
<div><div></div></div> 105(K)							
<div><div></div></div> 106(QQ)							
<div><div></div></div> 107(QQ)							
<div><div></div></div> 108(SK)							
<div><div></div></div> 109(SQQ)							
<div><div></div></div> 110(K)							

<

Mar

>

26

27

28

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

Clear

Today

					</		

In the right-side drop-down menu, you can choose a 7, 10, 14, or 30-day view.

Room Type:

Select Room Type

Start Date:

3/2/23

Tape Chart Filter

7

Default

Refresh

Date	Thu 3/23	Fri 3/24	Sat 3/25
Total	99	62	68
<div>C</div> 100(K)	29	14	
101(K)	29	7	11
<div>C</div> 102(QQ)	43	40	40
<div>C</div> 103(WQQ)	6	6	6
<div>C</div> 105(K)	Smith	7	11
106(QQ)	43	40	40
<div>C</div> 107(QQ)	43	40	40
<div>C</div> 108(SK)	9	0	2
<div>C</div> 109(SQQ)	10	8	8
<div>C</div> 110(K)	29	Out of Order	11

Click "Refresh" to apply your filter settings. To return to the current hotel date with a 7-day view, click "Default". **Note: the room type selector will need to be unchecked separately.**

Room Type: Start Date:

Tape Chart Filter

Date	Thu 3/23	Fri 3/24	Sat 3/25
Total	99	62	68
100(K)	29	Richardson	
101(K)	29	7	11
102(QQ)	43	40	40
103(WQQ)	6	6	6
105(K)	Smith	7	11
106(QQ)	43	40	40
107(QQ)	43	40	40
108(SK)	9	0	2
109(SQQ)	10	8	8
110(K)	29	Out of Order	11

Rooms and Room Status

The far-left column displays each room and room type in your hotel. It also displays a icon if the room is connected to another room. If you hover over the connecting icon, it will display the connecting room(s). Also, if you hover over a room number you will see any notes entered for that room.

Room Type: Start Date:

Tape Chart Filter

Date	Thu 3/23	Fri 3/24	Sat 3/25	Sun 3/26
Total	99	62	68	74
100(K)	29	Richardson		
101(K)	29	7	11	14
102(QQ)	43	40	40	43
102(QQ) Room Remarks: Connecting Room - Connects with 104 And 103	6	6	6	6
105(K)	Smith	7	11	14
106(QQ)	43	40	40	43
107(QQ)	43	40	40	43
108(SK)	9	0	2	2
109(SQQ)	10	8	8	8
110(K)	29	Out of Order	11	14

The room number column will also display the status of the room via color: white for Clean, orange for Dirty, or gray for Out of Order.

You can change the status of the room by right-clicking and changing the status between Clean or Dirty, or put the room Out of Order.

Room Type: Start Date:

Tape Chart Filter

Date	Thu 3/23	Fri 3/24	Sat 3/25
Total	99	62	68
100(K)	29	Richardson	
101(K)	29	7	11
102(QQ)	43	40	40
103(WQQ)	6	6	6
105(K)	Smith	7	11
106(QQ)	43	40	40
107(QQ)	43	40	40
108(SK)	9	0	2
109(SQQ)	10	8	8
110(K)	29	Out of Order	11

Right-click context menu for room 106(QQ):

- Clean
- Dirty
- Out of Order

Out of Order

The Tape Chart is the only place you can place a room out of order (OOO).

To place a room OOO, right-click on the room number and choose “Out of Order”. To select a specific start date for the OOO, right-click on the cell where the room number and the date intersect.

Tape Chart Filter			
Room Type: Select Room Type	Start Date: 3/23/23	7	Default Refresh
Date	Thu 3/23	Fri 3/24	Sat 3/25
Total	99	62	68
100(K)	29	Richardson	
101(K)	29	7	11
102(QQ)	43	40	40
103(WQQ)	6	6	6
105(K)	Smith		11
106(QQ)	43	40	40
107(QQ)	43	40	40
108(SK)	9	0	2
109(SQQ)	10	8	8
110(K)	29	Out of Order	11

A pop-up window will allow you to choose the dates and enter a reason for the room to be OOO. You may remove the room from service for three date periods at once in the event of planned deep cleanings, room renovations, etc.

Room Type: WQQ
Room: 103

From Date
03/24/23

To Date
03/24/23

Reason
Broken TV

Reason:

Reason2:

Reason3:

Created By
Andy Moran

Save

Cancel

Click “Save” and the room will display on the tape chart as gray for Out of Order.

You can hover over the cell to display the reason the room is OOO.

Tape Chart Filter			
Room Type: Select Room Type	Start Date: 3/23/23	7	Default Refresh
Date	Thu 3/23	Fri 3/24	Sat 3/25
Total	99	61	68
C 100(K)	29	Richardson	
101(K)	29	7	11
C 102(QQ)	43	40	40
C 103(WQQ)	6	Out of Order	6
C 105(K)	Smith	Reason:Broken TV	11
106(QQ)	43	40	40
C 107(QQ)	43	40	40
C 108(SK)	9	0	2

To edit or remove the Out of Order status, dates, or reason, click on the Out of Order text in the cell and the pop-up window will appear again.

Room Type: WQQ
Room: 103

From Date

To Date

Reason

03/24/23

3/24/23

Broken TV

Reason:

Last Modified By

Andy Moran

5/8/23 03:48 PM PDT

Save

Cancel

Remove

To put the room back in order, click "Remove". Out of Order rooms will always return to service as "Dirty" until set manually to "Clean".

Room Type: WQQ
Room: 103

From Date

To Date

Reason

03/24/23

3/24/23

Broken TV

Reason:

Last Modified By

Andy Moran

5/8/23 03:48 PM PDT

Save

Cancel

Remove

New Reservation from the Tape Chart

New reservations and walk-ins can be created from the Tape Chart.

Left-click the cell under the arrival date and the final night of the stay for the room number you wish to assign. If the stay is a single night, only one cell needs to be clicked. If the stay is for two (2) nights or longer, click the arrival date and the final night so that all nights in between will be selected.

Once the night(s) are selected, right-click, and choose "New Reservation" from the menu.

Room Type: Start Date:

Tape Chart Filter

Date	Thu 3/23	Fri 3/24	Sat 3/25	Sun 3/26	Mon 3/27
Total	99	61	68	74	75
100(K)	29	Richardson			15
101(K)	29	7	11	14	15
102(QQ)	43	40	40	43	43
103(WQQ)	6	Out of Order	6	6	6
105(K)	Smith	7	11	14	15
106(QQ)	43	40	40	New Reservation	13
107(QQ)	43	40	40	Out of Order	13
108(SK)	9	0	2	2	2
109(SQQ)	10	8	8	8	8
110(K)	29	Out of Order	11	14	15

The reservation page will display the dates and the room number and type chosen in the Tape Chart. You can continue to complete the reservation covering rates and entering guest information.

Jane Smith New CRS Confirmation: n/a MyHMS Confirmation: n/a

Arrive: Nights: Depart: Availability / Rates Room 106 Type: QQ Adults: 1 Children: 0 Infants: 0

Rate Plan: RACK - BAR Rate: \$215.00 Confidential Rate: ☐ Stay Total: \$785.35 Balance: \$0.00 Tax Exempt: ☐ Rollaways: 0 Crib: 0 Pet: 0 Fruit Basket: 0 Parking: ☐

Guest Best Western Company Group Travel Agent All Notes

Best Western ID: LookUp Remove BW ID

Last: First: Title: ETA:

Phone / Type: Address 1: Address 2: Zip / Country: City / State: e-mail / Type: Birth Date: Drivers License: Passport: Other Phone: Purchase Order: Company: Join BW Rewards: ☐

Reservation Comments: CRS Comments:

Guest Comments: Do Not Rent: ☐

Folio Comments:

Hold Type: CC-GTD Pay Type: Cash Credit Card Action:

Source: Travel Agent Source2: Travel Agent Market: Friends and Family Cancel Policy: 4PM Key System: Manual CONTROL Control

Once the reservation information has been entered and you click Save & Exit, you will be taken back to the Tape Chart. By creating a new reservation using this method, you are pre-assigning them to a specific room number. You can also hover over the guest name for Guest Remarks and Reservation Remarks.

Room Type: Start Date:

Tape Chart Filter

Date	Thu 3/23	Fri 3/24	Sat 3/25	Sun 3/26	Mon 3/27
Total	99	60	67	73	75
100(K)	29	Richardson			15
101(K)	29	7	11	14	15
102(QQ)	43	39	39	42	43
103(WQQ)	6	Out of Order	6	6	6
105(K)	Smith	7	11	14	15
106(QQ)	43	Smith			43
107(QQ)	43	Guest Remarks: 'Guest prefers to be a lower floor'			43
108(SK)	9	Reservation Remarks: 'Guest will be arriving at 10:00pm'			2
109(SQQ)	10		8	8	8
110(K)	29	Out of Order	11	14	15

Reservation Options

To access and modify an existing reservation on the Tape Chart, right-click on the reservation. Depending on the status of the reservation, it will give you multiple options to choose from, depending on the reservation status. You may also left-click directly on the name to modify the reservation or check-in.

Room Type: Start Date:

Tape Chart Filter

Date	Thu 3/23	Fri 3/24	Sat 3/25	Sun 3/26
Total	99	60	67	73
100(K)	29	Richardson		
101(K)	29	7	11	14
102(QQ)	43	39	39	42
103(WQQ)	6	Out of Order	6	6
105(K)	Smith	7	11	14
106(QQ)	43	Smith		
107(QQ)	43	Modify Guest Data	39	42
108(SK)	9	Folio	2	2
109(SQQ)	10	History	8	8
110(K)	29	Check In	11	14
		Print Folio		

- **Modify Guest Data** – Opens the reservation's Guest Data screen where you can make changes to that specific guest reservation.
- **Check In** – Also opens the reservation Guest Data screen. The user may then follow steps to process a check in.
- **Check Out** – Opens a checked-in reservation's folio where any charges/payments can be posted and a checkout can be processed.
- **Re-instate Guest** – Opens the Guest Data screen, allowing you to make necessary changes such as extending the check-out date.
 - **Note: you must Save or Save & Exit to save changes to the departure date and change the reservation status to Re-instated.**
 - Reinstatement can only be done if the Rate plan that the guest previously booked is a Rate Plan that the Front Desk is able to sell.









- **History** – Takes you to a list of the guest's stay history, including links to past and future reservations, and stay statistics such as most frequent room and average rate.

Room Moves and Date Changes

Room moves are easy from the Tape Chart using “Drag n Drop”:

Place the mouse pointer on the name of the reservation you wish to move. Then click and hold down on the left mouse button and the name of the guest will turn red. While holding the mouse button down, drag the reservation to the lime green cell (clean room) of the room number you desire and release the button.

The cell you move the reservation to must be lime green (for example, you cannot move it to a black or gray cell). You can also drag a reservation in New status to another date to change the reservation's arrival date.

Tape Chart Filter			
Room Type: <input type="text" value="Select Room Type"/>	Start Date: <input type="text" value="3/23/23"/>	<input type="text" value="7"/>	<input type="button" value="Default"/> <input type="button" value="Refresh"/>
Date	Thu 3/23	Fri 3/24	Sat 3/25
Total	99	60	67
 100(K)	30	Richardson	
101(K)	30	7	11
 102(QQ)	43	39 Smith	39
 103(WQQ)	6	Out of Order	6
 105(K)	Smith	7	11
106(QQ)	43		
 107(QQ)	43	39	39
 108(SK)	9	0	2
 109(SQQ)	10	8	8
 110(K)	30	Out of Order	11

You are asked to confirm the room move. Once you click “Yes”, the system will process the room move.

Confirmation

Are you sure you want to move this reservation from room 106 to 102 ?

Note: “Drag n Drop” is only recommended if the guest is changing to the same room type, a room type with the same rate or a complimentary upgrade. When moving a guest through the Tape Chart, the system will keep the original room rate and will not prompt you to change the rate even if the room move results in a more expensive or less expensive rate.

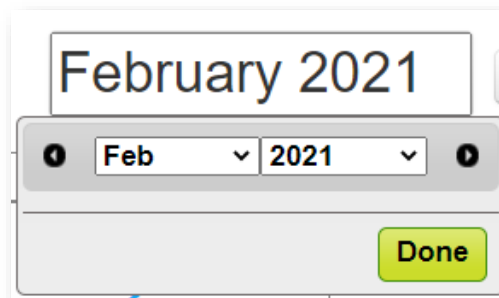
Rate Calendar

The **Rate Calendar** allows hotel staff to manage rates, stay restrictions, quickly reference occupancy, dates with group blocks, and other important notes about a particular date. From the "Reservation" Menu in the blue menu bar, select "Rate Calendar".

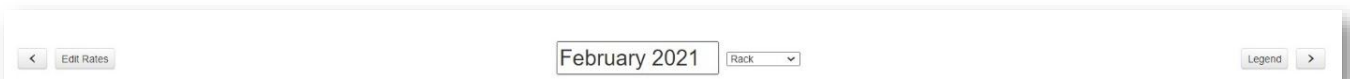
The Rate Calendar will default to the current month with the first rate in your list of rates in Setup. The current date has an orange circle over it.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Jan 31 \$0.00 - \$0.00	Feb 1 \$0.00 - \$0.00	2 \$0.00 - \$0.00	3 \$0.00 - \$0.00	4 \$0.00 - \$0.00	5 \$0.00 - \$0.00	6 \$0.00 - \$0.00
7 \$0.00 - \$0.00	8 \$0.00 - \$0.00	9 \$0.00 - \$0.00	10 \$0.00 - \$0.00	11 \$0.00 - \$0.00	12 \$0.00 - \$0.00	13 \$0.00 - \$0.00
14 \$0.00 - \$0.00	15 \$0.00 - \$0.00	16 \$0.00 - \$0.00	17 \$0.00 - \$0.00	18 \$0.00 - \$0.00	19 \$0.00 - \$0.00	20 \$0.00 - \$0.00
21 \$0.00 - \$0.00	22 \$0.00 - \$0.00	23 \$100.00 - \$200.00	24 \$125.00 - \$250.00	25 \$100.00 - \$200.00	26 \$100.00 - \$200.00	27 \$100.00 - \$200.00 Close to Arrival 2
28 \$100.00 - \$200.00	Mar 1 \$100.00 - \$200.00	2 \$100.00 - \$200.00	3 \$100.00 - \$200.00	4 \$100.00 - \$200.00	5 \$100.00 - \$200.00	6 \$100.00 - \$200.00

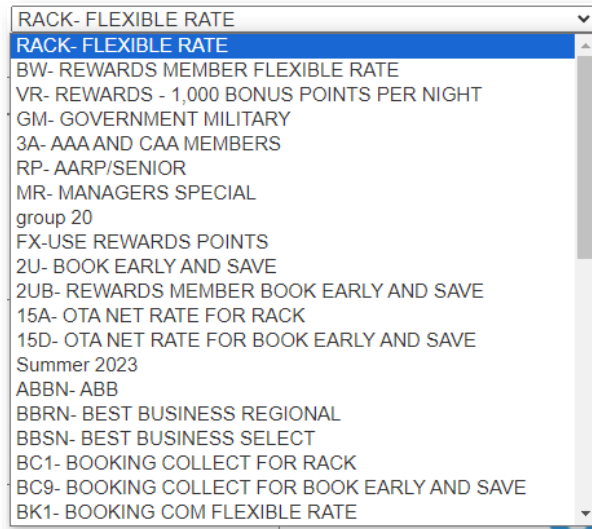
You can change the month by clicking on the current month and year.



Also at the top of the Rate Calendar, there is an arrow on each side which allows a user to go forward or backwards one month at a time.



The rate calendar will display rates for one rate plan at a time. Using the drop-down list next to the month and year, you may view any rate plan, but *only parent rates can be modified*.



Legend

The best way to understand and interpret the Rate Calendar is to click on the button labeled "Legend" on the top right of the Calendar.

Note - Hover to see notes

Group - At least one group is booked on this day
Hover for details

Lowest and Highest Rate for the Day
For selected Rate

Stay Restriction - Right Click to View All

Remaining Rooms to Sell

Projected Occupancy

Set Quick Rate Amounts

Default Dollar Change \$

Default Percent Change %

Set Middle Occupancy Range

Between % and %

Calendar Day colors


15 Occupancy 30% or below

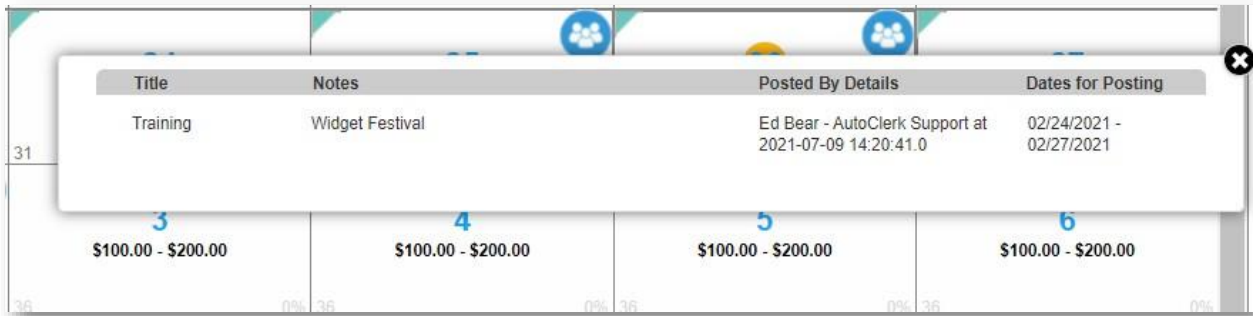
15 Occupancy between 30% and 70%

15 Occupancy 70% or above

Save & Exit **Escape**


Notes

The shaded teal triangle  in the upper left-hand corner indicates the date has a **Note**. To quickly view the Note, hover the mouse over the symbol.



Title	Notes	Posted By Details	Dates for Posting
Training	Widget Festival	Ed Bear - AutoClerk Support at 2021-07-09 14:20:41.0	02/24/2021 - 02/27/2021

Groups

The blue circle with three people  in the upper right-hand corner indicates there is one or more groups arriving, staying over, or checking out on that date. To quickly view the groups, hover the mouse over the symbol.



Group Name	Arrival	Departure	Blocked	Picked-Up
March Group	03-01-2021	03-02-2021	11	0

Available Rooms and Occupancy



27	\$100.00 - \$200.00	Close to Arrival 2	2.78%
----	---------------------	--------------------	-------

The bottom left of the date shows the total number of rooms available to sell and the statistic at the bottom right shows the occupancy percentage.

If a stay restriction has been set for that date, it is displayed in red below the rate range.

Middle Occupancy Range

On the bottom right corner of the Legend, you may set your hotel's **Middle Occupancy Range** to customize the color indicators on the Rate Calendar. This setting can be changed at any time when and if your occupancy fluctuates throughout the year.

Set Middle Occupancy Range

Between % and %

Calendar Day colors

15 Occupancy 30% or below

15 Occupancy between 30% and 70%

15 Occupancy 70% or above

The number in the center represents the date of the selected month. The date can be either **Light Blue**, **Black**, or **Magenta**, and is determined by the occupancy level and compared to the “Middle Occupancy Range”, which is customizable by the property and will give you a quick visual queue to the occupancy of that date without having read the percentage.

- If the occupancy is *below* the low number of the range, then the color of the date is **Light Blue**.
- If the occupancy level is *equal to or between* the Middle Occupancy Range then the color is **Black**.
- If the occupancy level is *above* the high number of the range, then the color of the date is **Magenta**.

For example, if the middle occupancy range is set to between 30%-60%, and the occupancy for that day is less than 30%, it will appear as **Light Blue**.



Set Quick Rate Amounts

The “Default Dollar Change \$” and “Default Percent Change” settings will allow you to set a default amount for the radio buttons in the “[Quick Rates](#)” feature. This is helpful if you have fixed amounts you would normally use to quickly adjust rates.

Set Quick Rate Amounts

Default Dollar Change \$

Default Percent Change %

Daily Overview

You can left click on any date to view the **Daily Overview** for that date. It will display many hotel statistics, room availability with rates, stay restrictions, and groups at the bottom.

Daily Overview 2023-02-26				
Hotel Summary		Availability At A Glance		Restrictions
Arrivals	0	K	\$79.00	27
Departures	0	QQ	\$89.00	43
Stay Overs	0	SK	\$99.00	10
Out of Order	0	SQQ	\$109.00	10
		WQQ	\$119.00	6
		WK	\$129.00	2
		Banquet Room	\$0.00	1
None				
Group Name	Arrival	Departure	Blocked	Picked-Up
Training camp 2023	02-23-2023	02-26-2023	0	9
Spring Training 2023	02-26-2023	02-28-2023	4	0

Edit Rates

At the top of the Rate Calendar in the upper left-hand corner, "Edit Rates" allows you to change rates for any rate plans that are already defined in Setup. **Note: a user must have the "PERMIT_EDITING_ON_RATE_CALENDAR" permission to edit rates.**

March 2023						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Feb 26 \$0.00 - \$0.00 MinLOS 1	27 \$0.00 - \$0.00 MinLOS 1	28 \$0.00 - \$0.00 MinLOS 1	Mar 1 \$0.00 - \$0.00 OPEN	2 \$0.00 - \$0.00 Close to Arrival 1	3 \$0.00 - \$0.00 OPEN	4 \$0.00 - \$0.00 OPEN
5 \$0.00 - \$0.00 OPEN	6 \$0.00 - \$0.00 MinLOS 2	7 \$0.00 - \$0.00 Close to Arrival 1	8 \$0.00 - \$0.00 OPEN	9 \$0.00 - \$0.00 Close to Arrival 1	10 \$0.00 - \$0.00 OPEN	11 \$0.00 - \$0.00 OPEN
12 \$0.00 - \$0.00 OPEN	13 \$0.00 - \$0.00 OPEN	14 \$0.00 - \$0.00 OPEN	15 \$0.00 - \$0.00 OPEN	16 \$0.00 - \$0.00 OPEN	17 \$0.00 - \$0.00 OPEN	18 \$0.00 - \$0.00 OPEN
19 \$0.00 - \$0.00 OPEN	20 \$0.00 - \$0.00 OPEN	21 \$0.00 - \$0.00 SoftLOS 1	22 \$0.00 - \$0.00 SoftLOS 2	23 \$0.00 - \$0.00 OPEN	24 \$205.00 - \$235.00 MinLOS 1	25 \$205.00 - \$235.00 MinLOS 1
26 \$255.00 - \$285.00 MinLOS 1	27 \$235.00 - \$265.00 MinLOS 1	28 \$235.00 - \$265.00 MinLOS 1	29 \$235.00 - \$265.00 OPEN	30 \$235.00 - \$265.00 OPEN	31 \$185.00 - \$215.00 OPEN	Apr 1 \$185.00 - \$215.00 OPEN

After clicking on Edit Rates, the system will display the message:



Select the start date of the Rate Change. Then the following message will display:



Select the last day of Rate Change

If you wish to change the rates for just one date, then click on the same date again. You can select any date into the future. The selected date(s) will appear cyan.

March 2023							Legend	
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday		
Feb 26 \$0.00 - \$0.00 MinLOS 1	27 \$0.00 - \$0.00 MinLOS 1	28 \$0.00 - \$0.00 MinLOS 1	Mar 1 \$0.00 - \$0.00 OPEN	2 \$0.00 - \$0.00 Close to Arrival 1	3 \$0.00 - \$0.00 OPEN	4 \$0.00 - \$0.00 OPEN		
5 \$0.00 - \$0.00 OPEN	6 \$0.00 - \$0.00 MinLOS 2	7 \$0.00 - \$0.00 Close to Arrival 1	8 \$0.00 - \$0.00 OPEN	9 \$0.00 - \$0.00 Close to Arrival 1	10 \$0.00 - \$0.00 OPEN	11 \$0.00 - \$0.00 OPEN		
12 \$0.00 - \$0.00 OPEN	13 \$0.00 - \$0.00 OPEN	14 \$0.00 - \$0.00 OPEN	15 \$0.00 - \$0.00 OPEN	16 \$0.00 - \$0.00 OPEN	17 \$0.00 - \$0.00 OPEN	18 \$0.00 - \$0.00 OPEN		
19 \$0.00 - \$0.00 OPEN	20 \$0.00 - \$0.00 OPEN	21 \$0.00 - \$0.00 SoftLOS 1	22 \$0.00 - \$0.00 SoftLOS 2	23 \$0.00 - \$0.00 OPEN	24 \$205.00 - \$235.00 MinLOS 1	25 \$205.00 - \$235.00 MinLOS 1		
26 \$255.00 - \$285.00 MinLOS 1	27 \$235.00 - \$265.00 MinLOS 1	28 \$235.00 - \$265.00 MinLOS 1	29 \$235.00 - \$265.00 OPEN	30 \$235.00 - \$265.00 OPEN	31 \$185.00 - \$215.00 OPEN	Apr 1 \$185.00 - \$215.00 OPEN		

After selecting the date(s), the following message will display:



Click Edit Rates to make changes for selected rate or escape

You may now Escape to cancel, use Quick Rates, or for more options use Rates.



Escape

Quick Rates

Rates

Rates

“Rates” will give you a screen similar to “Setup” when [building Parent Rate Plans](#).

	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> K	<input checked="" type="checkbox"/> QQ	<input checked="" type="checkbox"/> SK	<input checked="" type="checkbox"/> SQQ	<input checked="" type="checkbox"/> WK	<input checked="" type="checkbox"/> WQQ
<input type="checkbox"/> Base Rate	205	215	225	225	225	235	235
<input type="checkbox"/> Additional Adult	10	10	10	10	10	10	10
<input type="checkbox"/> Additional Child	0	0	0	0	0	0	0
<input type="checkbox"/> Additional Infant	0	0	0	0	0	0	0
<input type="checkbox"/> # Included Adults	2	2	2	2	2	2	2

Save

The checkboxes in the far-left column will apply your changes to the entire row. For example, if Additional Adult is checked and the value for K is changed to 15, then 15 will be applied to the entire row for all room types after clicking or tabbing out. To turn this off, uncheck the box to the left.

Note: The checkboxes above each room should never been unchecked because it could cause availability mismatches between the CRS and the PMS.

Quick Rates

“Quick Rates” will allow you to apply an increase or decrease for every room type and is convenient for quickly applying the same change to all room types at once for the date range.

Rate Plan : RACK - FLEXIBLE RATE Dates : 04-05-2024 - 04-05-2024

Quick Rate Change:

☐ Dollars ☒ Increase
☐ Percentage ☐ Decrease

Save

If you click the “Dollars” or “Percentage” radio button, it will auto-populate the amount set in the [“Set Quick Rate Amounts”](#) box of the [Legend](#).

Rate Plan : RACK - BAR Dates : 07-05-2024 - 07-05-2024

Quick Rate Change:

☐ Dollars ☒ Increase
☒ Percentage ☐ Decrease

Save

Right-Click: Other Options

If you right-click on a date you will get the following menu:



“[View Daily Overview](#)” and “[View Group Overview](#)” are already included when left-clicking on a date to get the “Daily Overview”. Selecting “Add / Edit Notes” will give you the following screen:

Title	Notes	Posted By Details	Dates for Posting
Special event in town	Rate is subject to change.	44791 at 2023-01-24 14:59:19.0	02/26/2023 - 02/28/2023
Add New Note			

Add/Edit Notes

You can either click on the link of the Title to view/edit the note, or you can click on the button on the right labeled “Add New Note”.

Title	Notes	Posted By Details	Dates for Posting
Art Walk	walk in's likely	Tessa Lara at 2024-01-31 09:13:32.0	01/05/2024 - 01/05/2024
Add New Note			

It is recommended to enter a note for each event of the year that might affect your occupancy. Notes may not be deleted but can be edited to replace the text.

Add/Edit Calendar Note

Title

Post From
Until

Content

Please fill out this field.

Save & Exit
Escape

Stay Restrictions

Stay Restrictions may be set here in the Rate Calendar by right-clicking on a date, or through hotel Setup.

Title	Begin Date	End Date	Type
Training	02-27-2021	02-27-2021	Close to Arrival 2 Some Room Types

Add View Escape

Notice that you can add or view, but you cannot modify or delete a stay restriction.

The Stay Restriction Setup screen in the rate calendar is almost identical to Setup > Stay Restrictions.

Stay Restriction Setup

Title:

Begin Date:

End Date:

Type:

Length:

Apply to Days

☐ All

☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thr ☐ Fri ☐ Sat

And Room Types

☐ All

☐ K ☐ QQ ☐ SK ☐ SQQ ☐ WK ☐ WQQ ☐ Banquet Room

And Rate Levels

☐ ***LEVEL A**

**Note: any Stay Restrictions applied to Level A will apply to all Levels A through H and to all Rate Plans.*

☐ **LEVEL B**

☐ **LEVEL C**

☐ **LEVEL D**

☐ **LEVEL E**

You will not be able to modify nor delete a stay restriction. Instead, you must create a new restriction which will override the previous restriction. Only the most recent restriction added will apply. For example:

- Create an Open restriction for a date that is Closed.
- To undo a minimum length of stay (MinLOS) rule, add a new minimum length of stay restriction of 1.

- To change the minimum length of stay rule from 2 to 3, add a new minimum length of stay restriction of 3.

Note: A MinLos rule for a stay restriction of 1 can only be applied in the Stay Restrictions setup area

Reservations

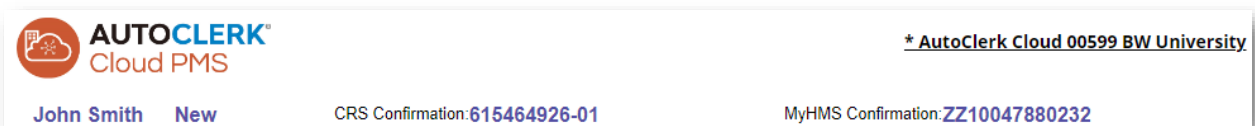
There are multiple options to create a reservation, such as from [Availability / Rates](#) or the [Tape Chart](#). From the Front Desk Dashboard, the quickest way is to either select the Reservations icon from the Shortcuts area or use the blue menu bar and select the Reservations drop down.



The Walk-In feature is identical to the Reservations button, except Walk-In will automatically fill the "Source" code as "Walk-In".

Name, Status, Confirmation Numbers

On the reservation page underneath the Cloud, the first and last name will display with the status of the reservation (**New** which is a future or due-in reservation, **Checked In**, **Checked Out**, **Cancelled**, or **No Show**).



Once the reservation is saved, two confirmation numbers will appear at the top of the page.

- The **CRS Confirmation** number is generated from the central reservations system and signifies the inventory has been deducted from the Central Reservation System (CRS).
 - When a booking is made online and sent to the PMS, it will come with the CRS Confirmation number.

- When a reservation is booked in the PMS, there should also be a CRS Confirmation number. The CRS number would then indicate that the reservation was successfully sent to the central reservation system.
- The **MyHMS Confirmation** is the local PMS confirmation number that is automatically generated once a reservation has been saved for the first time. This also signifies that the PMS inventory for that room type has been deducted.

Note: CRS confirmation numbers will only be generated if a property is using an interface to a CRS.

Reservation Settings

The required fields will be indicated by a red vertical bar (or “pipe”) next to the cell.

Starting from top left to right, select the arrival date, number of nights or the departure date for the guest. Then select the room type, adults, children and infants. Next, choose the Rate Plan and add any “Extras” such as Rollaways, Cribs, or any others that you have created at your property such as Pet, Pool Towels, etc.

Arrive	Nights	Depart	Availability / Rates		Room	Type	Adults	Children	Infants
Sun Feb 04 2024	1	Mon Feb 5 2024			Auto	King Standard	1	0	0
Rate Plan	Rate	Confidential Rate	Stay Total	Balance	Tax Exempt	Rollaways	Cribs	Pet	Early Check In
RACK - BAR	\$154.00	<input type="checkbox"/>	\$165.37	\$ 0.00	<input type="checkbox"/>	0	0	0	<input type="checkbox"/>

Rooms can be preassigned for future reservations. For details, see [Room Selection](#) in the Arrivals / Check-Ins section.

Tax Exempt Checkbox

The **Tax-Exempt** checkbox will allow you to stop taxes from being posted with the Room Rent transaction (both when you manually post the transaction and if posted by the night audit). A popup will allow you to choose to exempt all room taxes or select specific room taxes. Click “Done” to apply the exemption to the reservation.

☐ All
☐ State Tax ☐ City Tax ☐ County Tax

Done

Availability/Rates within a Reservation

“Rate Plan” and “Rate” appear on the second line of the reservation screen and default to the rate listed first in Hotel Setup. All users can choose the Rate Plan, and users can edit the rate amount if they have the PERMIT_MANUAL_RATE permission. **Note: the drop-down menu will only contain rate plans that are allowed to be sold at the Front Desk, as defined in Setup under each rate.**

Arrive Mon Jan 29 2024	Nights 3	Depart Thu Feb 1 2024	Availability / Rates		Room Auto	Type King Standard	Adults 1	Children 0	Infants 0
Rate Plan RACK - BAR	Rate \$109.99	Confidential Rate <input type="checkbox"/>	Stay Total \$369.39	Balance \$ 0.00	Tax Exempt <input type="checkbox"/>	Rollaways 0	Cribs 0	Pet 0	Early Check In <input type="checkbox"/>

Use the “Type” drop-down menu to select the room type and the corresponding rate will populate in the “Rate” field.

Arrive Mon Jan 29 2024	Nights 3	Depart Thu Feb 1 2024	Availability / Rates		Room Auto	Type Double Extended	Adults 1	Children 0	Infants 0
Rate Plan RACK - BAR	Rate \$119.99	Confidential Rate <input type="checkbox"/>	Stay Total \$402.99	Balance \$ 0.00	Tax Exempt <input type="checkbox"/>	Rollaways 0	Cribs 0	Pet 0	Early Check In <input type="checkbox"/>

To search for rates for different room types per night, click the lime green “Availability / Rates” button.

The “Availability / Rates” popup shows each date of the stay in the rows and the room type in the columns. The room type’s availability appears in **bold** and the overall rooms available are totaled on the far right. The total tax and stay total will display at the bottom of the column.

The selected rate plan appears in an **orange** row, with the selected room type in the **light blue** column. The **teal** represents the selected rate which will default to the standard rate amount for that rate plan. **Note: A user can enter a specific rate amount in the “Manual” box if they have the PERMIT_MANUAL_RATE permission. After entering a manual rate amount, click out of the field to update the “TAX” and “TOTAL”.**

In this example, the selection is **RACK for the rate plan**, **NQ1 for the room type**, and a **\$50.00 rate for both 01/12/2024 and 01/13/2024** (which is the default rate amount for that rate plan).

Availability / Rates

Rate Plan: RACK- FLEXIBLE RAT

Arrive: 03/21/2023 Depart: 03/22/2023 People: Adults: 1 Children: 0 Infants: 0

Date	K	QQ	SK	SQQ	WQQ	WK	Meeting Room	Total
03/21/2023	29	43	10	10	6	2	1	101
Manual	45							
RACK- FLEXIBLE RATE	\$45	\$47	\$45	\$45	\$45	\$45	--	
FX-USE REWARDS POINTS	\$36.3	\$36.3	\$36.3	\$36.3	\$36.3	\$36.3	\$36.3	
2U- BOOK EARLY AND SAVE	\$41.85	\$43.71	\$41.85	\$41.85	\$41.85	\$41.85	--	
2UB- REWARDS MEMBER BOOK EARLY AND SAVE	\$41.85	\$43.71	\$41.85	\$41.85	\$41.85	\$41.85	--	
3A- AAA AND CAA MEMBERS	\$42.75	\$44.65	\$42.75	\$42.75	\$42.75	\$42.75	--	
BW- REWARDS MEMBER FLEXIBLE RATE	\$41.85	\$43.71	\$41.85	\$41.85	\$41.85	\$41.85	--	
FX2-PAY WITH POINTS	\$41.85	\$43.71	\$41.85	\$41.85	\$41.85	\$41.85	--	
GM- GOVERNMENT MILITARY	\$40.5	\$42.3	\$40.5	\$40.5	\$40.5	\$40.5	--	
MR- MANAGERS SPECIAL	\$42.75	\$44.65	\$42.75	\$42.75	\$42.75	\$42.75	--	
RP- AARP/SENIOR	\$42.75	\$44.65	\$42.75	\$42.75	\$42.75	\$42.75	--	
VR- REWARDS - 1,000 BONUS POINTS PER NIGHT	\$45	\$47	\$45	\$45	\$45	\$45	--	
Meeting Room	--	--	--	--	--	--	\$1	
Group 20	\$36	\$37.6	\$36	\$36	\$36	\$36	--	
TAX	\$4.59							
TOTAL	\$49.59							

Source: Company: Travel Agent:

Cancel Done

Note that any stay restrictions will appear in red next to the number of infants.

Availability / Rates

Rate Plan: RACK - BAR

Arrive: 02/04/2024 Depart: 02/06/2024 People: Adults: 1 Children: 0 Infants: 0

Stay Restrictions: CLOSE-Hotel Closed for Renovations

Other rate plans can be viewed with the Rate Plan drop-down menu in the upper left corner. Here we will view the 3A – AAA AND CAA MEMBERS plan.

Availability / Rates

Rate Plan

RACK - FLEXIBLE RAT

Manual

RACK - FLEXIBLE RATE

BW - REWARDS MEMBER FLEXIBLE RATE

VR - REWARDS 1000 BONUS POINTS PER NIGHT

GM - GOVERNMENT MILITARY

3A - AAA AND CAA MEMBERS

RP - AARP SENIOR

MR - MANAGERS SPECIAL

FX - USE REWARDS POINTS

ZU - BOOK EARLY AND SAVE

ZUB - REWARDS MEMBER BOOK EARLY AND SAVE

Arrive

01/13/2024

Depart

01/14/2024

People:

Adults

Children

Infants

1

0

0

		NQ1	PNQ1	PNQ2	PNQ3	SNQ1	Total
		2	1	2	1	5	68
		\$50	\$52	\$53	\$51	\$56	
Date	NQ1	PNQ1	PNQ2	PNQ3	SNQ1	Total	
01/13/2024	57	2	1	2	1	5	68
Manual	55						
RACK - FLEXIBLE RATE	\$55	\$50	\$52	\$53	\$51	\$56	
TAX	\$8.42						
TOTAL	\$118.42						

Source

Company

Travel Agent

Cancel

Done

Availability / Rates

Rate Plan
3A - AAA AND CAA ME

Arrive
01/12/2024

Depart
01/14/2024

People:
Adults
1
Children
0
Infants
0

Date	NQQ1	NQ1	PNQ1	PNQ2	PNQ3	SNQ1	Total
01/12/2024	57	2	1	2	1	5	68
Manual		50					
3A - AAA AND CAA MEMBERS	\$52.25	\$47.5	\$49.4	\$50.35	\$48.45	\$53.2	
Date	NQQ1	NQ1	PNQ1	PNQ2	PNQ3	SNQ1	Total
01/13/2024	57	2	1	2	1	5	68
Manual		50					
3A - AAA AND CAA MEMBERS	\$52.25	\$47.5	\$49.4	\$50.35	\$48.45	\$53.2	
TAX		\$7.66					
TOTAL		\$107.66					

Source

Company

Travel Agent

Cancel

Done

To select the rate plan for the reservation, click the rate plan name on the start of the row (3A – AAA CAA MEMBERS) to highlight the line **orange**.

Availability / Rates

Rate Plan

3A - AAA AND CAA ME

Arrive

01/12/2024

Depart

01/14/2024

People:

Adults

1

Children

0

Infants

0

Date	NQQ1	NQ1	PNQ1	PNQ2	PNQ3	SNQ1	Total
01/12/2024	57	2	1	2	1	5	68
Manual		47.5					
3A - AAA AND CAA MEMBERS	\$52.25	\$47.5	\$49.4	\$50.35	\$48.45	\$53.2	

Date	NQQ1	NQ1	PNQ1	PNQ2	PNQ3	SNQ1	Total
01/13/2024	57	2	1	2	1	5	68
Manual		47.5					
3A - AAA AND CAA MEMBERS	\$52.25	\$47.5	\$49.4	\$50.35	\$48.45	\$53.2	
TAX		\$7.28					
TOTAL		\$102.28					

Source

-

Company

Travel Agent

Cancel

Done

From the “Availability / Rates” screen it is also optional to enter the number of people at the top right, and a source, company, or travel agent at the bottom. To apply your rate plan/amount/room type and any other choices to the reservation, click “Done” in the bottom right-hand corner and you will be returned to the reservation screen.

Guest Data Tab (and comments)

Guest	Best Western	Company	Group
All Notes			
Best Western ID		LookUp	
Last		Smith	
First		John	
Title		ETA	3:00PM
Phone / Type		555-874-8774	MOBILE
Address 1		123 Any Street	
Address 2			
Zip / Country		85044	United States
City / State		Phoenix	Arizona
e-mail / Type			HOME
Birth Date			
Drivers Lic / Gov ID			
Guest Nationality			
Passport			
Passport Eff. Date			
Passport End Date			
Country Of Issue			
Vehicle Make			
Vehicle Model			
Vehicle Color			
License Plate #			
Other Phone			
Purchase Order			
Company			
Join BW Rewards			

The **Guest Data tab** is the first and default tab on a reservation. All fields with the red vertical bar are mandatory. The system will accept a single character for these fields.

When entering a US or Canadian Zip/postal code, the system will autofill the matching City, Country, and State/Province for you. If there are multiple options for a zip code, the system will pick the first city alphabetically, and the others are available with the black drop-down arrow.

Note: Canadian postal codes must have a space in between the groups of three (M5V 0H6).

Other fields such as “Birth Date”, “Driver’s License”, “Guest Nationality”, “Passport”, “Vehicle Make”, and “Other Phone” are optional depending on your own hotel policies.

The “Purchase Order” field is optional. Note that the “Purchase Order” will show up on city ledger invoices, which may be helpful in certain billing situations.

The “Company” field is optional and allows the name of a company with no address. Companies with addresses and City Ledger billing must be built in Setup and are added to reservations through the Company tab.

- **Reservation Comments:** Information for this specific stay. An example of this might be “Late Arrival”. Note: please exercise caution on the type of comments written in this box, as these comments will show up on the guest’s reservation confirmation letter.
- **CRS Comments:** Displays comments from the CRS (Central Reservation System). These only appear on the Guest tab and not the All-Notes tab.
- **Guest Comments:** Attached guest profile and will be copied over every time the guest profile is used on a reservation. An example of this might be “Guest prefers Ground Floor”. Note: please exercise caution with the type of comments written in this box, as these comments will show up on the guest’s registration card.
- **Do Not Rent:** On the Guest tab, this checkbox is used to flag if a guest is not allowed to stay at the property in the future. When checked, this causes the guest’s name to appear in **red** when typing the guest name in the “Last” name field on a reservation, and the guest will appear on the [Do Not Rent Report](#). This checkbox will be saved to the guest’s profile, and it can be unchecked. **Note: The Do Not Rent box does not prevent the front desk from continuing to book the guest, and it will not prevent online bookings from the CRS.** This only appears on the Guest tab and not the All-Notes tab.
- **Folio Comments:** These comments are editable on the Guest Tab and will be visible on the Folio screen; however, they will not be visible to guests. These may be used to describe routing or billing instructions, such as a reminder for “virtual credit card”.

Add Charge

Type: Room Rent

Description:

Amount: Required Field

Add Payment

Type: Cash

Description:

Amount: 0.00

COMMENT
Virtual Credit Card

Set Default Payment

Apply Charge

Apply Payment

Save & Exit Check In Escape

Adding a Payment Method

The payment information is added at the bottom left of the reservation screen under “Pay Type”. Cash is always the default payment method when creating a new reservation.

Hold Type: CC-GTD

Pay Type: Cash

Credit Card Action: -

Cash

Check

Save & Exit Save Refresh Escape

Before adding a credit card or attaching City Ledger (direct bill) account, you must save the reservation. For details on adding a credit card, see the [Credit Cards](#) section. For details on adding a City Ledger payment method, see the [City Ledger](#) section.

Hold Type: CC-GTD

Pay Type: Cash

Credit Card Action: -

Go

Add CC without Authorization

Add CC with Authorization

Edit CC

Delete CC

Save & Exit Save Escape

Date: 09/10/2020

Source and Market Codes

Toward the bottom right of the screen, enter in the Source and Market codes. Both are required and must be entered before you can “Save” the reservation.

Source	Front Desk	Source2	Front Desk	Cancel Policy	4PM
Channel	Front Desk				
Market	Locals				

Note: A source code is how the business was obtained. A market code is the demographic the guest belongs to.

Saving the Reservation

Once all guest information on the Guest Tab is verified, click "Save" to save your progress and continue editing, or "Save and Exit" to return to the dashboard. A popup with the MyHMS Confirmation number will appear confirming that the save was successful. **Note: if the popup with the confirmation number does not appear, the changes to the reservation have not been saved.**

Attention!

Reservation ZZ10082727860 has been saved.

OK

Best Western Tab

The **Best Western tab** will give you the options to either enroll a new Best Western Rewards Member or to look up an existing member. All guest information will copy over from the "Guest" tab for quicker enrollment. To enroll a new Member press the "submit enrollment" enrollment button at the bottom. To look up an existing member, use the "LookUp" button the right of the last name to bring up a separate menu. [Enrolling in BWR](#), [Looking up a rewards profile](#), and [Enrolling a Guest in a BWR Promotion](#) are covered in depth later in the Creating Reservations section.

Guest	Best Western	Company	Group	Travel Agent	All Notes
<div> Remove BW ID </div>					
<div> <div> <div>Last</div> <div>Smith</div> <div>LookUp</div> </div> <div> <div>First</div> <div>John</div> </div> <div> <div>Title</div> <div></div> </div> </div>					
<div> <div>Phone / Type</div> <div>555-874-8774</div> <div>MOBILE</div> </div>					
<div> <div>Address Type</div> <div>HOME</div> </div>					
<div> <div>Address 1</div> <div>123 Any Street</div> </div>					
<div> <div>Address 2</div> <div></div> </div>					
<div> <div>Zip / Country</div> <div>85044</div> <div>United States</div> </div>					
<div> <div>City / State</div> <div>Phoenix</div> <div>Arizona</div> </div>					
<div> <div>Email / Type</div> <div>John.smith@yahoo.com</div> <div>HOME</div> </div>					
<div> <div>Would you like to receive BW Rewards offers via email?</div> <div> <input type="radio"/> Yes <input checked="" type="radio"/> No </div> </div>					
<div> <div>Would you like to receive BW Rewards offers via postal mail?</div> <div> <input type="radio"/> Yes <input checked="" type="radio"/> No </div> </div>					
<div> <div>Would you like to receive offers from BW Rewards Partners via email?</div> <div> <input type="radio"/> Yes <input checked="" type="radio"/> No </div> </div>					
<div> <div>Would you like to receive offers from BW Rewards Partners via postal mail?</div> <div> <input type="radio"/> Yes <input checked="" type="radio"/> No </div> </div>					
<div> <div>Company</div> <div></div> </div>					
<div> <div>Incentive Code</div> <div></div> </div>					
<div> <div>Submit Enrollment</div> </div>					
<div> <div>Affinity Program</div> <div>TWPOS - No Affinity Preference</div> </div>					
<div> <div>Miles</div> <div></div> </div>					
<div> <div>Earn</div> <div>BW Reward Points</div> </div>					
<div> <div>Account Number ID</div> <div>Account Number ID</div> </div>					
<div> <div>Communication Preferences:</div> <div></div> </div>					
<div> <div>Language</div> <div>ENGLISH</div> </div>					

Company Tab and Attaching a Company

After saving a reservation, you may add a company and company address via the **Company tab**.

All fields (except for “Company” or “Company Code”) are read-only. Begin to type the company name you would like to associate with the reservation. If the company is programmed in Setup, the company name will start to auto-populate after typing only two characters. You may also type in a Company Code for lookup. Select the correct company from the drop-down.

