Welcome

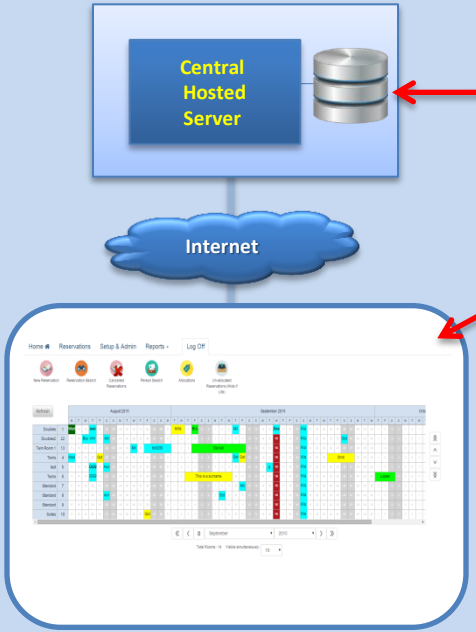
Semper Lite

Thank you for choosing Semper Lite Reservation System

Overview of the System

Overview of the System

Semper Lite Implementation



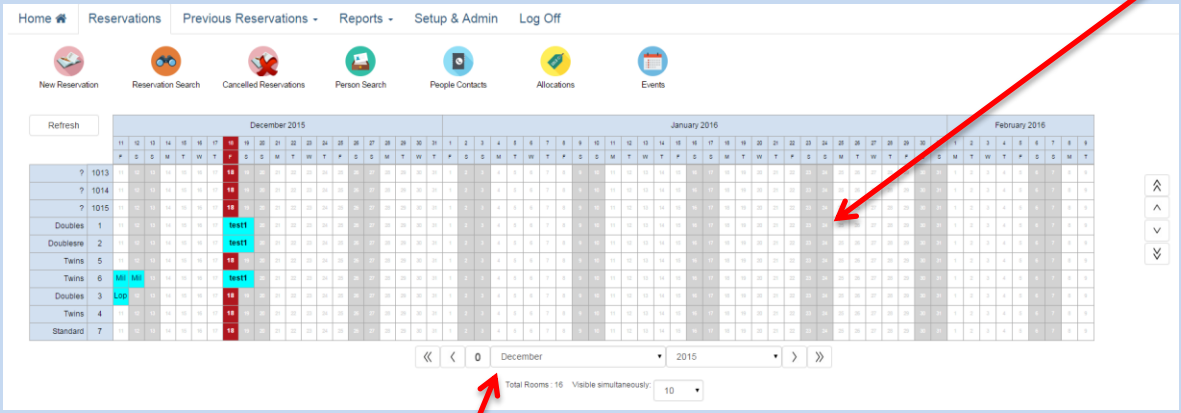
The System Consists of two Components:

1. The database where all your information and reservations are stored.
   This is a secure internet based environment hosted by Semper where your information is safe and cannot be accessed by any un-authorised person.