The below pop up will only appear if the company account has a “Preferred Rate Plan” set up on their Company profile. Select Yes.

The next pop-up window will show the rate change which will show the Original Rate of the reservation and the New Rate attached to the company preferred rate plan. Select New Rate and click ok.

Confirm Changes

The changes that you have made resulted in a change of rate.

☐ Original rate.
☒ New rate.

Date	Original Rate	New Rate
05/08/2023	\$ 180.00	\$ 79.00

Comments :

Attached Company

OK

Now, all the company's information will appear in the Company tab as below. The rate plan drop-down will also show the company rate plan selected. Click "Save" to update the reservation.

Rate Plan: ACME Supply | Rate: \$79.00 | Confidential Rate: ☐ | Stay Total: \$88.09 | Balance: \$ 0.00 | Tax Exempt: ☐

Guest | Best Western | **Company** | Group | Travel Agent | All Notes

Company: ACME Supply (Remove)

Last: Coyote
First: Wile
Other Phone: 866.750.3144
Fax:
e-mail: Coyote.Wile@gmail.com
Address 1: 12 Any Street
Address 2:
Country: Unknown
Zip: 85044
City: Phoenix
State: NA
Credit Limit: 25000
Tax ID Number:
Preferred Rate Plan: ACME Supply

Or Company Code: ACME

Company Comments:

Hold Type: CC-GTD | Pay Type: CL: ACME Supply (dropdown menu)
Credit Card Action: Add CC without Authorization

Save & Exit | Save | Refresh | Escape

Under the "Pay Type" drop down at the bottom, if the company is set up with a credit limit, you will have the option to select the company to direct bill (Appears as CL: for City Ledger). You can still use any other form of payment if needed, and/or set up folio routing later.

Group Tab

From the guest data screen, after entering the guest information and saving the reservation, click on the "Group" tab.

The screenshot shows the 'Group' tab selected in the reservation form. The form includes fields for guest information (Last Name: Smith, First Name: John, Title, Phone, Address, Zip, City, State, e-mail, Birth Date, Drivers License, Passport, Other Phone, Purchase Order, Company, Join BW Rewards), reservation details (Rate Plan: RACK - BAR, Rate: \$205.00, Confidential Rate, Stay Total: \$228.58, Balance: \$0.00, Tax Exempt), and comment sections (Reservation Comments, Guest Comments, Folio Comments). The 'Group' tab is highlighted with a green circle.

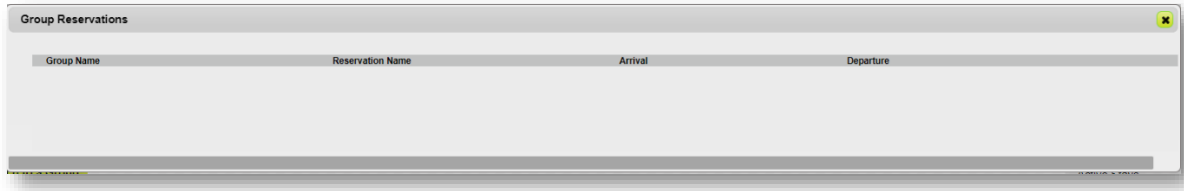
The **Group tab** fields are read-only and will be blank if the reservation is not attached to the group. To attach to a group, click “Attach to a Group” at the bottom.

The screenshot shows the 'Group' tab selected in the reservation form. The form includes fields for group information (Reservation Name, Group Name, Last, First, Business Phone, Fax, Home Phone, e-mail, Address 1, Address 2, Country, State, Zip, City), reservation details (Rate Plan: RACK - BAR, Rate: \$205.00, Confidential Rate, Stay Total: \$228.58, Balance: \$0.00, Tax Exempt), and comment sections (Group, Group Reservation). The 'Attach to a Group' button is highlighted with a green box.

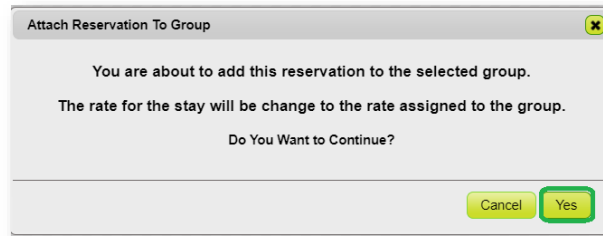
When attaching to a group, the popup below will appear. If the reservation you are making happens to be on the date(s) that a specific group is in house, the names of the specific group(s) will be available in the pop-up with the “Attach” button.

Group Reservations			
	Group Name	Reservation Name	Arrival
Attach	Andy Group	Andy Group 2023	03/25/23

However, if the dates that you are making the reservation for do not have any groups in house, the pop-up will be blank.

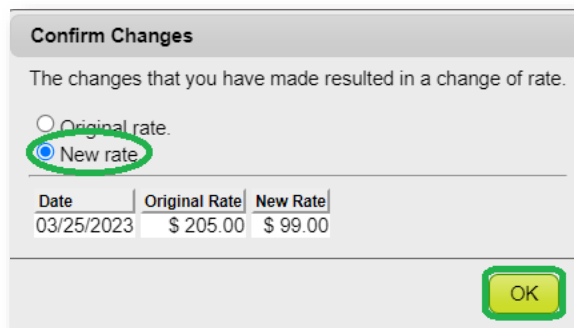


When you click "Attach", an additional pop-up will warn you that the rate will be changed to the group rate and ask you to confirm.



To complete the process, click "Yes". **Important: For the reservation to be attached successfully, that specific room type that you are booking the reservation for, must be an available room type under the hard block for the group.**

If changing the rate plan changes the rate amount, there will be one more popup asking if you would like to update the rate amount.



Once you select a rate and press "OK", the reservation will update with the group Rate Plan and Rate amount. In addition, the Group profile and address will appear under the Group tab as read-only. **Note: make sure to save the reservation after making any changes.**

If the reservation is already attached to a group, there will be group profile information in the read-only fields, and there will be an "Unattach from Group" button instead. Note that the Unattach button would remove the group, however, it would not prompt you to change the rate code, which must be done manually.

Guest	Best Western	Company	Group	Travel Agent	All Notes
Reservation Name	Midwest HS Volleyball 2024			Group	
Group Name	Midwest HS			Group has city ledger account	
Last	John				
First	Smith				
Business Phone	555-555-5555				
Fax					
Home Phone				Group Reservation	
e-mail					
Address 1					
Address 2					
Country	United States				
State	Illinois				
Zip	60606				
City	Chicago				
Unattach from Group					

Travel Agent Tab and Attaching a Travel Agent

Most reservations that involve a TA (travel agent) will come through the CRS (Central Reservation System) and there may be a Reservation or CRS comment to indicate it came from a 3rd-party travel agent. If needed or if you have local travel agents programmed in Setup, you may attach the travel agent to the reservation by clicking on the **Travel Agent tab**.

Guest	Best Western	Company	Group	Travel Agent	All Notes
Travel Agent				Travel Agent Comments	
IATA #					
Last					
First					
Other Phone					
e-mail					
Address 1					
Address 2					
Country					
Zip					
City					
State					
Flat Comm.					
Comm. %					
Manager Last					
Manager First					
Manager Phone					

All fields (except for “Travel Agent”) are read-only. The “Travel Agent” field allows you to look up the TA and once you have selected the TA, the system will fill out the fields for you. You can type in the IATA number or the name of the travel agency. Once the Travel Agent is selected, the system will auto-populate the other fields.

The screenshot shows the 'Travel Agent' dropdown menu open. The menu lists several travel agencies with their IATA numbers and names. The selected agency is 'Academi Training Center' with IATA # 34574492. The dropdown also shows the last name 'Last', first name 'First', other phone number, and email address for each agency.

Travel Agent	IATA #	Last	First	Other Phone	e-mail
ac	34574492	Academi	Training		Center
	45716646	ACADEMY	SPORTS & OUTDOORS		
	24502262	Accent	Travel Int'l Inc		
	96010946	Access	Bookings Limited		
	0601001	ACCESS	BOOKINGS LIMITED		

The screenshot shows the 'Travel Agent' tab selected. It displays detailed information for the selected travel agent, including their IATA number, last name, first name, other phone number, email address, address (P.O. Box 1029), country (United States), zip (27958), city (Moyock), state (North Carolina), flat commission, commission percentage (10%), manager last name, manager first name, and manager phone number (252 435 2488).

Travel Agent
Academi Training Center
IATA # 34574492
Last
First
Other Phone
e-mail
Address 1 P.O. Box 1029
Address 2
Country United States
Zip 27958
City Moyock
State North Carolina
Flat Comm.
Comm. % 10
Manager Last
Manager First
Manager Phone 252 435 2488

All Notes Tab (and comments)

The **All-Notes tab** will collect all notes from all other tabs and display them in one screen, like below:

The screenshot shows the 'All Notes' tab selected. It displays several comment sections for different entities: Reservation Comments, Guest Comments, Folio Comments, Group, Group Reservation, Company Comments, Travel Agent Comments, and Housekeeping Comments. Each section has a text area for entering comments.

Guest	Best Western	Company	Group	Travel Agent	All Notes
					<p>Reservation Comments</p> <p>Comment just for this reservation. Guest will be bringing a pet just this one time.</p> <p>Guest Comments</p> <p>Please more coffee for Ms. Tahiri. { Comments stays with the guest profile }</p> <p>Folio Comments</p> <p>This is only for the Hotel to see.</p> <p>Group</p> <p>Group Reservation</p> <p>Company Comments</p> <p>Room and Tax Only</p> <p>Travel Agent Comments</p> <p>Housekeeping Comments</p> <p>Has a big dog in the room!</p>

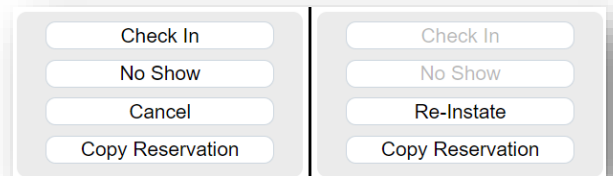
“Reservation Comments”, “Guest Comments” and “Folio Comments” come from the [Guest Data tab](#).

All comments on this screen are read-only because they are edited in different areas of the system, except for **"Housekeeping Comments"**. Any Housekeeping Comment will appear on the housekeeper sheets and housekeeping reports; for example, "Has a big dog in the room". **Note: these comments will not sync with CleanMeNext.**

- The **Group** and **Group Reservation** comments are also visible in the Group tab, and can be edited in the group block. Examples include "This group has room and tax to the master" or "On Saturday April 24, the bus leaves at 9:00am sharp!"
- **Company Comments** come from the "Remarks" field of the Company screen in Setup.
- **Travel Agent Comments** come from the "Remarks" field of the Travel Agent screen in Setup.

Action Buttons (Check In, No Show, Cancel, Copy Reservation, Re-Instate)

The action buttons are four white buttons on the right-hand side of the Guest Data screen. They will change depending on the reservation status.



- **Check In** – Available once a room number is assigned. Changes the reservation status from "New" to "Checked In".
- **No Show** – Changes the reservation status from "New" to "No Show" and is usually only used when performing the Night Audit.
- **Cancel** – Changes the reservation status from "New" to "Cancelled" and is used to cancel a reservation either with or without penalty. The system requires a short cancellation comment and allows an optional name and phone number of the guest cancelling. It will also generate a separate Cancellation Number (ends with C) and the cancellation Comments can be edited later by accessing the reservation and clicking on the Cancellation Number. If "Enable Auto Email of Conf and Canc" is turned on in Hotel Setup, a cancellation will automatically be emailed to the guest after cancelling a reservation.

Are you sure you wish to cancel this reservation?

Cancelled By Name

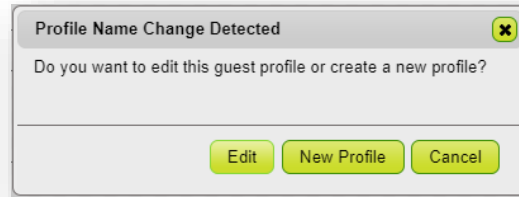
Cancel Phone #

Comments

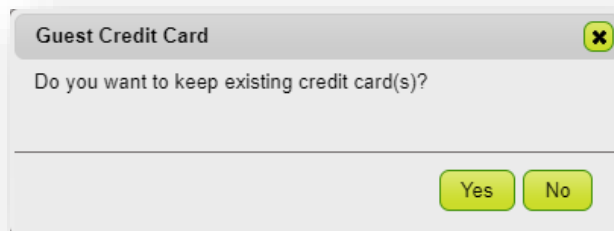
Required Field

Done Undo

- **Copy Reservation** – Copies a reservation and will bring over all the information from the previous reservation except the Folio comments and any Extras (Rollaways, Cribs, etc.) When a reservation has been copied you will have the option to change the name on the reservation. Anytime a profile name change is detected, you will receive a pop-up warning while attempting to save the reservation:



When selecting New Profile, you will be prompted with an additional pop-up warning asking if you would like to keep the existing credit card on file. Selecting **Yes** will keep the existing credit card on the copied reservation. Selecting **No** will save the new profile and remove any existing credit card that was copied over.

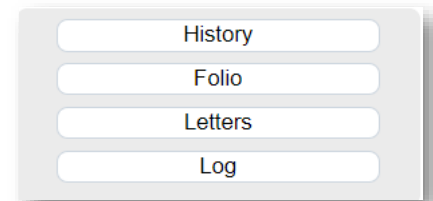


- **Re-Instate** – Available when a reservation has been Cancelled or has been marked a No Show. This can also be used for a guest who checked-out but decided to extend their stay. Once reinstated, the status will change from either “Cancelled” or “No Show” to “New”.
Note: Re-Instate should not be used on any prepaid OTA reservations.

Direction Buttons (History, Folio, Letters, Log)

The direction buttons are below the Action Buttons.

- **History** – Takes you to a list of the guest’s stay history, including links to past and future reservations, and stay statistics such as most frequent room and average rate.
- **Folio** – Takes you to the guest folio where you can post charges, collect payment, and more.
- **Letters** – Allows you to preview, print, or email Letters programmed into your system such as a cancellation letter, confirmation letter, or registration card.
- **Log** – Takes you to the activity log for that specific reservation. It includes the user who made the change, a description of the change that occurred, and the date and time of the change.



Itinerary

At the bottom of each page of the reservation under the orange buttons is an area called the itinerary. The itinerary shows each night of the guest stay, the current status of the reservation, the Room Type, the room number (this column will be blank if a room number has not been assigned), the Rate Plan the guest has booked each night, and what rate they are paying per night before taxes.

<div> <div>Save & Exit</div> <div>Save</div> <div>Refresh</div> <div>Escape</div> </div>					
Date	Status	Room Type	Room	Rate Plan	Rate
03/25/2023	NEW	1 KING BED	226	RACK - BAR	\$99.00
03/26/2023	NEW	1 KING BED	226	RACK - BAR	\$99.00

Best Western Rewards Profile ID Lookup

There are two ways to perform a Best Western Rewards Profile ID search. You may use “Lookup” button to the right of the Best Western ID field in the Guest tab, or you can use the Best Western tab on the black bar in the guest’s reservation.

The screenshot displays the 'Guest' tab in the AutoClerk Cloud interface. The 'Best Western' sub-tab is active, showing a form for a Best Western Rewards Profile ID lookup. The form includes fields for Last Name (Moran), First Name (John), Title, Phone / Type (123-695-6666), Address 1 (123 Main St), Address 2, Zip / Country (98111, United States), City / State (Las Vegas, Nevada), e-mail (john@icloud.com), Birth Date, Drivers License, Passport, Other Phone, Purchase Order, Company, and 1BW Rewards. A 'Lookup' button is visible next to the Best Western ID field. The form also includes sections for Reservation Comments, CRS Comments, Guest Comments, and Folio Comments. At the bottom, there are fields for Hold Type (CC-GTD), Play Type (Cash), Credit Card Action, Source (Front Desk), Source2 (Front Desk), and Cancel Policy (24H). The 'Save & Exit', 'Save', 'Refresh', and 'Escape' buttons are at the bottom of the form.

For the first example we will demonstrate the Best Western tab lookup.

Guest **Best Western** Company Group Travel Agent

Best Western ID LookUp Remove BW ID

Last

First

Title ETA

Phone / Type MOBILE

Address 1

Address 2

Zip / Country United States

City / State Nevada

e-mail HOME

Birth Date

Drivers License

Passport

Other Phone

Purchase Order

Company

Join BW Rewards ☐

Reservation Comments

Guest Comments

Folio Comments

Click on the “LookUp” button to the right of the Last name field.

Guest **Best Western** Company Group Travel Agent All Notes

BW Best Western REWARDS Remove BW ID

Last LookUp

First

Title

Phone / Type MOBILE

Address Type

Address 1

Address 2

Zip / Country United States

City / State Nevada

e-mail HOME

Would you like to receive BW Rewards offers via email?
☐ Yes ☒ No

Would you like to receive BW Rewards offers via postal mail?
☐ Yes ☒ No

Would you like to receive offers from BW Rewards Partners via email?
☐ Yes ☒ No

Would you like to receive offers from BW Rewards Partners via postal mail?
☐ Yes ☒ No

Company

Incentive Code

Submit Enrollment

Affinity Program

Miles

Earn

Account Number ID

Communication Preferences:
 Language

A pop-up window will appear to search for the profile.

There are three (3) search options:

1. BWR ID
2. Last name, First Name and City
3. Email Address

Note: You may search using only one (1) option. Using more than one option will cause an error message to appear.

Enter the data in the option field(s) you are using to search by and then click “Look Up”.

Best Western Rewards Lookup

BWR ID:

Or

Last Name:

First Name:

City:

Or

e-mail:

Look Up Clear

If there are multiple accounts, ask the guest to confirm their email address, city, or account number. Click the “Select” button to the left of the correct account.

Best Western Rewards Lookup

BWR ID:

Or

Last Name:

First Name:

City:

Or

email:

Look Up Clear

	Rewards ID	Last Name	First Name	City	Email
Select	6006637738528603	Moran	John	Las Vegas	john@icloud.com
Select	6006630582172891	Moran	John	Las Vegas	
Select	6006637451228803	Moran	John	Las Vegas	MORAN_J@ME.COM
Select	6006637676232556	Moran	John	Las Vegas	Pinhigh59@aol.com

Escape

After selecting the profile, the guest’s Best Western Rewards Profile information will populate in the Guest tab.

Note: When you perform a Best Western Rewards Profile ID LookUp, it will replace the guest information with the data from the rewards profile. If the rewards profile is not up to date, the guest profile will no longer have accurate guest data. Before you add a Rewards Profile to the reservation take note of the current guest data in the event you will need to re-enter it for accurate reservation information.

Changes to the Guest tab for a BWR member will not change the profile in the Best Western Rewards system. Guests must make updates to their rewards profile through the website, app, or by calling Best Western Rewards.

AutoClerk Cloud User Manual

The guest's BW Rewards ID number, their Rewards Level, and Points Balance will now appear at the top of the reservation above the confirmation numbers.

AUTOCLERK® Cloud PMS AutoClerk Cloud University

John Moran **New** CRS Confirmation: n/a BW Rewards ID: 6006637738528603 Level: Gold Balance: 0
MyHMS Confirmation: ZZ10050368945

Arrive: Sat Mar 25 2023 Nights: 2 Depart: Mon Mar 27 2023 **Availability / Rates** **Room** Type: SQQ Adults: 1 Children: 0 Infants: 0

Rate Plan: RACK - BAR Rate: \$225.00 Confidential Rate: ☐ Stay Total: \$250.88 Balance: \$ 0.00 Tax Exempt: ☐ Rollaways: 0 Cribs: 0 Pet: 0 Parking: 0 Parking - Discount: 0

Guest **Best Western** **Company** **Group** **Travel Agent** **All Notes**

Best Western ID: 6006637738528603

Last: Moran
First: John
Title: ETA: 3:00PM
Phone / Type: 123-666-6666 MOBILE
Address 1: 123 Main St
Address 2:
Zip / Country: 89118 United States
City / State: Las Vegas Nevada
e-mail: john@icloud.com HOME
Birth Date:
Drivers License:

Reservation Comments:
CRS Comments:
Guest Comments: Do Not Rent: ☐

The guest's BW Rewards ID number, their Rewards Level, and Points Balance will also appear at the top of the folio above the confirmation numbers.

AUTOCLERK® Cloud PMS * AutoClerk Cloud University

John Moran CRS Confirmation: BW Rewards ID: 6006637738528603 Level: Gold Balance: 0.00
MyHMS Confirmation: ZZ10107865669

Primary: \$ 0.00

Date	Hotel Date	User	Type	Description
Page 1 of 1: view more transactions				

Folio # 13048711

Add Charge

Type: Room Rent
Description:
Amount: Required Field

Add Payment

Type: Cash
Description:
Amount: 225.58

COMMENT:

☐ Use Company Address

Enrolling in Best Western Rewards

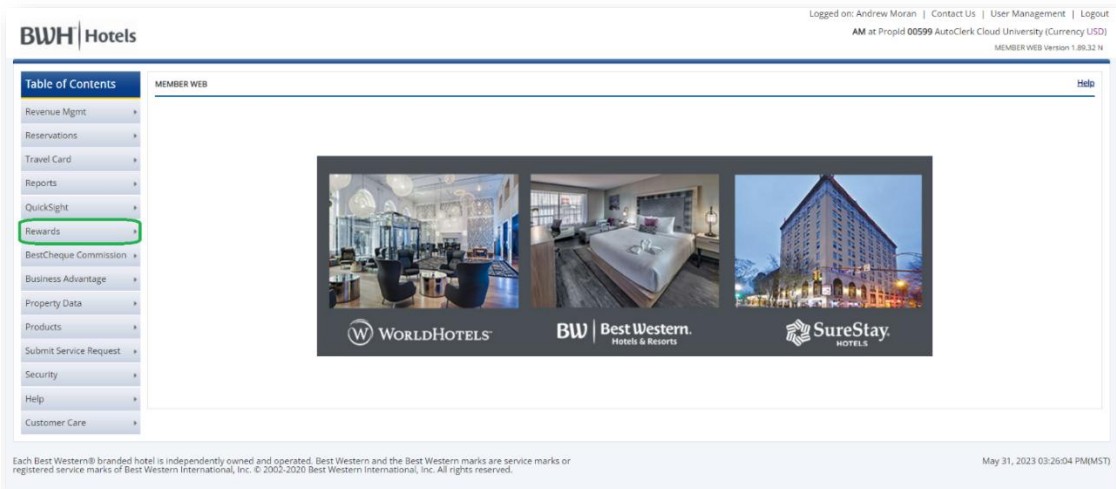
Using the Best Western tab on the guest's reservation, enter the required guest's profile information (marked by a red vertical bar). **Note: If the email provided is not valid, the hotel clerk will not receive points for the enrollment.** You will need to confirm if the guest wants to opt into BW Rewards and BW Rewards Partners marketing email or postal mail; these settings are required for enrollment.

The screenshot shows the 'Best Western REWARDS' enrollment form. The form is divided into several sections. The top section contains fields for 'Last', 'First', and 'Title', each with a 'Required Field' label. Below these are 'Phone / Type' and 'Address Type' dropdowns. The 'Address' section includes 'Address 1' and 'Address 2' fields, followed by 'Zip / Country' and 'City / State' dropdowns. The 'Email / Type' field is also present. To the right, there are dropdowns for 'Affinity Program', 'Miles', 'Earn', and 'Account Number ID'. Below these are checkboxes for 'Would you like to receive BW Rewards offers via email?' and 'Would you like to receive BW Rewards offers via postal mail?'. At the bottom, there are checkboxes for 'Would you like to receive offers from BW Rewards Partners via email?' and 'Would you like to receive offers from BW Rewards Partners via postal mail?'. A 'Company' field and an 'Incentive Code' field are at the bottom left. A green 'Submit Enrollment' button is at the bottom right.

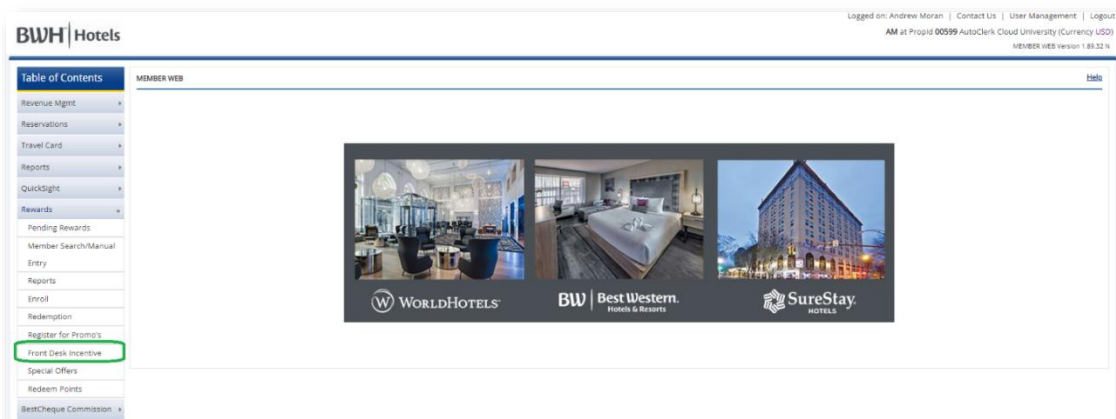
The "Incentive Code" refers to the three (3) digit code belonging to the employee who is enrolling the guest. The employee will receive credit to their Best Western Rewards account for all qualified enrollments. If the manager entered this code in their user profile, the code will automatically populate in the enrollment form. If not entered in the user profile, it needs to be manually entered during the enrollment.

This is a close-up of the bottom section of the enrollment form. It shows the 'Company' field and the 'Incentive Code' field. The 'Incentive Code' field is highlighted with a green box and contains the value '031'. A green 'Submit Enrollment' button is located to the right of the 'Incentive Code' field.

If the employee does not know their code, it can be found in the property's MemberWeb. Click the "Rewards" menu option:



Then in the drop-down menu, click “Front Desk Incentive”:



Note: Employee numbers may differ slightly between this page and other areas of the BestWestern network. For AutoClerk Cloud, the correct Front Desk Incentive code specifically comes from the last three digits of the number from the above page in MemberWeb.

An Affinity Program allows the guest to earn more points or extra benefits with their reservation. If the guest has a preference of which program to use, that may be chosen in the enrollment form from the drop-down menu:

Guest | **Best Western** | Company | Group | Travel Agent | All Notes

BW Best Western REWARDS Remove BW ID

Last Required Field LookUp

First Required Field

Title

Phone / Type Required Field MOBILE

Address Type HOME

Address 1 Required Field

Address 2

Zip / Country Required Field United States

City / State Required Field Arizona

Email / Type Required Field HOME

Would you like to receive BW Rewards offers via email?
☐ Yes ☒ No

Would you like to receive BW Rewards offers via postal mail?
☐ Yes ☒ No

Would you like to receive offers from BW Rewards Partners via email?
☐ Yes ☒ No

Would you like to receive offers from BW Rewards Partners via postal mail?
☐ Yes ☒ No

Company

Incentive Code

Affinity Program TWPOS - No Affinity Preference

Miles TWPOS - No Affinity Preference

Earn AAA for US guests

Account Number ID CAA for Canadian guests

Communication P Harley Rewards

Language NASCAR/Speed Rewards

Service Rewards

AARP Rewards

- **TWPOS:** This is the default if the guest does not want to use an Affinity Program.
- **AAA/CAA:** American Automobile Association (USA/Canada)
- ***Harley Rewards and NASCAR Speed Rewards are no longer available.**
- **Service Rewards:** Active and veteran military personnel
- **AARP:** American Association of Retired Persons

The guest will need to provide their account number for their Affinity Program which is entered in the "Account Number ID" field.

Guest | **Best Western** | Company | Group | Travel Agent | All Notes

BW Best Western REWARDS Remove BW ID

Last Required Field LookUp

First Required Field

Title

Phone / Type Required Field MOBILE

Address Type HOME

Address 1 Required Field

Address 2

Zip / Country Required Field United States

City / State Required Field Arizona

Email / Type Required Field HOME

Would you like to receive BW Rewards offers via email?
☐ Yes ☒ No

Would you like to receive BW Rewards offers via postal mail?
☐ Yes ☒ No

Would you like to receive offers from BW Rewards Partners via email?
☐ Yes ☒ No

Would you like to receive offers from BW Rewards Partners via postal mail?
☐ Yes ☒ No

Company

Incentive Code

Affinity Program AAA for US guests

Miles AAA for US guests

Earn BW Reward Points

Account Number ID A012345678

Communication Preferences:

Language ENGLISH

Submit Enrollment

The guest has the option to earn airline miles or BW Reward Points from their reservations.

If the guest elects to earn airline miles, choose "Miles" from the "Earn" drop-down menu. You will then need to choose their airline partner from the "Miles" drop-down menu. Once chosen, a

“Flight Number” field will appear and the guest must provide their frequent flyer number for that partner.

Guest **Best Western** Company Group Travel Agent All Notes

BW Best Western REWARDS. Remove BW ID

Last: Required Field LookUp
 First: Required Field
 Title:
 Phone / Type: Required Field MOBILE
 Address Type: HOME
 Address 1: Required Field
 Address 2:
 Zip / Country: Required Field United States
 City / State: Required Field Arizona
 Email / Type: Required Field HOME
 Affinity Program: TWPOS - No Affinity Preference
 Miles: Southwest Airlines
 Flight Number: RR12345678
 Earn: Miles
 Communication Preferences:
 Language: ENGLISH
 Would you like to receive BW Rewards offers via email?
☐ Yes ☒ No
 Would you like to receive BW Rewards offers via postal mail?
☐ Yes ☒ No
 Would you like to receive offers from BW Rewards Partners via email?
☐ Yes ☒ No
 Would you like to receive offers from BW Rewards Partners via postal mail?
☐ Yes ☒ No
 Company:
 Incentive Code:
 Submit Enrollment

There are many languages available to receive BW Rewards correspondence if the guest prefers a language other than English. Select the option the guest prefers from the “Language” drop-down menu.

Guest **Best Western** Company Group Travel Agent All Notes

BW Best Western REWARDS. Remove BW ID

Last: Required Field LookUp
 First: Required Field
 Title:
 Phone / Type: Required Field MOBILE
 Address Type: HOME
 Address 1: Required Field
 Address 2:
 Zip / Country: Required Field United States
 City / State: Required Field Arizona
 Email / Type: Required Field HOME
 Affinity Program: TWPOS - No Affinity Preference
 Miles: Southwest Airlines
 Flight Number: RR12345678
 Earn: Miles
 Communication Preferences:
 Language: SPANISH
 Would you like to receive BW Rewards offers via email?
☐ Yes ☒ No
 Would you like to receive BW Rewards offers via postal mail?
☐ Yes ☒ No
 Would you like to receive offers from BW Rewards Partners via email?
☐ Yes ☒ No
 Would you like to receive offers from BW Rewards Partners via postal mail?
☐ Yes ☒ No
 Company:
 Incentive Code:
 Submit Enrollment

Once information and preferences have been entered and selected, click on “Submit Enrollment”. You will then see an “Enrollment Successful” message along with an image of the guest’s blue Best Western Rewards card displaying their name and Best Western Rewards number.

Guest **Best Western** Company Group Travel Agent All Notes

BW Best Western REWARDS. Remove BW ID

Last Name LookUp

First Name

Title

Phone / Type 555-555-5555 MOBILE

Enrollment Successful

BW Best Western REWARDS.

Guest Name 6006630123456789

Print Welcome Letter

Once a member profile is added to a reservation, the **BW Rewards ID**, membership **Level**, and points **Balance** will display at the top of the guest data page:

AUTOCLERK Cloud PMS * AutoClerk Cloud University Search today... Jan 15, 2024 morana...

John Moran New CRS Confirmation n/a

BW Rewards ID: 6006637738528603 Level: Gold Balance: 0
MyHMS Confirmation ZZ10073790736

Arrive Mon Jan 15 2024 Nights 1 Depart Tue Jan 16 2024 Availability / Rates Room Type K Adults 1 Children 0 Infants 0

Rate Plan RACK - BAR Rate \$300.00 Confidential Rate \$300.00 Stay Total Balance \$300.00 Tax Exempt 0 Rollaways 0 Cribs 0 Parking 0 Parking - Discount 0 Pet 0 Wine & Cheese 0 Early Check In 0 BugCheck 0

Check In No Show Cancel Copy Reservation

History Folio Letters e-Regcard Log

Guest Statistics

Avg # of Nights	1.00
CXL Ratio	0%
Avg Rate	\$ 221.50
Most Freq Rm Typ	K
Most Freq Room	222
Active Stays	2
Total Reservations	2
Cancels	0
No-Shows	0

Best Western ID 6006637738528603 Remove BW ID

Last Name Moran

First Name John

Title ETA 3:00PM

Phone / Type 123-555-5555 MOBILE

Address 1 123 Main St

Address 2

Zip / Country 89118 United States

City / State Las Vegas Nevada

e-mail john@icloud.com HOME

Birth Date

Drivers License

Passport

Other Phone

Purchase Order

Company

Join BW Rewards ☒

Reservation Comments

CRS Comments

Guest Comments Do Not Rent

Folio Comments

Hold Type CC-GTD Pay Type Cash

Credit Card Action Go

Source 01 Front Desk Source2 01 Front Desk Cancel Policy 4PM

Market Corporate Key System Manual CONTROL

Save & Exit Save Refresh Escape

Date	Status	Room Type	Room	Rate Plan	Rate
01/15/2024	NEW	1 KING BED		RACK - BAR	\$300.00

Enrolling a Guest in a BWR Promotion

Once an existing membership is attached to a reservation, you can enroll in and check enrollment status of promotions for BW Rewards members from their reservation. In the “Best Western” tab, click on Promotions:

The screenshot shows the AutoClerk Cloud PMS interface for a reservation. At the top, it says "AutoClerk Cloud PMS" and "AutoClerk Cloud University, BW Collection". Below this, there's a header with "John Moran New", "CRS Confirmation: n/a", "MyHMS Confirmation: n/a", and "BW Rewards ID: 6006637738528603 Level: Gold Balance: 0".

The main section is divided into tabs: "Guest", "Best Western", "Company", "Group", and "Travel Agent". The "Best Western" tab is selected. Under this tab, there's a "Promotions" button highlighted with a red box. To the left of this button, there's a "Best Western REWARDS" logo and a "Remove BW ID" button. Below the logo, there's a form for guest information: Last Name (Moran), First Name (John), Title (dropdown), Phone / Type (123-666-6666 | MOBILE), Address Type (HOME), Address 1 (123 Main St), Address 2 (dropdown), Zip / Country (89118 | United States), City / State (Las Vegas | Nevada), Email / Type (john@cloud.com | HOME), and Language (ENGLISH). There are also checkboxes for "Would you like to receive BW Rewards offers via email?" and "Would you like to receive offers from BW Rewards Partners via email?".

At the bottom of the form, there's a "Company Incentive Code" field and an "Update Preferences" button.

A popup will present all the promotion(s) that the guest is eligible for. If one is already checked when opening this screen, this guest is already signed up for that promotion.

The screenshot shows a "Best Western Rewards - Promotions" popup. It contains a table with the following columns: Enroll, Promo Code, Title, Start Date, End Date, and Registered. The promotion SSRAMINTRA3X is selected with a red box.

Enroll	Promo Code	Title	Start Date	End Date	Registered
<input type="checkbox"/>	PWPSRING24	Book a Pay With Points reservation and get 2,000 bonus points on up to 10 stays for a possible 20,000 points.	04/01/2024	09/02/2024	
<input type="checkbox"/>	SUMMER24	Earn 10,000 bonus points after completing 3 eligible stays, limit 20,000 points.	05/20/2024	09/02/2024	
<input type="checkbox"/>	INDIAREWUSH224	Earn 10,000 bonus points after completing 3 eligible nights in India, Sri Lanka or Bangladesh.	05/20/2024	09/02/2024	
<input type="checkbox"/>	AUSREWUSH224	Earn 10,000 bonus points when you complete 3 eligible nights in Australia or New Zealand.	05/20/2024	09/02/2024	
<input type="checkbox"/>	ASIAREWUSH224	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/02/2024	
<input type="checkbox"/>	ASIAREWUSH224TH	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/02/2024	
<input type="checkbox"/>	ASIAREWUSH224JP	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/02/2024	
<input type="checkbox"/>	ASIAREWUSH224BH	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/09/2024	
<input type="checkbox"/>	ASIAREWUSH224VT	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/02/2024	
<input type="checkbox"/>	EMEAREWUSH224	Earn 10,000 bonus points after completing 3 eligible nights at participating countries in Asia, Africa, Europe, and in the Middle East.	05/20/2024	09/02/2024	
<input checked="" type="checkbox"/>	SSRAMINTRA3X	Take your next Bangkok city break and earn three times more with a member exclusive offer.	07/15/2024	08/15/2024	07/11/2024

Below the table, there's a "Description" box and two buttons: "Enroll" and "Cancel".

To get details about the promotion, click on the hyperlink of the promotion. A description will appear in the Description box at the bottom of the popup:

Best Western Rewards - Promotions

Enroll	Promo Code	Title	Start Date	End Date	Registered
<input type="checkbox"/>	PWVSPRING24	Book a Pay With Points reservation and get 2,000 bonus points on up to 10 stays for a possible 20,000 points.	04/01/2024	09/02/2024	
<input type="checkbox"/>	SUMMER24	Earn 10,000 bonus points after completing 3 eligible stays, limit 20,000 points.	05/20/2024	09/02/2024	
<input type="checkbox"/>	INDIAREWRUSH24	Earn 10,000 bonus points after completing 3 eligible nights in India, Sri Lanka, or Bangladesh.	05/20/2024	09/02/2024	
<input type="checkbox"/>	AUSREWRUSH24	Earn 10,000 bonus points when you complete 3 eligible nights in Australia or New Zealand.	05/20/2024	09/02/2024	
<input type="checkbox"/>	ASIAREWRUSH24	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/02/2024	
<input type="checkbox"/>	ASIAREWRUSH24TH	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/02/2024	
<input type="checkbox"/>	ASIAREWRUSH24JP	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/02/2024	
<input type="checkbox"/>	ASIAREWRUSH24BH	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/09/2024	
<input type="checkbox"/>	ASIAREWRUSH24VT	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/02/2024	
<input type="checkbox"/>	EMEAREWRUSH24	Earn 10,000 bonus points after completing 3 eligible nights at participating countries in Asia, Africa, Europe, and in the Middle East.	05/20/2024	09/02/2024	
<input type="checkbox"/>	SSRAMINTRA3X	Take your next Bangkok city break and earn three times more with a member exclusive offer.	07/15/2024	08/15/2024	

Description

Earn 10,000 bonus points after completing 3 eligible stays, limit 20,000 points. Best Western Rewards® ("BWR") members ("Rewards Member(s)") who (a) register for this promotion on bestwestern.com/rewardsrush2 or as otherwise permitted (e.g., at the front desk of any Best Western® branded hotel), (b) will earn 10,000 BWR bonus points ("Bonus Points") for every three (3) eligible nights* stayed at any Best Western branded hotel in the United States, Canada, or the Caribbean between May 20, 2024 and September 2, 2024 ("Promotion Period"). A Rewards Member can earn 10,000 Bonus Points a maximum of two (2) times during the Promotion Period. The total Bonus Points awarded for this promotion may not exceed 20,000 Bonus Points per Rewards Member.

Enroll

Cancel

To enroll a guest into specific promotion(s) they are eligible for, checkbox the specific promotion(s) and then click Enroll at the bottom.

Best Western Rewards - Promotions

Enroll	Promo Code	Title	Start Date	End Date	Registered
<input type="checkbox"/>	PWVSPRING24	Book a Pay With Points reservation and get 2,000 bonus points on up to 10 stays for a possible 20,000 points.	04/01/2024	09/02/2024	
<input type="checkbox"/>	SUMMER24	Earn 10,000 bonus points after completing 3 eligible stays, limit 20,000 points.	05/20/2024	09/02/2024	
<input type="checkbox"/>	INDIAREWRUSH24	Earn 10,000 bonus points after completing 3 eligible nights in India, Sri Lanka, or Bangladesh.	05/20/2024	09/02/2024	
<input type="checkbox"/>	AUSREWRUSH24	Earn 10,000 bonus points when you complete 3 eligible nights in Australia or New Zealand.	05/20/2024	09/02/2024	
<input type="checkbox"/>	ASIAREWRUSH24	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/02/2024	
<input type="checkbox"/>	ASIAREWRUSH24TH	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/02/2024	
<input type="checkbox"/>	ASIAREWRUSH24JP	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/02/2024	
<input checked="" type="checkbox"/>	ASIAREWRUSH24BH	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/09/2024	07/11/2024
<input type="checkbox"/>	ASIAREWRUSH24VT	Earn 10,000 bonus points when you complete 3 eligible nights in Asia, maximum 20,000 points.	05/20/2024	09/02/2024	
<input type="checkbox"/>	EMEAREWRUSH24	Earn 10,000 bonus points after completing 3 eligible nights at participating countries in Asia, Africa, Europe, and in the Middle East.	05/20/2024	09/02/2024	
<input checked="" type="checkbox"/>	SSRAMINTRA3X	Take your next Bangkok city break and earn three times more with a member exclusive offer.	07/15/2024	08/15/2024	07/11/2024

Description

Enroll

Cancel

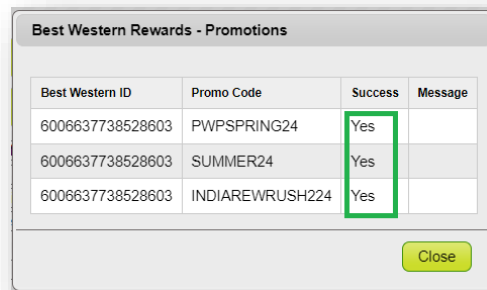
A pop up will come up; the "Yes" in the "Success" column indicates the guest has been officially enrolled into that promotion.

Best Western Rewards - Promotions

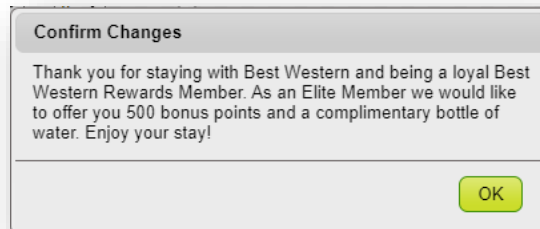
Best Western ID	Promo Code	Success	Message
6006637738528603	ASIAREWRUSH24BH	Yes	

Close

When you sign up for multiple promotions, you will receive a popup with all the promotions you enrolled them in.

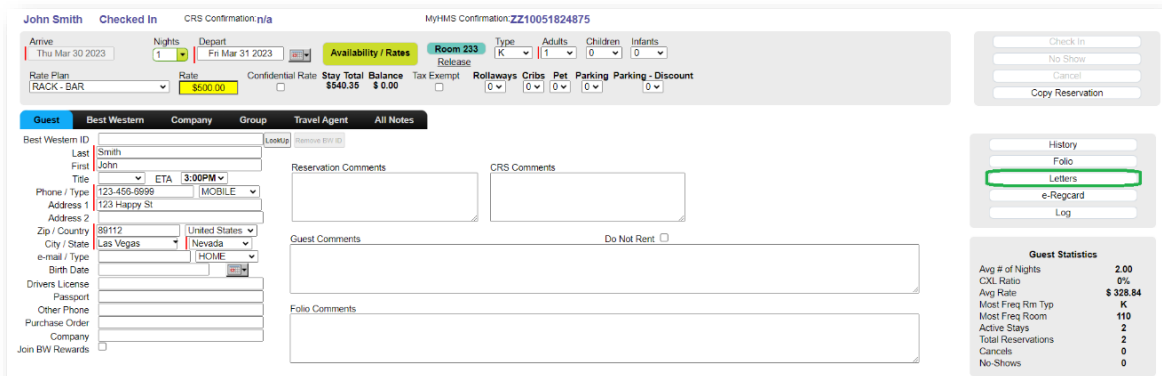


Note: When an **Elite member (Gold or above) BWR profile** has been attached to the reservation and gets checked in, the BWR Tier Reminder pop-up will say:



Letters

Letters are found by clicking the “Letters” button on the right side of a reservation or on the folio screen.



Select the letter you wish on the right-hand side of the screen. This will give you the option to “Print”, “Screen (HTML)” preview, and “e-mail” a selected letter.

AUTOCLERK
Cloud PMS

AutoClerk Cloud University

GUEST > LETTERS

John Smith

CRS Confirmation:

MyHMS Confirmation: **ZZ10051824875**

CONFIRMATION - Best Western - Confirmation *

- REGCARD - Best Western - Registration
- REGCARD - Best Western - Blank Registration
- CANCELLATION - Best Western - Cancellation
- THANKYOU - Best Western - Thank You
- CONFIRMATION - Best Western - Group Block
- CONFIRMATION - Best Western - Group Rooming List
- CANCELLATION - Best Western - Group Cancellation
- REGCARD - Best Western - Group Registration
- CONFIRMATION - Best Western Plus - Confirmation *

Email Settings

Subject: From the AutoClerk Cloud University hotel

To:

Cc:

Bcc:

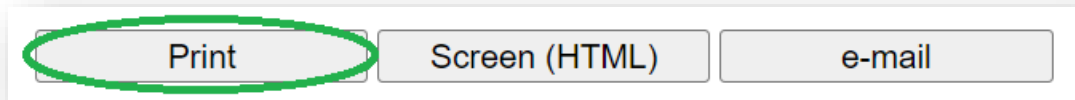
Print Screen (HTML) e-mail

Save & Exit Escape

- **Confirmation Letters** – Confirms that a guest has a reservation at your hotel. The details include: “Guest info”, “Reservation Info” (which includes any [Reservation Comments](#) listed under the “Special Requests” field), and “Rate & Payment Info”. It also lists “Terms & Conditions” which includes your hotel’s general policy from Hotel Setup and the reservation’s specific cancellation and guarantee policies.
- **Cancellation Letters** – Confirms that a guest’s reservation has been successfully cancelled. The letter includes the “Reservation details” which will include the “Cancellation #” (the number generated by the PMS confirming that the reservation was cancelled). **Note: if the reservation has not been cancelled in AutoClerk, the “Cancellation #” field will be blank.**
- **Registration Cards** – A document that a guest signs when they first check into the hotel to confirm their dates of stay, personal information, rate information, and that they are aware and agree to the hotel’s policies. There are boxes for the guest to write their vehicle information if needed. The “Guest Info” box will populate with any “[Guest Comments](#)” from the [Guest Data Tab](#).
- **eRegistration** – An electronic version of the Registration Card that contains the exact same information but is signed electronically on a tablet.
- **Thank You Letters** – Displays the reservation information with a summarized receipt of the reservation’s room and tax charges and balance.
- **Best Western Rewards Welcome (BWR Welcome letter)** – A one-page letter that summarizes the benefits of the Best Western Rewards program and is available in English, Spanish, and French.

Printing Letters

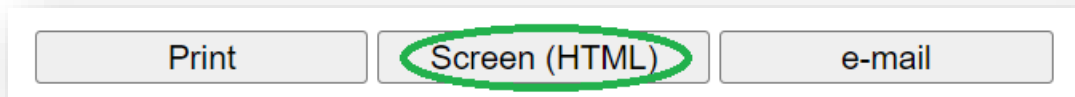
The Print button will open the Print Preview option in the browser, where you may be able to print or save to PDF depending on your computer settings.



There is also a feature to print multiple registration cards. Please see the [“Batch Print Reg Cards”](#) report under the [Reports](#) section of this manual for detailed information.

Screen (HTML) Letters

The **Screen (HTML)** button will open the letter in a new tab in HTML form and is a quick way to preview the letter. The letter may also be printed from this screen using your browser’s options, however it may not fill the page as well as the Print option above.



Sending Letters via Email

Select the appropriate Letter from the list. Next, edit the “Subject” line if necessary. Enter the guest e-mail address in the “To” field (if an email is on the guest profile it will automatically populate) and any additional address under Cc (Bcc is also available). Click on e-mail to send the selected letter.

AUTOCLERK
Cloud PMS

AutoClerk Cloud University

GUEST > LETTERS

John Smith

CRS Confirmation:

MyHMS Confirmation: **ZZ10051824875**

CONFIRMATION - Best Western - Confirmation *

REGCARD - Best Western - Registration

REGCARD - Best Western - Blank Registration

CANCELLATION - Best Western - Cancellation

THANKYOU - Best Western - Thank You

CONFIRMATION - Best Western - Group Block

CONFIRMATION - Best Western - Group Rooming List

CANCELLATION - Best Western - Group Cancellation

REGCARD - Best Western - Group Registration

CONFIRMATION - Best Western Plus - Confirmation *

Guest Data

Folio

History

Log

Email Settings

Subject: From the AutoClerk Cloud University hotel

To: john.smith@yahoo.com

Cc:

Bcc:

Print Screen (HTML) **e-mail**

Save & Exit Escape

Arrivals / Check-Ins

Locating an Arrival

There are multiple ways to locate an Arrival for check-in:

- [Tape Chart](#) (if the reservation already has a room assigned)
- [Search Today](#) and [Quick Search](#)
- Remaining Arrivals link in the “[Summary](#)” section on the Front Desk Dashboard
- Arrivals menu in the blue menu bar:

The screenshot shows the Front Desk Dashboard with tabs for Reservations, Reports, Arrivals, and In House. The 'Arrivals' tab is active. On the left, the 'Summary' section lists various reservation counts. A green box highlights '2 Remaining Arrivals'. To the right, a dropdown menu for 'Arrivals' is open, showing 'View List', 'Moran, John', and 'Steve, Smith'.

Summary	Arrivals	In House
2 <u>Remaining Arrivals</u>	Av	
2 <u>Remaining Departures</u>	19 <u>K</u>	\$ 235.00
7 <u>Currently In House</u>	42 <u>QQ</u>	\$ 245.00
4 <u>Stay Overs</u>	10 <u>SK</u>	\$ 255.00
0 <u>Arriving Tomorrow</u>	10 <u>SQQ</u>	\$ 255.00
0 <u>Departed Guests</u>	1 <u>WK</u>	\$ 255.00
0 Vacant Dirty	5 <u>WQQ</u>	\$ 265.00
92 Vacant Clean	1 <u>Banquet Room</u>	N/A
2 <u>Out of Order</u>		
1 <u>Users</u>		
0 <u>CRS Res</u>		

Check...

The screenshot shows the 'View List' for arrivals. The table displays reservation details for Moran, John and Steve, Smith.

Guest Name	BWR #	BWR Tier	Confirmation #	CRS Confirmation	Arrive	Depart	Status	Company	Type	Room	Avg Rate	# Guests	Pymt Type	Rate Plan
★ Moran, John	6006637738528603	Gold	ZZ10052570481		4/2/23	4/4/23	New		K		\$235.00	1/0/0	COMPLIME	RACK
★ Steve, Smith			ZZ10053292629		4/2/23	4/3/23	New		K		\$255.00	1/0/0	COMPLIME	RACK

Search

When an arrival is clicked, you will be taken to the reservation's Guest tab:

John Moran New CRS Confirmation: n/a BW Rewards ID: 6006637738528603 Level: Gold Balance: 0 MyHMS Confirmation: ZZ10052570481

Arrive: Sun Apr 2 2023 Nights: 2 Depart: Tue Apr 4 2023 Availability / Rates Room Type: K Adults: 1 Children: 0 Infants: 0

Rate Plan: RACK - BAR Rate: \$235.00 Confidential Rate: Stay Total: \$507.94 Balance: \$0.00 Tax Exempt: Rollaways: 0 Cribs: 0 Parking: 0 Parking - Discount: 0 Pet: 0

Guest Best Western Company Group Travel Agent All Notes

Best Western ID: 6006637738528603 Last: Moran First: John Title: Phone / Type: 123-666-6666 Address 1: 123 Main St Address 2: Zip / Country: 89118 United States City / State: Las Vegas Arizona e-mail: john@icloud.com Birth Date: Drivers License: Passport: Other Phone: Purchase Order: Company: Join BW Rewards: ☒

Reservation Comments: CRS Comments: Guest Comments: Do Not Rent: ☐ Folio Comments:

Guest Information

The first step is to confirm the guest's information is correct and [look up a Best Western ID](#) or [enroll](#) if necessary.

Once the guest information is updated, click "Save".

Room Selection

There are two methods to assign a room number to a reservation: Auto-assign or manual assignment.

To auto-assign a room to the reservation, click "Auto" underneath the teal "Room" button.

Arrive: Wed Jun 7 2023 Nights: 3 Depart: Sat Jun 10 2023 Availability / Rates Room Type: K Adults: 1 Children: 0 Infants: 0

Rate Plan: RACK - BAR Rate: \$250.00 Confidential Rate: Stay Total: \$806.25 Balance: \$0.00 Tax Exempt: Rollaways: 0 Cribs: 0 Parking: 0 Parking - Discount: 0 Pet: 0

Room Auto

The Auto assign method will look for rooms that are clean and on the highest floor:

Arrive: Wed Jun 7 2023 Nights: 3 Depart: Sat Jun 10 2023 Availability / Rates Room 243 Type: K Adults: 1 Children: 0 Infants: 0

Rate Plan: RACK - BAR Rate: \$250.00 Confidential Rate: Stay Total: \$806.25 Balance: \$0.00 Tax Exempt: Rollaways: 0 Cribs: 0 Parking: 0 Parking - Discount: 0 Pet: 0

Room 243 Release

To manually assign a specific room, click the teal "Room" button, which will bring up the Tape Chart.

Arrive: Wed Jun 7 2023 Nights: 3 Depart: 06/10/2023 Availability / Rates Room Type: K Adults: 1 Children: 0 Infants: 0

Rate Plan: RACK - BAR Rate: \$250.00 Confidential Rate: Stay Total: \$806.25 Balance: \$0.00 Tax Exempt: Rollaways: 0 Cribs: 0 Parking: 0 Parking - Discount: 0 Pet: 0

Room Auto

To select a specific room number, click on the first and last date of a guest stay, which will select all the nights in between those dates. You may also select a different room for each night if the guest will need to move rooms during their reservation.

Once you have selected your room, click done at the bottom left of the screen.

☐ Include day before and day after in room number look up?

Date	Tue 6/6	Wed 6/7	Thu 6/8	Fri 6/9	Sat 6/10
Total	97	100	100	102	102
100(K)					
101(K)	2				
105(K)					
110(K)					
111(K)					
112(K)					
114(K)					
115(K)					
116(K)					
120(K)					
124(K)					
125(K)					
132(K)					
137(K)					
202(K)	Stevens				
203(K)					
220(K)	Johnson				
221(K)	1				
222(K)	Adams				
Date	Tue 6/6	Wed 6/7	Thu 6/8	Fri 6/9	Sat 6/10
Total	97	100	100	102	102
225(K)					
226(K)					
232(K)					
233(K)					
234(K)					
235(K)					
237(K)					
238(K)					
241(K)					
242(K)					
243(K)					

Reservations: Checked Out Checked In New Room Status: Clean Dirty Out Of Order Availability: Available Unavailable Active Selection

Done Escape

The reservation will then display the room number in the teal box:

Arrive: Wed Jun 7 2023 Nights: 3 Depart: Sat Jun 10 2023 Availability / Rates **Room 116** Type: K Adults: 1 Children: 0 Infants: 0

Rate Plan: RACK - BAR Rate: \$250.00 Confidential Rate: ☐ Stay Total: \$806.25 Balance: \$ 0.00 Tax Exempt: ☐ Rollaways: 0 Cribs: 0 Parking: 0 Parking - Discount: 0 Pet: 0

Room 116
Release

If you would like to change the room number you assigned, click the release button underneath the room number to release the room back into inventory. Then assign a new room by repeating the process above.

Arrive: Wed Jun 7 2023 Nights: 3 Depart: Sat Jun 10 2023 Availability / Rates **Room 116** Type: K Adults: 1 Children: 0 Infants: 0

Rate Plan: RACK - BAR Rate: \$250.00 Confidential Rate: ☐ Stay Total: \$806.25 Balance: \$ 0.00 Tax Exempt: ☐ Rollaways: 0 Cribs: 0 Parking: 0 Parking - Discount: 0 Pet: 0

Room 116
Release

Updating a Payment Method during Check-In

Since most hotels will require payment at check-in (either for the stay or for incidentals), the next step is to obtain and update the payment from the guest. The system allows you to check in a guest without authorization if the [default payment method](#) is Cash, Check, or City Ledger (CL). If the default payment method is a credit card, the system will require that credit card to have authorization of the full Stay Total.

In the gray box above the orange buttons, you can click the drop-down menu titled “Pay Type” to change the payment method.

Hold Type | CC-GTD | Pay Type | Cash | Credit Card Action | - | Go

Save & Exit Save Refresh Escape

If the reservation is attached to a company or group, a City Ledger (direct bill) account may be available in the drop-down.

Hold Type | CC-GTD | Pay Type | Cash | Credit Card Action | -

Cash
CL: Happy Go Lucky Tours
Cash

If you'd like add a credit card, visit the sections on [Add CC without Authorization](#), [Add CC with Authorization](#), and [Splitting Authorizations between Multiple Credit Cards](#). **Note: before adding a credit card, you must save the reservation (which will generate a confirmation number).**

Check-in Button

Once a room is assigned and all other details are confirmed, the reservation can be checked-in.

In the upper right-hand corner of the reservation page, click “Check In”.

Check In
No Show
Cancel
Copy Reservation

After a reservation is checked-in, you are taken to the Folio page where you may post any charges or payments if necessary.

Generally, hotels collect any cash payments upon check-in. Virtual Credit Card (VCC) payments are also usually posted to the folio on the day of arrival, and these reservations will typically require a credit card from the guest for incidentals. Instructions on how to post charges and payments, and how to set up additional folios, will be covered in the [Folio Postings and Transfers](#) of this manual.

To complete the check-in, click “Save & Exit” at the lower left corner. You will then be returned to the Front Desk Dashboard.

When entering the folio page, the payment due amount is automatically calculated either of two (2) ways:

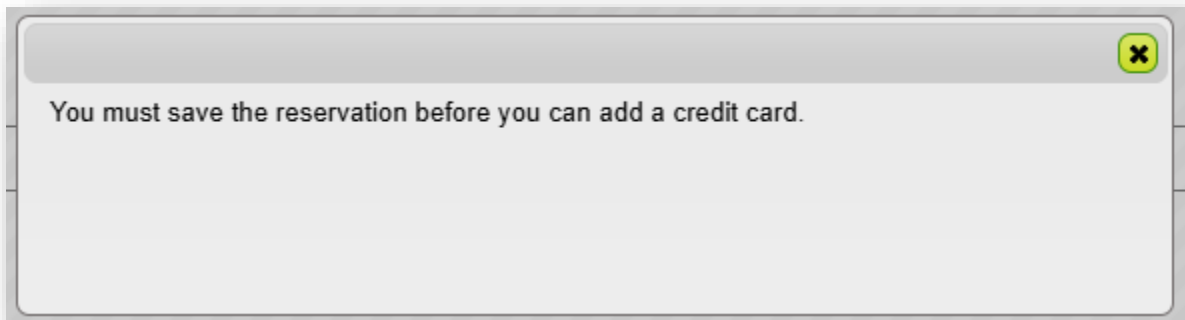
1. It will display what is needed to bring the balance to zero (\$0)
2. It will display the entire Stay Total

The calculation method is determined by the “Calculate Payment on Current Balance” setting in “Hotel” section of “Setup” accessible only to the “Hotel Manager” role or higher.

Credit Cards

Credit cards are added to guest profiles, which are available for use on any reservation (past or present) attached to that guest profile.

All credit card actions are made from a reservation. Before you can add a credit card, the reservation must be saved and have a confirmation number. If you attempt to add the Credit Card before saving the reservation, the below pop up will appear.



Above the orange buttons in the gray box, select the Credit Card Action drop-down list.

Date	Status	Room Type
11/06/2018	NEW	King Bed

- [Add CC without Authorization](#) is normally used add a credit card when creating a reservation.
- [Add CC with Authorization](#) is normally used for adding a credit card at check-in.
- [Edit CC](#) allows you to add, increase, or release an authorization, and read the credit card log and add notes for a Credit Card.
- [Delete CC](#) is used to a credit card from a reservation and from the guest profile.

Default Payment Method on a Reservation

The reservation's default payment method is the "Pay Type" that displays when the reservation is opened.

To change the default payment method for the reservation, choose the desired pay type from the drop-down menu, then save the reservation.

This update will also change the default payment method for the Primary folio.

Add CC without Authorization

Note: when adding a credit card, the card is added to the guest profile and will be available across all reservations with that guest profile.

Normally when you are creating a reservation, you do not have the credit card in-person, so instead of using the EMV reader you would enter the card number manually into AutoClerk Cloud when a guest is calling to make a reservation.

Note: Elavon customers are required to input credit card numbers into the EMV chip readers when you are creating reservations.

AUTOCLEK®
Cloud PMS

Main Menu Reservations Reports Arrivals

Credit Card Number | 4321000000001119

Expiration Date | (4) April ▼ 2025 ▼

CVV2 Code | [Whats this?](#)

Card Holder Name | ☐ Copy Zip and Address from Guest Profile

Zip |

Street Address |

Authorization Amount 0

Card Notes:

Continue and Return **Escape**

The only two fields that are mandatory with the red vertical bar are the “Credit Card Number” and “Expiration Date”. Since we are not adding an authorization, the “Authorization Amount” is 0. Card notes can be used to describe what this credit card is to be used for and will appear next to the card in the Pay Type.

Pay Type | VI *****1119 04/2025, , ▼

Credit Card Action | - ▼ **Go**

Save & Exit **Save** **Refresh** **Escape**

Date	Status	Room Type
11/06/2018	NEW	King Bed

Once a credit card is added, it not only becomes a “Pay Type”, but it also becomes the default form of payment.

Add CC with Authorization

Note: when adding a credit card, the card is added to the guest profile and will be available across all reservations with that guest profile.

When a guest arrives for check-in, after verifying the credit card and photo ID, select the “Add CC with Authorization” in the “Credit Card Action” drop down menu.

The screenshot shows a form with the following fields:

- Hold Type: CC-GTD
- Pay Type: Cash
- Credit Card Action: Add CC without Authorization (dropdown menu is open)

The dropdown menu options are:

- Add CC without Authorization
- Add CC with Authorization** (highlighted with a red box)
- Edit CC
- Delete CC

Buttons: Save & Exit, Save, Go, Escape.

Date	Status	Room Type
06/07/2023	NEW	1 KING BED

A pop-up window will appear where you can verify or change the authorization amount as well as add any short notes about the card. The authorization amount will always default to the total cost of Room and Tax (stay total). If your hotel collects an authorization for incidentals, you will need to update the amount.

The “Use EMV Chip Reader” button will send a signal to your EMV device. Follow the prompts on the EMV device to insert, tap, or swipe the card.

The screenshot shows the “Add Card and Authorize” pop-up window with the following fields:

- Authorization Amount: 380.16
- Card Notes: (text area)
- EMV Device: 1 (dropdown)

Buttons: Use EMV Chip Reader (highlighted with a red box), Enter Card Manually, Escape.

Once the authorization has been taken, you will see the authorized amount in bold black letters to the right of the card number in the “Pay Type” drop-down menu. This indicates the authorization was successful.

The screenshot shows the form with the following fields:

- Hold Type: CC-GTD
- Pay Type: AX **1158 08/2025 (S), Auth: \$448.00
- Credit Card Action: - (dropdown)

Buttons: Save & Exit, Save, Refresh, Escape.

AutoClerk Cloud User Manual

In the credit card log (described below), two actions would be added to the log: one that the card has been added, and the second that the authorization as added.

The screenshot shows the AutoClerk Cloud PMS interface for a reservation at "BW 90773 Dinosaur Valley Inn & Suites". The reservation is for "Millard Fillmore" and is marked as "NEW". The card holder name is "Millard Fillmore" and the card notes are "Yes". The current authorization amount is 126.72. Below this, the "Credit Card Activity" table is displayed, showing a single transaction.

Date	User	Trans ID	Invoice #	Auth Code	Folio #	Folio Name	Log	Authorization Amount	Action	Result	Response Code
07/06/2021 15:03:59	edbear	2529822	24509929	OK889Z	26774161	Primary	15:03 MC *****3332 12/2021 (M)	126.72	ADD_CREDITCARD	Successfully	A

Edit CC

To pull up the Credit Card Log, select "Credit Card Action", then "Edit". This will pull up the screen below. The credit card log is located directly below "**Credit Card Activity**". Anytime there is a new action on the reservation with a credit card, it is recorded here. So far there is only one transaction in the example log below.

The screenshot shows the AutoClerk Cloud PMS interface for a reservation at "ZZ-34 AC Cloud Demo Hotel". The reservation is for "Millard Fillmore" and is marked as "NEW". The card holder name is "Millard Fillmore" and the card notes are "Yes". The current authorization amount is 126.72. Below this, the "Credit Card Activity" table is displayed, showing a single transaction.

Date	User	Trans ID	Invoice #	Auth Code	Folio #	Folio Name	Log	Authorization Amount	Action	Result	Response Code
08/16/2023 07:11:50	Andy Moran	25311139	24509929	OK889Z	26774161	Primary	07:11 VI *****1119 03/2025 (M)	126.72	ADD_CREDITCARD	Successfully	A

AutoClerk Cloud User Manual

To authorize a guest Credit Card on file, make sure the correct credit card is selected in the drop down on the left side of the screen. Then in the blank box labeled amount (under the “Use Voice Authorization button”), type in the authorization amount, then click the lime green “Authorization” button.

AUTOCLERK® Cloud PMS ZZ-34 AC Cloud Demo Hotel Search today... Nov 06, 2018 morana---

Main Menu Reservations Reports Arrivals In House Departures Dashboard

Millard Fillmore **NEW**

Card Holder Name: Card Notes:

VI *****1119 03/2025, .

Save

Add Authorization Folio 27706800 Primary

Auth Code

Amount 50.00

Use Voice Authorization

Authorization

Credit Card Activity

View Details Escape

Date	User	Trans ID	Invoice #	Auth Code	Folio #	Folio Name	Log	Authorization Amount	Action	Result	Response Code
08/16/2023 07:11:50	Andy Moran		25311139				07:11 VI *****1119 03/2025 (M)		ADD_CREDITCARD		

If the Credit Card is authorized successfully, a line will be added to credit card log with the authorization amount and the action (in this example, “ADD_AUTHORIZATION”).

AUTOCLERK® Cloud PMS ZZ-34 AC Cloud Demo Hotel Search today... Nov 06, 2018 morana---

Main Menu Reservations Reports Arrivals In House Departures Dashboard

Millard Fillmore **NEW**

Card Holder Name: Millard Fillmore Card Notes:

VI *****1119 03/2025, Millard Fillmore, .

Save

Current Authorization Amount 50.00 Modify Release

Credit Card Activity

View Details Escape

Date	User	Trans ID	Invoice #	Auth Code	Folio #	Folio Name	Log	Authorization Amount	Action	Result	Response Code
08/16/2023 07:11:50	Andy Moran		25311139				07:11 VI *****1119 03/2025 (M)		ADD_CREDITCARD		
08/16/2023 08:08:18	Andy Moran	8265661	24053560	OK798Z	27706800	Primary		50.00	ADD_AUTHORIZATION	Successfully	A

copyright © 2008 - 2023 AutoClerk Inc. All rights reserved. | Read Terms of Use | HELP | Contact Support | 4.34-SNAPSHOT-20230816090451 | ac-qa-myhms-app-a-03

AutoClerk Cloud User Manual

If a greater authorization amount is needed, instead of replacing the authorization, use the Modify button.

To obtain that additional authorization, in the box to left of the “Modify” button input the total authorization amount needed and then click “Modify”.

AUTOCLERK Cloud PMS ZZ-34 AC Cloud Demo Hotel Search today... Nov 06, 2018 morana...

Main Menu Reservations Reports Arrivals In House Departures Dashboard

Millard Fillmore **NEW**

Card Holder Name: Millard Fillmore
Card Notes:

VI *****1119 03/2025, Millard Fillmore, v

Save

Current Authorization Amount **75.00** **Modify** **Release**

Credit Card Activity

										View Details	Escape
Date	User	Trans ID	Invoice #	Auth Code	Folio #	Folio Name Log	Authorization Amount	Action	Result	Response Code	
08/16/2023 07:11:50	Andy Moran		25311139			07:11 VI *****1119 03/2025 (M)		ADD_CREDITCARD			
08/16/2023 08:08:18	Andy Moran	8265661	24053560	OK798Z	27706800	Primary	50.00	ADD_AUTHORIZATION	Successfully	A	

copyright © 2008 - 2023 AutoClerk Inc. All rights reserved. | Read Terms of Use | HELP | Contact Support | 4.34-SNAPSHOT-20230816090451 | ac-qa-myhms-app-a-03

Notice that the log records another line, this time with the new total authorization amount and a “MODIFY_AUTHORIZATION” action.

AUTOCLERK Cloud PMS ZZ-34 AC Cloud Demo Hotel Search today... Nov 06, 2018 morana...

Main Menu Reservations Reports Arrivals In House Departures Dashboard

Millard Fillmore **NEW**

Card Holder Name: Millard Fillmore
Card Notes:

VI *****1119 03/2025, Millard Fillmore, v

Save

Current Authorization Amount **75.00** **Modify** **Release**

Credit Card Activity

										View Details	Escape
Date	User	Trans ID	Invoice #	Auth Code	Folio #	Folio Name Log	Authorization Amount	Action	Result	Response Code	
08/16/2023 07:11:50	Andy Moran		25311139			07:11 VI *****1119 03/2025 (M)		ADD_CREDITCARD			
08/16/2023 08:08:18	Andy Moran	8265661	24053560	OK798Z	27706800	Primary	50.00	ADD_AUTHORIZATION	Successfully	A	
08/16/2023 11:00:16	Andy Moran	8265661	24053560	OK942Z	27706800	Primary	75.00	MODIFY_AUTHORIZATION	Successfully	A	

copyright © 2008 - 2023 AutoClerk Inc. All rights reserved. | Read Terms of Use | HELP | Contact Support | 4.33.1-20230816105909 | ac-qa-myhms-app-a-03

Delete CC

Note: deleting a credit card will remove it from the guest profile. It will also remove the credit card log for that card.

From the “Credit Card Action” we will select “Delete CC”.

The screenshot shows the AutoClerk Cloud PMS interface. At the top, the header includes the AutoClerk Cloud PMS logo, the guest name "Millard Fillmore", a "New" status, and a "CRS Confirmation: n/a". Below this, there are fields for "Arrive" (Tue Nov 6 2018), "Nights" (1), and "Depart" (Wed Nov 7 2018). A yellow "Availability / Rates" button and a "Room" button are also visible. The "Rate Plan" is set to "RACK- Flexible Rate" and the "Rate" is "\$100.00". A "Confidential Rate" checkbox is present. The "Stay Total" is "\$110.00" and the "Balance" is "\$0.00".

The "Guest" tab is selected, showing a form for guest details. The "Last" name is "Fillmore" and the "First" name is "Millard". The "Title" is a dropdown menu. The "ETA" is "3:00PM". The "Phone / Type" is "202-456-1111" and "MOBILE". The "Address 1" is "1600 Pennsylvania Avenue NW". The "Address 2" is empty. The "Zip / Country" is "20500" and "United States". The "City / State" is "Washington" and "District of C". The "e-mail / Type" is a dropdown menu and "HOME". The "Birth Date" is a date picker. The "Drivers License", "Passport", "Other Phone", "Purchase Order", and "Company" fields are empty. The "Join Jameson Test" checkbox is unchecked.

The "Credit Card Action" dropdown menu is open, showing the following options: "Add CC without Authorization", "Add CC with Authorization", "Edit CC", and "Delete CC". The "Delete CC" option is highlighted in blue.

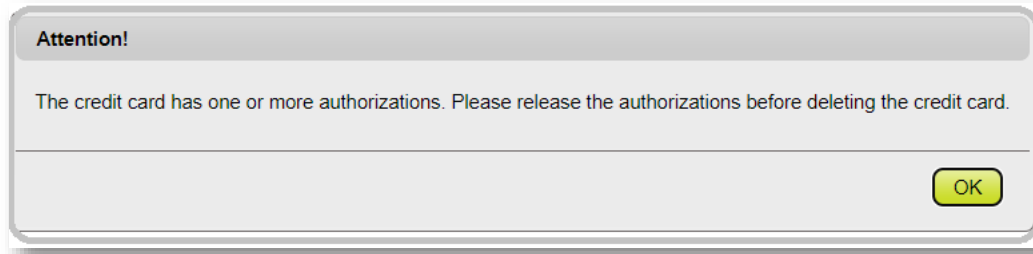
At the bottom, there is a "Pay Type" field with a dropdown menu showing "VI *****1119 03/2025, Millard Fillmore, Auth: \$75.00". A "Go" button is next to it. The "Save & Exit" button is also visible.

The bottom status bar shows the "Date" as "11/06/2018", the "Status" as "NEW", and the "Room Type" as "King Bed Suite".

If the credit card has no pending authorization, you will receive a warning pop up:

The warning pop-up dialog box has a title bar that says "Warning". The main text inside the box asks, "Are you sure you want to delete this CC?". At the bottom of the box, there are two buttons: "Yes" and "No".

If there is a remaining authorization on the card, you will receive this response:



To delete a credit card with an authorization, you must return to “Edit CC” and click the “Release” button to release the authorization on the credit card.

Main Menu Reservations Reports Arrivals In House Departures Dashboard

Millard Fillmore **NEW**

Card Holder Name: Millard Fillmore
Card Notes:

VI *****1119 03/2025, Millard Fillmore, v

Save

Current Authorization Amount: 75.00 **Modify** **Release**

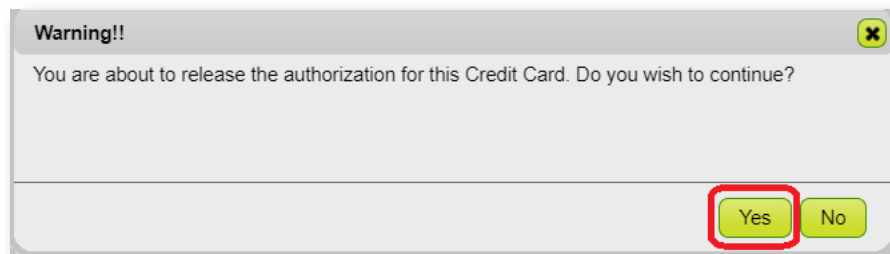
Credit Card Activity

Date	User	Trans ID	Invoice #	Auth Code	Folio #	Folio Name	Log	Authorization Amount	Action	Result	Response Code
08/16/2023 07:11:50	Andy Moran		25311139				07:11 VI *****1119 03/2025 (M)	50.00	ADD_CREDITCARD	Successfully	A
08/16/2023 08:08:18	Andy Moran	8265661	24053560	OK798Z	27706800	Primary		75.00	ADD_AUTHORIZATION	Successfully	A
08/16/2023 11:00:16	Andy Moran	8265661	24053560	OK942Z	27706800	Primary			MODIFY_AUTHORIZATION	Successfully	A

View Details Escape

copyright © 2008 - 2023 AutoClerk Inc. All rights reserved. | Read Terms of Use | HELP | Contact Support | 4.33.1-20230816105909 | ac-qa-myhms-app-a-03

You will be asked to confirm this action. Click “Yes”.



The credit card log will record the authorizations that were released (RELEASE_AUTHORIZATION). Now you can delete the credit card, and once it is deleted, it will be removed from the credit card list on the guest profile. However, the credit card will still be accessible in the drop-down menu of the Edit CC screen and the log will still be available.

NEW

Card Holder Name: Millard Fillmore
Card Notes:

VI *****1119 03/2025, Millard Fillmore, v

Save

Add Authorization
Folio: 27706800 Primary
Auth Code:
Amount:
Authorization:

Credit Card Activity

Date	User	Trans ID	Invoice #	Auth Code	Folio #	Folio Name	Log	Authorization Amount	Action	Result	Response Code
08/16/2023 07:11:50	Andy Moran	25311139	24053560	OK798Z	27706800	Primary	07:11 VI *****1119 03/2025 (M)	50.00	ADD_CREDITCARD	Successfully	A
08/16/2023 08:08:18	Andy Moran	8265561	24053560	OK942Z	27706800	Primary		75.00	ADD_AUTHORIZATION	Successfully	A
08/16/2023 11:00:16	Andy Moran	8265561	24053560	OK942Z	27706800	Primary		75.00	MODIFY_AUTHORIZATION	Successfully	A
08/16/2023 11:47:15	Andy Moran	8265561	24053560	OK798Z	27706800	Primary		75.00	RELEASE_AUTHORIZATION	Successfully	A

copyright © 2008 - 2023 AutoClerk Inc. All rights reserved. | Read Terms of Use | HELP | Contact Support | 4.33.1-20230816114627 | ac-qa-myhms-app-a-03

Splitting Authorizations between Multiple Credit Cards

If the guest would like to use multiple credit cards for authorization at check-in, we recommend first checking-in the reservation with Cash as the default payment method because the system does not require an authorization for Cash payments (this is because if the default payment method is a credit card, the system will require a single credit card with an authorization of the full Stay Total).

After checking the reservation in with Cash, add each credit card separately using [“Add CC with Authorization”](#) and manually enter the authorization amount. You may also [“Add CC without Authorization”](#) and then use [“Edit CC”](#) to add an authorization.

Voice Authorization

When using the “Add CC with Authorization” option with an EMV device, AutoClerk Cloud’s connection to the EMV device will time out in 80 seconds. We recommend asking the guest to get their credit card ready before activating the EMV device to avoid this timeout.

If the card is tapped, swiped, or inserted during or after this timeout, or there is an error with the connection, the guest may see the authorization go through on their bank account but AutoClerk Cloud did not record the credit card at all.

When this error occurs, the credit card administrator for your hotel will need to go into the credit card portal, locate the authorization, and obtain the authorization code and the authorization amount. The card would then need to be readded to AutoClerk Cloud with the “Add CC without Authorization” action.

Pay Type: Cash
Credit Card Action:

Save & Exit

Date: 11/06/2018
Status: NEW
Room Type: King Bed Suite

AutoClerk Cloud User Manual

Once the Credit Card is added, go back to the drop-down menu and select “Edit CC”. Click the “Use Voice Authorization” button in the middle of the screen.

The screenshot shows the AutoClerk Cloud interface with a top navigation bar (Main Menu, Reservations, Reports, Arrivals, In House, Departures, Dashboard). The main content area is titled 'Millard Fillmore' and 'NEW'. It includes a 'Card Holder Name' field, a 'Card Notes' field, and a 'Save' button. Below these is the 'Add Authorization' section, which includes a 'Folio' dropdown (27706800 Primary), an 'Auth Code' field, an 'Amount' field, and a 'Use Voice Authorization' button (highlighted with a red box). A yellow 'Authorization' button is at the bottom. The 'Credit Card Activity' table is visible at the bottom, showing a single transaction with the following data:

Date	User	Trans ID	Invoice #	Auth Code	Folio #	Folio Name	Log	Authorization Amount	Action	Result	Response Code
08/16/2023 11:54:31	Andy Moran		25311154				11:54 VI *****1119 03/2026 (M)		ADD_CREDITCARD		

You must then input the “Auth Code” and “Amount” from the credit card portal. The Amount must be an exact match with the authorization amount. Once these fields are entered, click “Authorization”.

The screenshot shows the AutoClerk Cloud interface with the 'NEW' credit card authorization screen. The 'Auth Code' field is now populated with 'OK745Z' and the 'Amount' field is populated with '100.00'. Both fields are highlighted with a red box. The 'Authorization' button is still visible at the bottom. The 'Credit Card Activity' table is visible at the bottom, showing a single transaction with the following data:

Date	User	Trans ID	Invoice #	Auth Code	Folio #	Folio Name	Log	Authorization Amount	Action	Result	Response Code
08/16/2023 11:54:31	Andy Moran		25311154				11:54 VI *****1119 03/2026 (M)		ADD_CREDITCARD		

To verify that the correct amount is being entered you will get the following pop-up warning after clicking “Authorization”. If the amount is correct, press “OK”.

The screenshot shows a pop-up warning dialog box with the following text:

www.qa.myhms4.com says

WARNING: Your property is responsible for entering the correct Authorization Code. Invalid auth codes will be subject to a fine,(\$50 for each instance). Otherwise, press Cancel and refresh the page and do not edit the Approval Code field.

Buttons: OK, Cancel

Once complete, an “ADD_AUTHORIZATION” action will be added at the bottom of the “Credit Card Activity” log. This method will not double-authorize the guest.

Main Menu Reservations Reports Arrivals In House Departures Dashboard

Millard Fillmore **NEW**

Card Holder Name: Millard Fillmore
Card Notes:

Current Authorization Amount:

Credit Card Activity

Date	User	Trans ID	Invoice #	Auth Code	Folio #	Folio Name	Log	Authorization Amount	Action	Result	Response Code
08/16/2023 11:54:31	Andy Moran	19	25311154	OK746Z	27706800	Primary	11:54 VI *****1119 03/2026 (M)	100.00	ADD_CREDITCARD ADD_AUTHORIZATION	Successfully	A

Authorization Settlements

As mentioned above, when Credit Cards are authorized onto a reservation, there are two transactions that will post to the "Credit Card Activity" log: one to add the card, the another for the authorization.

Main Menu Reservations Reports Arrivals In House Departures Dashboard

Millard Fillmore **NEW**

Card Holder Name: Millard Fillmore
Card Notes:

Current Authorization Amount:

Credit Card Activity

Date	User	Trans ID	Invoice #	Auth Code	Folio #	Folio Name	Log	Authorization Amount	Action	Result	Response Code
08/22/2023 06:23:25	Andy Moran	8298458	24053718	OK780Z	27710458	Primary	06:23 VI *****1119 03/2025 (M)	100.00	ADD_CREDITCARD ADD_AUTHORIZATION	Successfully	A

Continuing this example, we will post a payment to the folio, except the payment amount will be more than the authorization (we will post \$120 against the \$100 authorization).

Millard Fillmore CRS Confirmation My+MS Confirmation: ZZ20261515268 Stay Total: 110.00

Primary \$ -120.00

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
8/22/23 8:27 AM	11/6/18	morana	Visa	OK780Z *****1119, Invoice # 24053718	120.00		-120.00

Folio # 27710458 **Total: \$ -120.00**

Add Charge **Add Payment**

Type: Type:

Description: Description:

Amount: Amount:

Print Folio Folio to Excel Folio to PDF Email Folio ☐ Use Company Address Guest Data History Letters Log

Date	Status	Room Type	Room	Rate Plan	Rate
11/06/2018 Tue	NEW	King Suite		RACK- Flexible Rate	\$ 100.00

This causes the system to obtain an authorization modification (MODIFY_AUTHORIZATION) so that we have the full purchase amount authorized. The posting of the payment shows as a "PURCHASE" in the credit card log.

NEW

Card Holder Name: Millard Fillmore
Card Notes:

Save

Add Authorization
Folio: 27710458 Primary
Auth Code: **Use Voice Authorization**
Amount:
Authorization

Credit Card Activity

Date	User	Trans ID	Invoice #	Auth Code	Folio #	Folio Name	Log	Authorization Amount	Action	Result	Response Code
06/22/2023 06:23:25	Andy Moran	8295458	25311383	OK780Z	27710458	Primary	06/23 VI *****1119 03/2025 (M)	100.00	ADD_CREDITCARD	Successfully	A
06/22/2023 06:23:30	Andy Moran	8295458	24053718	OK780Z	27710458	Primary		120.00	ADD_AUTHORIZATION	Successfully	A
06/22/2023 06:27:15	Andy Moran	8295458	24053718	OK780Z	27710458	Primary		120.00	MODIFY_AUTHORIZATION	Successfully	A
06/22/2023 06:27:16	Andy Moran		23182812						PURCHASE		

Adding Incidental Credit Cards

There are times when you need to add an additional credit card to a room. An example of this is when you have a reservation made by an OTA (Online Travel Agency) with a virtual credit card; you will often want to get a second credit card to cover any incidental charges the guest may have.

AUTOCLERK Cloud PMS

AutoClerk Cloud University

Search today...

Nov 06, 2018

Millard Fillmore New

CRS Confirmation n/a

My RMS Confirmation ZZ20261515314

Arrive: Tue Nov 6 2018, Nights: 1, Depart: Wed Nov 7 2018, Availability / Rates, Rooms: King Suite, Type: Auto, Adults: 1, Children: 0, Infants: 0

Rate Plan: RACK, Flexible Rate, Rate: \$100.00, Conditional Rate: \$110.00, Stay Total Balance: \$110.00, Tax Exempt: \$0.00, Rollaways: 0, Cribs: 0, Parking Fee: 0

Guest Company Group Travel Agent All Notes

Last: Fillmore, First: Millard, Title: Mr., Phone / Type: 202-456-1111 MOBILE, Address 1: 1000 Pennsylvania Avenue NW, Zip / Country: 20500 United States, City / State: Washington District of C., e-mail / Type: HOME, Birth Date: , Drivers License: , Passport: , Other Phone: , Purchase Order: , Company: , Join Jameson Test:

Reservation Comments:

Guest Comments:

Folio Comments:

Add Card and Authorize

Authorization Amount: 110.00 Card Notes:

Enter Card Manually Escape

Pay Type: Cash, Credit Card Action: Add CC with Authorization, Source: Front Desk, Market: Corporate

Save & Exit Save Refresh Escape

Date	Status	Room Type	Room	Rate Plan	Rate
11/06/2018	NEW	King Bed Suite		RACK, Flexible Rate	\$100.00

copyright © 2008 - 2023 AutoClerk Inc. All rights reserved. | Read Terms of Use | HELP | Contact Support | 434-SNAPSHOT-20230822055214 | ac-qa-my/pms-app-a-01

Once the incidentals card has been collected, it will become the default payment method. You will now have access to all credit cards on the reservation via the "Pay Type" drop-down menu.

AUTOCLERK®
Cloud PMS

Millard Fillmore New CRS Confirmation: n/a MyHMS

Arrive: Tue Nov 6 2018 Nights: 1 Depart: Wed Nov 7 2018 Availability / Rates Room Auto

Rate Plan: RACK- Flexible Rate Rate: \$100.00 Confidential Rate: ☐ Stay Total: \$110.00 Balance: \$0.00 Tax Ex: ☐

Guest Company Group Travel Agent All Notes

Last: Fillmore First: Millard Title: ETA: 3:00PM Phone / Type: 202-456-1111 MOBILE Address 1: 1600 Pennsylvania Avenue NW Address 2: City / State: Washington District of C Zip / Country: 20500 United States e-mail / Type: HOME Birth Date: Drivers License: Passport: Other Phone: Purchase Order: Company: Join Jameson Test: ☐

Reservation Comments:

Guest Comments:

Folio Comments:

Pay Type: MC ****3332 04/2028, Millard Fillmore, incidentals Auth: \$110.00
Credit Card Action: MC ****3332 04/2028, Millard Fillmore, incidentals
VI ****1119 03/2026, Millard Fillmore, Cash, Check, Training

Save & Exit

Date: 11/06/2018 Status: NEW Room Type: King Bed Suite

To properly set up a separate payment for incidentals, you will need to set up an Incidental folio. If you check-in a reservation that has the rate plan set as “Confidential”, the system will automatically prompt you to create an Incidentals folio.

Create Incidentals Folio?

You have selected a Confidential Rate Plan or marked this Reservation as having a Confidential Rate.

Do you want to automatically add a Incidentals folio to this reservation?

No Yes

The next step is to set up routing (Folio Setup) so the system will automatically post the correct charges to the Primary or Incidentals folio. For details on routing, or to manually create folios, see [Creating Additional Folios and Routing](#) section of this manual.

Default Payment Method on a Folio

You also have the option to set a default payment for each folio. Select the folio you'd like to edit (the selected folio appears as the light blue tab at the top of the folio). From the Add Payment section, select the desired credit card in the drop-down list.

The screenshot shows the AutoClerk Cloud PMS interface for Folio # 27710463. The 'Add Payment' section is active, and a dropdown menu is open, showing a list of payment methods. The selected method is 'MC ****3332 04/2028, Millard Fillmore, incidentals'. The 'Set Default Payment' button is highlighted in yellow.

Finally, click on the button labeled “Set Default Payment”.

A close-up of the 'Set Default Payment' button, which is highlighted in yellow and has a red border. The button is located below the 'Auth: \$110.00' and 'COMMENT' fields.

Folio Postings and Transfers

A folio (also called a bill or a receipt) is where the charges and payments for a guest's hotel stay are posted and managed.

There are three ways to locate a guest folio:

1. Arrivals/In House/Departures lists
2. Search (Search Today, Quick Search, or “More...” search)

If the guest is arriving, select the guest's name from the Arrivals list or menu and click “Folio” on the right-side of the reservation.

If the guest is currently in your hotel, select the guest's name from the In-House or Departures list or menu and you will be taken directly to the folio.

If the reservation is in the past or the future, use the Quick Search or Advanced Search feature from the Front Desk Dashboard to locate the reservation and click "Folio" on the right-side of the reservation.

Creating Additional Folios and Routing

You can create as many folios as you need in a reservation. **Note: guest folios that are added cannot be deleted or renamed. See the [House Accounts](#) section for deleted a House Account folio.**

Above the folio on the left-side are two tabs labeled "Primary" and "Add +". Click "Add +" to create a new folio. A pop-up window will appear in the upper center of the page to give the new folio a name. For example, if a guest is requesting specific charges to be separated from their Room charges, you can create an "Incidentals" folio. Click "OK" to finish creating the folio. The folio name will not be visible on the printed guest folio. **We strongly recommend not creating a second folio named "Primary", as this will cause the system to recognize it as a duplicate of the Primary folio and causes issues with routing and folio closing.**

To select a folio to make changes to it, click the tab at the top. The selected folio tab will highlight in light blue.



After creating a new folio, you will need to assign what charges are to be applied to it. At the bottom of the page click the "Folio Setup" button.

	Primary	Incidentals
Room	<input type="radio"/>	<input type="radio"/>
Cribs	<input checked="" type="radio"/>	<input type="radio"/>
PETS	<input type="radio"/>	<input checked="" type="radio"/>
Rollaways	<input type="radio"/>	<input checked="" type="radio"/>
Room Rent	<input checked="" type="radio"/>	<input type="radio"/>
Late Check In After Audit	<input checked="" type="radio"/>	<input type="radio"/>
No Show Charge	<input checked="" type="radio"/>	<input type="radio"/>
Cancellation Charge	<input checked="" type="radio"/>	<input type="radio"/>
Early Check -In	<input checked="" type="radio"/>	<input type="radio"/>
Late Check Out	<input checked="" type="radio"/>	<input type="radio"/>
Room Correction	<input checked="" type="radio"/>	<input type="radio"/>
Room Rent FX2	<input checked="" type="radio"/>	<input type="radio"/>
BW Adjustment	<input checked="" type="radio"/>	<input type="radio"/>
Misc	<input type="radio"/>	<input checked="" type="radio"/>
Gift Shop	<input type="radio"/>	<input type="radio"/>
Property Damage	<input type="radio"/>	<input type="radio"/>
Smoking Fees	<input type="radio"/>	<input type="radio"/>
Misc Non-Taxable	<input type="radio"/>	<input type="radio"/>
Misc Taxable	<input type="radio"/>	<input type="radio"/>
Meeting	<input type="radio"/>	<input type="radio"/>
Meeting Room Rental	<input checked="" type="radio"/>	<input type="radio"/>
Audio Visual	<input checked="" type="radio"/>	<input type="radio"/>
Wash	<input type="radio"/>	<input checked="" type="radio"/>
Laundry	<input type="radio"/>	<input type="radio"/>
Phone	<input type="radio"/>	<input type="radio"/>
Phone	<input type="radio"/>	<input checked="" type="radio"/>
Fax	<input checked="" type="radio"/>	<input type="radio"/>

The names of the folios appear at the top in orange. Assign charges to a folio by clicking the radio buttons.

Notice how charges are listed by category (for example, several different charges fall under Room). You can route all charges in the entire category or choose only specific charges.

In this example, PETS, Rollaways, all charges under the Misc and Wash categories, and Phone charges are routed to the Incidentals folio.

Click "Done" to save.

Posting Charges to a Folio

To post a charge to a guest's folio look for the "Add Charge" section below the folio on the left-side.

The screenshot shows the 'Folio # 27710525' header. Below it are two main sections: 'Add Charge' and 'Add Payment'. The 'Add Charge' section has a 'Type' dropdown menu with 'Room Rent' selected, a 'Description' text area, and an 'Amount' input field. Below these is a green 'Apply Charge' button. The 'Add Payment' section has a 'Type' dropdown menu with 'Cash' selected, a 'Description' text area, and an 'Amount' input field with '0.00' entered. Below these is a green 'Apply Payment' button. At the bottom of the interface are three orange buttons: 'Save & Exit', 'Check Out', and 'Escape'.

From the "Type" drop-down menu, choose the charge from the list and enter a Description (if necessary), which will be visible on the guest's folio copy. Enter the amount you wish to post in the "Amount" field.

This screenshot shows the same interface as the previous one, but with the 'Add Charge' dropdown menu open. The menu lists various charge types: Room Rent, Meeting Room, Audio Visual, Coffee, Stationary, Restaurant, Bar, Room Service, Misc Taxable, Best Western Travel Card, Sunglasses, Misc Non-Taxable, Parking, Laundry, Gift Shop (highlighted in blue), Phone, Fax, Valet Laundry, Soap, Softener, and Washing Machine. The 'Add Payment' section remains unchanged. At the bottom, the 'Save & Exit' button is partially visible. Below the main form area, there is a table with guest information:

Date	Status	Room Type
11/06/2018 Tue	CHECKEDIN	Queens Suite

When ready click “Apply Charge” and the transaction will post to the folio.

Type

Description

Amount

Apply Charge

The posting Date and time (actual date), Hotel Date (business date), User, Posting Type, Description, and Charge Amount will display.

George Washington CRS Confirmation: MyHMS Confirmation: **ZZ20261515831** Stay Total : **115.50**

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
8/22/23 10:22 AM	11/6/18	morana	Gift Shop	Candy Bar		1.50	1.50

Posting Payments to a Folio

To post a payment to a guest’s folio look for the “Add Payment” section below the folio on the left-side. From the “Type” drop-down menu, choose the payment Type or credit card from the list and enter a Description (if necessary) which will appear on the guest’s folio copy.

Folio # 27710525

Add Charge

Type

Description

Amount

Apply Charge

Add Payment

Type

Description

Amount

Apply Payment

Save & Exit **Escape**

The payment due amount is automatically calculated either one of two (2) ways:

1. It will be calculated to display what is needed to bring the balance to zero (\$0)
2. It will be calculated to display the entire Stay Total

The calculation method is determined by the “Calculate Payment on Current Balance” setting in “Hotel” section of “Setup” accessible only to the “Hotel Manager” role or higher.

If you would like to post a different amount, enter the amount you wish to post in the “Amount” field.

The screenshot shows two side-by-side forms: "Add Charge" and "Add Payment".

- Add Charge:**
 - Type: Room Rent (dropdown)
 - Description: (empty text area)
 - Amount: (empty text field)
 - Apply Charge: (yellow button)
- Add Payment:**
 - Type: MC *****3332 04/2028, Millard Fillmore, incidentals (dropdown)
 - Description: (empty text area, highlighted with a green box)
 - Amount: 1.50 (text field, highlighted with a red box)
 - Apply Payment: (yellow button, highlighted with a red box)

At the bottom of both forms are "Save & Exit" and "Escape" buttons.

When ready click “Apply Payment” and the transaction will post to the folio. The posting Date and time (actual date), Hotel Date (business date), User, Posting Type, Description, and Charge Amount will display.

George Washington

CRS Confirmation:

MyHMS ConfirmationZZ20261515831

Stay Total : 115.50

Primary \$ 0.00Add +

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
8/22/23 10:22 AM	11/6/18	morana	Gift Shop	Page 1 of 1, view more transactions			
8/22/23 10:45 AM	11/6/18	morana	Mastercard	Candy Bar OKB612 *****3332, Invoice # 24053721	1.50	1.50	0.00

Posting a Split or Mixed-Tender Payment

To post a split or mixed-tender payment to a guest’s folio look for the “Add Payment” section below the folio on the left-side. From the “Type” drop-down menu, choose the payment type or credit card from the list you wish to apply the first part of the split and enter a Description (if necessary), which will appear on the guest’s folio copy. Then repeat the process with the second payment method.

If a new credit/debit card is presented for the split, it will need to be added to the reservation from the Guest Data screen using “[Add CC with Authorization](#)” in the payment section.

Posting Corrections to a Folio

There are multiple ways to correct folio transactions: you can modify existing transactions, void transactions, or post adjustments to previous transactions. All users can post charges and adjustments.

If your Hotel Manager has added the “PERMIT_FOLIO_LINE_EDITING” permission to your user, you’ll be able to access a special menu to correct transactions. The specific user permission can be activated in the “Users” underneath the “System” Category in the “Setup” area.

AUTOCLERK®
Cloud PMS

Main Menu Reservations Reports

Login Name: test123

Full Name: test123

Password:

User Role: Hotel Staff

User Permissions:

- ☐ PERMIT_MANUAL_RATE
- ☐ PERMIT_OVER_BOOKING
- ☐ PERMIT_EDITING_ON_RATE_CALENDAR
- ☒ PERMIT_FOLIO_LINE_EDITING
- ☐ PERMIT_REFUND_POSTING
- ☐ PERMIT_GROUP_DATE_EDITING

Language: en_US

Locked: ☐

Force password change on next login: ☐

Save Reset Done Undo

Note: City Ledger payments and credit card payments posted on a previous business day cannot be modified and must be adjusted with additional postings.

Modify amount

To modify existing transitions, in the guest folio, right-click your mouse on the posting line that needs to be corrected. A pop-up menu will appear with multiple options. Click on “Modify Amount”. In this example we will make an adjustment to the Room Rent charge of \$100.00.

AutoClerk Cloud User Manual

George Washington CRS Confirmation: MyHMS Confirmation: ZZ20261515831 Stay Total : 115.50

Primary /\$ 110.00 Add +

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
Page 1 of 1. view more transactions							
8/22/23 10:22 AM	11/6/18	morana	Gift Shop	Candy Bar		1.50	1.50
8/22/23 10:45 AM	11/6/18	morana	Mastercard	OK861Z *****3332, Invoice # 24053721	1.50		0.00
8/22/23 11:10 AM	11/6/18	morana	Room R			100.00	100.00
8/22/23 11:10 AM	11/6/18	morana	Occupa			3.00	103.00
8/22/23 11:10 AM	11/6/18	morana	Sales Ta			4.00	107.00
8/22/23 11:10 AM	11/6/18	morana	City Tax			3.00	110.00

Folio # 27710525 Total : \$ 110.00

A window will pop-up where you can correct the posting, in this example to \$90.00. By default, this will adjust the taxes that are associated with the Room Rent charge, but you can uncheck the box if you do not want the taxes adjusted. Click "Yes" when finished.

Confirmation

Modify amount for Room Rent from \$100.00 to:

90.00

☒ Automatically Adjust Taxes associated with the Room Posting -.

Yes Cancel

The folio will now display the adjusted room rent and taxes. The balance previously was \$110 but after the adjustment the folio balance is now \$99.00.

George Washington CRS Confirmation: MyHMS Confirmation: ZZ20261515831 Stay Total : 115.50

Primary /\$ 99.00 Add +

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
Page 1 of 1. view more transactions							
8/22/23 10:22 AM	11/6/18	morana	Gift Shop	Candy Bar		1.50	1.50
8/22/23 10:45 AM	11/6/18	morana	Mastercard	OK861Z *****3332, Invoice # 24053721	1.50		0.00
8/22/23 11:10 AM	11/6/18	morana	Room Rent			90.00	90.00
8/22/23 11:10 AM	11/6/18	morana	Occupancy Tax			2.70	92.70
8/22/23 11:10 AM	11/6/18	morana	Sales Tax			3.60	96.30
8/22/23 11:10 AM	11/6/18	morana	City Tax			2.70	99.00

Folio # 27710525 Total : \$ 99.00

Transaction reports will provide an audit trail for modifications. Any changes are reported as adjustment postings to keep track of each instance the amount was modified. This allows accurate reporting while keeping the guest's folio uncluttered and easier to read.

Gift Shop						
32764213	Adams, John	Primary	2/25/21	Chocolate	\$ 500.00	edbear 07/22/21 11:48
32764213	Adams, John	Primary	2/25/21	null , Invoice # 0. Old description == Chocolate	-\$ 495.00	edbear 07/22/21 11:51
Total Gift Shop:					\$ 5.00	

Remove line item

To void the posting entirely, in the right-click menu, choose “Remove Line Item”.

John Moran

CRS Confirmation:

MyHMS Confirmation:ZZ20261482069

Stay Total : 77.00

Primary /\$ 5.00

Add +

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
Page 1 of 1. view more transactions							
8/22/23 11:22 AM	11/6/18	morana	Gift Shop	<div><div>Modify amount</div><div>Remove line item</div><div>Transfer line item</div><div>Transfer all items</div></div>		5.00	5.00

After confirming that you want to remove the transaction, the line will remain on the folio, but the amount will show as \$0.00. This informs hotel staff that a transaction was voided on the folio, however the transaction line will *not* display to the guest on printed folios.

John Moran

CRS Confirmation:

MyHMS Confirmation:ZZ20261482069

Stay Total : 77.00

Primary /\$ 0.00

Add +

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
Page 1 of 1. view more transactions							
8/22/23 11:22 AM	11/6/18	morana	Gift Shop	Chocolate		0.00	0.00

Adjustments

Posting adjustments is required if your manager has not permitted “Folio Line Editing”. This method is also necessary if the transaction is for a previous business day (e.g., Night Audit was completed and now an adjustment needs to be made).

Note: Posting any “Room Rent” amount, positive or negative, will prevent the system from posting room and tax to that folio during the Night Audit. You can avoid this by using a separate charge such as “Room Correction” to adjust room rent postings. For arrivals after rolling the night audit routine, use a “Late Check-In After Audit” charge.

In this example we will make the same adjustment to the Room Rent charge of \$100.00 however we will post a credit to room rent instead of modifying the original posting.

In the guest folio, select the transaction type from the drop-down menu in the “Add Charge” section, in our example, we will use “Room Rent”. Enter the reason for the adjustment in the “Description”, which will appear on the guest’s folio copy.

Next, enter the amount of the adjustment needed. If entering a credit, use a minus (-) to indicate a negative amount. When ready click “Apply Charge”.

Add Charge

Type: Room Correction ▼

Description: Rate Adjustment

Amount: -10.00

Apply Charge

Add Payment

Type: MC *****3332 04/2028, Millard Fillmore, incidentals ▼

Description:

Amount: 99.00

Apply Payment

Save & Exit
Escape

The folio will now display the adjusted room rent and tax. The balance will now display a negative (-) amount indicating that there is a credit due that will need to be refunded to the guest. Details on how to post a refund are in the next section.

George Washington

CRS Confirmation:

MyHMS Confirmation:ZZ20261515831

Stay Total : 115.50

Primary /\$ -11.00

Add +

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
Page 1 of 1. view more transactions							
8/22/23 10:22 AM	11/6/18	morana	Gift Shop	Candy Bar		1.50	1.50
8/22/23 10:45 AM	11/6/18	morana	Mastercard	OK861Z *****3332, Invoice # 24053721	1.50		0.00
8/22/23 11:10 AM	11/6/18	morana	Room Rent			90.00	90.00
8/22/23 11:10 AM	11/6/18	morana	Occupancy Tax			2.70	92.70
8/22/23 11:10 AM	11/6/18	morana	Sales Tax			3.60	96.30
8/22/23 11:10 AM	11/6/18	morana	City Tax			2.70	99.00
8/22/23 11:37 AM	11/6/18	morana	Room Correction	Rate Adjustment		-10.00	89.00
8/22/23 11:37 AM	11/6/18	morana	Occupancy Tax			-0.30	88.70
8/22/23 11:37 AM	11/6/18	morana	Sales Tax			-0.40	88.30
8/22/23 11:37 AM	11/6/18	morana	City Tax			-0.30	88.00
8/22/23 11:39 AM	11/6/18	morana	Mastercard	OK939Z *****3332, Invoice # 24053722	99.00		-11.00

Folio # 27710525

Total : \$ -11.00

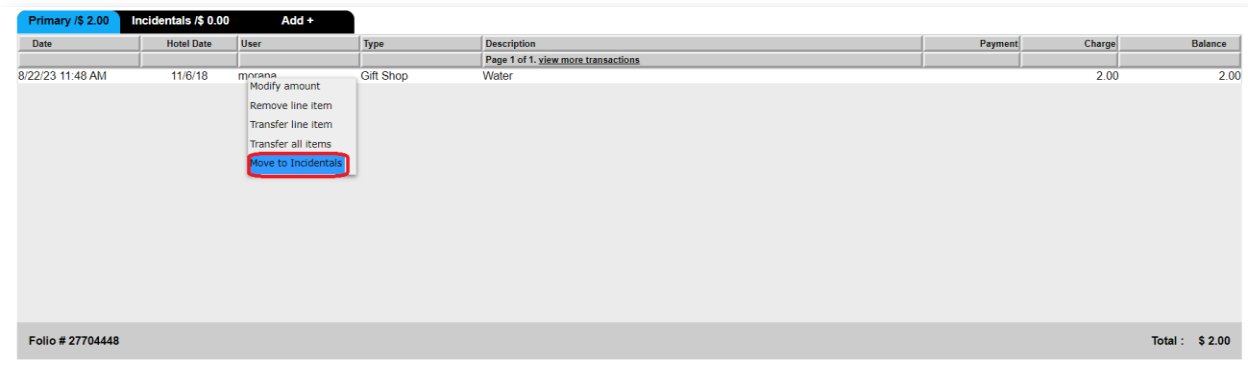
Moving and Transferring Folio Postings

Folio postings can be moved to any folio in a reservation, including the group folio if the reservation is attached to a group. They can also be transferred to a different guest's folio. Postings can only be moved or transferred if your manager has added "PERMIT_FOLIO_LINE_EDITING" permission to your user. If you do not have this permission, you will need to ask your manager to complete this task.

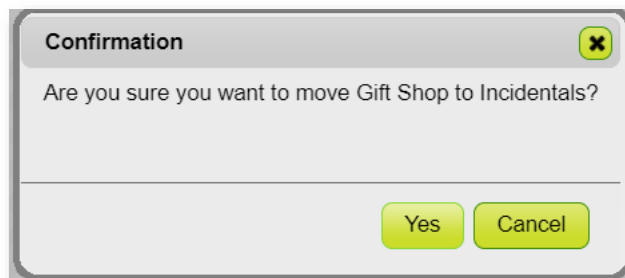
Note: All payment types except City Ledger and credit card payments can be transferred to another guest's folio. Credit card payments are tied to the guest's profile and cannot be transferred to another guest's profile. These payment types will need to be refunded and then reposted on the new folio.

Move Charges to Another Folio

In the guest folio, right-click your mouse on the posting line that needs to be moved. A pop-up menu will appear with multiple options. Click on "Move to <name of folio>", "Transfer Line Item", or "Transfer All Items".



When moving to another folio in the reservation, a Confirmation window will pop-up asking, "Are you sure you want to move <transaction> to <folio name>?". Click "Yes".



You will be taken to the destination folio and the moved transaction will display.

Note: Only the taxes associated with Rent postings can be moved automatically. All other postings will require the taxes to be moved manually to other folios in the reservation.

Primary /\$ 0.00		Incidentals /\$ 2.00		Add +			
Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
				Page 1 of 1. view more transactions			
8/29/23 3:34 PM	11/6/18	morana	Gift Shop	Water		2.00	2.00

Transfer Charges to another Folio

In the guest folio, right-click your mouse on the posting line that needs to be transferred.

Primary /\$ 0.00		Incidentals /\$ 2.00		Add +				
Date	Hotel Date	User	Type	Description	Payment	Charge	Balance	
				Page 1 of 1. view more transactions				
8/29/23 3:34 PM	11/6/18	morana	Gift Shop	Water		2.00	2.00	

Modify amount
 Remove line item
Transfer line item
 Transfer all items
 Move to Primary

When transferring to another guest's folio, a Confirmation window will pop-up asking, "Are you sure you want to transfer line item <transaction>" or "Are you sure you want to transfer all items?".

Confirmation

Are you sure you want Transfer line item Gift Shop for 2.00?

--Selected from in House Guest--

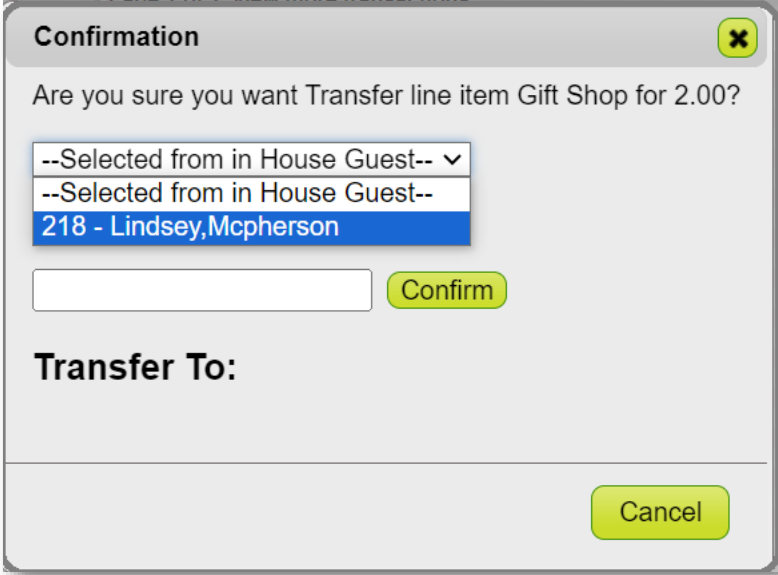
Or Select Folio Number

Confirm

Transfer To:

Cancel

In the drop-down menu, choose the in-house guest to transfer the posting(s) to. If the guest was checked-out, or will check-in, or you need to transfer the posting(s) to a group master folio, you may enter the Folio Number for the destination of the transfer. (The Folio Number can be found below the folio's postings on the lower left, above the "Add Charge" section).



Confirmation [X]

Are you sure you want Transfer line item Gift Shop for 2.00?

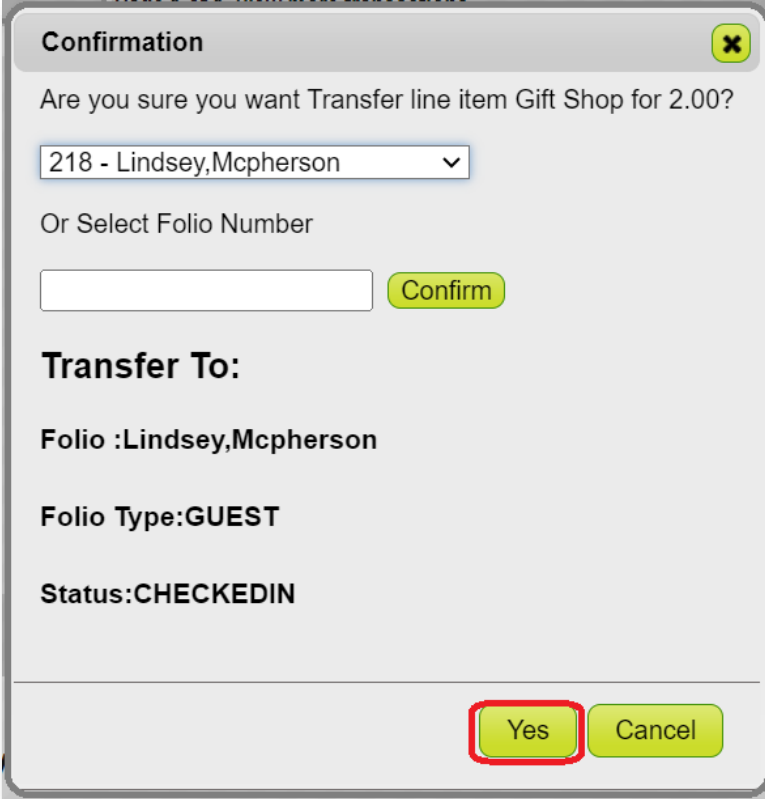
--Selected from in House Guest-- ▾
 --Selected from in House Guest--
 218 - Lindsey,Mcpherson

Confirm

Transfer To:

Cancel

Once you have selected your folio destination and confirmed the transfer, click "Yes".



Confirmation [X]

Are you sure you want Transfer line item Gift Shop for 2.00?

218 - Lindsey,Mcpherson ▾

Or Select Folio Number

Confirm

Transfer To:

Folio :Lindsey,Mcpherson

Folio Type:GUEST

Status:CHECKEDIN

Yes **Cancel**

The folio posting(s) will then turn gray, and notes will appear to show where the posting(s) were transferred to. The Folio Number will be displayed as a hyperlink which will take you to that folio

to view the transferred transaction(s). These notes will not appear on printed folios and are only for the hotel to see that a transaction was transferred.

Primary /\$ 0.00		Add +					
Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
				Page 1 of 1. view more transactions			
8/30/23 8:33 AM	11/6/18	morana	Gift Shop			2.00T	
8/30/23 8:33 AM	11/6/18	morana		Transferred 11/6/18 - To Folio 27716386 RM 218 - Lindsey, Mcpherson			

Refunding a Credit/Debit Card

After a posting has been adjusted, you may need to refund the guest if a previous payment to the folio has already been applied. This is indicated by a negative (-) amount in the "Total" balance at the bottom of the folio on the right, and you will see in the "Add Payment" section under the folio on the lower left that the Amount field will be a negative (-) **red** number.

George Washington CRS Confirmation: MyHMS Confirmation: ZZ20261515831 Stay Total: 115.50

Primary /\$ -11.00		Add +						
Date	Hotel Date	User	Type	Description	Payment	Charge	Balance	
Page 1 of 1, view more transactions								
8/22/23 10:22 AM	11/6/18	morana	Gift Shop	Candy Bar		1.50	1.50	
8/22/23 10:45 AM	11/6/18	morana	Mastercard	OK961Z *****3332, Invoice # 24053721	1.50		0.00	
8/22/23 11:10 AM	11/6/18	morana	Room Rent			90.00	90.00	
8/22/23 11:10 AM	11/6/18	morana	Occupancy Tax			2.70	92.70	
8/22/23 11:10 AM	11/6/18	morana	Sales Tax			3.60	96.30	
8/22/23 11:10 AM	11/6/18	morana	City Tax			2.70	99.00	
8/22/23 11:37 AM	11/6/18	morana	Room Correction	Rate Adjustment		-10.00	89.00	
8/22/23 11:37 AM	11/6/18	morana	Occupancy Tax			-0.30	88.70	
8/22/23 11:37 AM	11/6/18	morana	Sales Tax			-0.40	88.30	
8/22/23 11:37 AM	11/6/18	morana	City Tax			-0.30	88.00	
8/22/23 11:39 AM	11/6/18	morana	Mastercard	OK939Z *****3332, Invoice # 24053722	99.00		-11.00	

Folio # 27710525 **Total: \$ -11.00**

Add Charge

Type: Room Rent

Description:

Amount:

Apply Charge

Add Payment

Type: MC *****3332 04/2028, Millard Fillmore, incidentals

Description: Refund for Room Rate Adjustment

Amount: -11.00

Apply Payment

COMMENT:

Set Default Payment

Print Folio

Folio to Excel

Folio to PDF

Email Folio

☐ Use Company Address

Guest Data

History

Letters

Log

- Confirm the guest's credit/debit card to be refunded in the "Type" drop down menu.
- Enter the reason for the refund in the "Description" which will appear on the guest's folio copy.
- Confirm the amount to be refunded and when ready click on "Apply Payment"
- You will see the amount refunded in the folio. The "Total" balance will be updated.
- The amount of time it will take for the guest to receive their refund varies depending on their bank's processing time and could take approximately 2-14 business days.

George Washington CRS Confirmation MyHMS Confirmation **ZZ20261515831** Stay Total **115.50**

Primary \$ 0.00 Add +

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
Page 1 of 1. view more transactions							
8/22/23 10:22 AM	11/6/18	morana	Gift Shop	Candy Bar		1.50	1.50
8/22/23 10:45 AM	11/6/18	morana	Mastercard	OK961Z *****3332, Invoice # 24053721	1.50		0.00
8/22/23 11:10 AM	11/6/18	morana	Room Rent			90.00	90.00
8/22/23 11:10 AM	11/6/18	morana	Occupancy Tax			2.70	92.70
8/22/23 11:10 AM	11/6/18	morana	Sales Tax			3.60	96.30
8/22/23 11:10 AM	11/6/18	morana	City Tax			2.70	99.00
8/22/23 11:37 AM	11/6/18	morana	Room Correction	Rate Adjustment		-10.00	89.00
8/22/23 11:37 AM	11/6/18	morana	Occupancy Tax			-0.30	88.70
8/22/23 11:37 AM	11/6/18	morana	Sales Tax			-0.40	88.30
8/22/23 11:37 AM	11/6/18	morana	City Tax			-0.30	88.00
8/22/23 11:38 AM	11/6/18	morana	Mastercard	OK9397 *****3332, Invoice # 24053722	99.00		-11.00
8/22/23 11:42 AM	11/6/18	morana	Mastercard	*****3332, Invoice # 24053724 Refund for Room Rate Adjustment	-11.00		0.00
Folio # 27710525							Total : \$ 0.00

Add Charge

Type: Room Rent

Description:

Amount:

Apply Charge

Add Payment

Type: MC *****3332 04/2028, Millard Fillmore, incidentals

Description:

Amount: 0.00

Apply Payment

COMMENT

Set Default Payment

Print Folio

Folio to Excel

Folio to PDF

Email Folio

☐ Use Company Address

Guest Data

History

Letters

Log

Departures / Check Outs

Locating a Departure

Once Night Audit has been run, there are a few different areas in the system where you can locate guests that need to be checked out:

- [Tape Chart](#) (if the reservation already has a room assigned)
- [Search Today](#) and [Quick Search](#)
- Remaining Departures link in the “[Summary](#)” section on the Front Desk Dashboard
- Departures menu in the blue menu bar:

Arrivals	In House	Departures	Dashboard															
<p>Availability</p> <p>RACK-Flexible Rate</p> <table> <tr> <td>13</td> <td>NSQQ</td> <td>\$ 110.00</td> </tr> <tr> <td>9</td> <td>NSK</td> <td>\$ 110.00</td> </tr> <tr> <td>2</td> <td>NSKS</td> <td>\$ 134.00</td> </tr> <tr> <td>2</td> <td>NSKE</td> <td>\$ 150.00</td> </tr> <tr> <td>2</td> <td>NSHQ</td> <td>\$ 120.00</td> </tr> </table>				13	NSQQ	\$ 110.00	9	NSK	\$ 110.00	2	NSKS	\$ 134.00	2	NSKE	\$ 150.00	2	NSHQ	\$ 120.00
13	NSQQ	\$ 110.00																
9	NSK	\$ 110.00																
2	NSKS	\$ 134.00																
2	NSKE	\$ 150.00																
2	NSHQ	\$ 120.00																
		<p>View List</p> <p>108,Bass, Lance</p> <p>111,Stamos, John</p> <p>112,Moran, Sam</p>																
		<p>Arrival Date</p> <p>Departure Date</p>																
		<p>Search</p> <p>More...</p>																

You may also see the guests due to check out by selecting the “View List” option from the drop down. This will take you to a separate screen and show additional guest data.

Arrivals	In House	Departures	Dashboard
Availability			
RACK-Flexible Rate			
13	NSQQ	\$ 110.00	
9	NSK	\$ 110.00	
2	NSKS	\$ 134.00	
2	NSKE	\$ 150.00	
2	NSHQ	\$ 120.00	

View List

108,Bass, Lance

111,Stamos, John

112,Moran, Sam

Arrival Date

Departure Date

Search More...

From here, you can sort the guest data by clicking on any of the **underlined column headers**. Click the individual guest's name to be taken directly to their folio.

Main Menu

Reservations

Reports

Arrivals

In House

Departures

Departures > View List

3 items found, displaying all items. 1

Grp	Guest Name	BWR #	BWR Tier	Confirmation #	CRS Confirmation	Arrive	Depart	Status	Company
	Bass, Lance			ZZ10064841542		1/5/23	1/6/23	Checked	
(G)	Moran, Sam			ZZ10065687866		1/5/23	1/6/23	Checked	
	Stamos, John			ZZ10060810779		1/1/23	1/6/23	Checked	

Settle the Folio

From the guest folio, you can see any charges or payments that have been posted. In the example below, room rent and tax have been charged and there is a balance of \$144.90.

Lance Bass

CRS Confirmation: MyHMS Confirmation: ZZ10064841542

Stay Total: 144.90

Primary: \$ 144.90

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
11/3/23 2:45 PM	1/5/23	JSoliz	Room Rent	Room 108		120.00	120.00
11/3/23 2:45 PM	1/5/23	JSoliz	Occupancy Tax			15.60	135.60
11/3/23 2:45 PM	1/5/23	JSoliz	County Tax			6.00	141.60
11/3/23 2:45 PM	1/5/23	JSoliz	Sales Tax			3.30	144.90

Folio # 7765307

Total: \$ 144.90

Add Charge

Type: Room Rent

Description:

Amount: Unrequired Field

Apply Charge

Add Payment

Type: Cash

Description:

Amount: 144.90

Apply Payment

COMMENT

Set Default Payment

Print Folio

Folio to Excel

Folio to PDF

Email Folio

Use Company Address

Guest Data

History

Letters

Log

Save & Exit

Escape

Before a guest can be checked out, all folios must have a zero balance. Payments to a folio can be made in the "Add Payment" section of the screen. Use the "type" drop down and select the

method of payment for the guest. The balance of the folio will automatically be populated in the amount field (always double check the amount being posted). When ready, click Apply Payment.

Add Charge

Type:

Description:

Amount:

Apply Charge

Add Payment

Type:

Description:

Amount:

Apply Payment

Auth: \$144.90

COMMENT:

Set Default Payment

Save & Exit **Check Out** **Escape**

After payment has been applied, the balance must be zero before continuing the checkout:

Lance Bass

CRS Confirmation:

MyHMS Confirmation: ZZ20262018111

Stay Total: 144.90

Primary /\$ 0.00

Add +

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
Page 1 of 1. view more transactions							
11/28/23 12:56 PM	11/28/18	morana	Room Rent			131.73	131.73
11/28/23 12:56 PM	11/28/18	morana	Occupancy Tax			3.95	135.68
11/28/23 12:56 PM	11/28/18	morana	Sales Tax			5.27	140.95
11/28/23 12:56 PM	11/28/18	morana	City Tax			3.95	144.90
11/28/23 12:56 PM	11/28/18	morana	Visa	OK879Z *****2257, Invoice # 24207005	144.90		0.00

Folio # 27949580

Total: **\$ 0.00**

Once the payment has been applied and the folio has a \$0.00 balance, an orange "Check Out" button will appear at the bottom of the folio screen.

Add Charge

Type:

Description:

Amount:

Apply Charge

Add Payment

Type:

Description:

Amount:

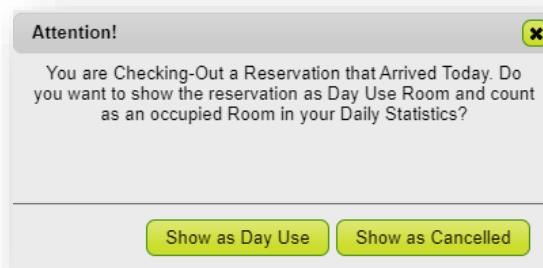
Apply Payment

Save & Exit **Check Out** **Escape**

Day Use Reservations

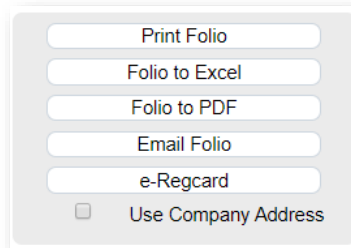
All reservations must be booked for at least a one-night stay. However, a room can be marked day use by checking it in, and then on the same day checking out the reservation with a zero balance. Any charges must be posted manually as there will not be a Night Audit routine to automatically post charges.

After clicking “Check Out” popup will ask you to confirm if you’d like to mark the reservation as a day use room or cancellation.

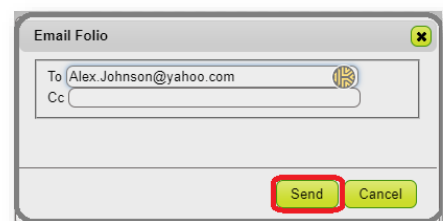


Printing or Emailing a Reservation Folio

A guest has the option for either a hard copy or digital copy of their folio. From the guest folio screen near the bottom right corner, there are a few options:



- **Print Folio:** This will produce the folio for preview in another browser tab, which can be printed by using the browser's print function. The resulting printout may appear smaller and may not fill the page.
- **Folio to Excel:** This will send the folio to a spreadsheet program like Excel in the event certain lines need to be removed before printing. The resulting printout will look the same as if printed from a PDF.
- **Folio to PDF:** This is the best printing method. This will export a copy of the folio to your PDF reader for immediate printing. It fills the page providing a professional and readable copy for the guest.
- **Email Folio:** This will send an email to the guest and attach the folio as a PDF. If there is an email address on the guest's profile, it will automatically populate, however you may edit this field and one Cc may be added. To send to more than two recipients at a time, click Email Folio again.



Example Folio*** AutoClerk Cloud University**

100 Main Street
 Phoenix, Arizona 85027
 Main:(623) 780-6000 Fax:623-780-1234
00599@hotel.bestwestern.com

Training Manual
 6201 N. 24th Parkway
 Phoenix, AZ 85016

Guest Folio

User: EM
 Date: August 21, 2024
 Time: 2:52 PM

Arrival date: 7/27/2024
 Departure 7/28/2024
 Confirmation ZZ10098400517
 Room: 125 (King)
 Folio #: 11888625

DATE	DESCRIPTION	TYPE	CHARGES	CREDITS	BALANCE
7/27/24		Room Rent	\$ 100.00		\$ 100.00
7/27/24		County Sales Tax	\$ 7.38		\$ 107.38
7/27/24		Occupancy Tax	\$ 11.95		\$ 119.33
7/27/24		Sales Tax	\$ 2.00		\$ 121.33
Totals					\$ 121.33

Guest Signature: _____

House Accounts

House Accounts are folios used to post charges and payments for non-guest or non-group purposes. Common uses include Market/Sundry sales, sales to customers who are not guests in your hotel, or to keep track of vending refunds and/or laundry commissions.

The House Account folios must all be at \$0.00 balance for Night Audit to be run.

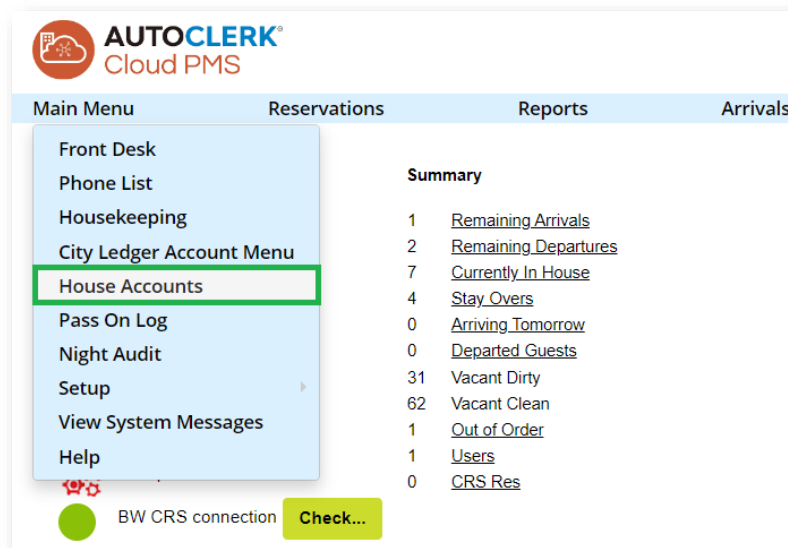
House Account folios are like guest folios, with only some key differences (described in detail in the following sections). In House Accounts:

- Specific transactions may be check-boxed to display on the printed or emailed folio.
- Folios may be closed which will wipe out all charges and recreate the folio with the same name and settings. Any folios not named "House" will give you the option to delete the folio after closing it.
- Credit cards are stored in House Accounts until the folio is closed, or until the card is removed using the white "Remove Card" button.
- It is not possible to transfer charges from a guest folio to the House Account folios. However, charges can be transferred from the House Folio to a guest folio.
- City Ledger/Direct Bill cannot be used as a payment type in House Accounts.

For basic information on handling folios, reference the following sections under [Folio Postings and Transfers](#):

- [Creating Additional Folios and Routing](#)
- [Posting Charges to a Folio](#)
- [Posting Payments to a Folio](#)
- [Posting a Split or Mixed-Tender Payment](#)
- [Posting Corrections to a Folio](#)
- [Refunding a Credit/Debit Card](#)
- [Moving and Transferring Folio Postings](#)

The House Accounts can be accessed from the Main Menu drop-down menu in the blue menu bar.



All House Accounts appear as a folio.

AUTOCLERK
Cloud PMS

AutoClerk Cloud University

Search today...

Mar 15, 2022
morana...

HOUSE ACCOUNTS

House/ \$ 0.00 **Add +**

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
Page 1 of 1. view more transactions							

Folio # 2374623 Total: \$ 0.00

Add Charge

Type: Room Rent

Description:

Amount:

Apply Charge

Add Payment

Type: Cash

Description:

Amount:

Apply Payment

Print Folio

Folio to Excel

Email Folio

Add Card

Edit CC

Remove Card

Save & Exit **Folio Setup** **Close Folio** **Escape**

Creating Additional Folios in the House Accounts

You can create as many folios as you'd like in House Accounts. **Note: We strongly recommend not creating a second folio named "House", as this will cause the system to recognize it as a duplicate of the default House folio and causes issues with routing and folio closing.**

Above the folio on the left-side you'll see two tabs labeled "House" and "Add +". Click "Add +" to create a new folio. A pop-up window will appear in the upper center of the page to give the new folio a name.

AUTOCLERK
Cloud PMS

AutoClerk Cloud University

Search today...

Mar 15, 2022
morana...

HOUSE ACCOUNTS

House/ \$ 0.00 **Add +**

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
Page 1 of 1. view more transactions							

Folio # 2374623 Total: \$ 0.00

For example, for a purchase from the Marketplace you can create a "Marketplace" folio. Click "OK".

HOUSE ACCOUNTS

House/ \$ 0.00	Marketplace/ \$ 0.00	Add +	
<input type="checkbox"/> Date	Hotel Date	User	Type

Folio # 8879853

The “Add Payment” area of a House Account folio functions [the same way as a guest folio](#). However, to take credit card payments in House Accounts, you must first add the card by clicking the “Add Card” button near the bottom-right of the screen.

212

Then you will have the credit card available from the “Type” drop-down menu.

Add Charge

Type: Room Rent
Description:
Amount: Required Field
Apply Charge

Add Payment

Type: Cash
Description:
Amount: 0.00
Apply Payment

Print Folio
Folio to Excel
Email Folio
Add Card
Edit CC
Remove Card

Save & Exit Folio Setup Close Folio Escape

Credit cards are stored in a House Accounts folio until the folio is closed, or until the card is removed using the white “Remove Card” button.

Add Charge

Type: Room Rent
Description:
Amount: Required Field
Apply Charge

Add Payment

Type: Cash
Description:
Amount: 0.00
Apply Payment

Print Folio
Folio to Excel
Email Folio
Add Card
Edit CC
Remove Card

Save & Exit Folio Setup Close Folio Escape

Printing or Emailing a House Account Folio

Printing and emailing a House Account folio works differently than a guest folio.

To print a copy of the folio, *select the transactions to display on the printed copy* using the checkboxes on the left-hand side. Selecting the transactions is required for folios that are kept open with running transactions in succession, to prevent the entire folio from being printed.

HOUSE ACCOUNTS

House/ \$ 0.00 Test/ \$ 0.00 Add +

<input type="checkbox"/>	Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
					Page 1 of 1. view more transactions			
<input type="checkbox"/>	10/2/23 1:17 PM	3/15/22	morana	Sundry Shop	Water		3.00	3.00
<input type="checkbox"/>	10/2/23 1:17 PM	3/15/22	morana	Sundry Shop	Chips		2.00	5.00
<input type="checkbox"/>	10/2/23 1:17 PM	3/15/22	morana	Cash		5.00		0.00

Folio # 2374623 Total: \$ 0.00

If the entire folio should be displayed, click the checkbox at the top left of the folio to select all.

HOUSE ACCOUNTS

House/ \$ 0.00 Test/ \$ 0.00 Add +

<input checked="" type="checkbox"/>	Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
					Page 1 of 1. view more transactions			
<input checked="" type="checkbox"/>	10/2/23 1:17 PM	3/15/22	morana	Sundry Shop	Water		3.00	3.00
<input checked="" type="checkbox"/>	10/2/23 1:17 PM	3/15/22	morana	Sundry Shop	Chips		2.00	5.00
<input checked="" type="checkbox"/>	10/2/23 1:17 PM	3/15/22	morana	Cash		5.00		0.00

Folio # 2374623 Total: \$ 0.00

When are ready to print, click "Print Folio" to generate a PDF file. You can also export the folio to Excel or email the folio, as described in the [Printing or Emailing a Folio for a Guest](#) section.

Closing a House Account Folio

A hotel can choose to keep a folio open and display each transaction in running succession or can close the folio at any time, such as every time a transaction is completed. Each time a House Account folio is closed, all credit cards added to the folio will be removed. Once a House Account folio is closed, it cannot be reopened to edit or print, however, the transactions are still recorded and can be seen in reports. A folio can only be closed if the balance is \$0.00.

HOUSE ACCOUNTS

House/ \$ 0.00 Test/ \$ 0.00 Add +

<input type="checkbox"/>	Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
	Page 1 of 1. view more transactions							
<input type="checkbox"/>	10/2/23 1:17 PM	3/15/22	morana	Sundry Shop	Water		3.00	3.00
<input type="checkbox"/>	10/2/23 1:17 PM	3/15/22	morana	Sundry Shop	Chips		2.00	5.00
<input type="checkbox"/>	10/2/23 1:17 PM	3/15/22	morana	Cash		5.00		0.00

Folio # 2374623 Total: \$ 0.00

Add Charge

Type: Room Rent

Description:

Amount: Required Field

Apply Charge

Add Payment

Type: Cash

Description:

Amount: 0.00

Apply Payment

Print Folio

Folio to Excel

Email Folio

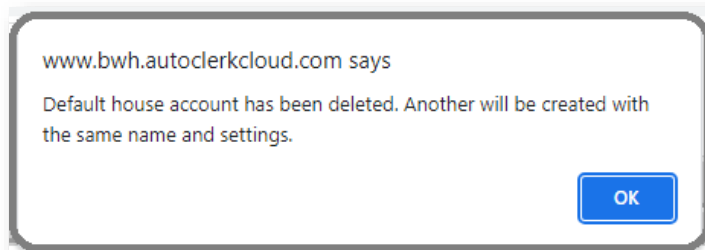
Add Card

Edit CC

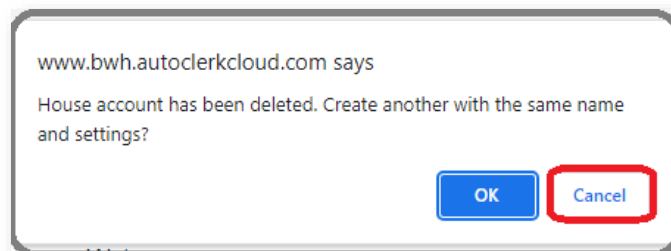
Remove Card

Save & Exit
Folio Setup
Close Folio
Escape

If the primary “House” folio is closed, it will automatically be reopened empty and ready for new transactions.

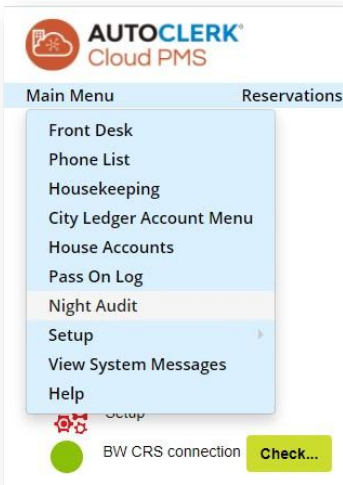


If an added folio is closed, you will be prompted to choose to reopen it empty and ready for new transactions. If you click “Cancel” the folio will be deleted and not reopened.



Night Audit

The Night Audit can be accessed from the Main Menu drop-down menu in the blue menu bar.



Preflight Checklist

You will be presented with a Night Audit Preflight Checklist indicating all 10 steps of the Night Audit process and the step's status.

Night Audit	
Status	Night Audit Preflight Checklist
LOCK	Night Audit Lock
OK	Invalid Reservations
ACTION REQ.	Clear Folios Moran John(\$-27.5)
OK	Clear Group Folios
ACTION REQ.	House Folios House (\$3.00)
ACTION REQ.	Stay overs 110.Bayliss_Skip 240.Washington_George
ACTION REQ.	No Shows 103.Collins_Fred Expedia_Example Kelly_Bride 110.Payment_Split 240.Washington_George
SETTLE	Settle Credit Cards
ACTION REQ.	Charge Folios
ACTION REQ.	Increment Date

There are three (3) status indicators:

1. **Blue status with "OK"** indicates the step is complete and no action is required.
2. **Green status** indicates an action that can be taken by clicking the button: "LOCK", "SETTLE", "CHARGE", and "INCREMENT".
3. **Red status with "ACTION REQ."** indicates the step needs action before moving forward with the audit. Any time a step needs attention there will be hyperlinks to the name(s) of the reservation(s) that need action.

To complete the Night Audit using “Increment Date”, all steps must be **Blue status with “OK”**, except for Night Audit Lock and Increment Date which can be **Green**.

Night Audit Lock

This button is optional. Clicking the “LOCK” button will lock all users except for the user who clicked the button, preventing all other users from making any changes or postings while preparing the Night Audit.

It is not mandatory to lock the system but may be beneficial to properties who may have more than one user working on the overnight shift. This will not allow any financial changes to the system while the audit is being processed. Failure to do so could put the properties ledgers out of balance. **Note: The Night Audit must be manually unlocked. It will not unlock automatically after incrementing the date, and it can *only* be unlocked by the same user who locked it. Not even users with higher permission levels can Unlock.**

Invalid Reservations

This button should always remain **blue**. If for any reason this turns **red/ACTION REQ.**, it signifies a reservation has been corrupted. You must reach out to [AutoClerk Cloud Support](#) for assistance.

Clear Folios

If any past reservation has an open balance on the folio, this button will appear **red/ACTION REQ.** Use the link to go directly to the folio and post a payment, refund, or charge to obtain a zero (\$0.00) balance. Once all are cleared, it will turn **blue/OK**, and you can then continue with the Night Audit.

Clear Group Folios

If a departed group has a group master folio with an open balance, this button will appear **red/ACTION REQ.** Use the link to go directly to the group folio and post a payment or charge to obtain a zero (\$0.00) balance. Once this turns **blue/OK**, you can continue with the Night Audit.

House Folios

When a House Accounts folio is holding a balance, this button will appear **red/ACTION REQ.** Use the link to go directly to the folio and post a payment or charge to obtain a zero (\$0.00) balance. Once this turns **blue/OK**, you can continue with the Night Audit. **Note: it is best practice to ensure that staff members are collecting and posting payments right away when posting any charges to House Accounts.**

Stay Overs

If a room is due to check-out today but has not been checked-out or extended, this button will appear **red/ACTION REQ.** Use the link to check-out or extend the room if necessary. Once this turns **blue/OK**, you can continue with the Night Audit.

No Shows

If a reservation has not arrived before Night Audit, this button will appear **red/ACTION REQ.** Use the link to process the no-show reservation.

AutoClerk Cloud User Manual

1. In the reservation adjust the number of nights to one (1) and click "Save".

AutoClerk Cloud PMS AutoClerk Cloud University

John Moran New CRS Confirmation: n/a MyRMS Confirmation: ZZ10064085092

Arrive: Tue Mar 15 2022 Nights: 1 Depart: Thu Mar 17 2022 Availability / Rates Room: KLC Type: KLC Adults: 1 Children: 0 Infants: 0

Rate Plan: RACK-FLEXIBLE RATE Rate: \$50.00 Confidential Rate: \$0.00 Stay Total: \$116.50 Balance: \$0.00 Tax Exempt: 0 Rollaways: 0 Cribs: 0 Pets: 0

Guest: Best Western Company Group Travel Agent All Notes

Best Western ID: Moran Last: John First: John Title: 702-666-4613 12:00PM MOBILE Address 1: 123 Main St Address 2: Zip / Country: 89123 United States City / State: Las Vegas Nevada e-mail: john@icloud.com HOME Birth Date: Drivers License: Passport: Other Phone: Purchase Order: Company: Join BW Rewards: ☐

Reservation Comments: CRS Comments:

Guest Comments: Do Not Rent: ☐

Folio Comments:

Hold Type: CC-GTD Pay Type: Cash Credit Card Action: Go Source: Front Desk Source2: Front Desk Cancel Policy: 4PM

Save & Exit Save Refresh Escape

Date	Status	Room Type	Room	Rate Plan	Rate
03/15/2022	NEW	King Lounge Chair		RACK-FLEXIBLE RATE	\$50.00
03/16/2022	NEW	King Lounge Chair		RACK-FLEXIBLE RATE	\$50.00

2. On the right-side of the reservation, click the "Folio" button.

AutoClerk Cloud PMS AutoClerk Cloud University

John Moran New CRS Confirmation: n/a MyRMS Confirmation: ZZ10064085092

Arrive: Tue Mar 15 2022 Nights: 1 Depart: Wed Mar 16 2022 Availability / Rates Room: KLC Type: KLC Adults: 1 Children: 0 Infants: 0

Rate Plan: RACK-FLEXIBLE RATE Rate: \$50.00 Confidential Rate: \$0.00 Stay Total: \$59.25 Balance: \$0.00 Tax Exempt: 0 Rollaways: 0 Cribs: 0 Pets: 0

Guest: Best Western Company Group Travel Agent All Notes

Best Western ID: Moran Last: John First: John Title: 702-666-4613 12:00PM MOBILE Address 1: 123 Main St Address 2: Zip / Country: 89123 United States City / State: Las Vegas Nevada e-mail: john@icloud.com HOME Birth Date: Drivers License: Passport: Other Phone: Purchase Order: Company: Join BW Rewards: ☐

Reservation Comments: CRS Comments:

Guest Comments: Do Not Rent: ☐

Folio Comments:

Hold Type: CC-GTD Pay Type: Cash Credit Card Action: Go Source: Front Desk Source2: Front Desk Cancel Policy: 4PM

Save & Exit Save Refresh Escape

Date	Status	Room Type	Room	Rate Plan	Rate
03/15/2022	NEW	King Lounge Chair		RACK-FLEXIBLE RATE	\$50.00

3. In the "Add Payment" section, post one night of room and tax.
 - a. Use the guarantee form of payment on file from the "Type" drop-down menu.
 - b. Use the "Stay Total" in the upper right above the folio for the payment amount.

AutoClerk Cloud User Manual

AUTOCLERK Cloud PMS ZZ-34 AC Cloud Demo Hotel Mar 15, 2022

John Moran CRS Confirmation: MyHMS Confirmation: ZZ20261867741 Stay Total: \$5.00

Primary \$5.00 Add +

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
Page 1 of 1. view more transactions							

Folio # 27836134 Total: \$ 0.00

Add Charge

Type: Room Rent

Description: Type VI *****1119 04/2025

Amount: \$5.00 Apply Charge

Add Payment

Type: VI *****1119 04/2025

Description: \$5.00 Apply Payment

COMMENT: Set Default Payment

Print Folio

Folio to Excel

Folio to PDF

Email Folio

☐ Use Company Address

Guest Data

History

Letters

Log

Save & Exit Check In Escape

Date	Status	Room Type	Room	Rate Plan	Rate
11/27/2018 Tue	NEW	King		RACK: Flexible Rate	\$ 50.00

4. In the “Add Charge” section, post the no show charge.
 - a. Use the “No Show Charge” transaction type from the “Type” drop-down menu.
 - b. Use the pre-tax rent amount found in the Itinerary on the lower right at the bottom of the page.

AUTOCLERK Cloud PMS AutoClerk Cloud University Mar 15, 2022

John Moran CRS Confirmation: MyHMS Confirmation: ZZ20261867741 Stay Total: \$5.00

Primary \$5.00 Add +

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
10/25/23 10 27 AM	11/27/18	morana	Visa	OK2352 *****1119 Invoice # 24096066	55.00		-55.00

Folio # 27836134 Total: \$ -55.00

Add Charge

Type: No Show Charge

Description: \$0.00 Apply Charge

Add Payment

Type: VI *****1119 04/2025 John Moran

Description: -\$5.00 Apply Payment

COMMENT: Set Default Payment

Print Folio

Folio to Excel

Folio to PDF

Email Folio

☐ Use Company Address

Guest Data

History

Letters

Log

Save & Exit Check In Escape

Date	Status	Room Type	Room	Rate Plan	Rate
11/27/2018 Tue	NEW	King		RACK: Flexible Rate	\$ 50.00

- Confirm the folio has a zero (\$0.00) balance

John Moran CRS Confirmation: MyRMS Confirmation ZZ20261867741 Stay Total 55.00

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
18/25/23 10 27 AM	11/27/18	morana	Ving	OK2352 *****119, Invoice # 24096066	55.00		-55.00
18/25/23 10 34 AM	11/27/18	morana	No Show Charge			50.00	-5.00
18/25/23 10 34 AM	11/27/18	morana	Occupancy Tax			1.50	-3.50
18/25/23 10 34 AM	11/27/18	morana	Sales Tax			2.00	-1.50
18/25/23 10 34 AM	11/27/18	morana	City Tax			1.50	0.00

Folio # 27836134 **Total: \$0.00**

Add Charge Type: Room Rent Description: Amount: Apply Charge

Add Payment Type: V1 *****119 84/2025, John Moran, Description: Amount: \$0.00 Apply Payment

COMMENT Set Default Payment

Print Folio Folio to Excel Folio to PDF Email Folio Use Company Address Guest Data History Letters Log

Save & Exit Check In Escape

Date	Status	Room Type	Room	Rate Plan	Rate
11/27/2019 Tue	NEW	King		RACK- Flexible Rate	\$50.00

- Click "Guest Data" under the folio on the lower right.
- Finally, click "No Show" in the upper right to set the reservation status and complete the no show procedure.

John Moran New CRS Confirmation: n/a MyRMS Confirmation: ZZ20261867741

Arrive: Tue Mar 15 2022 Nights: 1 Depart: Wed Mar 16 2022 Availability / Rates Room: KLC 1 Adults: 0 Children: 0 Infants: 0

Rate Plan: RACK- FLEXIBLE RATE Rate: \$50.00 Confidential Rate: \$50.25 Stay Total Balance: \$0.00 Tax Exempt: 0 Rollaways: 0 Cribs: 0 Pets: 0

Guest: Best Western Company: Group: Travel Agent: All Notes

Best Western ID: Last: Moran First: John Title: Mr. ETA: 12:00 PM Phone / Type: 702-666-4813 (MOBILE) Address 1: 123 Main St Address 2: 89123 City / Country: Las Vegas / United States City / State: Las Vegas / Nevada e-mail: john@kcloud.com Birth Date: Drivers License: Passport: Other Phone: Purchase Order: Company: Join BW Rewards: [X]

Reservation Comments: CRS Comments: Guest Comments: Do Not Rent: [X] Folio Comments:

Guest Statistics: Avg # of Nights: 1.00 CXL Ratio: 0% Avg Rate: \$50.00 Most Freq Rm Typ: KLC Most Freq Room: 1 Active Stays: 1 Total Reservations: 1 Cancels: 0 No-Shows: 0

Hold Type: CC-GTD Play Type: Cash Credit Card Action: Go Source: Front Desk Market: Corporate Source2: Front Desk Cancel Policy: 4PM

Save & Exit Save Refresh Escape

Date	Status	Room Type	Room	Rate Plan	Rate
03/15/2022	NEW	King Lounge Chair		RACK- FLEXIBLE RATE	\$50.00

- Once the reservation has been no showed, click "Save & Exit" and you will be returned to the preflight checklist. Once "No Shows" turns blue/OK, you can continue with the Night Audit.

Settle Credit Cards

When all previous steps are completed, this will appear as a green **"SETTLE"** button. When clicked this will settle all pending credit card transactions in the batch for the day by transmitting them to the property's credit card processor.

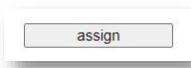
NOTE: The “Settle Credit Cards” process can be run at any time of the day, not just at Night Audit, and the Night Audit can proceed without settling your credit card batch. If you get an error during this step, finish the audit, and try again thirty (30) minutes later. If you again get an error, call [AutoClerk Cloud Support](#).

Charge Folios

When all previous steps are completed, this will appear as a **green “CHARGE” button**. When clicked this will post room and tax to all folios that do not have “Room Rent” manually posted with today’s date. This will also post any extra charges that have applied to a reservation.

Note: If you are processing a late check-in (someone who checked-in after the audit) it is best to post the previous night’s rent using the “Late Check-In After Audit” transaction type. If you do not have this transaction type, it is recommended to add this charge under the “Room” Category or call [AutoClerk Cloud Support](#) to assist in adding the charge.

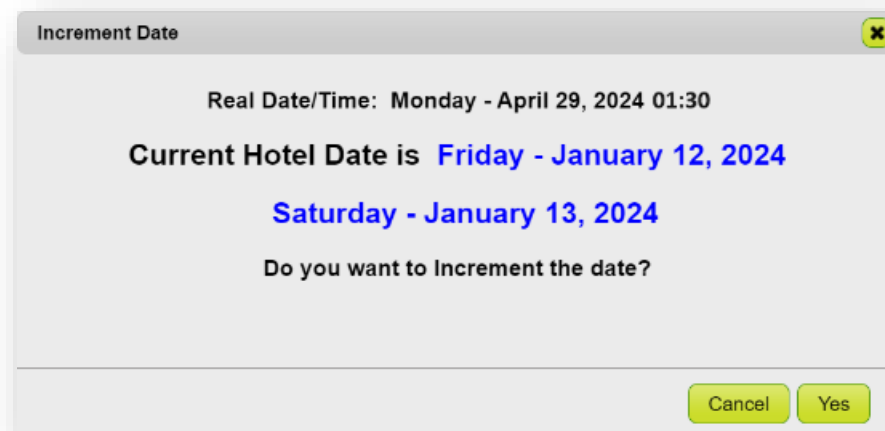
Assign Button



This button is optional. The “Assign” button at the very bottom center of the page will assign a room number to every reservation with an arrival date of today that does not have a room number assigned. This function assumes that the property is not overbooked. **Note: This button can be used any time to assign arrivals.**

Increment Date

When all previous steps are completed, this will appear as a **green “INCREMENT” button**. This is the final step to complete the Night Audit. When clicked, a pop-up will appear displaying the “real” (actual) date and time, the *current* hotel business date, the business date the hotel *will be changed to*, and will ask to confirm if you’d like to increment the date. Always double-check that the date being incremented to is the correct date, then click “Yes”. **Note: please be careful not to run the Night Audit or Increment the date more than once.**



Once complete, you will be returned to the Front Desk Dashboard and will see the new date in the upper right corner.

Jan 13, 2024
Zmoore...

Night Audit Reports

No reports will be printed when the Night Audit is complete. Instead, there are three (3) reports that are automatically emailed as PDFs to the email addresses set by the Hotel Manager in Hotel Setup.

The reports generated for each Night Audit are:

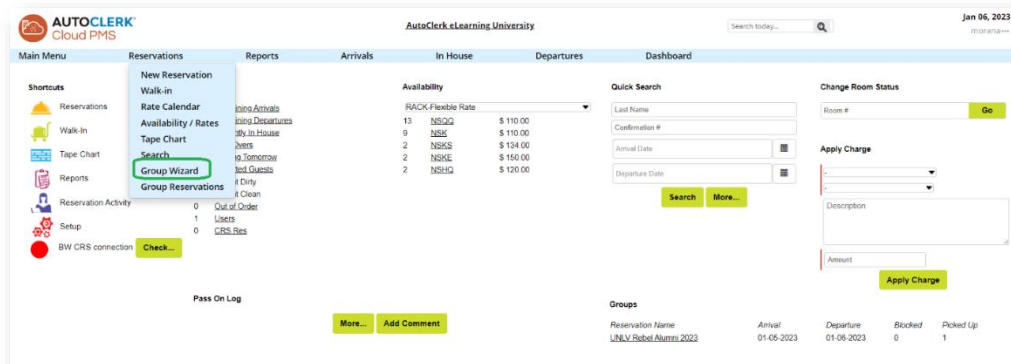
1. [Managers Report](#) – a collection of reports arranged in a single report for the manager to get a sense of the day's performance. This report can be found in the Manager section of the Reports page.
2. [Transaction Summary Report](#) – a summary report of all transaction categories and type totals for the day. This report can be found in the accounting section of the Reports page.
3. [Batch Settlements Report](#) – a report of the results of the batch settlement transmission to your credit card gateway or processor. This report can be found in the Accounting and Daily Reports sections of the Reports page.

Groups

AutoClerk Cloud allows hotel staff to create and manage groups, which includes managing group allocations, producing a Best Western booking URL, entering a rooming list, maintaining a group master folio, running reports, and even processing batch check-ins and checkouts.

Group Wizard

To create a group, from the main dashboard on the blue menu bar, click on Reservations and select **Group Wizard**:



Fill out the required fields with the red vertical bar.

The screenshot shows the 'Group Reservation Wizard' window. It contains the following fields and values:

- Arrival: 2/8/24
- Number of Nights: 1
- New Group Data**
 - Group Profile Name: Arizona Diamondbacks
 - Contact Last Name: Smith
 - Contact First Name: Alex
 - Business Phone: 555-555-5555
- Reservation Information**
 - Group Booking Name: Spring Training 2024

A yellow 'Continue' button is located at the bottom right.

- **Group Profile Name** – This is the name of the company.
 - Since Group Profile Name is linked to a profile, if they have stayed before, the group profile name will appear as you type. Clicking the name will autofill the contact's first and last name.

This screenshot shows the 'Group Reservation Wizard' window with the 'Group Profile Name' dropdown menu open. The menu lists 'arizona' and 'Arizona Diamondbacks'. The 'Arizona Diamondbacks' option is highlighted, and its details are visible in the adjacent fields:

- Contact Last Name: Arizona Diamondbacks
- Contact First Name: (empty)
- Business Phone: (empty)

The 'Continue' button remains at the bottom right.

- **Group Booking Name** – The name of the group for this arrival date (e.x. Spring Training 2023)
- Sometimes, the Group Profile and Group Booking name are the same. However, if you were dealing with a tour company that books many different groups, the Group Profile Name would be the name of the company and the Group Booking name would be the name or number of the specific group. (For example, Group Profile Name could be Arizona Diamondbacks, and Group Booking Name could be Spring Training 2024).

Group Room Allotment Set Up

The next page of the Group Wizard will ask you to set up Group Allotments:

Group Allotment

CutOff Days:

Rate Plan: CutOff Days Indicator: Release to Soft? ☒

	2023-02-23	2023-02-24	2023-02-25
K (29)	Avail: 26 Hard: 2 Soft: 1	Avail: 29 Hard: 2 Soft: 1	Avail: 29 Hard: 2 Soft: 1
QQ (43)	Avail: 43 Hard: 2 Soft: 1	Avail: 43 Hard: 2 Soft: 1	Avail: 43 Hard: 2 Soft: 1
SK (10)	Avail: 10 Hard: <input type="text"/> Soft: <input type="text"/>	Avail: 10 Hard: <input type="text"/> Soft: <input type="text"/>	Avail: 10 Hard: <input type="text"/> Soft: <input type="text"/>
SQQ (10)	Avail: 10 Hard: <input type="text"/> Soft: <input type="text"/>	Avail: 10 Hard: <input type="text"/> Soft: <input type="text"/>	Avail: 10 Hard: <input type="text"/> Soft: <input type="text"/>
WQQ (6)	Avail: 6 Hard: <input type="text"/> Soft: <input type="text"/>	Avail: 6 Hard: <input type="text"/> Soft: <input type="text"/>	Avail: 6 Hard: <input type="text"/> Soft: <input type="text"/>
WK (2)	Avail: 2 Hard: <input type="text"/> Soft: <input type="text"/>	Avail: 2 Hard: <input type="text"/> Soft: <input type="text"/>	Avail: 2 Hard: <input type="text"/> Soft: <input type="text"/>
Banquet Room (1)	Avail: 1 Hard: <input type="text"/> Soft: <input type="text"/>	Avail: 1 Hard: <input type="text"/> Soft: <input type="text"/>	Avail: 1 Hard: <input type="text"/> Soft: <input type="text"/>

Continue

- **Inventory types:**

- **Hard Inventory:** Guaranteed rooms for the group that are withheld from your general inventory immediately so other booking channels cannot book these rooms.
- **Soft Inventory:** Non-guaranteed rooms that still bookable by the group but also open to other booking channels to pick up. The inventory will be available on a first-come, first-served basis.

- **Cutoff Days** – The days prior to an arrival date that your inventory will be released from the group block and released to the general inventory. (in the above example, 2 days)

- **Rate Plan** – Each group must be associated with a rate. If you offer a special discount or rate, you may create a special local Rate Plan for that group, or you will have the option to customize the rates that you offer in the “Availability and Rates” of the Group Reservation.

- **Cutoff Days Indicator:**

- **Standard:** Releases all group block inventory at the same time for all group nights, based on the “Cutoff Days” setting.
 - For example: If the group’s dates are **Thursday 2/23/24 through Saturday 2/25/24** and the Cutoff Days is set to 3 days, on **Monday 2/20/24** the system will release all hard inventory not picked up into general inventory.
- **Rolling:** Releases inventory one day at a time on a “rolling basis”, based on the “Cutoff Days” setting.
 - For example: If the group's dates are **Thursday 2/23/24 through Saturday 2/25/24** and the Cutoff Days is set to **3 days**, on **Monday 2/20/24** the system will release all hard inventory not picked up for Thursday 2/23/24, but the hard inventory of the group’s remaining days will still be guaranteed for the group. Then, on **Tuesday 2/21/24** the system will again release all hard inventory not picked up for **Friday 02/24/24** into soft inventory, and so on.

- **Release to Soft?** – Checking this box will cause group inventory to release to your soft inventory first (the rooms are no longer guaranteed but can still be picked up. They are available via other channels on a first-come first-served basis).

Enter the number of rooms you want for the hard and soft inventory. The room types are all notated to the far left and the number of available rooms is above the boxes where you enter your Hard and Soft inventory.

Once you have made your selections, click on continue. You will be taken to the Group Reservation page to complete more information.

Group Data Tab

On the left side:

- The Group Name, Group Booking Name, contact first and last name, and Business phone will auto-populate from the first step of the Group Wizard.
- The address and city are required fields and must be filled out, but all the other information is optional.
- **Email address:** the group's email address, where you can send the confirmation, rooming list, or cancellation letters.
- **Lead ID:** This field is for the name of the staff member who booked the group, e.x. if they get credit for obtaining group business.

Arizona Diamondbacks - Spring Training 2023

Group Data	Group Folio	Availability / Rates	Comments	Letters	Group History	Room List	Log
Group Name: Arizona Diamondbacks Group Booking Name: Spring Training 2023 Contact Last Name: Smith Contact First Name: Alex Business Phone: 555-888-9999 e-mail: lisasimp@me.com Phone: Fax: Address 1: 20400 N 22nd Ave Address 2: Country: United States State: Arizona Zip: 85004 City: Phoenix Lead ID: BUSINESS BUSINESS	Confirmation # ZZ10000293644G Projected Income \$ 683.00 Projected Tax \$ 69.61 Arrival 2/26/23 Departure 2/28/23 Group Comments Reservation Comments Status ACTIVE Company Travel Agent Source Front Desk Channel Front Desk Market Tax Exempt? Guaranteed By Cash Current Auth \$ 0.00 Credit Card Action Group Guarantee Code DEP Group Cancel Policy 4PM Group Type OTHER Go Group Sync Tool Cancel Group Reservation Done Save Undo Refresh Back to Group Reser						

On the right side:

- From the right side you must enter a source code, market, guaranteed type, group cancellation code, and group cancellation policy.
- If the group is being billed to a **City Ledger account** at the end of their stay you would create a company profile in the Hotel Setup area with a credit limit and attach it here.
- **Channel:** This field represents the origin of the group booking.

- **Tax Exempt:** This box will allow you to choose to exempt group reservations from all or specific Room Rent taxes. This will automatically check the [“Tax Exempt” checkbox](#) on both existing reservations and any new bookings.

Arizona Diamondbacks - Spring Training 2023 ZZ10000293622G

Group Data	Group Folio	Availability / Rates	Comments	Letters	Group History	Room List	Log
Group Name: Arizona Diamondbacks Group Booking Name: Spring Training 2023 Contact Last Name: Smith Contact First Name: Alex Business Phone: 505-888-9999 e-mail / Type: <input type="text"/> BUSINESS Phone: <input type="text"/> Fax: <input type="text"/> Address 1: 5000 N 22nd Ave Address 2: <input type="text"/> Country: United States State: Arizona Zip: 85004 City: Phoenix Lead ID: <input type="text"/>	Confirmation #: ZZ10000293622G Projected Income \$ 0 Projected Tax \$ 0 Arrival 11/15/23 Departure 11/18/23 Group Comments Reservation Comments Status: ACTIVE Company: <input type="text"/> Travel Agent: <input type="text"/> Source: 01 Front Desk Channel: Front Desk Market: Group Tax Exempt? <input type="checkbox"/> Guaranteed By: Cash Credit Card Action: - <input type="button" value="Go"/> Group Guarantee Code: DEP Group Cancel Policy: 4PM CRS - Group ID: N29SR1V3 CRS Rate Plan: 0030 CRS URL: https://www.bestwestern.com/en_US/book/hotel-rooms.00599.html?groupid=N29SR1V3 Group Type: OTHER	<div> <input type="button" value="Group Sync Tool"/> <input type="button" value="Cancel Group Reservation"/> </div>					
<div> <input type="button" value="Done"/> <input type="button" value="Save"/> <input type="button" value="Undo"/> <input type="button" value="Refresh"/> <input type="button" value="Back to Group Reser"/> </div>							

Once you press save you will see the Group URL, Confirmation Number, [Group Sync Tool](#) and [Cancel Group Reservation](#).

Saving a New Group Reservation

You must click “Save” or “Done” to confirm the group block, otherwise all changes will be lost.

Arizona Diamondbacks - Spring Training 2024

Group Data | Group Folio | Availability / Rates | Comments | Letters | Group History | Room List | Log

Group Name: Arizona Diamondbacks
 Group Booking Name: Spring Training 2024
 Contact Last Name: Smith
 Contact First Name: Alex
 Business Phone: 555-555-5555
 e-mail / Type: BUSINESS
 Phone:
 Fax:
 Address 1: 20400 N 22nd Ave
 Address 2:
 Country: United States
 State: Arizona
 Zip: 85004
 City: Phoenix
 Lead ID:
 Confirmation #
 Projected Income \$ 0
 Projected Tax \$ 0
 Arrival 2/8/24
 Departure 2/9/24
 Group Comments Room and Tax to Master Folio
 Reservation Comments
 Status: ACTIVE
 Company:
 Travel Agent:
 Source: (01 Front Desk)
 Channel: Front Desk
 Market: Group
 Tax Exempt?
 Guaranteed By: Cash
 Credit Card Action:
 Group Guarantee Code: DEP
 Group Cancel Policy: 4PM
 Group Type: OTHER

Done Save Undo Refresh Back to Group Reser

After you click “Save” or click “Done” and then return the group block, there will be a group booking confirmation number in the upper right corner and the lime green “Group Sync Tool” and “Cancel Group Reservation” buttons in the lower right corner.

Arizona Diamondbacks - Spring Training 2024

Group Data | Group Folio | Availability / Rates | Comments | Letters | Group History | Room List | Log

Group Name: Arizona Diamondbacks
 Group Booking Name: Spring Training 2024
 Contact Last Name: Smith
 Contact First Name: Alex
 Business Phone: 555-555-5555
 e-mail / Type: BUSINESS
 Phone:
 Fax:
 Address 1: 20400 N 22nd Ave
 Address 2:
 Country: United States
 State: Arizona
 Zip: 85004
 City: Phoenix
 Lead ID:
 Confirmation # ZZ10000377726G
 Projected Income \$ 0
 Projected Tax \$ 0
 Arrival 2/8/24
 Departure 2/9/24
 Group Comments Room and Tax to Master Folio
 Reservation Comments
 Status: ACTIVE
 Company:
 Travel Agent:
 Source: (01 Front Desk)
 Channel: Front Desk
 Market: Group
 Tax Exempt?
 Guaranteed By: Cash
 Credit Card Action:
 Group Guarantee Code: DEP
 Group Cancel Policy: 4PM
 Group Type: OTHER

Done Save Undo Refresh Back to Group Reser

Group Sync Tool Cancel Group Reservation

Group Folio Tab

If the group should make one payment for all the charges, you will use the Group Folio to set up a “group master” and “Folio Setup” in the bottom right-hand corner to route the charges.

Arizona Diamondbacks - Spring Training 2023

Group Data | Group Folio | Availability / Rates | Comments | Letters | Group History | Room List | Log

Group Master Add +

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
Page 1 of 1. View more transactions							

Folio # 8126070 Total: 0.00

Add Charge

Type: Room Rent
 Description:
 Amount:
 Apply Charge

Add Payment

Type: Cash
 Description:
 Amount: 0.00
 Apply Payment

Done Print Folio Folio to Excel Email Folio Folio to PDF Folio Setup

“Folio Setup” will direct you to a page with all charge categories and charges in the rows and the folio names in the columns. Charges always default to post to the guest folio (left). Simply select the radio button(s) of the charge(s) you’d like to route to the master account column. In the example on the right, room rent charges have been selected to be routed to the Master. All others will remain on the Guest folio. Press Done when finished to be taken back to the Group Folio tab.

	Guest	Master
Room	<input checked="" type="radio"/>	<input type="radio"/>
Room Rent	<input type="radio"/>	<input type="radio"/>
Late Check-in After Audit	<input type="radio"/>	<input type="radio"/>
FX2 Room	<input type="radio"/>	<input type="radio"/>
Room Correction	<input type="radio"/>	<input type="radio"/>
Early Check-in	<input type="radio"/>	<input type="radio"/>
No Show Charge	<input type="radio"/>	<input type="radio"/>
Cancellation Charge	<input type="radio"/>	<input type="radio"/>
Late Check Out	<input type="radio"/>	<input type="radio"/>
Misc	<input checked="" type="radio"/>	<input type="radio"/>
Cribs	<input type="radio"/>	<input type="radio"/>
Pet Fee	<input type="radio"/>	<input type="radio"/>
Rollaways	<input type="radio"/>	<input type="radio"/>
Smoking Fee	<input type="radio"/>	<input type="radio"/>
Pet Violation	<input type="radio"/>	<input type="radio"/>
Property Damage	<input type="radio"/>	<input type="radio"/>
Shipping And Handling	<input type="radio"/>	<input type="radio"/>
Misc Taxable	<input type="radio"/>	<input type="radio"/>
Misc Non-Taxable	<input type="radio"/>	<input type="radio"/>
Sundry	<input checked="" type="radio"/>	<input type="radio"/>
Snacks	<input type="radio"/>	<input type="radio"/>
Beverages	<input type="radio"/>	<input type="radio"/>
Hot Meal	<input type="radio"/>	<input type="radio"/>
Sundries	<input type="radio"/>	<input type="radio"/>
Phone	<input checked="" type="radio"/>	<input type="radio"/>
Phone	<input type="radio"/>	<input type="radio"/>
Fax	<input type="radio"/>	<input type="radio"/>

Any *new* postings that are selected to be routed will be moved to the Group Master folio. Any *existing* postings will stay on the original reservations and must be manually moved.

If you need to add an additional folio in the master account, click on “Add+” to the right of the Group Master folio tab. This will create a new folio where additional charges can be routed or added using the folio setup option. Once all routing and folios have been completed, click “Done” to save your changes.

Arizona Diamondbacks - Spring Training 2023 ZZ10000293644G

Group Data **Group Folio** Availability / Rates Comments Letters Group History Room List Log

Group Master **Add +**

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
Page 1 of 1 view more transactions							

Folio # 8128070 Total : 0.00

Type

Description

Amount

Add Charge

Room Rent

Apply Charge

Type

Default

Description

Amount

Add Payment

Cash

0.00

Apply Payment

Done Print Folio Folio to Excel Email Folio Folio to PDF Folio Setup

Availability/Rates Tab

Arizona Diamondbacks - Spring Training 2023 ZZ10000293644G

Group Data Group Folio **Availability / Rates** Comments Letters Group History Room List Log

Start Date: 2/23/23 Thursday End Date: 2/25/23 Saturday Refresh ☐ Hide Rates ☐ Hide Allotments ☐ Hide Soft Allotments

Hard / Soft Allotments

	2023-02-23	2023-02-24	2023-02-25
K (29)	Avail: 24 Hard: 2 0 Soft: 1 0 Rate: 79.00	Avail: 27 Hard: 2 0 Soft: 1 0 Rate: 104.00	Avail: 27 Hard: 2 0 Soft: 1 0 Rate: 104.00
QQ (43)	Avail: 41 Hard: 2 0 Soft: 1 0 Rate: 88.00	Avail: 41 Hard: 2 0 Soft: 1 0 Rate: 94.00	Avail: 41 Hard: 2 0 Soft: 1 0 Rate: 94.00
SK (10)	Avail: 10 Hard: 0 0 Soft: 0 0 Rate: 99.00	Avail: 10 Hard: 0 0 Soft: 0 0 Rate: 104.00	Avail: 10 Hard: 0 0 Soft: 0 0 Rate: 104.00
SQQ (10)	Avail: 10 Hard: 0 0 Soft: 0 0 Rate: 109.00	Avail: 10 Hard: 0 0 Soft: 0 0 Rate: 0.00	Avail: 10 Hard: 0 0 Soft: 0 0 Rate: 0.00
WQQ (6)	Avail: 6 Hard: 0 0 Soft: 0 0 Rate: 119.00	Avail: 6 Hard: 0 0 Soft: 0 0 Rate: 0.00	Avail: 6 Hard: 0 0 Soft: 0 0 Rate: 0.00
WK (2)	Avail: 2 Hard: 0 0 Soft: 0 0 Rate: 129.00	Avail: 2 Hard: 0 0 Soft: 0 0 Rate: 0.00	Avail: 2 Hard: 0 0 Soft: 0 0 Rate: 0.00
Banquet Room (1)	Avail: 1 Hard: 0 0 Soft: 0 0 Rate: 250.00	Avail: 1 Hard: 0 0 Soft: 0 0 Rate: 0.00	Avail: 1 Hard: 0 0 Soft: 0 0 Rate: 0.00

In this tab, you can change and view inventory allotment, set Rates for the group, change the group's Rate Plan, Booking Channel, Cutoff Days Indicator, and Cutoff Days, and updating Dates and Rates to Reservations.

- Modifying Group Block arrival and departure** – To modify the arrival and departure date of the group block, use the “Start Date” and End Date” fields at the top of this page.
 - The “Start Date” is the day the group block is set to arrive along with the matching day of the week and the “End Date” is last night the group block is staying over along with the matching day of the week. The group is set to check-out the day after the “End Date”.
 - You can either manually type in a new date in the box or choose a new date from the calendar to the right of the day of the week and then click the “Refresh” button.

Note: to modify the Group block dates, you must have the “PERMIT_GROUP_DATE_EDITING” permission.

- Allocation Changes** – Hard and Soft Allocations can be changed from this screen from what was initially set when creating the group via the Group Wizard. Any changes will be communicated up to the CRS and update the inventory on MemberWeb.
- Rate grid** – On the orange line below the Hard and Soft allocations, you can change the rate for the specific room types. The Rates for each room type will be defaulted to the Rate Plan you selected when the group was first created. However, the rates can be changed to the negotiated rates that you are offering for the specific group. This feature allows you to set rates without having to create a specific group local rate plan.
- Rate and Allocation settings** – Next to the Start Date and End Date at the top are checkboxes to filter the view of this page.
 - Hide Rates** – Hides the Rates and only leave you with the Hard and Soft allocations.
 - Hide Allotments** – Hides both the Hard and Soft allocations, allowing you to only view the rates.

- **Hide Soft allotments** – This will hide the soft allocations only leaving you only the Hard allocations and Rates.

As an example, when “Hide Allotments” is checked, the screen will display as:

Arizona Diamondbacks - Spring Training 2023 ZZ10000293644G

Group Data Group Folio **Availability / Rates** Comments Letters Group History Room List Log

Start Date: 2/23/23 Thursday End Date: 2/25/23 Saturday Refresh ☐ Hide Rates ☒ Hide Allotments ☐ Hide Soft Allotments

☒ Hard / ☐ Soft Allocations

	2023-02-23	2023-02-24	2023-02-25
K (29)	Avail: 24 Rate: 79.00	Avail: 27 Rate: 104.00	Avail: 27 Rate: 104.00
QQ (43)	Avail: 41 Rate: 89.00	Avail: 41 Rate: 94.00	Avail: 41 Rate: 94.00
SK (10)	Avail: 10 Rate: 99.00	Avail: 10 Rate: 104.00	Avail: 10 Rate: 104.00
SQQ (10)	Avail: 10 Rate: 109.00	Avail: 10 Rate: 0.00	Avail: 10 Rate: 0.00
WQQ (6)	Avail: 6 Rate: 119.00	Avail: 6 Rate: 0.00	Avail: 6 Rate: 0.00
WK (2)	Avail: 2 Rate: 129.00	Avail: 2 Rate: 0.00	Avail: 2 Rate: 0.00
Banquet Room (1)	Avail: 1 Rate: 250.00	Avail: 1 Rate: 0.00	Avail: 1 Rate: 0.00

On the bottom of the screen:

Rate Plan: RACK-FLEXIBLE RATE Booking Channel: Online

Release Date

☐ Calendar 2/23/23

☒ Standard Cutoff Days 2

☐ Rolling Cutoff Days 2

☐ No Release

Release to Soft? ☒

Update Dates to ALL Reservations in Rooming List ☐

Update Rates to ALL Reservations in Rooming List ☐

Done Save Undo

copyright © 2008 - 2023 AutoClerk Inc. All rights reserved. | Read Terms of Use | HELP | Contact Support | 4.36 | ac-prod-myhms-app-bwh-03

- **Rate Plan** – Allows you to change the Rate plan that you originally selected when you created the group. **Note: this will change the rate amounts to what that Rate Plan offers and will erase any customized Rates that you may have set.**
- **Booking Channel** – By default, this is set to Local, however you may change it to “online” which will activate the group URL on the Group Data Page and allow guests to book their own reservations online. **Note: the URL can take up to 24 hours to activate.**
- **Release Date** – Allows you change to/from standard and rolling cutoff, the number of group cutoff days, allows two additional options (either “Calendar” which will release the room by a specific date, or “No release” which will hold all the rooms not picked up in Hard inventory).
- **Update Dates to ALL Reservations in Rooming List** – This feature will allow you change the arrival and departure date of all already existing reservations if the Group Arrival and Departure date suddenly changed.
 - For example: if three separate rooms are booked already that were for two nights, and the group decided to extend on additional day, by checking this feature it will automatically update the already existing reservations to 3 nights without having to extend each reservation individually.
- **Updates Rates to All Reservations in Rooming list** – This feature will allow you to update the Rate to all already existing reservations if the Group rates for room type(s) change.
 - For example: there are three reservations that were booked for the “K” room type and the original nightly rate was \$109.00. However, the group was able to renegotiate that the price

down to \$89.00 per night. If this feature is checked, it would update all three reservations rates to \$89.00 without having to edit each reservation individually.

- If unchecked, only any newly booked reservations moving forward will be at the new rate, and any already existing reservations will remain at the previous rate.

Comments Tab

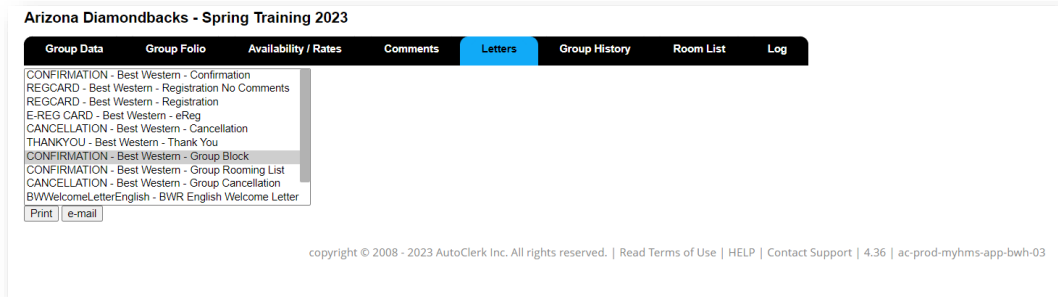
In this tab, you may enter group comments, which will show up in the “Group” and “All Notes” tabs when a reservation has the group attached.

- **Group Comments** – appears in the “Group ” and “All Notes” tabs on the guest data screen and stays with the group profile if they were to book again at your hotel.
- **Reservation Comments** – appears in the “Group” and “All Notes” tabs on the guest data screen. These comments are only for the upcoming arrival for the group and will not stay with the group profile if they were to book again.

The comments will also appear on the Group Data tab.

Letters Tab

From this tab, you can print and/or email registration cards, cancellation letters, and confirmation letters. This will only email the group master email (from the Group Data tab).



Group History Tab

This tab will show you the statistics for the group, including the confirmation number, arrival and departure dates, group name, status of group, individual reservations, blocked revenue, rate, and the number of room nights.

Arizona Diamondbacks - Spring Training 2023

ZZ10000293644G

Group Data	Group Folio	Availability / Rates	Comments	Letters	Group History	Room List	Log					
	Confirmation # ZZ10000293644G	Arrival 2/23/23	Departure 2/28/23			Title Spring Training 2023	Status ACTIVE	Ind Res 0	Revenue 0.00	Rms/Night 0.00	Rm Nights 0	

copyright © 2008 - 2023 AutoClerk Inc. All rights reserved. | Read Terms of Use | HELP | Contact Support | 4.36 | ac-prod-myhms-app-bwh-03

Room List Tab

This tab will allow you to add reservations to group block, which we will cover in the next section. It also displays room availability for the group in the lower left-hand side. The far right allows you to batch print registration cards by arrival date, sorting by either guest name or room number.

Arizona Diamondbacks - Spring Training 2023

ZZ10000293644G

Group Data

Group Folio

Availability / Rates

Comments

Letters

Group History

Room List

Log

Guest Name	Confirmation #	Arrival	Departure	Status	Room Type	Room	Avg Rate	Total Folios Balance	# Guests
Avg # of Nights: 0									
Auto Assign All									
CXL Ratio: 0%									
Avg Rate: \$0									

Last Name:

First Name:

Arrival:

Departure:

Guests:

Room Type:

Add Reservation

Thu 2/23

Fri 2/24

Sat 2/25

K

QK

SK

SOQ

WQK

Banquet Room

Total:

3

3

3

3

0

0

6

Print Selected Reg Cards for this Group

Date:

Sort by:

Display Method:

Generate Report

Log Tab

The Log will list changes made to the group reservation. For example: what specific date the group was created, rate changes by room type, and arrival date or departure date changes.

Arizona Diamondbacks - Spring Training 2023			ZZ10000293644G
Group Data	Group Folio	Availability / Rates	Comments
Letters	Group History	Room List	Log
Edited By	Description	Date	
morana	Group Reservation is created	11/29/23 5:50 AM	
morana	Rate changed from "104.00" to "89.00" for "2023-02-24", room type "K"	11/30/23 5:56 AM	
morana	Rate changed from "104.00" to "89.00" for "2023-02-25", room type "K"	11/30/23 5:56 AM	
morana	Rate changed from "79.00" to "89.00" for "2023-02-23", room type "K"	11/30/23 5:56 AM	
morana	Rate changed from "89.00" to "109.00" for "2023-02-23", room type "QQ"	11/30/23 5:56 AM	
morana	Rate changed from "94.00" to "109.00" for "2023-02-24", room type "QQ"	11/30/23 5:56 AM	
morana	Rate changed from "94.00" to "109.00" for "2023-02-25", room type "QQ"	11/30/23 5:56 AM	

copyright © 2008 - 2023 AutoClerk Inc. All rights reserved. | Read Terms of Use | HELP | Contact Support | 4.36 | ac-prod-myhms-app-bwh-03

Entering a Rooming List

In the "Room List" tab of a group reservation, enter the name of the guest in the Last Name field. If the guest you are entering has stayed with you before, their name will appear in a drop-down list and you can select their guest profile. This will copy over any address and contact information in the reservation.

Arizona Diamondbacks - Spring Training 2023

Group Data

Group Folio

Availability / Rates

Comments

Guest Name

Confirmation #

Arrival

Avg # of Nights: 0

Last Name:

First Name:

Arrival:

Departure:

Guests

Room Type:

Wash

Washington, George

Add Reservation

Select the number of guests (# Guest) in the room (from left to right: Adults/Children/Infants) and room type.

Some hotels prefer to assign room numbers to a group reservation when booking, for instance if the group would like to be on the same floor. Assigning a room number is optional and not required when making a group reservation.

Arizona Diamondbacks - Spring Training 2023

Group Data	Group Folio	Availability / Rates	Comments
Guest Name	Confirmation #	Arrival	
Avg # of Nights: 0			
Last Name:	Washington		
First Name:	George		
Arrival:	2/23/23		
Departure:	2/26/23		
# Guests	1 0 0		
Room Type:	K - \$89.00		
Room:	-		
Add Res 101			
105			
110			
112			
114			
115			
116			
120			
124			
125			
132			
137			
202			
203			
220			
221			
222			
225			

	Thu 2/23	Sat 2/25
K	3	3
QQ	3	3
SK	0	0
SQQ	0	0
WQQ	0	0
WK	0	0
Banquet Room	0	0
Total:	6	6

Click "Add Reservation" to create the reservation. You may repeat the process with another guest.

Add Reservation

When you add reservations, a list will form at the top of this tab. Each new reservation will have a blue star next to the confirmation number.

Arizona Diamondbacks - Spring Training 2023 ZZ10000293644G

Group Data	Group Folio	Availability / Rates	Comments	Letters	Group History	Room List	Log		
Guest Name	Confirmation #	Arrival	Departure	Status	Room Type	Room	Avg Rate	Total Folios Balance	# Guests
Washington, George	★ ZZ10067848922	2/23/23	2/26/23	New	K	Auto	\$89.00	\$0.00	1/0/0
Adams, John	★ ZZ10067848955	2/23/23	2/26/23	New	QQ	Auto	\$109.00	\$0.00	1/0/0
Avg # of Nights: 3.00 CXL Ratio: 0% Avg Rate: \$99.00									
<div> <div> <div>Last Name:</div> <div>First Name:</div> <div>Arrival:</div> <div>Departure:</div> <div># Guests</div> <div>Room Type:</div> <div>Room:</div> </div> <div> <div>2/23/23</div> <div>2/26/23</div> <div>1 0 0</div> <div>QQ - \$109.00</div> <div>-</div> </div> </div> <div> <div>Print Selected Reg Cards for this Group</div> <div>Date: 2/23/23</div> <div>Sort by: Name Room number</div> <div>Display Method: Printer</div> <div>Generate Report</div> </div>									
Add Reservation									

If the Group Folio is setup to route specific charges to the Group Master like Room and tax, this will automatically apply to all reservations that have already been booked in the group block.

However, if a group requires each guest to pay on their own, you will need to collect additional information such as phone, address, email and credit card for guarantee. To do this, you will need to click on their hyperlink, which is the underlined confirmation number.

This will bring up the reservation page where you can record the contact and payment information.

John Adams **New** CRS Confirmation: n/a MyHMS Confirmation: ZZ10067846955

Arrive: Thu Feb 23 2023 Nights: 3 Depart: Sun Feb 26 2023 Availability / Rates Room 250 Type: QQ Adults: 1 Children: 0 Infants: 0

Rate Plan: RACK- FLEXIBLE RATE Rate: \$109.00 Confidential Rate: ☐ Stay Total: \$388.98 Balance: \$ 0.00 Tax Exempt: ☐ Rollaways: 0 Cribs: 0 Pet Fee: 0

Guest Best Western Company Group Travel Agent All Notes

Best Western ID: [LookUp] Remove BW ID

Last: Adams First: John Title: [v] ETA: 3:00PM [v]

Phone / Type: 234-524-5222 [v] MOBILE [v]

Address 1: 100 Main Address 2: [v]

Zip / Country: 20012 [v] United States [v]

City / State: Washington [v] District of Cr: [v]

e-mail / Type: [v] HOME [v]

Birth Date: [v]

Drivers License: [v] Passport: [v]

Other Phone: [v] Purchase Order: [v]

Company: [v] Join BW Rewards: ☐

Reservation Comments: [v] CRS Comments: [v]

Guest Comments: [v] Do Not Rent: ☐

Folio Comments: [v]

Hold Type: [v] DEP [v] Pay Type: [v] Cash [v]

Credit Card Action: [v] Go

Source: [v] 01Front Desk [v] Market: [v] Groups [v]

Save & Exit **Save** **Cancel** **Print**

Credit Card Action

- Add CC without Authorization
- Add CC with Authorization
- Edit CC
- Delete CC

Attaching a Group to an Existing Reservation

When a group block has already been created, a reservation can be attached to a group block without using the "Rooming List" tab by using the "Group" tab on the reservation. This is covered in detail in the [Group Tab](#) section.

Group Check-in

There are, in general, two types of group arrivals: the "traditional group" and the "courtesy block".

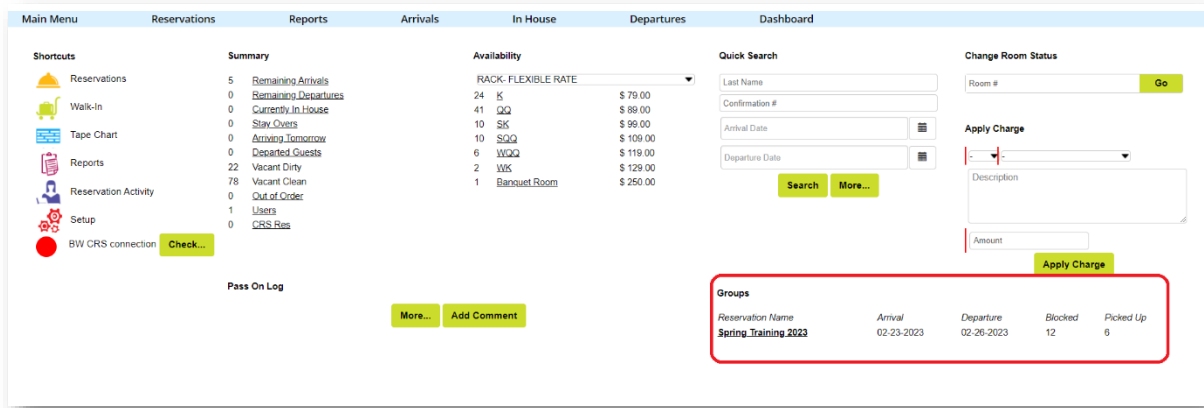
Traditional Group Arrival

The "Traditional Group" will typically show up to the hotel as one big group and will check-in and check-out all at once as a group, with all charges to a master folio.

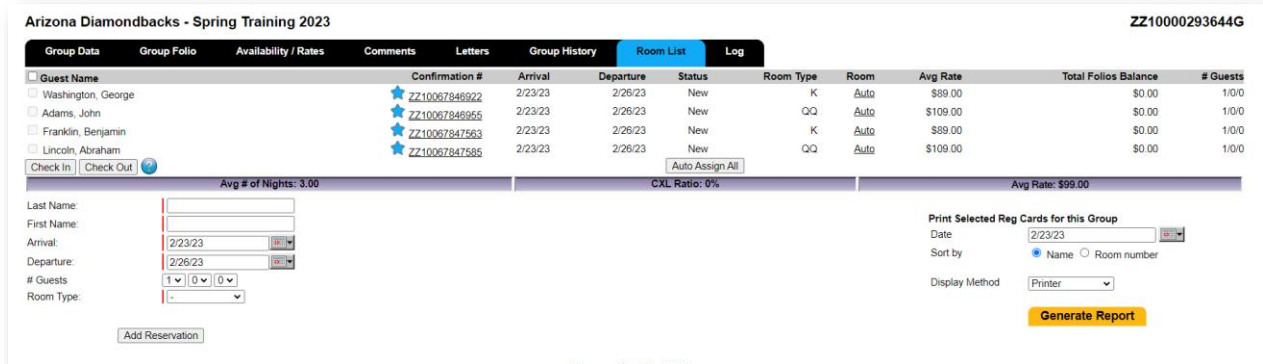
You can check-in all the group's reservations at once using the "group check-in" functionality in the Rooming List tab.

The easiest way to access a group on their arrival date is to click the hyperlink of the group on the dashboard.

AutoClerk Cloud User Manual



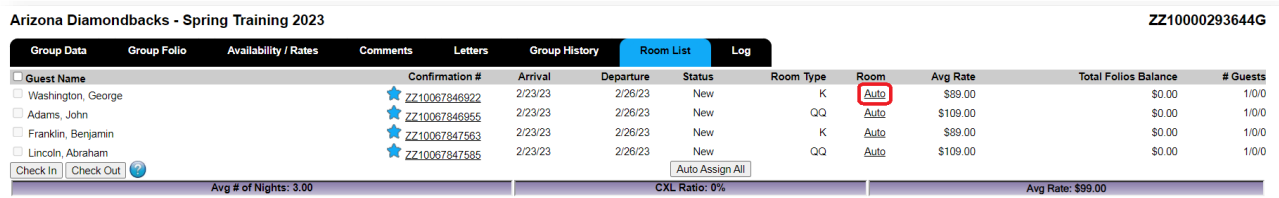
From here, you will be taken to with the “Group Data” tab. Click on the “Room List” tab.



In the “Room List” tab you must assign a room to each reservation that is checking-in order for the Group Check-in function to work. However, not every reservation needs to be checked-in at once; for example, if only half the group arrived, you would just need to assign a room to guests that have arrived.

Other than going into each individual reservation and manually assigning a room, there are two ways to automatically assign rooms from this area.

1. You can assign individual reservations by clicking the “Auto” button on the right side of that reservation to individually assign a room.



2. You may also use the “Auto Assign All” feature which will automatically assign every reservation in the group.

Arizona Diamondbacks - Spring Training 2023

ZZ10000293644G

Group Data	Group Folio	Availability / Rates	Comments	Letters	Group History	Room List	Log			
<input type="checkbox"/> Guest Name		Confirmation #	Arrival	Departure	Status	Room Type	Room	Avg Rate	Total Folios Balance	# Guests
<input type="checkbox"/> Washington, George		★ ZZ10067846922	2/23/23	2/26/23	New	K	Auto	\$89.00	\$0.00	1/0/0
<input type="checkbox"/> Adams, John		★ ZZ10067846955	2/23/23	2/26/23	New	QQ	Auto	\$109.00	\$0.00	1/0/0
<input type="checkbox"/> Franklin, Benjamin		★ ZZ10067847563	2/23/23	2/26/23	New	K	Auto	\$89.00	\$0.00	1/0/0
<input type="checkbox"/> Lincoln, Abraham		★ ZZ10067847585	2/23/23	2/26/23	New	QQ	Auto	\$109.00	\$0.00	1/0/0
<input type="checkbox"/> Check In	<input type="checkbox"/> Check Out									
Avg # of Nights: 3.00			CXL Ratio: 0%			Avg Rate: \$99.00				

If not everyone in the group has arrived, you are able to either select the reservations individually by checking the box to left of the reservation's last name, or you can click on the "Guest Name" checkbox in the left corner to select all the reservations that have been assigned a room. **Note: Any reservations that have been assigned a dirty room will have the checkbox grayed out, preventing you from selecting it. Please make sure to go into the reservation manually and select a clean room to proceed with the group check-in.**

Once the names have been selected you can click "Check In" at the bottom.

Arizona Diamondbacks - Spring Training 2023 ZZ10000293644G

Group Data	Group Folio	Availability / Rates	Comments	Letters	Group History	Room List	Log			
<input checked="" type="checkbox"/> Guest Name		Confirmation #	Arrival	Departure	Status	Room Type	Room	Avg Rate	Total Folios Balance	# Guests
<input checked="" type="checkbox"/> Washington, George		★ ZZ10067846922	2/23/23	2/26/23	New	K	115	\$89.00	\$0.00	1/0/0
<input checked="" type="checkbox"/> Adams, John		★ ZZ10067846955	2/23/23	2/26/23	New	QQ	250	\$109.00	\$0.00	1/0/0
<input checked="" type="checkbox"/> Franklin, Benjamin		★ ZZ10067847563	2/23/23	2/26/23	New	K	114	\$89.00	\$0.00	1/0/0
<input checked="" type="checkbox"/> Lincoln, Abraham		★ ZZ10067847585	2/23/23	2/26/23	New	QQ	249	\$109.00	\$0.00	1/0/0
<input checked="" type="checkbox"/> Check In	<input type="checkbox"/> Check Out									
Avg # of Nights: 3.00			CXL Ratio: 0%			Avg Rate: \$99.00				

Last Name:

First Name:

Arrival:

Departure:

Guests:

Room Type:

Print Selected Reg Cards for this Group

Date:

Sort by: ☒ Name ☐ Room number

Display Method:

After the "Check In" button is clicked, the system will give you the below pop-up asking you to confirm by clicking "OK".

www.bwh.autoclerkcloud.com says

CHECKIN to be started , you will be redirected to groups page

Once you click "OK", you will be taken to another screen which displays a "Check/Checkout in Progress" hyperlink while the system is checking-in the reservations. The system will check the rooms in faster if there are fewer rooms.

One item found 1

Group Profile Name	Group Reservation Name	Arrival	Departure	Cutoff	Blocked	Picked-Up	Status	Add Reservation
Arizona Diamondbacks	Spring Training 2023	2/23/23	2/26/23	2/23/23	12	12	Checkin/Checkout in Progress	Add Reservation

Save & Exit Escape

After a few minutes, go back into the group and into the “Room List” tab. The middle “Status” column should display that your selected reservations have been checked-in. There will also be a green checkmark next to the Confirmation# hyperlink:

Arizona Diamondbacks - Spring Training 2023

ZZ10000293644G

Group Data	Group Folio	Availability / Rates	Comments	Letters	Group History	Room List	Log
<input type="checkbox"/> Guest Name			Confirmation #		Arrival	Departure	Status
<input type="checkbox"/> Washington, George			ZZ10067846922		2/23/23	2/26/23	Checked In
<input type="checkbox"/> Adams, John			ZZ10067846955		2/23/23	2/26/23	Checked In
<input type="checkbox"/> Franklin, Benjamin			ZZ10067847563		2/23/23	2/26/23	Checked In
<input type="checkbox"/> Lincoln, Abraham			ZZ10067847585		2/23/23	2/26/23	Checked In
<input type="checkbox"/> Check In	<input type="checkbox"/> Check Out					<input type="button" value="Auto Assign All"/>	
Avg # of Nights: 3.00					CXL Ratio: 0%		Avg Rate: \$99.00

Courtesy Block Arrival

The other type of group is sometimes called a “Courtesy Block”. These groups typically call in individually to book their reservations, and they check-in and check-out on their own and pay individually with no group master.

While you can check-in guests by searching for the reservation via the Arrivals section or search, you can also locate a group guest by finding them in the Room List. You can easily enter the group by clicking the hyperlink of the group on the dashboard.

Main Menu Reservations Reports Arrivals In House Departures Dashboard

Shortcuts: Reservations, Walk-In, Tape Chart, Reports, Reservation Activity, Setup, BW CRS connection

Summary: Remaining Arrivals, Remaining Departures, Currently In House, Stay Overs, Arriving Tomorrow, Departed Guests, Vacant Dirty, Vacant Clean, Out of Order, Users, CRS Res

Availability: RACK FLEXIBLE RATE, 23 K \$79.00, 41 QQ \$89.00, 10 SS \$99.00, 10 SQ \$109.00, 6 WSG \$119.00, 2 VBS \$129.00, 1 Banquet Room \$250.00

Quick Search: Last Name, Confirmation #, Arrival Date, Departure Date

Change Room Status: Room #, Go

Apply Charge: Description, Amount, Apply Charge

Groups: Reservation Name, Arrival, Departure, Blocked, Picked Up

Spring Training 2023 02-23-2023 02-26-2023 12 15

The link will open the “Group Data” tab. Click the “Room List” tab.

Click on the guest “Confirmation#” hyperlink to go directly to the guest’s reservation, collect payment and get them checked-in.

Phoenix Suns - Training camp 2023

ZZ10000294218G

Group Data	Group Folio	Availability / Rates	Comments	Letters	Group History	Room List	Log				
<input type="checkbox"/> Guest Name			Confirmation #	Arrival	Departure	Status	Room Type	Room	Avg Rate	Total Folios Balance	# Guests
<input type="checkbox"/> Williams, Monty			ZZ10067849149	2/23/23	2/26/23	New	K	Auto	\$95.67	\$0.00	1/0/0
<input type="checkbox"/> Nash, Steve			ZZ10067849161	2/23/23	2/26/23	New	K	Auto	\$95.67	\$0.00	1/0/0
<input type="checkbox"/> Johnson, Rick			ZZ10067849172	2/23/23	2/26/23	New	K	Auto	\$95.67	\$0.00	1/0/0
<input type="button" value="Check In"/>	<input type="button" value="Check Out"/>	<input type="button" value="Auto Assign All"/>									
Avg # of Nights: 3.00					CXL Ratio: 0%					Avg Rate: \$95.67	

Keep in mind that before you can click the “Check-in” button, you will need to fill in all required fields (indicated by a red virtual bar).

Monty Williams New CRS Confirmation n/a MyHMS Confirmation ZZ10067849149

Arrive: Thu Feb 23 2023 Nights: 3 Depart: Sun Feb 26 2023 Availability / Rates Room Type: K Adults: 1 Children: 0 Infants: 0

Rate Plan: RACK- FLEXIBLE RATE Rate: \$79.00 Confidential Rate: \$341.40 Stay Total Balance: \$ 0.00 Tax Exempt: [] Rollaways: 0 Cribs: 0 Pet Fee: 0

Check In: [] No Show: [] Cancel: [] Copy Reservation: []

Guest: Best Western Company: Group: Travel Agent: All Notes

Best Western ID: [] Last: Williams First: Monty Title: [] ETA: 3:00PM Phone / Type: 555-666-1512 MOBILE Address 1: 2440 51st NW Address 2: [] Zip / Country: 85004 United States City / State: Phoenix Arizona e-mail / Type: [] HOME Birth Date: [] Drivers License: [] Passport: [] Other Phone: [] Purchase Order: [] Company: [] Join BW Rewards: []

Reservation Comments: [] CRS Comments: [] Guest Comments: [] Do Not Rent: [] Folio Comments: []

Hold Type: DEP Pay Type: Cash Credit Card Action: [] Add CC without Authorization: [] Add CC with Authorization: [] Edit CC: [] Delete CC: []

Source: 01Front Desk Market: Groups Source2: 01Front Desk Cancel Policy: 4PM

Date	Status	Room Type	Room	Rate Plan	Rate
02/23/2023	NEW	1 KING BED		RACK- FLEXIBLE RATE	\$79.00
02/24/2023	NEW	1 KING BED		RACK- FLEXIBLE RATE	\$104.00
02/25/2023	NEW	1 KING BED		RACK- FLEXIBLE RATE	\$104.00

Guest Statistics: Avg # of Nights: 3.00 CXL Ratio: 0% Avg Rate: \$95.67 Most Freq Rm Typ: K Most Freq Room: 1 Active Stays: 1 Total Reservations: 1 Cancels: 0 No-Shows: 0

Group Check-Out

While you can check-out guests by searching for the reservation via the Departures list or search, you can also checkout an individual group guest or process a batch group checkout in the Room List. You can easily enter the group by clicking the hyperlink of the group on the dashboard.

Arizona Diamondbacks - Spring Training 2023

Group Data Group Folio Availability / Rates Comments Letters Group History Room List Log

Group Name: Arizona Diamondbacks Group Booking Name: Spring Training 2023 Contact Last Name: Smith Contact First Name: Alex Business Phone: 555-888-9999 e-mail / Type: [] BUSINESS Phone: [] Fax: [] Address 1: 20400 N 22nd Ave BUSINESS Address 2: [] Country: United States State: Arizona Zip: 85004 City: Phoenix Lead ID: []

Confirmation # ZZ10000293644G Projected Income \$ 1455.00 Projected Tax \$ 275.79 Arrival 2/23/23 Departure 2/26/23 Group Comments: [] Reservation Comments: [] Status: ACTIVE Company: [] Travel Agent: [] Source: 01Front Desk Channel: Front Desk Market: Groups Tax Exempt? [] Guaranteed By: Cash Credit Card Action: [] Go Group Guarantee Code: DEP Group Cancel Policy: 4PM Group Type: OTHER

Group Sync Tool Cancel Group Reservation

From the Rooming List tab, you have the option to either checkout the rooms one at a time by clicking the hyperlink for each reservation, or to use the Group Check out feature which will allow you to check-out multiple reservations at once.

If only part of the group is checking out, you can check the boxes to left of the guest names that are checking out and then press “Check out” below. **Note – If there are any charges on the individual guest folio, that specific reservation cannot be checked out until the balance has been settled to \$0.** To select all the reservations in the rooming list, click on the “Guest Name” checkbox in the upper left-hand corner, which will select all reservations that have a \$0 folio balance. Then click the “Check Out” button.

Arizona Diamondbacks - Spring Training 2023 ZZ10000293644G

Group Data	Group Folio	Availability / Rates	Comments	Letters	Group History	Room List	Log				
<input checked="" type="checkbox"/> Guest Name			Confirmation #	Arrival	Departure	Status	Room Type	Room	Avg Rate	Total Folios Balance	# Guests
<input checked="" type="checkbox"/> Washington, George			ZZ10067846922	2/23/23	2/26/23	Checked In	K	115	\$89.00	\$0.00	1/0/0
<input checked="" type="checkbox"/> Adams, John			ZZ10067846955	2/23/23	2/26/23	Checked In	QQ	250	\$109.00	\$0.00	1/0/0
<input checked="" type="checkbox"/> Franklin, Benjamin			ZZ10067847563	2/23/23	2/26/23	Checked In	K	114	\$89.00	\$0.00	1/0/0
<input checked="" type="checkbox"/> Lincoln, Abraham			ZZ10067847585	2/23/23	2/26/23	Checked In	QQ	249	\$109.00	\$0.00	1/0/0
<input checked="" type="checkbox"/> Washington, Martha			ZZ10067849060	2/23/23	2/26/23	Checked In	K	220	\$89.00	\$0.00	1/0/0

Check In ☒ Check Out ☐ Auto Assign All

Avg # of Nights: 3.00 CXL Ratio: 0% Avg Rate: \$97.00

Last Name:
 First Name:
 Arrival:
 Departure:
 # Guests:
 Room Type:

Print Selected Reg Cards for this Group
 Date:
 Sort by: ☒ Name ☐ Room number
 Display Method:

Generate Report

Add Reservation

After the "Check Out" button is clicked, the system will give you the below pop-up asking you to confirm by clicking "OK".

www.bwh.autoclerkcloud.com says

CHECKOUT to be started , you will be redirected to groups page

OK
Cancel

Once you click "OK", you will be taken to another screen which displays a "Check/Checkout in Progress" hyperlink while the system is checking-in the reservations.

RESERVATIONS > GROUP RESERVATIONS

Stay Dates Greater Than: Status: ☒ Show Active ☐ Show Inactive ☐ Show All

Title: Search Sort By: ☒ Arrival Date ☐ Name

2 items found, displaying all items 1

Group Profile Name	Group Reservation Name	Arrival	Departure	Cutoff	Blocked	Picked-Up	Status	Add Reservation
Arizona Diamondbacks	Spring Training 2023	2/23/23	2/26/23	2/23/23	12	15	Checkin/Checkout in Progress	Add Reservation
Phoenix Suns	Training camp 2023	2/23/23	2/26/23	2/23/23	6	9	ACTIVE	Add Reservation

Save & Exit Escape

copyright © 2008 - 2023 AutoClerk Inc. All rights reserved. | Read Terms of Use | HELP | Contact Support | 4.36 | ac-prod-myhms-app-bwh-03

After a few minutes, go back into the group and into the "Room List" tab. The middle "Status" column should display that your selected reservations have been checked out with a red X.

Arizona Diamondbacks - Spring Training 2023 ZZ10000293644G

Group Data	Group Folio	Availability / Rates	Comments	Letters	Group History	Room List	Log				
<input type="checkbox"/> Guest Name			Confirmation #	Arrival	Departure	Status	Room Type	Room	Avg Rate	Total Folios Balance	# Guests
<input type="checkbox"/> Washington, George			ZZ10067846922	2/23/23	2/26/23	Checked Out	K	115	\$89.00	\$0.00	1/0/0
<input type="checkbox"/> Adams, John			ZZ10067846955	2/23/23	2/26/23	Checked Out	QQ	250	\$109.00	\$0.00	1/0/0
<input type="checkbox"/> Franklin, Benjamin			ZZ10067847563	2/23/23	2/26/23	Checked Out	K	114	\$89.00	\$0.00	1/0/0
<input type="checkbox"/> Lincoln, Abraham			ZZ10067847585	2/23/23	2/26/23	Checked Out	QQ	249	\$109.00	\$0.00	1/0/0
<input type="checkbox"/> Washington, Martha			ZZ10067849060	2/23/23	2/26/23	Checked Out	K	220	\$89.00	\$0.00	1/0/0

Check In ☐ Check Out ☒ Auto Assign All

Avg # of Nights: 0.00 CXL Ratio: 0% Avg Rate: \$97.00

As you checkout the rooms from the group, the green checkmark will change to a red "X" to indicate that the room has gone from checked-in to checked-out.

Once all the members of the group are checked out, you will need to process the group folio, or the system will not let you run the Night Audit later.

The Group Folio tab will show the group master folio(s) with all the charges that were routed from the group rooms. This folio needs to be paid by Cash, Credit Card, or City Ledger account and there is no Check Out button. The folio can be printed or emailed. When you are done, click on the “Done” button.

Arizona Diamondbacks - Spring Training 2023 ZZ10000293644G

Group Data **Group Folio** Availability / Rates Comments Letters Group History Room List Log

Group Master Add +

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
Page 1 of 1, view more transactions							
11/30/23 1:02 PM	2/24/23	morana	Room Rent	Room 250		94.00	94.00
11/30/23 1:02 PM	2/24/23	morana	Occupancy Tax			3.76	97.76
11/30/23 1:02 PM	2/24/23	morana	Tourism Tax			4.70	102.46
11/30/23 1:02 PM	2/24/23	morana	Parish Tax			5.17	107.63
11/30/23 1:02 PM	2/24/23	morana	State Sales Tax			4.18	111.81
11/30/23 1:02 PM	2/24/23	morana	Room Rent	Room 115		104.00	215.81
11/30/23 1:02 PM	2/24/23	morana	Occupancy Tax			4.16	219.97
11/30/23 1:02 PM	2/24/23	morana	Tourism Tax			5.20	225.17
11/30/23 1:02 PM	2/24/23	morana	Parish Tax			5.72	230.89
11/30/23 1:02 PM	2/24/23	morana	State Sales Tax			4.63	235.52

Folio # 8126070 Total : 235.52

Add Charge

Type: Room Rent
Description:
Amount:

Add Payment

Type: Cash
Description:
Amount: 235.52

Apply Charge

Done

Canceling a Group

A group can be cancelled from the Group Data tab in the bottom right-hand corner.

Cancel Group Reservation

If there are no reservations picked up in the group, the group will be cancelled immediately.

If the group has reservations picked up, a popup will ask you to confirm the cancellation and take you to a list of the group's reservations.

www.bwh.autoclerkcloud.com says

There are 2 reservations booked against this group. Cancelling the Group will also cancel the reservations. Are you sure that you want to proceed?

OK

Cancel

The final screen will show all the group reservations, which must be cancelled to complete cancelling the group. Click “Cancel Reservations” to complete cancelling the group and all its reservations or click “Undo” to stop cancelling the group and return to the group block page.

The following reservations are currently booked under the group. You will have a choice below to cancel the group and leave these existing reservations alone, or to cancel all "NEW" reservations.

Guest Name	Confirmation #	Arrival	Departure	Status	Room Type	Room	Avg Rate	Total Folios Balance	# Guests
Test, 1	✓ ZZ10082186386	2/2/24	2/10/24	Checked In	King Standard	243	\$50.00	\$	1/0/0
Test, 1	✗ ZZ10082186421	2/3/24	2/10/24	No Show	King Standard		\$0.00	\$	1/0/0
Avg # of Nights: 7.50		CXL Ratio: 60%		Avg Rate: \$25.00					

Cancel Reservations Undo

Note: cancelling a group will not check out in-house group guests, and it will not change the rate plans for any group guests.

Group Sync Tool

AutoClerk Cloud’s inventory syncs with the Best Western CRS immediately after any change is saved. If a manual resync is needed or desired, the Group Sync Tool button (on the Group Data tab) allows you to push inventory updates immediately to the CRS. **Note: it is recommended to click the Group Sync Tool only once when making updates. Clicking it multiple times could briefly disrupt communication between the two systems.**

Group Sync Tool

Group Reports

All group reports are run from [Reports](#) area of the system. Visit the [Group Reports](#) section of this manual for detailed information.

Group Meeting Rooms

If your hotel has meeting rooms setup as a room type, they can be booked by treating them like a real reservation. Simply create the reservation, attach them to a group block and/or billing them to a city ledger if desired, and check them in and out as normal. The [day use](#) function can be used as well.

Housekeeping

The housekeeping features are accessible from a variety of areas in the system. Rooms may either be in Clean, Dirty, or Out of Order (OOO) status.

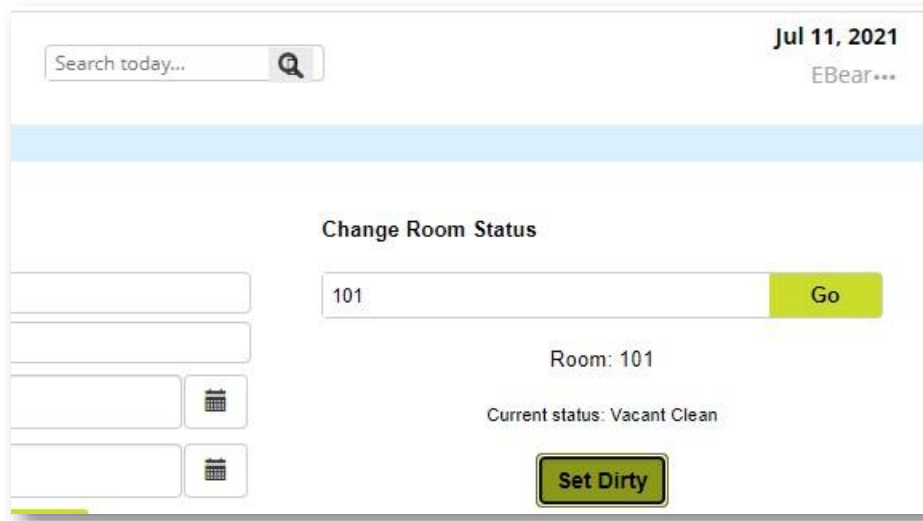
Changing Room Status

Occupied rooms are automatically changed from Clean to Dirty when a guest is checked-in to the room. There are three ways to change a room status:

1. Front Desk Dashboard
2. Tape Chart
3. Housekeeping from "Main Menu" in the blue menu bar

Front Desk Dashboard

From the upper right-hand corner of the dashboard, you can type in a room number and quickly set a room to Clean or Dirty.



The screenshot shows a web interface for changing room status. At the top right, it displays the date 'Jul 11, 2021' and the user 'EBear...'. Below this is a search bar with the placeholder 'Search today...'. The main section is titled 'Change Room Status'. It features a text input field containing '101' and a yellow 'Go' button. Below the input field, it shows 'Room: 101' and 'Current status: Vacant Clean'. At the bottom, there is a yellow button labeled 'Set Dirty'. On the left side of the interface, there are several empty text input fields and two calendar icons.

This can be handy for making quick updates, for example if a housekeeper calls down with an update of several rooms, you can update those rooms right from the Front Desk Dashboard.

Note: Out of Order (OOO) rooms will display as Vacant Dirty. Flipping OOO rooms to Vacant Clean will not delete the OOO status. When OOO rooms are released (either by removing the status in the Tape Chart or by the OOO dates ending) they will always automatically flip to Dirty.

Tape Chart

The left column of the Tape Chart contains a list of all room numbers along with their room types. Room types can be filtered using the "Room Type" drop-down list at the top and clicking "Refresh".

Right-click on any room number to set a room to Clean, Dirty, or OOO. **Remember:** The Tape Chart is the only place where you can change a room's OOO status.

Room Type: Start Date: Tape Chart Filter

Date	Sat 2/25	Sun 2/26	Mon 2/27
Total	98	99	99
100(K)	26	27	27
101(K)	Nash	27	27
102(QQ)	43	43	43
103(WQQ)	6	6	6
105(K)	Williams	27	27
106 pet(QQ)	43	43	43
107(QQ)	43	43	43
108(SK)	10	10	10
109(SQQ)	10	10	10
110(K)	26	27	27
112(K)	26	27	27
114(K)	26	27	27
115(K)	26	27	27
116(K)	26	27	27
117(QQ)	43	43	43
118(QQ)	43	43	43
120(K)	26	27	27
121(WK)	2	2	2
123(SK)	10	10	10
124(K)	26	27	27
125(K)	26	27	27
126(QQ)	43	43	43
127(QQ)	43	43	43
128(QQ)	43	43	43
129(SQQ)	10	10	10
130(QQ)	43	43	43
131(QQ)	43	43	43
132(K)	26	27	27
133(WK)	2	2	2
134(QQ)	43	43	43
135(QQ)	43	43	43
136(QQ)	43	43	43
137(K)	26	27	27
138(QQ)	43	43	43

You can also set a room out of order by right-clicking on the cell of the date you'd like to start the OOO status, then right-click and select "Out of Order".

Room Type: Start Date: Tape Chart Filter

Date	Wed 2/7	Thu 2/8	Fri 2/9	Sat 2/10
Total	88	84	89	91
0564(King Suite - ADA - Roll-in)	1	1	1	1
102(Double Standard)	43	43	43	43
103(Double ADA Tub)	6	6		
106 pet(Double Standard)	43	43		
107(Double Standard)	43	43		

You have the option to put a room OOO for three date spans at once. After entering the "From Date" and "To Date", there is a field to record the "Reason" why the room is OOO.

Room Type: SK
Room: 108

From Date: To Date: Reason:

Reason2:

Reason3:

Created By:

This reason will appear on the Tape Chart if you hover over the Out of Order text for the room.

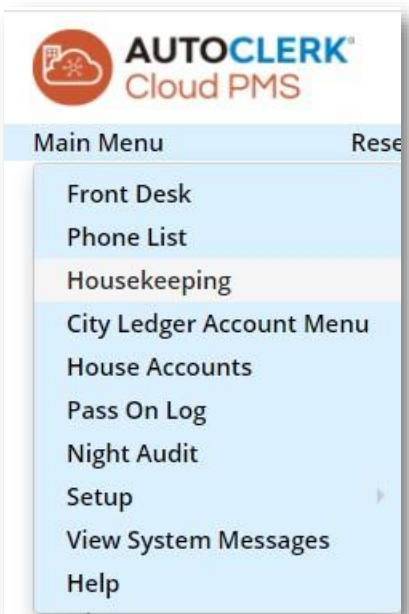
Room Type: Start Date: Click Refresh to view

Tape Chart Filter

Date	Sat 2/25	Sun 2/26	Mon 2/27	Tue 2/28	Wed 3/1	Thu 3/2
Total	98	99	99	100	100	100
100(K)	26	27	27	29	29	29
101(K)	Nash	27	27	29	29	29
102(QQ)	43	43	43	43	43	43
103(WQQ)	6	6	6	6	6	6
105(K)	Williams	27	27	29	29	29
106 pet(QQ)	43	43	43	43	43	43
107(QQ)	43	43	43	43	43	43
108(SK)	10	10	10	10	10	10
109(SQQ)	10	10	10	10	10	10
110(K)	26	27	27	29	29	29
112(K)	26	27	27	29	29	29

Housekeeping Menu

The main area of Housekeeping is found in the Main Menu in the blue menu bar.



It will bring you to this screen:

Housekeeping

Clean Rooms: Through: Clean Rooms:

<input type="checkbox"/> 100	<input type="checkbox"/> 101	<input type="checkbox"/> 102	<input checked="" type="checkbox"/> 103	<input type="checkbox"/> 105	<input checked="" type="checkbox"/> 106 pet	<input checked="" type="checkbox"/> 107	<input checked="" type="checkbox"/> 108	<input type="checkbox"/> 109	<input checked="" type="checkbox"/> 110	<input checked="" type="checkbox"/> 112	<input type="checkbox"/> 114	<input type="checkbox"/> 115	<input type="checkbox"/> 116	<input checked="" type="checkbox"/> 117	<input checked="" type="checkbox"/> 118	<input checked="" type="checkbox"/> 120	<input checked="" type="checkbox"/> 121
<input checked="" type="checkbox"/> 123	<input checked="" type="checkbox"/> 124	<input checked="" type="checkbox"/> 125	<input checked="" type="checkbox"/> 126	<input checked="" type="checkbox"/> 127	<input checked="" type="checkbox"/> 128	<input checked="" type="checkbox"/> 129	<input checked="" type="checkbox"/> 130	<input checked="" type="checkbox"/> 131	<input checked="" type="checkbox"/> 132	<input checked="" type="checkbox"/> 133	<input checked="" type="checkbox"/> 134	<input checked="" type="checkbox"/> 135	<input checked="" type="checkbox"/> 136	<input type="checkbox"/> 137	<input checked="" type="checkbox"/> 138	<input checked="" type="checkbox"/> 139	<input checked="" type="checkbox"/> 140
<input checked="" type="checkbox"/> 141	<input checked="" type="checkbox"/> 142	<input checked="" type="checkbox"/> 143	<input checked="" type="checkbox"/> 144	<input checked="" type="checkbox"/> 145	<input type="checkbox"/> 201	<input type="checkbox"/> 202	<input type="checkbox"/> 203	<input type="checkbox"/> 204	<input checked="" type="checkbox"/> 205	<input checked="" type="checkbox"/> 206	<input checked="" type="checkbox"/> 207	<input checked="" type="checkbox"/> 208	<input checked="" type="checkbox"/> 209	<input checked="" type="checkbox"/> 210	<input checked="" type="checkbox"/> 211	<input checked="" type="checkbox"/> 212	<input checked="" type="checkbox"/> 214
<input checked="" type="checkbox"/> 215	<input checked="" type="checkbox"/> 216	<input checked="" type="checkbox"/> 217	<input checked="" type="checkbox"/> 218	<input checked="" type="checkbox"/> 219	<input type="checkbox"/> 220	<input type="checkbox"/> 221	<input type="checkbox"/> 222	<input checked="" type="checkbox"/> 223	<input checked="" type="checkbox"/> 224	<input type="checkbox"/> 225	<input type="checkbox"/> 226	<input checked="" type="checkbox"/> 227	<input checked="" type="checkbox"/> 228	<input checked="" type="checkbox"/> 229	<input checked="" type="checkbox"/> 230	<input checked="" type="checkbox"/> 231	<input type="checkbox"/> 232
<input type="checkbox"/> 233	<input type="checkbox"/> 234	<input type="checkbox"/> 235	<input type="checkbox"/> 236	<input type="checkbox"/> 237	<input type="checkbox"/> 238	<input checked="" type="checkbox"/> 239	<input type="checkbox"/> 241	<input type="checkbox"/> 242	<input type="checkbox"/> 243	<input checked="" type="checkbox"/> 246	<input checked="" type="checkbox"/> 247	<input checked="" type="checkbox"/> 248	<input type="checkbox"/> 249	<input type="checkbox"/> 250	<input type="checkbox"/> 251	<input checked="" type="checkbox"/> 401	<input checked="" type="checkbox"/> 402
<input checked="" type="checkbox"/> 404	<input checked="" type="checkbox"/> 405	<input checked="" type="checkbox"/> 406	<input checked="" type="checkbox"/> 990	<input type="checkbox"/> 991	<input type="checkbox"/> 995	<input checked="" type="checkbox"/> 996	<input checked="" type="checkbox"/> 997	<input checked="" type="checkbox"/> 998	<input checked="" type="checkbox"/> 999	<input checked="" type="checkbox"/> Conference Room							

Number of Attendants: ☒ Exclude clean rooms ☒ Exclude OOO rooms

copyright © 2008 - 2023 AutoClerk Inc. All rights reserved. | Read Terms of Use | HELP | Contact Support | 4.36 | ac-prod-myhms-app-bwh-03

All rooms are listed with checkboxes.

- ☒ If the room is clean, vacant, in order, and ready for check-in, the checkbox will be blue with a checkmark.
- ☐ If the room is dirty or OOO, the box will be unchecked indicating the room is not ready to rent.

You can manually check or uncheck the boxes and click the “Save” button. You may also update a range of rooms to Clean by using the drop-down lists, selecting the first and last rooms of the range, and then clicking “Clean Rooms”. **Note: neither option will update any OOO rooms; updates to OOO rooms must be done through the Tape Chart.**

Housekeeping

Clean Rooms Through Clean Rooms

<input type="checkbox"/> 100	<input type="checkbox"/> 101	<input type="checkbox"/> 102	<input type="checkbox"/> 103	<input type="checkbox"/> 104	<input checked="" type="checkbox"/> 106 pet	<input checked="" type="checkbox"/> 107	<input checked="" type="checkbox"/> 108	<input type="checkbox"/> 109
<input checked="" type="checkbox"/> 123	<input checked="" type="checkbox"/> 124	<input checked="" type="checkbox"/> 125	<input checked="" type="checkbox"/> 126	<input checked="" type="checkbox"/> 127	<input checked="" type="checkbox"/> 128	<input checked="" type="checkbox"/> 129	<input checked="" type="checkbox"/> 130	<input checked="" type="checkbox"/> 131
<input checked="" type="checkbox"/> 141	<input checked="" type="checkbox"/> 142	<input checked="" type="checkbox"/> 143	<input checked="" type="checkbox"/> 144	<input checked="" type="checkbox"/> 145	<input type="checkbox"/> 201	<input type="checkbox"/> 202	<input type="checkbox"/> 203	<input type="checkbox"/> 204
<input checked="" type="checkbox"/> 215	<input checked="" type="checkbox"/> 216	<input checked="" type="checkbox"/> 217	<input checked="" type="checkbox"/> 218	<input checked="" type="checkbox"/> 219	<input type="checkbox"/> 220	<input type="checkbox"/> 221	<input type="checkbox"/> 222	<input checked="" type="checkbox"/> 223
<input type="checkbox"/> 233	<input type="checkbox"/> 234	<input type="checkbox"/> 235	<input type="checkbox"/> 236	<input type="checkbox"/> 237	<input type="checkbox"/> 238	<input checked="" type="checkbox"/> 239	<input type="checkbox"/> 241	<input type="checkbox"/> 242
<input checked="" type="checkbox"/> 404	<input checked="" type="checkbox"/> 405	<input checked="" type="checkbox"/> 406	<input checked="" type="checkbox"/> 407	<input checked="" type="checkbox"/> 408	<input type="checkbox"/> 995	<input checked="" type="checkbox"/> 996	<input checked="" type="checkbox"/> 997	<input checked="" type="checkbox"/> 998

Save & Exit Save Refresh Escape

Number of Attendants ☒ Exclude clean rooms ☒ Exclude OOO rooms

Screen (HTML) Submit

Housekeeper Sheets

From the Housekeeping screen you can also print housekeeper assignment sheets by entering the number of housekeepers and choosing whether to exclude clean and OOO rooms. This will produce a report of rooms evenly divided between the number of housekeepers and columns to checkoff what types of linen was used. See the [Housekeeping Sheets](#) section of Reports for more information.

Housekeeping Services

If Housekeeping Services are programmed in Hotel Setup, every reservation will have a drop-down list on the Guest tab. The selection can be changed at any time.

This service type, in addition to any [Housekeeping Comments](#) (from the All Notes tab), will appear on [Housekeeper Sheets](#).

Guest Best Western Company Group Travel Agent All Notes

Best Western ID LookUp Remove BW ID

Last First Title ETA

Phone / Type

Address 1 Address 2

Zip / Country

City / State

e-mail / Type

Birth Date

Drivers License

Passport

Other Phone

Purchase Order

Company

Join BW Rewards ☐

Housekeeping Reservation Cost

Guest Comments

Folio Comments

City Ledger Accounts

A City Ledger account, also known as a Direct Bill account, is enabled for a Company by adding a “Credit Limit” to the company profile in Setup. The City Ledger Account Menu will allow you to make payments, invoice, view payment history, and make changes to individual folios if needed.

Applying a City Ledger Payment to a Folio

To use a city ledger as payment for a guest, you first must attach the company to the guest reservation. Click on the “Company” tab and type in the Company name or Company Code.

AUTOCLERK® Cloud PMS XX AutoClerk Cloud University

John Adams Checked In CRS Confirmation: n/a MyHMS Confirmation: ZZ10074

Arrive: Sun Feb 26 2023 Nights: 1 Depart: Mon Feb 27 2023 Availability / Rates Room 114 Type K

Rate Plan: RACK-FLEXIBLE RATE Rate: \$79.00 Confidential Rate: ☐ Stay Total: \$93.98 Balance: \$0.00 Tax Exempt: ☐

Guest Best Western **Company** Group Travel Agent All Notes

Company Remove: ac Or Company Code:

Last: Acme Supply

First:

Other Phone:

Fax:

e-mail:

Company Comments:

The selected company will auto-populate the remaining information for that company as read-only.

AUTOCLERK® Cloud PMS XX AutoClerk Cloud

John Adams Checked In CRS Confirmation: n/a MyHMS Confirmation: ZZ10074

Arrive: Sun Feb 26 2023 Nights: 1 Depart: Mon Feb 27 2023 Availability / Rates Room 114 Type K

Rate Plan: RACK-FLEXIBLE RATE Rate: \$79.00 Confidential Rate: ☐ Stay Total: \$93.98 Balance: \$0.00 Tax Exempt: ☐

Guest Best Western **Company** Group Travel Agent All Notes

Company Remove: Acme Supply Or Company Code: ACME

Last: Coyote

First: Wylie

Other Phone: 213-555-1234

Fax: 213-55-2323

e-mail: w@aol.com

Address 1: 233 Wilshire Blvd

Address 2:

Country: Unknown

Zip: 90021

City: Los Angeles

State: California

Credit Limit: 10000

Tax ID Number: 123

Preferred Rate Plan:

Company Comments: Training only

AutoClerk Cloud User Manual

You must save the reservation before City Ledger becomes available as a “Pay Type”.

Pay Type **CL: Acme Supply**
 Credit Card Action **-**
 Go

You may either set the City Ledger as the [default payment method](#), and/or at checkout time you can post a payment using that City Ledger account.

John Adams CRS Confirmation MyHMS Confirmation ZZ1007495754 Stay Total: 93.98

Date	Hotel Date	User	Type	Description	Payment	Charge	Balance
2/19/24 1:00 PM	2/26/23	morana	Room Rent	Page 1 of 1 view more transactions		79.00	79.00
2/19/24 1:06 PM	2/26/23	morana	Occupancy Tax			3.16	82.16
2/19/24 1:06 PM	2/26/23	morana	Tourism Tax			3.95	86.11
2/19/24 1:06 PM	2/26/23	morana	Parish Tax			4.35	90.46
2/19/24 1:06 PM	2/26/23	morana	State Sales Tax			3.52	93.98

Folio # 9010740 Total: \$ 93.98

Add Charge **Add Payment**

Type: Room Rent Type: **CL: Acme Supply**

Description: Description: COMMENT:

Amount: Required Field Amount: 93.98

Apply Charge **Apply Payment**

Set Default Payment

Print Folio
Folio to Excel
Folio to PDF
Email Folio
☐ Use Company Address

Guest Data
History
Letters
Log

City Ledger payments will appear on the folio like this:

*** AutoClerk Cloud University**

, Arizona 85027
Main: 3375142253 Fax: 3375142239
Trainingteam@autoclerk.com

John Adams
100 Main
Washington, DC 20012

Guest Folio

User: AM
Date: February 22, 2024
Time: 7:14 AM

Arrival date: 2/26/2023
Departure: 2/27/2023
Confirmation: ZZ1007495754
Room: 114 (K)
Folio #: 9010740

DATE	DESCRIPTION	TYPE	CHARGES	CREDITS	BALANCE
2/26/23		Room Rent	\$ 79.00		\$ 79.00
2/26/23		Occupancy Tax	\$ 3.16		\$ 82.16
2/26/23		Tourism Tax	\$ 3.95		\$ 86.11
2/26/23		Parish Tax	\$ 4.35		\$ 90.46
2/26/23		State Sales Tax	\$ 3.52		\$ 93.98
2/26/23	CL:Acme Supply	Direct Bill		-\$ 93.98	-\$ 0.00
Totals					-\$ 0.00

Guest Signature: _____

City Ledger Account Menu

The City Ledger Account Menu function is located under “Main Menu” in the blue menu bar.

When you enter the City Ledger, the system lists all accounts that owe the hotel money (open accounts) in alphabetical order. You can use the radio button at the bottom left-hand corner to show only open accounts or all accounts (an account will display in "Show All" as long as the account has been direct billed at least once).

The accounts list displays any Rate Code assigned to the account, the total Credit Limit, the unused credit limit ("Available Credit"), the amount owed by the company (Receivables), and the number of unpaid folios ("Open Folios").

AutoClerk Cloud University						
AutoClerk Cloud PMS						
Search today...						
Main Menu	Reservations	Reports	Arrivals	In House	Departures	Dashboard
City Ledger Accounts						
Account Name	Rate Code	Credit Limit	Available Credit	Receivables	Open Folios	Statement
Acme Supply		\$ 10000.00	\$ 9812.04	\$ 187.96	2	VIEW HTML <input type="checkbox"/> Include Folios
BW Free Nights FX	FX	\$ 5000.00	\$ 4952.42	\$ 47.58	1	VIEW HTML <input type="checkbox"/> Include Folios
BW Pay with Points FX2	FX2	\$ 5000.00	\$ 4901.55	\$ 98.45	1	VIEW HTML <input type="checkbox"/> Include Folios
BW Travel Card		\$ 5000.00	\$ 4950.00	\$ 50.00	1	VIEW HTML <input type="checkbox"/> Include Folios
Totals		\$ 25000.00	\$ 24616.01	\$ 383.99	5	
<input checked="" type="radio"/> Show Open <input type="radio"/> Show All						

The Statement for each account can be printed, emailed, produced as a PDF, or viewed in HTML, with the option to include the individual supporting folios.

Example Statement

AutoClerk Cloud University

9565 Egan Highway

, Arizona 85027

3375142253

Wylie Coyote

Acme Supply

233 Wilshire Blvd

Los Angeles, CA 90021

Account #:

0008460

User:

Andy Moran

Date:

February 22, 2024

Time:

8:03 AM

Invoice #	Bill Date	Arrival	Departure	Conf #	Folio #	Description	PO #	Original Amount	Invoice Total
Uninvoiced									
	02/26/23	02/27/23	ZZ100749575749010740			Adams, John		\$93.98	\$93.98
	02/26/23	02/27/23	ZZ100752871669050933			Coyote, Wiley E		\$93.98	\$93.98
								\$187.96	\$187.96
BALANCE DUE:									\$187.96

Example Folio

AutoClerk Cloud University , Arizona 85027 Main:3375142253 Fax:3375142239 Trainingteam@autoclerk.com John Adams 123 Main St Washington,DC 20012	Guest Folio User: null Date: February 22, 2024 Time: 8:03 AM Arrival date: 2/26/2023 Departure 2/27/2023 Confirmation ZZ10074957574 Room: 114 (K) Folio #: 9010740
--	---

DATE	DESCRIPTION	TYPE	CHARGES	CREDITS	BALANCE
2/26/23		Room Rent	\$ 79.00		\$ 79.00
2/26/23		Occupancy Tax	\$ 3.16		\$ 82.16
2/26/23		Tourism Tax	\$ 3.95		\$ 86.11
2/26/23		Parish Tax	\$ 4.35		\$ 90.46
2/26/23		State Sales Tax	\$ 3.52		\$ 93.98
2/26/23	CL:Acme Supply	Direct Bill		-\$ 93.98	-\$ 0.00
Totals					-\$ 0.00

Guest Signature: _____

Invoicing

Although the invoicing feature is optional, it is recommended to always invoice folios before payment as it groups multiple folios together and is easy to view under the "Invoices" tab under "Show Closed" or "Show All".

☐ Show Open
 ☒ Show Closed
 ☐ Show All

If a payment is applied in the Uninvoiced tab, that payment can only be found through the [Transactions](#) report or by searching [the Payments tab](#) by payment date.

When you wish to invoice a company, in the City Ledger Account Menu list, click on the name of the account which will bring up the Uninvoiced screen.

City Ledger Accounts	
Account Name	Rate Code
2005 Group	VCC
ACME Supply	Test1

AutoClerk Cloud User Manual

To add a folio to an invoice, first check the boxes on the left; if you wish to select all of them you can click on the box at the top in the header to select all. To add the folios to a new invoice, click the "Transfer" button. The Transfer button will allow you to transfer folios either to a new invoice or existing invoices using the drop-down list.

The screenshot shows the AutoClerk Cloud PMS interface. At the top, there's a navigation bar with 'Main Menu', 'Reservations', 'Reports', 'Arrivals', 'In House', 'Departures', and 'Dashboard'. The 'Uninvoiced' tab is selected under 'Acme Supply'. Below this, there's a table with columns: Description, Folio #, Confirmation #, Arrival, Departure, and Balance. Two folios are listed: Adams, John (Folio # 18274120, Confirmation # ZZ10149595036) and Coyote, Wiley E (Folio # 18274128, Confirmation # ZZ10149595115). A 'Total' row shows a balance of \$99.18. On the left, there's a 'New' dropdown and a 'Transfer' button. Below that, there's a 'Check Amount' field, a 'Remaining Amount' field, a 'Payment type' dropdown (set to 'Cash'), a 'Current Auth' field, a 'Description' field, and a 'Payment Amount' field. There are also 'Add Card', 'Add Card without Auth', 'Edit CC', and 'Remove Card' buttons. At the bottom, there are radio buttons for 'Show Open', 'Show Closed', and 'Show All'.

All invoiced folios will then be grouped together under one invoice number and moved from the "Uninvoiced" tab to the "Invoices" tab.

This Invoices tab will list each invoice that is not paid off. The far-left column has "Invoice #" which is a hyperlink to that invoice and all the associated folios. The Invoices tab shows the date the invoice was created, how many folios it is made up of, the original total, and the remaining balance.

At the bottom, you can use the radio buttons to show open, closed, or all invoices.

The screenshot shows the AutoClerk Cloud PMS interface with the 'Invoices' tab selected. The table lists invoices with columns: Invoice #, Date Created, Open Folios, Total, Balance, and Invoice. One invoice is shown with Invoice # 3, Date Created 02/27/2023, Open Folios 2, Total \$187.96, and Balance \$187.96. A 'Totals' row shows the same values. On the right, there are icons for printing, emailing, and viewing as PDF or HTML. Below the table, there are radio buttons for 'Show Open', 'Show Closed', and 'Show All'.

To the right, you may also print or email the invoice, preview as PDF or HTML, and choose to include the folios. The email option will pre-fill the company's email address, or you may type in a new email recipient. There is a white text box which allows you to customize the email.

The screenshot shows a dialog box titled 'Email An Account'. It has a 'To' field with 'lw@aol.com' and a 'Cc' field. There is a large white text box for customizing the email. At the bottom, there are 'Send' and 'Cancel' buttons.

Posting Payments to City Ledger Accounts

You may either post a payment directly in the Uninvoiced screen, or if invoiced, click the Invoice # hyperlink on the far left of the Invoices tab, which will bring up the folios to be paid off.

Note: If a payment is applied in the Uninvoiced tab, that payment can only be found through the [Transactions](#) report or by searching [the Payments tab](#) by payment date.

AUTOCLERK® Cloud PMS AutoClerk Cloud University Search today... Feb 27, 2023 morana...

Main Menu Reservations Reports Arrivals In House Departures Dashboard

Acme Supply

Accounts Uninvoiced **Invoices** Payments

Invoice #	Date Created	Open Folios	Total	Balance Invoice
3	02/27/2023	2	\$ 187.96	\$ 187.96
Totals			\$ 187.96	\$ 187.96

VIEW HTML ☐ Include Folios

☒ Show Open ☐ Show Closed ☐ Show All

copyright © 2008 - 2024 AutoClerk Inc. All rights reserved. | Read Terms of Use | HELP | Contact Support | 4.37.4 | ac-prod-myhms-app-bwh-01

Below, the Folio # column includes hyperlink that allows you to go directly to a folio to make any corrections. The Escape button in the folio will return you to the Invoices screen.

On the right side of the invoice screen, click on the green circle of each folio that is being paid off to copy the Balance into the payment box. If all folios are being paid off in full, you can click on the top green dot in the header to autofill all payment boxes for all folios.

In the case of a partial payment, enter the actual amount being paid in the boxes.

AUTOCLERK® Cloud PMS XX Training Team Manual DB Search today... Mar 21, 2023 Erica Mills...

Main Menu Reservations Reports Arrivals In House Departures Dashboard

Invoices 16

Accounts Uninvoiced **Invoices** Payments

Description	Folio #	Confirmation #	Arrival	Departure	Balance
<input type="checkbox"/> Adams, John	18274120	ZZ10149595036	3/21/23	3/21/23	\$ 49.59
<input type="checkbox"/> Coyote, Wiley E	18274128	ZZ10149595115	3/21/23	3/21/23	\$ 49.59
Total:					\$ 99.18

Check Amount

Remaining Amount

Payment type

Current Auth

Description

Payment Amount

☒ Show Open ☐ Show Closed ☐ Show All

Print Statement

VIEW HTML ☐ Include Uninvoiced Folios

The total being paid will appear in the “Payment Amount” field near the bottom.

Note: the “Check Amount” field in the middle-left side of the screen is currently in use.

The default payment type is “Cash”, and you have lime green buttons that allow you to add a credit card, which will stay on file for the account until it is removed. Many City Ledger payments are done via check. In the case of a franchise account such as Best Western, those accounts are paid using the “Best Western Statement” payment type.

The “Description” can be used for the check number. In the case of a franchise account you will normally record the month and year of the statement that contains the credit.

When all information is correct, click the “Apply Payment” button.

Payments Tab

When viewing a City Ledger account, if payments have been made in the past, there will be a fourth tab on the far right labeled “Payments”. You can filter the “Start date” and “End date”, and optionally filter to a specific Payment type and/or User.

AUTOCLERK Cloud PMS AutoClerk Cloud University Search today... Feb 27, 2023 morana...

Main Menu Reservations Reports Arrivals In House Departures Dashboard

Acme Supply

Payments 3 Accounts Uninvoiced Invoices **Payments**

Transactions

Start date: 2/1/23 End date: 2/27/23
 Payment type: Select category (optional) User: Select user (optional) SEARCH

Date	Folio #	Payment type	Name	Description	Amount	User
2023-02-12	7523678	Cash	Check	123	185.55	EBear 10/03/23 12:49 PM
	7523250		Bolden, Adriana		61.85	
	7523269		Adams, John		61.85	
	7523257		Bailey, David		61.85	
	Found Payments	1		Total Payments	\$ 185.55	

copyright © 2008 - 2024 AutoClerk Inc. All rights reserved. | Read Terms of Use | HELP | Contact Support | 4.37.4 | ac-prod-myhms-app-bwh-01

Reports

The Reports area can be reached via the “Reports” button under the Shortcuts area of the Front Desk Dashboard or use the blue menu bar and click Reports. **For our Best Western Branded hotels these reports are also available through QuickSight. You may access QuickSight using Member Web or by clicking the QuickSight button in the AutoClerk reports area.**

QuickSight ☆ AC - BWH Prod - Report Index / Original dashboard (Modified)

Controls

Property ID: 00599

AUTOCLERK Cloud PMS Reports User Role: GG-AWS-QuickSight-Users-AutoClerk

Daily	Group	Accounting	Manager
Arrivals	Group Revenue	Guest Ledger	Managers
Departures	Group Block	In-House Guest Ledger	Occupancy/Forecast
In-House	Rooming List	City Ledger	Reservations
Extras	Group Evaluation	Advance Ledger	Revenue
Breakfast Attendant (NEW)		Daily Ledgers	User Activity
Transactions		City Ledger Aging	Tax Exempt
Batch Settlements		Batch Settlements	Yield Analysis
Credit Card Timeouts		Transactions	Room Utilization (NEW)
Cancellations		Transaction Summary	Out of Order Displacement (NEW)
High Balance		Quarterly Report	Ops Monitoring (NEW)
Reservation Comments		Travel Agent Commissions	Marketing Export (NEW)
Do Not Rent Report			Yesterday's Bookings (NEW)
CRS No Host Confirmation			Channel Share (NEW)
Reservation Errors			

Housekeeping

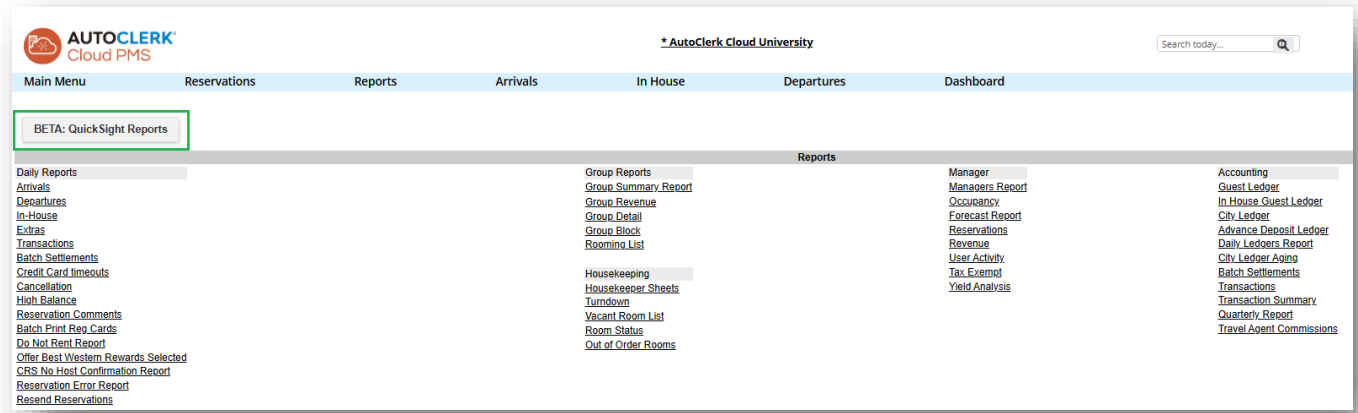
- Housekeeper Sheets
- Turndown
- Vacant Room List
- Room Status
- Out of Order Rooms

BWH

- Medallia (NEW)
- RM Business Intelligence (NEW)
- Marketing Statistics (NEW)
- STR Report

Audit / Reconciliation

- Room Moves (NEW)
- FX / FX2 Reconciliation (NEW)



All reports are pre-programmed in AutoClerk Cloud and can be run with many different filters.

Reports may be displayed in up to four different formats. The Display Method is selected at the bottom of the screen after clicking a report.

- **Screen (HTML)** is the default and the quickest way to see a report. Note that HTML is normally not designed for printers or paper and so it often prints small. The screen can typically be zoomed using browser options or **CTRL +/-** on the keyboard.
- **Print (PDF)** is the best choice when printing or saving a report. The print is larger and properly fills the printed page.
- **Excel** will export the report in XLS format, typically read by the Microsoft Excel program. This format allows you to manipulate the data in an Excel spreadsheet after it is generated.
- **Data (CSV)** will export the report in CSV format. This allows other spreadsheet programs to read the data.
- **Printer** will immediately open a print preview of the report. This option is uncommon and appears on the [Batch Print Reg Cards](#) report.

Different reports are visible based on user role.

	Hotel Staff	Night Auditor	Hotel Manager
Daily Reports	All except: -Credit Card Timeouts -CRS No Host Confirmation Report -Resend Reservations	All except: -Credit Card Timeouts -CRS No Host Confirmation Report -Resend Reservations	All except: -Credit Card Timeouts
Group Reports	Only Group Summary Report and Rooming List	Only Group Summary Report and Rooming List	All
Housekeeping	All	All	All
Manager	none	All	All
Accounting	none	All	All

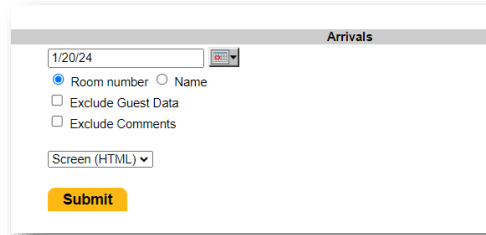
Daily Reports

Arrivals

This report displays all reservations with an arrival date of the date selected, including reservations that are already checked-in. This report is historical, so it may be run for past reservations with the selected date, or for the current date, or for a future date.

AutoClerk Cloud User Manual

The report may be sorted by Room number or Name (last name), and there are also options to Exclude Comments or Guest Data (which will not display Group, Name, Company, Rate Code and Rate, Pay, Departure Date, Extras, or CRS #).



The screenshot shows a web form titled "Arrivals". It includes a date input field set to "1/20/24" with a calendar icon. Below this are two radio buttons: "Room number" (selected) and "Name". There are two checkboxes: "Exclude Guest Data" and "Exclude Comments", both of which are currently unchecked. A dropdown menu is set to "Screen (HTML)". At the bottom is a yellow "Submit" button.

* AutoClerk Cloud University

100 Main Street
Phoenix, Arizona 85027
(623) 780-6000

Date: 01/20/2024

Arrivals

User: Andy Moran
Date: February 23, 2024
Time: 11:49 AM

Rm	Type	Grp	Name	BWR	Company	Rate Code	Rate	Pay	A	C	I	Past	Arrival	Depart	Crb	Pets	R		
131	QQ	(G)	Adams, Ken			RACK	\$ 110.00	CASH	1	0	0	0	01/20/2	01/21/2					
			CRS #	Reservation Remarks: Requesting 8am Check in															
	QQ		Moran, John		Gold	RACK	\$ 110.00	CASH	1	0	0	0	01/20/2	01/21/2					
			CRS #	Reservation Remarks: Arriving at 8:00am															
				Guest Remarks: Likes to be on High floor															
												TOTAL		2 0 0					
												GUESTS							
												TOTAL		2					
												ROOMS							

Cancellations

Rm	Type	Grp	Name	BWR	Company	Rate Code	Rate	Pay	A	C	I	Past	Arrival	Depart	Crb	Pets	R
	QQ		Johnson, Mike			RACK	\$ 110.00	CASH	1	0	0	0	01/20/2	01/21/2			
			CRS #														

For each reservation, basic information includes room number, room type, if they are with a group (G), name, company, rate, form of payment, the number of Adults/Children/Infants (A/C/I), the number of past stays at your property, and the arrival and departure date. There are columns for cribs, pets, and rollaways (RW), regardless of whether you have these options turned on at your property.

If you are a Best Western-branded property, there will also be a column labeled BWR which will show the member level for a guest if they have a Best Western Rewards account attached to their reservation. For example, if the guest has a BWR membership level of Gold, it will display "Gold" in this column.

The CRS # and Reservation and Guest Comments are listed on a second line for each reservation. The summary displays the total number of guests in the report and how many total rooms.

After this, there is a line that separates a list of cancelled reservations for that arrival date.

Departures

This report has the exact same options and format as the Arrivals report. It also has a list of cancelled reservations that have a departure date of the selected date.

* AutoClerk Cloud University

100 Main Street
Phoenix, Arizona 85027
(623) 780-6000

Date: 01/20/2024

Departures

User: Andy Moran
Date: February 23, 2024
Time: 11:54 AM

Rm	Type	Grp	Name	BWR	Company	Rate Code	Rate	Pay	A	C	I	Past	Depart	Crb	Pets	RW
131	QQ		Smith, Jane		ACME Supply	RACK	\$ 300.00	CASH	3	0	0	0	01/20/24			
	CRS #															
217	QQ		Test, Andrew		ACME Supply	RACK	\$ 110.00	CASH	1	0	0	0	01/20/24			
	CRS #															
									TOTAL GUESTS		4			0	0	
									TOTAL ROOMS		2					

Cancellations

Rm	Type	Grp	Name	BWR	Company	Rate Code	Rate	Pay	A	C	I	Past	Depart	Crb	Pets	RW
	WQQ		Detrick, Phillip	Diamond		GRP 24	\$ 400.00	CASH	1	0	0	1	01/20/24			
	CRS #															
Guest Remarks: .																
	WQQ		t, t			MANUAL	\$ 110.00	CASH	1	0	0	0	01/20/24			
	CRS #															

In-House

This report differs from the Arrivals and Departures reports because it can also list Reservation Status: IN for Checked in, OUT for Checked out, and NEW for New arrivals.

The report can be filtered by Room number, Name (last name), or Creation Date. You can also decide to include In-house only, Exclude Guest Data, and Exclude Guest Comments.

If you do not check "In-House only" the report will include all reservations status such as IN, OUT, and NEW. Checking "In-House only" will generate a list of the actual in-house guests only.

AutoClerk Cloud User Manual

In-House

Date

Sort by

Display Method

☐ Room number
 ☒ Name
 ☐ Creation Date

☐ In-House only(Exclude new arrivals and checked out guests.)

☐ Exclude Guest Data

☐ Exclude Comments

Submit

This report includes the guest's room number, room type, group (G), name, BWR if any, confirmation number, reservation status, rate, balance, form of payment, credit card authorized amount, number of adults/children/infants, and arrival and departure date. The second line of each reservation lists Reservation and Guest Remarks (Comments), as well as the CRS # which includes the user who created the reservation with creation date and time. Extras are not included in this report.

* AutoClerk Cloud University

9565 Egan Highway

, Arizona 85027

3375142253

Date: 02/28/2023

In-House

User: Andy Moran

Date: February 23, 2024

Time: 3:03 PM

Rm	Type	Grp	Name	BWR	Confirmation	Status	Rate	Balance	Pay	Auth.	A	C	I	Arrival	Depart	
	GROUP		Arizona Diamondbacks		ZZ1000029364	4G	\$ 0.00	\$ 235.52			0	0	0	02/26/23	02/28/23	
	CRS #															
248	QQ		Culley		ZZ1007528693	IN	\$ 82.77	\$ 98.45	CAS		1	0	0	02/26/23	03/01/23	
	CRS #				0				H						<div>Andy Moran</div> <div>2024-02-22 07:28:26</div>	
	K		Jones		ZZ1007544344	NEW	\$ 79.00	\$ 0.00	CAS		1	0	0	02/28/23	03/01/23	
	CRS #				1				H						<div>Andy Moran</div> <div>2024-02-23 13:05:37</div>	
					Guest Remarks: High Floor request											
125	K		Rosenbaum		ZZ1007542883	IN	\$ 79.00	\$ 93.98	CAS		1	0	0	02/27/23	02/28/23	
	CRS #				7				H						<div>Andy Moran</div> <div>2024-02-23 11:08:19</div>	
100	K		Waters		ZZ1007528689	OUT	\$ 40.00	\$ 0.00	DIRE		1	0	0	02/26/23	02/28/23	
	CRS #				5				CTBI						<div>Andy Moran</div> <div>2024-02-22 07:27:23</div>	
									LL							
							\$ 427.95									
											TOTAL			4	0	0
											GUESTS					
											TOTAL			5		
											ROOMS					

Extras

If your property has the Extras feature turned on, you will be able to generate this report to show guests who have requested cribs, rollaways, and any other Extras you have defined at your property. You can pull the extras report by Arrivals, In-House, or Departures.

While the Arrivals and Departures reports both display Extras, the Extras report is the only report that displays Extras for *in-house* guests.

AutoClerk Cloud User Manual

Extras

Date 2/28/23

Type
☐ Arrivals
 ☒ In-House
 ☐ Departures

Display Method Screen (HTML) ▼

Submit

Note: the report will only show a column for an Extra if the Extra is in use for that date.

* AutoClerk Cloud University								Extras	
9565 Egan Highway , Arizona 85027 3375142253								User:	Andy Moran
InHouse 02/28/23								Date:	February 23, 2024
								Time:	3:19 PM
Rm	Type	Name	Arrival	Departure	A C I	Pet Fee	Rollaways		
125	K	Rosenbaum	02/27/23	02/28/23	1 0 0	1	0		
248	QQ	Culley	02/26/23	03/01/23	1 0 0	0	1		
Totals						1	1		

Transactions

This report lists the charges and payments for a date or date/time range with sub-totals and totals.

* AutoClerk Cloud University

9565 Egan Highway

, Arizona 85027

3375142253

Start

02/28/2023

End Date:

02/28/2023

Rm

Folio

Guest Name

Folio Name

Date

Description

Amount

User / Time

Cash

Cash

1259068141Rosenbaum, JakePrimary2/28/23-\$ 93.98bw19136 02/23/24 18:21

2489050904Culley, RickPrimary2/28/23-\$ 98.45bw19136 02/23/24 18:21

Total Cash: - \$ 192.43

Total Cash: - \$ 192.43

Transactions

User:

bw19136

Date:

February 23, 2024

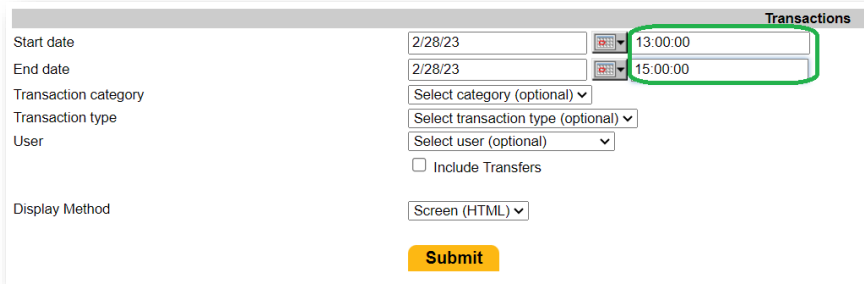
Time:

4:24 PM

The time field is the unlabeled field next to each date. If only dates are entered, the system will include all transactions at all times of that hotel date.

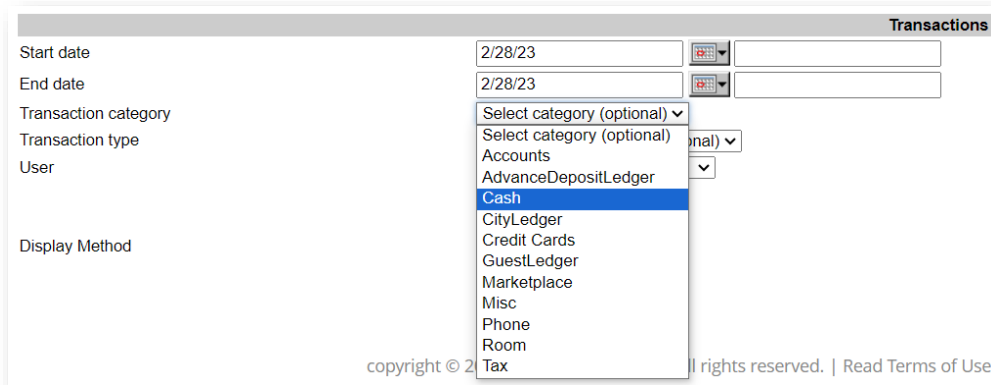
If entering a time, it must be in Military format (for example, 13:00:00 for 1PM), which will cause the system to use the calendar date and time.

AutoClerk Cloud User Manual



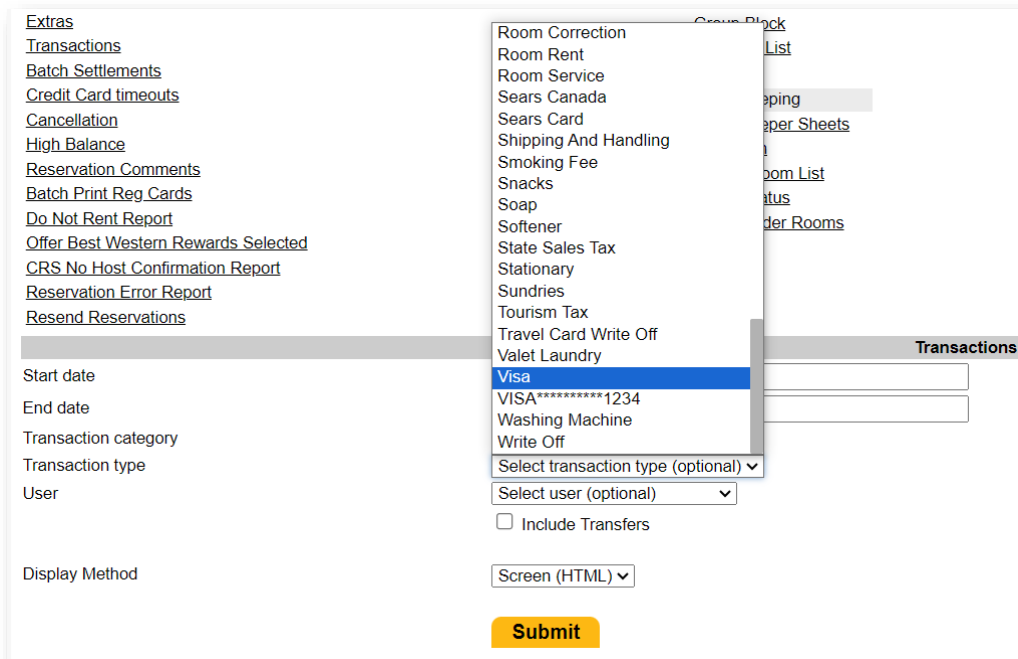
The screenshot shows the 'Transactions' report filter form. The 'Start date' is set to 2/28/23 and the 'End date' is also 2/28/23. The 'Transaction category' is set to 'Select category (optional)'. The 'Transaction type' is set to 'Select transaction type (optional)'. The 'User' is set to 'Select user (optional)'. The 'Include Transfers' checkbox is unchecked. The 'Display Method' is set to 'Screen (HTML)'. A green box highlights the time range filters: '13:00:00' and '15:00:00'. A yellow 'Submit' button is at the bottom.

“Transaction category” allows you to filter the transaction by groups of transactions, such as credit cards or taxes.



The screenshot shows the 'Transactions' report filter form with the 'Transaction category' dropdown menu open. The dropdown list includes: 'Accounts', 'AdvanceDepositLedger', 'Cash' (highlighted), 'CityLedger', 'Credit Cards', 'GuestLedger', 'Marketplace', 'Misc', 'Phone', 'Room', and 'Tax'. The 'Start date' is 2/28/23 and the 'End date' is 2/28/23. The 'Transaction type' is 'Select transaction type (optional)'. The 'User' is 'Select user (optional)'. The 'Include Transfers' checkbox is unchecked. The 'Display Method' is 'Screen (HTML)'. A yellow 'Submit' button is at the bottom.

Transaction type allows you to filter the report by a single transaction such as Visa, for example.



The screenshot shows the 'Transactions' report filter form with the 'Transaction type' dropdown menu open. The dropdown list includes: 'Room Correction', 'Room Rent', 'Room Service', 'Sears Canada', 'Sears Card', 'Shipping And Handling', 'Smoking Fee', 'Snacks', 'Soap', 'Softener', 'State Sales Tax', 'Stationary', 'Sundries', 'Tourism Tax', 'Travel Card Write Off', 'Valet Laundry', 'Visa' (highlighted), 'VISA*****1234', 'Washing Machine', and 'Write Off'. The 'Start date' is 2/28/23 and the 'End date' is 2/28/23. The 'Transaction category' is 'Select category (optional)'. The 'User' is 'Select user (optional)'. The 'Include Transfers' checkbox is unchecked. The 'Display Method' is 'Screen (HTML)'. A yellow 'Submit' button is at the bottom.

“User” can be used to track postings by a specific user and can also be used to “cash out” at the end of a shift. Select the user and only that user’s transactions will be included in the report. You can also select the transaction category as Cash, which will generate a report of all cash and check transactions posted by that user.

Transactions	
Start date	3/5/23
End date	3/5/23
Transaction category	Select category (optional) ▼
Transaction type	Cash ▼
User	Temptrain1 (Temptrain1) ▼
<input type="checkbox"/> Include Transfers	
Display Method	Screen (HTML) ▼
Submit	

Transactions	
Start date	3/5/23
End date	3/5/23
Transaction category	Cash ▼
Transaction type	Select transaction type (optional) ▼
User	Temptrain1 (Temptrain1) ▼
<input type="checkbox"/> Include Transfers	
Display Method	Screen (HTML) ▼
Submit	

“Include Transfers” is normally left unchecked. When a transaction is transferred from one room to another, the system posts a credit from the source room and a debit to the destination. This transfer has no effect on the overall totals, so these transactions are often not included, but can be included by checking the box.

Batch Settlements

This report appears in two report sections: both “Daily Reports” and “Accounting”.

This report is one of three reports that can be emailed automatically during the Night Audit (the others being [Managers Report](#) and [Transaction Summary](#)).

The Batch Settlements report shows which credit cards transactions were sent to the credit card processor on a specific day. Note that the report filter defaults to the current business date, however it can be adjusted to past dates.

Batch Settlements

Start date

12/2/18

End date

12/2/18

Display Method

Screen (HTML) ▼

Submit

On the report, credit card purchases (payments) and credits (refunds) are grouped by credit card type (such as VI for Visa). The room number, last name, folio, and invoice numbers are displayed with the CC #, and the batch number to the far right.

Each card type has a sub-total. The Total of all card types appears at the bottom of the report.

* AutoClerk Cloud University

123 Happy Street

Phoenix, Arizona 85044

Batch Settlement Report

User: Andy Moran

Date: February 23, 2024

Time: 3:29 PM

Start 12/02/2018

End Date: 12/02/2018

Card	Room	Last Name	Folio	Invoice	Auth	CC #	Amount	Transaction Type	Batch Number
System Date: 12/2/18									
Settled 12/29/23 7:12 AM by edbear									
VI	230	Lincoln	28093952	24336051		*****0010	-\$ 77.00	CREDIT	327
VI	230	Lincoln	28093952	24336052		*****0010	-\$ 10.00	CREDIT	327
VI	228	Newone	28093957	24336055		*****2257	\$ 77.00	PURCHASE	327
VI	240	Jefferson	28093971	24336057		*****2257	\$ 97.00	PURCHASE	327
VI	230	Lincoln	28093952	24336050		*****0010	\$ 87.00	PURCHASE	327
Subtotal							\$ 174.00		
AX	102	Becker	27837712	24336058		*****2221	\$ 231.00	PURCHASE	327
Subtotal							\$ 231.00		
Total							\$ 405.00		

- The first line contains the confirmation, guest name, arrival and departure dates, room type, rate plan, cancellation number and the user who cancelled the reservation as well as the calendar date and time the reservation was canceled.
- The second line shows that the reservation was cancelled, the person who called to cancel the reservation and their phone number (if entered), and cancellation reason (comment).

* AutoClerk Cloud University								Cancellation	
9565 Egan Highway Arizona 85027 3375142253								User:	Andy Moran
Date: 02/28/2023 - 02/28/2023								Date:	February 23, 2024
								Time:	4:56 PM
Confirmation	Guest Name	Arrival	Departure	Room	Rate Plan	Cancellation	User	Time	
ZZ10075472139	Smith, John	02/28/2023	03/01/2023	K	RACK-	ZZ10013655673C	Andy Moran	2/23/24 4:42 PM	
Cancelled	John	Cancel			Comment	Due to illness			
ZZ10075473196	Loveridge, Chase	02/28/2023	03/01/2023	K	RACK-	ZZ10013655864C	Andy Moran	2/23/24 4:55 PM	
Cancelled	Chase	Cancel	702-646-4444		Comment	1 night penalty			

High Balance

This report lists all rooms that have a balance greater than the amount you enter when filtering.

Amount

0.00

Sort by

Room

Display Method

Screen (HTML)

☐ On Screen / Interactive

Generate Report

The report displays the balance of the primary folio and all other folios, the total balance, the projected balance due based on the Stay Total, as well as the currently total authorized amount and the form of payment. The "Auth Increase Needed" column will indicate in **red** if the Total Auth Amount is less than the Projected Balance Due.

* AutoClerk Cloud University

9565 Egan Highway

, Arizona 85027

3375142253

High Balance

User: Andy Moran

Date: February 23, 2024

Time: 4:58 PM

Name	Status	Room	Rate Code	Folio #	Primary Folio Balance	Other Folios Balance	Total Balance	Projected Balance Due	Total Auth Amount	Auth Increase Needed	Payment Type
Chip Jones	Arrival		RACK	9069869	\$ 0.00	\$ 0.00	\$ 0.00	\$ 118.98	\$ 0.00	\$ 118.98	
Stella Kawalski	Arrival		RACK	9071856	\$ 0.00	\$ 0.00	\$ 0.00	\$ 108.98	\$ 0.00	\$ 108.98	
Brandon Waters	Checked-Out	100	FX	9050897	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	CL,CL
Jake Rosenbaum	Departure	125	RACK	9068141	\$ 0.00	\$ 0.00	\$ 0.00	\$ 25.00	\$ 0.00	\$ 25.00	
Rick Culey	In-House	248	FX2	9050904	\$ 0.00	\$ 0.00	\$ 0.00	\$ 143.45	\$ 0.00	\$ 143.45	CL

Reservation Comments

The **Reservation Comments report** will display reservations of all statuses with the selected arrival dates and all comments attached to those reservations. The filter defaults to "Guest Comments", however it can be changed to Reservation Comments, Folio Comments, or All.

AutoClerk Cloud User Manual

Reservation Comments

Start date

2/28/23

End date

2/28/23

Comments

Guest Comments

Guest Comments

Reservation Comments

Folio Comments

All

Sort by

Display Method

☐ On Screen / Interactive

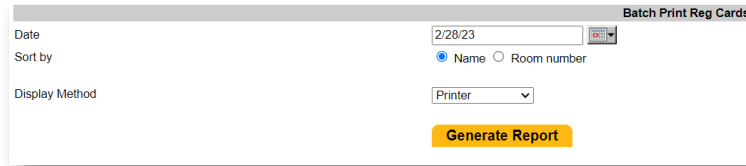
Generate Report

The report displays the Confirmation Number and Guest name, along with the comments you selected in the filter.

* AutoClerk Cloud University ;		Guest Remarks		
9565 Egan Highway ; Arizona 85027 3375142253		User: Andy Moran		
Start Date:		Date: February 23, 2024		
End Date:		Time: 5:20 PM		
Confirmation	Guest Name	Guest Comments	Reservation Comments	Folio Comments
ZZ10075443441	Chip Jones	High Floor Request	Needs Early Check-in	
ZZ10075459831	Stella Kawalski	Needs 2 extra pillows	Arriving at 11:00 PM	Will be paying Cash at check out

Batch Print Reg Cards

If a hotel does not use eReg (Electronic Registration), they can use AutoClerk's printed registration cards for guests to sign. Reg Cards may be printed one at a time [on the guest reservation by clicking Letters](#), or all registration cards for a single arrival date can be printed out as a batch. This can be particularly useful if there is an internet or power outage.



Batch Print Reg Cards

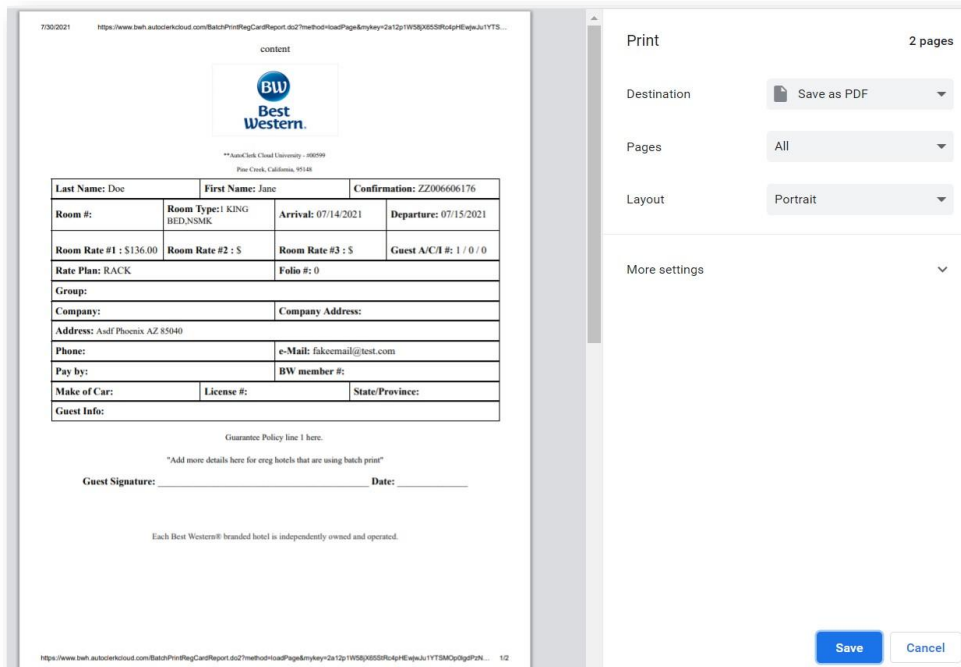
Date: 2/28/23

Sort by: ☒ Name ☐ Room number

Display Method: Printer

Generate Report

The filters allow you to select the arrival date for the registration cards and sort by Name or Room number. This is one of the few reports that default the Display Method as Printer, which will open a print preview.



Print 2 pages

Destination: Save as PDF

Pages: All

Layout: Portrait

More settings

Save **Cancel**

7/30/2021 https://www.bwh.autoclerkcloud.com/BatchPrintRegCardReport.do?method=loadPage&key=2a12p1W936X055F0d4tEwju1Y75...

content

BW
Best Western

**AutoClerk Cloud User: 080598
Pine Creek, California, 95148

Last Name: Doe		First Name: Jane		Confirmation: ZZ006606176	
Room #:	Room Type: 1 KING BED, NSMK	Arrival: 07/14/2021	Departure: 07/15/2021		
Room Rate #1 : \$136.00	Room Rate #2 : \$	Room Rate #3 : \$	Guest A/C I #: 1 / 0 / 0		
Rate Plan: RACK		Folio #: 0			
Group:					
Company:			Company Address:		
Address: Asdf Phoenix AZ 85040					
Phone:			e-Mail: fakedemail@test.com		
Pay by:			BW member #:		
Make of Car:	License #:	State/Province:			
Guest Info:					

Guarantee Policy line 1 here.

"Add more details here for eReg hotels that are using batch print"

Guest Signature: _____ Date: _____

Each Best Western® branded hotel is independently owned and operated.

https://www.bwh.autoclerkcloud.com/BatchPrintRegCardReport.do?method=loadPage&key=2a12p1W936X055F0d4tEwju1Y75M03d9gP2N... 1/2

Do Not Rent Report

This report lists all guest profiles that have the [“Do Not Rent” checkbox](#) marked on their profile. This report is useful if a hotel is moving from another system to AutoClerk Cloud and wants to make sure all guests on their old “Do Not Rent” list are in AutoClerk Cloud.

This report has many options, allowing you to search by Zip Code, State Code, Country Code, and minimum stays.

Do Not Rent

Sort Order Alphabetical ▼

Data Type doNotRent ▼

Data Limit 100000

Zip Code

State Code

Country Code

Min Stays 0

Include Email All ▼

Display Method Screen (HTML) ▼

Submit

The report lists basic guest information and then displays Guest Comments in a rectangular box.

* AutoClerk Cloud University										Do Not Rent List	
9565 Egan Highway Arizona 85027 3375142253										User:	Andy Moran
										Date:	February 23, 2024
										Time:	5:32 PM
Last Name	First Name	Address	Company	City	State	Zip	Cntry	Phone	Cell Phone	Stays	
										Past	Res
Jackson	Pluto	Local Ruidoso		Ruidoso Downs	NM	88346	USA		5500269630	0	0
		Guest was rude to Hotel Staff									
Stark	Tony	10880 Malibu Point		Malibu	CA	90265	USA		214-666-6666	1	0
		guest broke table in the room no longer welcome back									
Xyz	Pluto	Local Ruidoso		Ruidoso Downs	AZ	88346	USA		5500269630	0	0
		Guest was rude to Hotel Staff									
										Totals:	1 0

Offer Best Western Rewards Selected

This is a historic report that is no longer in use.

CRS No Host Confirmation Report

Note: This report is only available for Best Western properties.

This report will display all reservations that do not have a Best Western CRS confirmation number. This is not a problem if the reservation is for a non-sleeping room such as a conference room, a room whose checkout date has passed, or a no-show or cancelled reservation. However, if an active guest reservation does not have a CRS number, it can cause communication issues with the Best Western CRS.

*** AutoClerk Cloud University**

9565 Egan Highway
 , Arizona 85027
 3375142253

Start Date: 02/27/2023
End Date: 02/28/2023

CRS No Host

User: Andy Moran
Date: February 23, 2024
Time: 6:20 PM

Guest Name	Arrival Date	PMS Confirmation #	Status
Jake Rosenbaum	02/27/2023	ZZ10075428837	CHECKEDIN
Chip Jones	02/28/2023	ZZ10075443441	NEW
Stella Kawalski	02/28/2023	ZZ10075459831	NEW
John Smith	02/28/2023	ZZ10075472139	CANCELED
Chase Loveridge	02/28/2023	ZZ10075473196	CANCELED

If you determine that the reservation should have a Best Western CRS confirmation number, you can resend the reservation by making a simple modification to the reservation such as putting a period at the end of a line and saving it. You can also resend the reservation by using the [Resend Reservations link under "Daily Reports"](#). If these methods do not work, please contact [AutoClerk Cloud Support](#).

Reservation Error Report

Note: this report is only available for Best Western properties.

This report will display reservations that received an error either when they were first created or when they were modified. Because of this, they may have a BW CRS confirmation number but somehow violated a system rule and therefore got an error. A reservation with an error may be incomplete or not up to date in either the CRS or PMS and must be corrected.

Reservation Error Report

Start Created Date

End Created Date

Display Method

3/20/23

3/20/23

☐ Exclude Pending
☐ Exclude No Response
☐ Exclude Fail

Screen (HTML) ▼

Generate Report

You can run this report for a date range and exclude different types of error messages such as Pending, No Response, and Fail.

* AutoClerk Cloud University				Reservation Error Report	
20400 N. 29th Avenue Phoenix, Arizona 85027 (623) 780-6000				User: Andy Moran	
				Date: May 12, 2023	
				Time: 10:33 AM	
PMS #	CRS #	Status	Error Message	Created	Received
ZZ043749434		FAIL	CANNOT CREATE RESERVATION 6 DAYS AFTER DEPARTURE DATE 13-MAR-23, FOR PROPERTY 00599, TRANSACTION id=10202852858, OTA_HotelResNotifRQ	2023-03-20 06:18:10.0	2023-03-20 06:18:09.0
ZZ043749445		FAIL	CANNOT CREATE RESERVATION 6 DAYS AFTER DEPARTURE DATE 13-MAR-23, FOR PROPERTY 00599, TRANSACTION id=10202854130, OTA_HotelResNotifRQ	2023-03-20 06:18:37.0	2023-03-20 06:18:37.0
ZZ043749445		FAIL	CANNOT FIND ACTIVE CRS CONFIRMATION NUMBER , FOR PROPERTY 00599, TRANSACTION ID=10202855896, OTA_HotelResNotifRQ	2023-03-20 06:19:20.0	2023-03-20 06:19:21.0
ZZ000197737 G	K89DM0C2	NO_RESPONSE	No response after 0 attempts	2023-03-20 06:26:35.0	2023-03-20 06:26:35.0
ZZ000197737 G	K89DM0C2	NO_RESPONSE	No response after 0 attempts	2023-03-20 06:22:19.0	
ZZ000200833 G	4L9DX2C1	FAIL	CANNOT CANCEL THIS ACTIVE GROUP MASTER ON OR AFTER EARLIEST ARRIVAL DATE. TRANSACTION ID=1709500197	2023-03-20 06:21:27.0	2023-03-20 06:25:01.0
ZZ000200215 G	R58KC6P4	NO_RESPONSE	No response after 3 attempts	2023-03-20 06:26:36.0	

The report will include any PMS and CRS confirmation numbers, message status, and most importantly the Error Message, with the message date and time it was created and received.

Look up each reservation by the PMS # or CRS#. If the reservation is a valid reservation for a sleeping room, try to resend reservation by using the [Resend Reservations link under "Daily Reports"](#). If the reservation still shows as an error, please contact [AutoClerk Cloud Support](#).

Resend Reservation

Note: this function is only available for Best Western properties.

Start Created Date

1/02/24

End Created Date

1/02/24

☐ Exclude Pending
☐ Exclude No Response

SEARCH

Type	PMS #	CRS #	Status	Attempt Count	Created	Click
GROUPRESERVATIONINVAJUST	ZZ10000305176G	3NTNC7Q3	NO_RESPONSE	3	2024-01-02 13:22:21.0	RESEND
RESERVATION	ZZ10070363245		NO_RESPONSE	3	2024-01-02 18:11:50.0	RESEND

This function lists reservations with errors between the selected date range and allows you to resend them. It has the option to exclude error messages that are in status “Pending” and/or “No Response”.

Group Reports

Group Summary Report

This report lists all groups (inactive and active) between a date span and can be run for any date range.

Group Summary Report

Start date: 7/14/21

End date: 8/13/21

This report lists the arrival and departure dates of Group Name (a.k.a. Group Profile Name) and “Reservation name” (a.k.a. the “Group Booking Name”)

Demo Hotel Edward
1981 North Broadway
Walnut Creek, California 94596
925-284-1005

Group Summary Report

User: Ed Bear - AutoClerk
Date: July 30, 2021
Time: 10:13 AM

Start: 02/26/2021
End Date: 03/25/2021

Arrival Date	Departure	Group Name	Reservation Name
02/26/21	02/27/21	Docs Group	Doc's Group
03/01/21	03/02/21	March Group	March Group

Group Revenue

This report lists groups, and the amount of revenue posted and room nights that have been actualized by group (Group Booking Name). It can be run over a date span and even filtered out by the user who booked the group.

Group Revenue

Summary or Detail: ☒ Summary ☐ Detail

Arrival Start Date: 2/26/21

Arrival End Date: 3/25/21

User: Select user (optional)

The report can be run by Summary (which displays one line for each group), or Detail (which breaks out individual reservations under a group). The revenue will show zero until a room has been charged.

Demo Hotel Edward

1981 North Broadway
Walnut Creek, California 94596
925-284-1005

Start 02/26/2021
End 03/25/2021

Group Revenue

User: Ed Bear - AutoClerk
Date: July 30, 2021
Time: 10:30 AM

Group Booking Name	Arrival Date	Departure Date	Booked By	Folio	Revenue	Room Nights	# Guests	ADR	Avg Per
March Group	03/01/202	03/02/202	edbear	32767987	\$ 0.00	0	0	\$ 0.00	\$ 0.00
Doc's Group	02/26/202	02/27/202	edbear	32784944	\$ 0.00	1	1	\$ 0.00	\$ 0.00
					\$ 0.00	1	1	\$ 0.00	\$ 0.00

In the Summary view, each group is listed individually with dates in chronological order. It is stamped with the user who booked the group and the master folio number, along with revenue and room night/guest stats. The Detail view also shows each reservation underneath the group booking name (in **bold**) with the individual stay dates/revenue/room night/guest totals.

Group Detail

This report can only be run for one group at a time. Type in at least three letters of any of the words in either a Group Profile Name or Group Booking Name, and the system will show name matches in a drop-down list. There is also an option to include the room types that do not have blocks.

Group Detail

Select Group Reservation

Start date

End date

Doc's Group

▼

▼

☐ Include all RoomTypes (Even those without Blocks)

The report will show a grid with each row as the room type, the available/blocked/picked up/unused rooms per night in the columns, and the totals per room type on the far right. A line at the end of the report shows overall totals and estimates the amount of room revenue to be generated.

Demo Hotel Edward

1981 North Broadway
Walnut Creek, California 94596
925-284-1005

Selected: Doc's
Arrival 02/26/2021
Departure 02/27/2021
Showing: Blocked Room Types

Group Block Detail

User: Ed Bear - AutoClerk
Date: July 30, 2021
Time: 10:36 AM

Room Type		Fri 2/26	Total
JS	Available	-8	-8
	Blocked	11	11
	Picked Up	0	0
	Unused	11	11
KING	Available	12	12
	Blocked	5	5
	Picked Up	0	0
	Unused	5	5
SU	Available	1	1
	Blocked	1	1
	Picked Up	0	0
	Unused	1	1
Totals	Available	5	5
	Blocked	17	17
	Picked Up	0	0
	Unused	17	17

Booking Name	Confirmation	Arrival Date	Departure Date	Blocked Rooms	Picked Up Rooms	Difference	Blocked Revenue	Picked Up	Difference	Cutoff Date
Doc's Group	DE002645108G	02/26/2021	02/27/2021	17	1	16	\$ 2,450.00	\$ 120.00	\$ 2,330.00	02/26/2021

270

Group Block

This report lists estimated and actual group block revenue and rooms by Group Booking Name between a date range. The Summary view will display individual groups, while the Detail view will display block availability/pickup details for the entire hotel and all groups by date in a grid.

Group Block

Summary or Detail
 Sort by
 Start date
 End date

☒ Summary ☐ Detail
☒ Arrival Date ☐ Cutoff Date ☐ Booking Name

2/26/21

3/25/21

The report includes the group name, confirmation number, dates, and the number of rooms blocked, picked up, and the difference. The potential revenue is projected and the projected picked up revenue is calculated from the reservations that have been picked up.

Demo Hotel Edward				Group Block Summary					
1981 North Broadway Walnut Creek, California 94596 925-284-1005 Hotel 02/25/2021 Start 02/26/2021 End Date: 03/25/2021 Selected: Sorted by Arrival				User: Ed Bear - AutoClerk Date: July 30, 2021 Time: 10:46 AM					
Group Booking Name	Confirmation	Arrive	Depart	Block	P/U	Diff	Blocked Revenue	Picked Up Revenue	Cutoff Date
Doc's Group	DE002645108G	02/26/21	02/27/21	17	3	14	\$ 2,450.00	\$ 360.00	02/26/21
March Group	DE002644770G	03/01/21	03/02/21	11	0	11	\$ 1,200.00	\$ 0.00	02/26/21
				28	3	25	\$ 3,650.00	\$ 360.00	

Rooming List

This report can only be run for one group at a time. It will list each reservation that belongs to that group. The list includes the guest name, confirmation, dates, rate plan and room number that has been blocked. It includes other information such as room type, number of guests and average rate for the stay.

Rooming List

Select group reservation

Docs Group. - Doc's Group ▼

Demo Hotel Edward				Rooming List					
1981 North Broadway Walnut Creek, California 94596 925-284-1005				User: Ed Bear - AutoClerk Date: July 30, 2021 Time: 11:11 AM					
Guest Name	Conf #	Arrival	Departure	Days	Rate Plan	Room	Room Type	# Guests (A/C/I)	Avg Rate
Epson, Buddy	DE318527758	02/26/21	02/27/21	1	Rack	105	King	1 / 0 / 0	\$ 120.00
Bodine, Jethroe	DE318593795	02/26/21	02/27/21	1	Rack	106	King	1 / 0 / 0	\$ 120.00
Smith, Granny	DE318593818	02/26/21	02/27/21	1	Rack	108	King	1 / 0 / 0	\$ 120.00

Housekeeping Reports

Housekeeper Sheets

This report is designed to be printed and given to individual housekeepers so they will know which rooms they need to clean and can keep track of the linen used. It can either be run from the [Housekeeping area](#) or from the Reports area.

This report can be filtered with a range of rooms and/or you can enter the number of housekeepers and the system will split up the rooms that need to be cleaned evenly between the housekeepers. There are options to exclude clean and OOO rooms from the report.

The screenshot shows a form titled "Housekeeper Sheets". It includes a dropdown menu for "Include only Rooms", a "Through" dropdown, and a text input for "Number of Attendants" with the value "0". At the bottom, there are two checked checkboxes: "Exclude clean rooms" and "Exclude OOO rooms".

The room numbers are listed with their room type, status (C=clean, D=Dirty, V=Vacant, O=Occupied), departure date, which night of the stay the guest is on, and the guest name. Any [Housekeeping Services](#) or [Housekeeping Comments from a reservation's "All Notes" tab](#) will appear below the room number. To the right, there are boxes where a housekeeper could write the number of towels and sheets that were replaced. When the room is ready to be inspected, the "OK?" box can be checked.

The screenshot shows a printout titled "Housekeeper's Sheets" for "AutoClerk Cloud University". It includes the address "9565 Egan Highway, Arizona 85027, 3375142253" and the user information "User: Andy Moran, Date: February 26, 2024, Time: 8:26 AM". Below is a table with columns for Room, Room Type, Status, Departure, Night, Guest, and various linen counts (Twin sheets, Double sheets, Queen sheets, King sheets, Pillows, Bath towels, Hand towels, Wash cloths, Bath mats, and an OK? checkbox).

Room	Room Type	Status	Departure	Night	Guest	Twin sheets	Double sheets	Queen sheets	King sheets	Pillows	Bath towels	Hand towels	Wash cloths	Bath mats	OK?
125	K	C/O	02/28/23	1	Jake										
144	QQ	S/O	03/01/23	2	Rick Culley										
202	K	V/D													

Turndown

For properties who offer turndown service (when housekeeping goes into each occupied room, makes the bed and pulls down the covers a bit, and may place a chocolate on the pillow). It produces list of rooms that are expected to be in-house at the end of the day.

- **Status:** Displays and groups the vacant rooms in the following order: Clean, Dirty, Out of Order.

Vacant Room List

Date: 2/28/23

Sort by: Room

Display Method:

Submit

Room Status

This report lists the status of every room in the hotel, with arrivals and/or stayover nights. While there are many options to filter this report, typically the defaults are used. **Note: This report is typically used daily by the Head Housekeeper.**

Room Status Report

☒ All

☒ Dirty Rooms

- ☒ Dirty & Vacant
- ☒ Dirty and Blocked
- ☒ Dirty and Due Out
- ☒ Dirty Staying Over

☒ Clean Rooms

- ☒ Clean and Vacant
- ☒ Clean and Blocked
- ☒ Clean and Due Out
- ☒ Clean and Staying Over

☒ Out Of Order

Include only Rooms: - Through -

Room type: All

Sort by: Room Number

Display Method: Screen (HTML)

Submit

Out of Order reasons are displayed in [blue text](#).

* AutoClerk Cloud University					Room Status Report		
9565 Egan Highway Arizona 85027 3375142253					User:	Andy Moran	
					Date:	February 26, 2024	
					Time:	10:58 AM	
Room	Room Type	Housekeeping Status	Reservation Status	Block Status	Stay Status	Departure Date	Service Type
100	K Room Model	OUTOFORDER					
101	K	DIRTY	Vacant				
102	QQ	DIRTY	Stay Over		Night 2 of 3	Tomorrow	
103	WQQ	CLEAN	Vacant				

Out of Order Rooms

This report can be used to determine which rooms need repairs and the reason why. It can be run for any date range needed.

Out of Order Rooms

Start date: 2/28/23

End date: 2/28/23

Display Method: Screen (HTML) ▼

Submit

Rooms are listed with their room types and Reasons for OOO in the middle of the page. The begin and end date for the OOO are included along with the date and time stamp and the user who put the room OOO. The Day column is not used.

* AutoClerk Cloud University 9565 Egan Highway , Arizona 85027 3375142253 Start Date: 02/28/2023 End Date: 02/28/2023						Out of Order Rooms User: Andy Moran Date: February 26, 2024 Time: 11:04 AM	
Room Type	Room	Begin	End Date	Day	Reason	Time stamp	User Name
K	100	02/28/23	03/02/23	1	Room Model	02/26/24 8:54 AM	Andy Moran
SK	108	02/28/23	03/01/23	1	Room Remodel	11/30/23 2:36 PM	Andy Moran
Totals:				2			

Manager Reports

Managers' Report

This report is one of three reports that can be emailed automatically during the Night Audit (the others being [Batch Settlements](#) and [Transaction Summary](#)) and will include last year's data. When running the report manually, if you do not want to include last year's data, uncheck the box to the left of the Date. You can run this report for any date in the past.

Managers Report

Date: 2/27/23 ☒ Include Last Years Data

Display Method: Screen (HTML) ▼

Submit

The Managers Report is a collection of other reports that give an overview of the property's performance. It contains the following six sections:

1. Charge and payment totals for today, MTD (month-to-date), YTD (year-to-date), LYSD (last year same day), LYMTD (last year month-to-date), and LYYTD (last year year-to-date):

* AutoClerk Cloud University				Manager's Report		
100 Main Street Phoenix, Arizona 85027 (623) 780-6000				User:	Andy Moran	
Date: 01/19/2024				Date:	February 26, 2024	
				Time:	12:20 PM	
Folio Charges / Income	Today	MTD	YTD	LYSD	LYMTD	LYYTD
Room	\$2,409.99	\$24,416.88	\$47,572.31	\$110.00	\$9,948.17	\$13,727.47
Tax	\$273.87	\$2,827.69	\$5,953.08	\$16.50	\$1,188.51	\$1,536.58
F&B	\$0.00	\$143.25	\$480.65	\$0.00	\$0.00	\$0.00
Conf	\$0.00	\$303.00	\$315.00	\$0.00	\$550.00	\$850.00
Misc	\$0.00	\$12.00	\$464.59	\$0.00	\$369.00	\$369.00
Sundry Shop	\$0.00	\$1.50	\$39.50	\$0.00	\$0.00	\$0.00
Room Damage	\$0.00	\$200.00	\$200.00	\$0.00	\$0.00	\$0.00
Pet Fee	\$0.00	\$60.00	\$345.00	\$0.00	\$0.00	\$0.00
Tony	\$0.00	\$0.00	\$1.00	\$0.00	\$0.00	\$0.00
Debit Balance	\$0.00	\$335.85	\$335.85	\$0.00	\$0.00	\$0.00
Total	\$2,683.86	\$28,300.17	\$55,706.98	\$126.50	\$12,055.68	\$16,483.05
Payments	Today	MTD	YTD	LYSD	LYMTD	LYYTD
Cash	-\$9,682.17	-\$31,015.20	-\$53,977.16	\$0.00	-\$10,037.98	-\$13,457.09
Accounts Category	-\$123.15	-\$2,419.78	-\$10,636.54	\$0.00	-\$1,365.97	-\$2,072.98
VCC	\$0.00	-\$956.05	-\$2,085.29	\$0.00	-\$57.50	-\$57.50
COMP	\$0.00	\$0.00	\$0.00	\$0.00	-\$366.30	-\$366.30
Test	\$0.00	\$0.00	-\$113.00	\$0.00	\$0.00	\$0.00
Credit Balance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
CARD	\$0.00	-\$1,108.10	-\$1,108.10	\$0.00	\$0.00	\$0.00
Total	-\$9,805.32	-\$35,499.13	-\$67,920.09	\$0.00	-\$11,827.75	-\$15,953.87

2. Ledger Totals for the Guest, Advance Deposit, and City Ledgers.

Ledger	Beginning Balance	Today's Debits	Today's Credits	Ending Balance	LY Today's Debits	LY Today's Credits	LY Ending Balance
Guest Ledger	\$ 888.49	-\$ 9,826.96	\$ 2,606.50	-\$ 6,331.97	\$ 0.00	\$ 126.50	\$ 4,662.33
Advance Deposit Ledger	-\$23.85	-\$873.22	\$973.22	\$76.15	\$0.00	\$0.00	-\$110.00
City Ledger	\$1,095.42	-\$1.00	\$123.15	\$1,217.57	\$0.00	\$0.00	\$6,981.24
Ledger Totals	\$1,960.06	-\$10,701.18	\$3,702.87	-\$5,038.25	\$0.00	\$126.50	\$11,533.57

3. Occupancy statistics for today, MTD, YTD, LYSD, LYMTD, and LYYTD:

Occupancy	Today	MTD	YTD	LYSD	LYMTD	LYYTD
Occupied	10	97	235	1	99	128
Occupied Percent	9.80 %	5.05 %	2.91 %	0.92 %	4.78 %	1.47 %
ADR	\$241.00	\$251.72	\$202.44	\$110.00	\$100.49	\$107.25
REVPAR	\$23.63	\$12.72	\$5.89	\$1.01	\$4.80	\$1.57
Adults	13	108	267	1	114	144
Children	1	4	6	0	0	0
Infants	1	4	4	0	0	0
Total	15	116	277	1	114	144

4. General statistics:

Statistics	Today	Yesterday	Tomorrow	LY Today	LY Yesterday	LY Tomorrow
Arrivals	8	7	6	0	0	0
Departures	12	3	2	0	0	0
In-House	10	14	14	1	1	1
No Shows	0	0	n/a	0	0	n/a
Reservations	110	7	n/a	0	0	n/a
Cancellations	103	0	n/a	0	0	n/a
Out of Order	0	0	n/a	1	1	n/a

5. City Ledger charges, payments, and balances, including both totals and aging:

City Ledger	Today	MTD	YTD	LYSD	LYMTD	LYYTD
Charges	\$123.15	\$789.09	\$6,848.62	\$0.00	\$1,003.87	\$1,549.63
Payments	-\$1.00	-\$14.07	-\$5,878.55	\$0.00	-\$1,941.77	-\$2,603.02
Balance	\$122.15	\$775.02	\$970.07	\$0.00	-\$937.90	-\$1,053.39
	0-30 days	31-60 days	61-90 days	91-120 days	121+ days	
	\$775.02	-\$100.00	\$542.55	\$0.00	-\$361,072.58	
Total Running Balance:	-\$359,855.01					

6. The 14-day forecast includes the date, expected occupied rooms, the occupancy percentage, projected room revenue, and the total number of guests. The totals and averages are calculated at the bottom.

Forecast					
	Date	Occupancy	Occupancy %	Room Revenue	Total Guests
	02/26/21	18	51.4%	\$480.00	6
	02/27/21	1	2.8%	\$100.00	1
	02/28/21	0	0.0%	\$0.00	0
	03/01/21	11	30.6%	\$0.00	0
	03/02/21	0	0.0%	\$0.00	0
	03/03/21	0	0.0%	\$0.00	0
	03/04/21	0	0.0%	\$0.00	0
	03/05/21	0	0.0%	\$0.00	0
	03/06/21	0	0.0%	\$0.00	0
	03/07/21	0	0.0%	\$0.00	0
	03/08/21	0	0.0%	\$0.00	0
	03/09/21	0	0.0%	\$0.00	0
	03/10/21	0	0.0%	\$0.00	0
	03/11/21	0	0.0%	\$0.00	0
	Total	30		\$580.00	7
	Average	2.1	6.0%	\$41.43	0

Occupancy

This report provides statistics by day over a date range and can be run for past, present and future dates.

Occupancy

Start date
End date
Room type
Display Method

Submit

The report shows, per date, the occupancy percentage, number rooms, the number adults/children/infants, room revenue, and ADR (Average Daily Rate). **Note: this report will not display any dates that have a 0% occupancy rate.**

* AutoClerk Cloud University

9565 Egan Highway
, Arizona 85027
3375142253

Start Date: 02/15/2023

End Date: 03/15/2023

Occupancy Report

User: Andy Moran
Date: February 27, 2024
Time: 5:14 AM

Date	Occupancy %	All Room Types	A	C	I	Room Revenue	ADR
02/16/23	9.1%	9	9	0	0	\$ 795.00	\$ 88.33
02/18/23	2.0%	2	2	0	0	\$ 208.00	\$ 104.00
02/20/23	1.0%	1	1	0	0	\$ 79.00	\$ 79.00
02/21/23	4.0%	4	4	0	0	\$ 370.00	\$ 92.50
02/23/23	11.0%	11	6	0	0	\$ 474.00	\$ 43.09
02/24/23	5.0%	5	5	0	0	\$ 510.00	\$ 102.00
02/25/23	3.0%	3	3	0	0	\$ 312.00	\$ 104.00
02/26/23	5.0%	5	5	0	0	\$ 359.77	\$ 71.95
02/27/23	3.0%	3	3	0	0	\$ 201.77	\$ 67.26
02/28/23	3.1%	3	3	0	0	\$ 240.77	\$ 80.26
Totals:	1.6%	47	43	0	0	\$ 3,531.31	\$ 75.13

Forecast Report

This report provides a variety of forecasting information. It can be run for any date span in the past, present and future, however the default filter includes today's business date to 30 days out.

Occupancy Forecast

Start date

2/16/23

End date

2/28/23

☒ Include Projected Group Revenue

Display Method

Screen (HTML)

Submit

The report displays rooms, arrivals, stayovers, departures, unused group blocks, occupancy, number of adults/children/infants, room revenue, ADR, RevPAR, OOO rooms, available rooms and more.

* AutoClerk Cloud University

9565 Egan Highway

, Arizona 85027

3375142253

User: Andy Moran

Date: February 27, 2024

Time: 5:19 AM

Start 02/16/2023

End 02/28/2023

Include Projected Group Revenue

Date	Rooms	Arrivals	Stay Over	Depart Today	Occup Rooms	Unused Group Blocks	Occup %	A	C	I	Room Revenue	ADR	REVPAR	OOO Rooms	Unused Allotment	Avail Rooms
02/16/2023	100	9	0	0	9	0	9.00 %	9	0	0	\$ 795.00	\$ 88.33	\$ 7.95	1	0	90
02/17/2023	100	0	0	8	0	0	0.00 %	0	0	0	\$ 0.00	\$ 0.00	\$ 0.00	1	0	99
02/18/2023	100	2	0	0	2	0	2.00 %	2	0	0	\$ 208.00	\$ 104.00	\$ 2.08	1	0	97
02/19/2023	100	1	0	2	1	0	1.00 %	1	0	0	\$ 0.00	\$ 0.00	\$ 0.00	0	0	99
02/20/2023	100	1	0	0	1	0	1.00 %	1	0	0	\$ 79.00	\$ 79.00	\$ 0.79	0	0	99
02/21/2023	100	4	0	1	4	0	4.00 %	4	0	0	\$ 370.00	\$ 92.50	\$ 3.70	0	0	96
02/22/2023	100	0	0	4	0	0	0.00 %	0	0	0	\$ 0.00	\$ 0.00	\$ 0.00	0	0	100
02/23/2023	100	11	0	0	11	0	11.00 %	11	0	0	\$ 474.00	\$ 43.09	\$ 4.74	0	0	89
02/24/2023	100	0	5	3	5	0	5.00 %	5	0	0	\$ 510.00	\$ 102.00	\$ 5.10	0	0	95
02/25/2023	100	0	3	2	3	0	3.00 %	3	0	0	\$ 312.00	\$ 104.00	\$ 3.12	0	0	97
02/26/2023	100	5	0	3	5	0	5.00 %	5	0	0	\$ 359.77	\$ 71.95	\$ 3.60	0	0	95
02/27/2023	100	1	2	3	3	0	3.00 %	3	0	0	\$ 201.77	\$ 67.26	\$ 2.02	0	0	97
02/28/2023	100	2	1	2	3	0	3.00 %	3	0	0	\$ 240.77	\$ 80.26	\$ 2.41	2	0	95
Totals:	1300	36	11	28	47	0	3.62 %	47	0	0	\$ 3,550.31	\$ 75.54	\$ 2.73	5	0	1248

Reservations

This report summarizes the reservations in the system created over a date range and reports the number of room nights by category selected, which can include Company, Market, Rate Plan, Source, State or Travel Agent.

Reservations	
Reservations by	Market ▼
Created on or after	2/1/23 
Created on or before	2/28/23 
Display Method	Screen (HTML) ▼
Submit	

The report will display the category selected above with the room nights, ADR, Room Revenue, Percentage of Room Revenue, and a summary at the bottom.

* AutoClerk Cloud University 9565 Egan Highway , Arizona 85027 3375142253		Reservations Report User: Andy Moran Date: February 27, 2024 Time: 5:25 AM		
Market	Room Nights	ADR	Room Revenue	% Room Revenue
None	6	\$90.86	\$545.17	9.2%
Corporate	17	\$84.53	\$1,437.00	24.4%
Friends and Family	13	\$64.33	\$836.24	14.2%
Gov/Milt	1	\$79.00	\$79.00	1.3%
Groups	20	\$95.00	\$1,900.00	32.2%
Locals	7	\$69.47	\$486.31	8.2%
Tourist	3	\$204.67	\$614.00	10.4%
	67	\$88.03	\$5,897.72	

Revenue

This report displays room and non-room revenue and their percentage, broken out by the selected category. Categories include Company, Market, Rate Plan, Source, State, Travel Agent, Room Type, and Channel.

Revenue

Revenue by
Start date
End date

Display Method

Source ▼

2/1/23

2/28/23

Screen (HTML) ▼

Submit

By category selected, it will report the revenue by Rooms (room nights, ADR, and room revenue) and non-room revenue (such as meeting rooms, F&B) with percentages of each line and totals.

* AutoClerk Cloud University								Revenue Report	
9565 Egan Highway Arizona 85027 3375142253								User:	Andy Moran
Start Date: 02/01/2023 End Date: 02/28/2023								Date:	February 27, 2024
								Time:	5:28 AM
Source	Room Nights	ADR	Room Revenue	% Room Rev.	Non-Room Revenue	% Non-Room Rev.	Total Revenue	% Total Rev.	
FRNDREF	1	\$ 45.00	\$ 45.00	1.0%	\$ 0.00	0.0%	\$ 45.00	1.0%	
FRONTDESK	33	\$ 74.34	\$ 2,453.31	56.3%	\$ 0.00	0.0%	\$ 2,453.31	55.2%	
HOTLREF	5	\$ 68.60	\$ 343.00	7.9%	\$ 0.00	0.0%	\$ 343.00	7.7%	
IPHN	3	\$ 93.33	\$ 280.00	6.4%	\$ 0.00	0.0%	\$ 280.00	6.3%	
None	0	\$ 0.00	\$ 0.00	0.0%	\$ 36.00	41.9%	\$ 36.00	0.8%	
PSBM00024UG	1	\$ 52.23	\$ 52.23	1.2%	\$ 0.00	0.0%	\$ 52.23	1.2%	
REPEAT	8	\$ 70.63	\$ 565.00	13.0%	\$ 5.00	5.8%	\$ 570.00	12.8%	
TA	1	\$ 0.00	\$ 0.00	0.0%	\$ 0.00	0.0%	\$ 0.00	0.0%	
WALK	9	\$ 68.63	\$ 617.63	14.2%	\$ 45.00	52.3%	\$ 662.63	14.9%	
TOTALS:	61	\$71.41	\$ 4,356.17		\$ 86.00		\$ 4,442.17		

User Activity

This report lists all logins for all users or a single user. This report runs off the calendar date.

User Activity			
Start date	6/25/21		
End date	6/25/21		
User	Select user (optional) ▼		

It reports login date and time in chronological order along with the IP address they accessed your system from.

Demo Hotel Edward				User Activity
1981 North Broadway Walnut Creek, California 94596 925-284-1005				User: Ed Bear - AutoClerk
Start 06/25/2021				Date: July 30, 2021
End Date: 06/25/2021				Time: 2:28 PM
User	Date	Login Time	Host	User IP
Ed Bear - AutoClerk	06/25/2021	11:50:55 AM	ac-prod-myhms-app-	107.129.163.192
Ed Bear - AutoClerk	06/25/2021	12:12:54 PM	ac-prod-myhms-app-	107.129.163.192
Ed Bear - AutoClerk	06/25/2021	12:15:07 PM	ac-prod-myhms-app-	107.129.163.192
Ed Bear - AutoClerk	06/25/2021	12:28:39 PM	ac-prod-myhms-app-	107.129.163.192
Ed Bear - AutoClerk	06/25/2021	01:35:24 PM	ac-prod-myhms-app-	107.129.163.192
Guillermo Raven -	06/25/2021	01:49:56 PM	ac-prod-myhms-app-	146.168.86.43,
TEST-E-Bear	06/25/2021	02:03:31 PM	ac-prod-myhms-app-	107.129.163.192
TEST-E-Bear	06/25/2021	02:06:58 PM	ac-prod-myhms-app-	107.129.163.192

Tax Exempt

This report shows all tax exemptions of room revenue by room number. It can be filtered by date range for any previous month. The "Tax Exempt Mode" can show either reservations that were marked as Tax Exempt, those that were manually adjusted off, or both. It can also display all room taxes or just specific room taxes.

Tax Exempt			
Start date	2/1/23		
End date	2/28/23		
Tax Exempt Mode	Both ▼		
<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> OCCTAX1 <input checked="" type="checkbox"/> OCCTAX2 <input checked="" type="checkbox"/> PARISHTAX <input checked="" type="checkbox"/> SALESTAX			
Display Method	Screen (HTML) ▼ <input type="radio"/> On Screen / Interactive		
<input type="button" value="Generate Report"/>			

The report includes basic information on the guest such as name, room number, and reservation status, and includes the room revenue that was exempt from taxation, the total taxes that were exempted, as well as how the exemption was processed. ("E" means the reservation was set as Tax

Exempt and the taxes were never posted; "M" means the taxes were posted but they were adjusted off manually).

* AutoClerk Cloud University

9565 Egan Highway

, Arizona 85027

3375142253

Start Date:

02/01/2023

End Date:

02/28/2023

Taxes Included:

ALL

Tax Exempt

User:

Andy Moran

Date:

February 27, 2024

Time:

5:35 AM

Room	Type	Folio	Guest	Status	Total Room Revenue	Exempted Taxes	Exempt Type	A	C	I	Arrival	Departure	Nights Included on
243	K	9069869	Chip Jones	IN	\$ 79.00	\$ 7.11	M	1	0	0	02/28/23	03/01/23	1
242	K	9118489	John Adams	IN	\$ 79.00	\$ 14.98	E	1	0	0	02/28/23	03/01/23	1
237	K	7523866	George Washington	OUT	\$ 0.00	\$ 0.01	M	1	0	0	02/12/23	02/13/23	1
999	SK	7522611	Adriana Bolden	OUT	\$ 58.00	\$ 10.99	E	2	0	0	02/09/23	02/10/23	1
					\$ 216.00	\$ 33.09							4

Yield Analysis

This report displays the amount of room revenue, ADR, and room nights over a date span by category over, which can be selected as Source, Market, Rate Plan, Room type or Channel. The report filter defaults to the current month but can be run for any date range. It is normally best run in HTML.

Revenue by

Summary or Detail

Start date

End date

Source

☒ Both
☐ Summary Only
☐ Detail Only

2/1/21

2/28/21

☒ Only those with Revenue
☐ All

The Detail view/section reports the amount of room revenue by filtered category in a table. The far right shows totals per day for room revenue, ADR, and number of room nights.

* AutoClerk Cloud University

9565 Egan Highway
Arizona 85027
3375142253

Yield Analysis Report

User: Andy Moran
Date: February 27, 2024
Time: 5:38 AM

Revenue by Source Code

Start02/01/2023End02/28/2023

2/27/24 3:38 AMPage 1 of 1

Date	FRNDREF	FRONTDESK	HOTLREF	IPHN	PSBM00024UG	REPEAT	TA	WALK	Revenue	ADR	Nights
Feb 09, Thu	0.00	114.00	56.00	0.00	0.00	0.00	0.00	0.00	\$ 170.00	\$ 85.00	2
Feb 11, Sat	0.00	0.00	208.00	0.00	0.00	0.00	0.00	0.00	\$ 208.00	\$ 52.00	4
Feb 12, Sun	0.00	0.00	0.00	0.00	0.00	0.00	0.00	33.62	\$ 33.62	\$ 33.62	1
Feb 13, Mon	33.62	0.00	0.00	0.00	52.23	0.00	0.00	0.01	\$ 85.86	\$ 42.93	2
Feb 14, Tue	11.38	0.00	0.00	0.00	0.00	0.00	0.00	316.00	\$ 327.38	\$ 65.48	5
Feb 15, Wed	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-19.00	-\$ 19.00	\$ 0.00	0
Feb 16, Thu	0.00	716.00	0.00	0.00	0.00	0.00	0.00	79.00	\$ 795.00	\$ 88.33	9
Feb 18, Sat	0.00	0.00	0.00	0.00	0.00	0.00	0.00	208.00	\$ 208.00	\$ 104.00	2
Feb 19, Sun	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$ 0.00	\$ 0.00	1
Feb 20, Mon	0.00	0.00	0.00	0.00	0.00	79.00	0.00	0.00	\$ 79.00	\$ 79.00	1
Feb 21, Tue	0.00	0.00	0.00	280.00	0.00	90.00	0.00	0.00	\$ 370.00	\$ 92.50	4
Feb 23, Thu	0.00	237.00	0.00	0.00	0.00	237.00	0.00	0.00	\$ 474.00	\$ 43.09	11
Feb 24, Fri	0.00	510.00	0.00	0.00	0.00	0.00	0.00	0.00	\$ 510.00	\$ 102.00	5
Feb 25, Sat	0.00	312.00	0.00	0.00	0.00	0.00	0.00	0.00	\$ 312.00	\$ 104.00	3
Feb 26, Sun	0.00	161.77	79.00	0.00	0.00	119.00	0.00	0.00	\$ 359.77	\$ 71.95	5

Each column is totaled in green at the bottom of the table.

Feb 27, Mon	0.00	161.77	0.00	0.00	0.00	40.00	0.00	0.00	\$ 201.77	\$ 67.26	3
Feb 28, Tue	0.00	319.77	0.00	0.00	0.00	0.00	0.00	0.00	\$ 319.77	\$ 79.94	4
Total	45.00	2532.31	343.00	280.00	52.23	565.00	0.00	617.63	\$ 4,435.17	\$ 71.53	62

The Summary view/section lists nights, occupancy, and revenue totals by the filtered category.

Source Code	Nights	%Nights	Occupancy	Stays	Revenue	%	ADR
PSBM00024UG	1	1.61 %	0.04 %	1	52.23	1.18 %	52.23
WALK	9	14.52 %	0.32 %	9	617.63	13.93 %	68.63
REPEAT	8	12.90 %	0.29 %	7	565.00	12.74 %	70.63
HOTLREF	5	8.06 %	0.18 %	6	343.00	7.73 %	68.60
FRNDREF	1	1.61 %	0.04 %	1	45.00	1.01 %	45.00
TA	1	1.61 %	0.04 %	1	0.00	0.00 %	0.00
FRONTDESK	34	54.84 %	1.21 %	24	2532.31	57.10 %	74.48
IPHN	3	4.84 %	0.11 %	3	280.00	6.31 %	93.33
Total	62	100 %	2.21 %	52	\$ 4,435.17	100 %	\$ 71.53

Accounting Reports

Guest Ledger

This report lists the open balances for all folios and is also used to audit that the balance and folio totals are matching. It can be run for any date in the past or the current business date, and defaults to yesterday's date.

Guest Ledger

Date
Sort By

Display Method

2/27/23

Room number ▼

☒ Show folios with zero balances

Screen (HTML) ▼

Submit

The **Total** and **Ending Balance** are calculated using two different methods using unrelated data:

- The **Total** field adds up the balances listed vertically in the ledger.
- The **Ending Balance** is calculated horizontally, adding the beginning balance of the day (which is also the ending balance of the night before) with Today's Debits and Today's Credits, resulting in the Ending Balance.

Because these two numbers are calculated differently, the report allows the hotel to ensure the system is posting finances correctly. **Therefore, the two balances should always be the same.** If they are not matching, please contact [AutoClerk Cloud Support](#).

* AutoClerk Cloud University

9565 Egan Highway
, Arizona 85027
3375142253

Report02/27/2023

User:Andy Moran

Date:February 27, 2024

Time:5:43 AM

Room Type	Name	Confirmation	Status	Rate	Pay	Arrival	Departure	Balance
	HOUSEMarketplace	8879853		\$ 0.00	Snac			\$ 0.00
	GROUPArizona	ZZ10000293644		\$ 0.00		02/26/23	02/28/23	\$ 235.52
	HOUSEHouse	7534910		\$ 0.00	Snac			\$ 0.00
100	KWaters	ZZ10075286895	C/O	\$ 40.00	DIRE	02/26/23	02/28/23	\$ 47.58
125	KRosenbaum	ZZ10075428837	C/I	\$ 79.00	CAS	02/27/23	02/28/23	\$ 93.98
248	QQCulley	ZZ10075286930	C/I	\$ 82.77	DIRE	02/26/23	03/01/23	\$ 98.45
Total								\$ 475.53

Beginning Balance

Today's Debits

Today's Credits

Ending Balance

Guest Ledger

\$ 569.51

-\$ 333.99

\$ 240.01

\$ 475.53

In House Guest Ledger

This report is the only report that defaults to Excel as the Display Method. This report may be downloaded as a CSV file if you use a different spreadsheet software than Excel. It defaults to the current hotel date, sorted by room number, but it can be set for any date. There is an option to toggle showing in-house guests only or include both new arrivals and checked out guests for that date.

In House Guest Ledger

Date:

Sort by: ☒ Room number
☒ In-House only (Exclude new arrivals and checked out guests.)

Display Method:

Submit

This report will display each guest on a line with basic guest information, and include balances of primary and secondary folios, the group master folio balance, the projected income, and any deposits paid.

AutoClerk Cloud University											In House Guest Ledger Report										
9565 Egan Highway Arizona 85027 3375142253											User: Andy Moran Date: 2/27/2024 Time: 5:45:26 AM										
System Date: 2/27/2023 Sort By: RoomNumber																					
Room #	Room Type	Old Room #	Date Moved	Guest Name	Payment Type	Rate	A	C	I	Confirmation #	Group	Group Master Balance	Projected Income	Deposit(s) Paid	Folio Balance	Secondary Folio Balance	Authorization Amount	Arrival Date	Departure Date	Number of Previous stays	
✓ 125 K				Rosenbaum, Jake	Cash	\$ 79.00	1	0	0	ZZ10075428837		\$ -	\$ 93.98	\$ -	\$ -	\$ -	\$ -	2/27/2023	2/28/2023		
248 QQ				Culley, Rick	Direct Bill	\$ 82.77	1	0	0	ZZ10075286930		\$ -	\$ 295.35	\$ -	\$ -	\$ -	\$ -	2/26/2023	3/1/2023		
Totals:						\$ 161.77	2	0	0			\$ -	\$ 389.33	\$ -	\$ -	\$ -	\$ -				
Total Rooms						2															

City Ledger

This report is similar to the Guest Ledger report, however, only displays direct bill accounts that have balances. The report can be run for any date in the past or the current business date, defaulting to yesterday.

* AutoClerk Cloud University

9565 Egan Highway
Arizona 85027
3375142253

Report Date: 02/27/2023

City Ledger

User: Andy Moran
Date: February 27, 2024
Time: 5:52 AM

Company	Un-invoiced Receivables	Open Folios	Invoiced Receivables	Open Folios	Total Receivables
Acme Supply	\$0.00	0	\$187.96	2	\$187.96
BW Free Nights FX	\$47.58	1	\$0.00	0	\$47.58
BW Pay with Points FX2	\$98.45	1	\$0.00	0	\$98.45
BW Travel Card	\$50.00	1	\$0.00	0	\$50.00
Totals:	\$196.03	3	\$187.96	2	\$383.99

	Beginning Balance	Today's Debits	Today's Credits	Ending Balance
City Ledger	\$ 93.98	\$ 0.00	\$ 290.01	\$ 383.99

The **Total** and **Ending Balance** are calculated using two different methods using unrelated data:

- The **Total** field adds up the balances listed vertically in the ledger.
- The **Ending Balance** is calculated horizontally, adding the beginning balance of the day (which is also the ending balance of the night before) with Today's Debits and Today's Credits, resulting in the Ending Balance.

Because these two numbers are calculated differently, the report allows the hotel to ensure the system is posting finances correctly. **Therefore, the two balances should always be the same.** If they are not matching, please contact [AutoClerk Cloud Support](#).

Advance Deposit Ledger

This report is similar to the City Ledger and Guest Ledger reports, however it only displays reservations that have not yet checked in with balances. The report can be run for any date and can be sorted either by Arrival Date or Guest Name.

Advance Deposit Ledger

Date: 2/7/24

Sort By: Arrival Date

Display Method: Screen (HTML)

Submit

The report will display the confirmation number, folio number, arrival date, guest name, DB (total debits), CR (total credits), and NET (balance).

* AutoClerk Cloud University

100 Main Street
Phoenix, Arizona 85027
(623) 780-6000

Report Date:

02/07/2024

Advance Deposit Ledger

User: Zachary Moore
Date: April 29, 2024
Time: 5:37 PM

Conf #	Folio	Arrival	Guest Name	DB	CR	NET
ZZ10060335243	7222118	07/08/23	x, x	\$255.00	\$0.00	\$255.00
ZZ10058225035	6967956	07/19/23	Jira8302, Test	\$53.75	\$0.00	\$53.75
ZZ10059479307	7118552	07/21/23	Android, Metal	\$0.00	-\$100.00	-\$100.00
ZZ10061036769	7305983	08/22/23	Odendahl, 1	\$282.50	\$0.00	\$282.50
ZZ10064718950	7750689	10/23/23	Banquet, Test	\$0.00	-\$2,000.00	-\$2,000.00
ZZ10075645850	9094479	04/01/24	Test, 1	\$137.70	\$0.00	\$137.70
ZZ10079445986	9558701	04/03/24	Buffagni, Alberto	\$5,666.90	\$0.00	\$5,666.90
ZZ10072724383	8731658	05/17/24	Test, Test	\$0.00	-\$111.95	-\$111.95
ZZ000158026G	4214612	10/04/25	test	\$0.00	-\$100.00	-\$100.00
Total:				\$6,395.85	-\$2,311.95	\$4,083.90

Next is the City Ledger, which is typically made up of direct bill charges for that date. The Previous Balance is the ending balance of the ledger from the previous business date. The CL Debits for that date (City Ledger Debits) are typically the reservations that checked out to direct bill accounts. The "CL Credits" may include a form of payment made that day to a City Ledger such as a check, credit card payment, write-off, or statement credit.

City Ledger	
City Ledger Previous Balance	\$2,796.00
CL Debits	
DIRECTBILL	\$946.25
Total Debits	<u>\$946.25</u>
CL Credits	
Total Credits	<u>\$0.00</u>
City Ledger Ending Balance	\$3,742.25

The City Ledger Ending Balance is the difference between the Previous Balance and all Debits and Credits for the day.

City Ledger	
City Ledger Previous Balance	\$93.98
CL Debits	
DIRECTBILL	\$290.01
Total Debits	<u>\$290.01</u>
CL Credits	
Total Credits	<u>\$0.00</u>
City Ledger Ending Balance	\$383.99

Lastly, the Advance Deposit Ledger summarizes direct bill to City Ledger and Applied Deposit to GL (Guest Ledger) for the date.

Advance Deposit Ledger

Adv. Deposit Previous Balance	\$0.00
Direct Bill To City Ledger	\$0.00
Applied Deposit to GL	\$0.00
Today Changes to Advance Deposit	<hr/> \$0.00
Advance Deposits Ending Balance	\$0.00

At the bottom of the Daily Ledgers Report, the three Ledgers' activity for the day is summarized along with their ledger totals for that date at very bottom.

Ledger	Beginning Balance	Today's Debits	Today's Credits	Ending Balance
Guest Ledger	\$ 569.51	-\$ 333.99	\$ 240.01	\$ 475.53
Advance Deposit	\$0.00	\$0.00	\$0.00	\$0.00
City Ledger	\$93.98	\$0.00	\$290.01	\$383.99
Ledger Totals	\$663.49	-\$333.99	\$530.02	\$859.52

City Ledger Aging

This report shows all outstanding totals for City Ledger company accounts and how long the amount has been owed to the hotel. It can display all Companies or one at a time.

City Ledger Aging

Select Company Name

All ▼

Display Method

Screen (HTML) ▼

Submit

The standard categories of 30, 60, 90, and over 120 days are used and the report displays by Company. The Amount column shows the remaining Credit Limit, and the Amount owed shows the amount that is still owed to the hotel. The running total across the days is displayed to the far right.

* AutoClerk Cloud University

9565 Egan Highway
Arizona 85027
3375142253

Reporting:All companies

User:Andy Moran
Date:February 27, 2024
Time:6:16 AM

	Credit Limit	Amount	Amount Owed	Running Total
Company: Acme Supply - 213-555-1234				
120+ Days	\$10,000.00	\$10,000.00	\$0.00	\$0.00
90 Days	\$10,000.00	\$10,000.00	\$0.00	\$0.00
60 Days	\$10,000.00	\$10,000.00	\$0.00	\$0.00
30 Days	\$10,000.00	\$10,000.00	\$0.00	\$0.00
Current	\$10,000.00	\$9,812.04	\$187.96	\$187.96
		Total	\$187.96	
Company: BW Free Nights FX - 623-780-6000				
120+ Days	\$5,000.00	\$5,000.00	\$0.00	\$0.00
90 Days	\$5,000.00	\$5,000.00	\$0.00	\$0.00
60 Days	\$5,000.00	\$5,000.00	\$0.00	\$0.00
30 Days	\$5,000.00	\$5,000.00	\$0.00	\$0.00
Current	\$5,000.00	\$4,904.84	\$95.16	\$95.16
		Total	\$95.16	
Company: BW Pay with Points FX2 - 623-780-6000				
120+ Days	\$5,000.00	\$5,000.00	\$0.00	\$0.00
90 Days	\$5,000.00	\$5,000.00	\$0.00	\$0.00
60 Days	\$5,000.00	\$5,000.00	\$0.00	\$0.00
30 Days	\$5,000.00	\$5,000.00	\$0.00	\$0.00
Current	\$5,000.00	\$4,901.55	\$98.45	\$98.45
		Total	\$98.45	
Company: BW Travel Card - 1				
120+ Days	\$5,000.00	\$5,000.00	\$0.00	\$0.00
90 Days	\$5,000.00	\$5,000.00	\$0.00	\$0.00
60 Days	\$5,000.00	\$5,000.00	\$0.00	\$0.00
30 Days	\$5,000.00	\$5,000.00	\$0.00	\$0.00
Current	\$5,000.00	\$4,950.00	\$50.00	\$50.00
		Total	\$50.00	

There are totals for all accounts at the end of the City Ledger Aging report.

TOTALS				
120+ Days	\$30,000.00	\$30,000.00	\$0.00	\$0.00
90 Days	\$30,000.00	\$30,000.00	\$0.00	\$0.00
60 Days	\$30,000.00	\$30,000.00	\$0.00	\$0.00
30 Days	\$30,000.00	\$30,000.00	\$0.00	\$0.00
Current	\$30,000.00	\$29,568.43	\$431.57	\$431.57
		Total	\$431.57	

Batch Settlements

This report is the same as the [Batch Settlements](#) report in [Daily Reports](#).

Transactions

This report is the same as the [Transactions](#) report in [Daily Reports](#).

Transaction Summary

This report is one of three reports that can be emailed automatically during the Night Audit (the others being [Batch Settlements](#) and [Managers Report](#)). When running the report manually, you may select any past date since you've had the system.

Transaction Summary

Date: 2/27/23

Display Method: Screen (HTML)

Submit

This report lists transactions by Category and totals by Category for Today, MTD, and YTD. Note that the report will show the totals for each transaction (for example, Mastercard or Room Rent) in the Credit Cards category. If a charge has no postings for that day, it will not appear on the report.

* AutoClerk Cloud University		Transaction Summary		
9565 Egan Highway Arizona 85027 3375142253		User:	Andy Moran	
Transaction Summary 02/27/2023		Date:	February 27, 2024	
		Time:	6:18 AM	
Category	Type	TODAY	MTD	YTD
Room				
	Room Rent	\$ 201.77	\$ 3,971.17	\$ 3,971.17
	Late Check-in After	\$ 0.00	\$ 79.00	\$ 79.00
	FX2 Room	\$ 0.00	\$ 19.23	\$ 19.23
	Room Correction	\$ 0.00	\$ -10.00	\$ -10.00
	No Show Charge	\$ 0.00	\$ 56.00	\$ 56.00
	TOTAL Room:	\$ 201.77	\$ 4,115.40	\$ 4,115.40
Cash				
	Cash	-\$ 43.98	-\$ 3,323.62	-\$ 3,323.62
	Check	\$ 0.00	\$ -185.55	\$ -185.55
	TOTAL Cash:	-\$ 43.98	-\$ 3,509.17	-\$ 3,509.17
Tax				
	Occupancy Tax	\$ 8.07	\$ 162.28	\$ 162.28
	Tourism Tax	\$ 10.09	\$ 201.91	\$ 201.91
	Parish Tax	\$ 11.10	\$ 222.20	\$ 222.20
	State Sales Tax	\$ 8.98	\$ 179.81	\$ 179.81
	TOTAL Tax:	\$ 38.24	\$ 766.20	\$ 766.20
Misc				
	Misc Non-Taxable	\$ 0.00	\$ 50.00	\$ 50.00
	TOTAL Misc:	\$ 0.00	\$ 50.00	\$ 50.00
Accounts				
	Direct Bill	-\$ 290.01	-\$ 733.07	-\$ 733.07
	Best Western	\$ 0.00	-\$ 158.53	-\$ 158.53
	Write Off	\$ 0.00	-\$ 5.00	-\$ 5.00
	VISA*****1234	\$ 0.00	-\$ 435.38	-\$ 435.38
	TOTAL Accounts:	-\$ 290.01	-\$ 1,331.98	-\$ 1,331.98

The grand totals for Today, MTD, and YTD are at the bottom of the report.

Category	Type	TODAY	MTD	YTD
	Snacks	\$ 0.00	\$ 21.50	\$ 21.50
	Beverages	\$ 0.00	\$ 1.50	\$ 1.50
	Hot Meal	\$ 0.00	\$ 8.00	\$ 8.00
	Sundries	\$ 0.00	\$ 5.00	\$ 5.00
	TOTAL Marketplace:	\$ 0.00	\$ 36.00	\$ 36.00
	GRAND TOTAL:	-\$ 93.98	\$ 126.45	\$ 126.45

Quarterly Report

This report lists the same data the [Transaction Summary report](#), except instead of specific date it is broken up by 3-month quarters (Jan-Mar, Apr-Jun, Jul-Sep, and Oct-Dec). You can select any year since you've had the system.

Quarterly Report

Date
2022

Display Method
Screen (HTML)

Submit

* AutoClerk Cloud University 9565 Egan Highway , Arizona 85027 3375142253 Hotel Date: 02/28/2023 Year: 2023		Quarterly Report User: Andy Moran Date: February 27, 2024 Time: 6:22 AM			
	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Total
Room					
Room Rent	\$ 4,129.17	\$ 0.00	\$ 0.00	\$ 0.00	\$ 4,129.17
Late Check-in After Audit	\$ 79.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 79.00
FX2 Room	\$ 19.23	\$ 0.00	\$ 0.00	\$ 0.00	\$ 19.23
Room Correction	-\$ 10.00	\$ 0.00	\$ 0.00	\$ 0.00	-\$ 10.00
No Show Charge	\$ 56.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 56.00
**TOTAL:	\$ 4,273.40	\$ 0.00	\$ 0.00	\$ 0.00	\$ 4,273.40
Cash					
Cash	-\$ 3,516.05	\$ 0.00	\$ 0.00	\$ 0.00	-\$ 3,516.05
Check	-\$ 185.55	\$ 0.00	\$ 0.00	\$ 0.00	-\$ 185.55
**TOTAL:	-\$ 3,701.60	\$ 0.00	\$ 0.00	\$ 0.00	-\$ 3,701.60
Tax					
Occupancy Tax	\$ 162.28	\$ 0.00	\$ 0.00	\$ 0.00	\$ 162.28
Tourism Tax	\$ 201.91	\$ 0.00	\$ 0.00	\$ 0.00	\$ 201.91
Parish Tax	\$ 226.55	\$ 0.00	\$ 0.00	\$ 0.00	\$ 226.55
State Sales Tax	\$ 183.33	\$ 0.00	\$ 0.00	\$ 0.00	\$ 183.33
**TOTAL:	\$ 774.07	\$ 0.00	\$ 0.00	\$ 0.00	\$ 774.07
Misc					
Misc Non-Taxable	\$ 50.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 50.00
**TOTAL:	\$ 50.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 50.00
Accounts					
Direct Bill	-\$ 780.65	\$ 0.00	\$ 0.00	\$ 0.00	-\$ 780.65
Best Western Statement	-\$ 158.53	\$ 0.00	\$ 0.00	\$ 0.00	-\$ 158.53
Write Off	-\$ 5.00	\$ 0.00	\$ 0.00	\$ 0.00	-\$ 5.00
VISA*****1234	-\$ 435.38	\$ 0.00	\$ 0.00	\$ 0.00	-\$ 435.38
**TOTAL:	-\$ 1,379.56	\$ 0.00	\$ 0.00	\$ 0.00	-\$ 1,379.56

Travel Agent Commissions

This report will display the calculated travel agent commissions based on the commission rate for each Travel Agent in Setup.

This report can be generated between any two date ranges.

Travel Agent Commissions	
Start date	9/1/20
End date	9/30/20

The report includes the travel agent with the commission rate, the stays for that travel agent are listed with the date, confirmation number, Name, ADR, and the amount of the commission.

**AutoClerk Cloud University		Agent Commissions	
Pine Creek, California 95148		User:	Edward Bear
		Date:	August 02, 2021
		Time:	7:48 AM
Start 09/01/2020			
End Date: 09/30/2020			
01123	Luna Wolves 8832 Glendon Way Rosemead, CA 91770	Commission rate:	10 %
Arrival	Departure	Nights	Confirmation
09/06/2020	09/07/2020	1	ZZ000341266
Name		Rate Code	ADR
Jameson Stevens		MR	300.00
		Amount	\$ 30.00
		Amount due:	\$ 30.00
TOTAL AMOUNT DUE:		\$ 30.00	

This report can be used to calculate payment for individual local travel agents.

Some franchises may have a service that will pay online travel agents (OTAs) on behalf of the hotel, and/or the franchise will bill the hotel.

Interfaces

AutoClerk Cloud has connections available with several systems. For more information about adding interfaces, contact our sales team at sales@autoclerk.com.

Contact Support and Training

AutoClerk Cloud Support is available 24/7. *

Phone: 1.800.365.2585

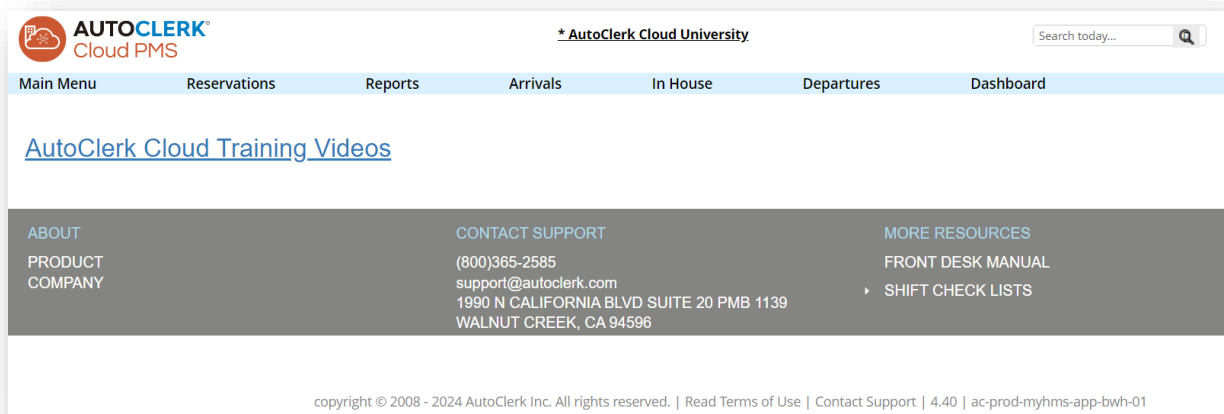
Email: support@autoclerk.com

*If your property is in the process of installing AutoClerk Cloud, and it is before your install date, please contact your AutoClerk Cloud Onboarding team directly for all support needs as our team is still preparing your system.

At the bottom of every page, there is a bar with the “Contact Support” link.

copyright © 2008 - 2024 AutoClerk Inc. All rights reserved. | Read Terms of Use | Contact Support | 4.40 | ac-prod-myhms-app-bwh-01

The **Contact Support** page has a link to our AutoClerk Cloud video library, which can be a great resource for brushing up on a particular topic or training a new staff member.



For **Best Western Branded Hotels only**, these videos can be found by logging into Online Learning also known as OWL from the hotel portal. Once logged in you can watch or assign one of our Learning Path courses or use the AutoClerk Cloud Video Library to watch a specific video.



This learning path is best assigned to a **brand-new employee**. It an hour long of content to show them what they need to know to get started at the front desk, focusing on reservations, check-ins, check-outs, and more



This learning path is for **any hotel employee that will need to use the PMS**. It will include all hotel operations topics a Front Desk and Night Auditor need.



This learning path is for any **management level hotel employee** that needs to know how to use AutoClerk.



AutoClerk Cloud Video Library. This course allows the view to select and watch any video and not have to watch them in a specific order.

In case of internet or power outage, we recommend that you keep a hard copy of the support contact information at the front desk and in the hotel offices.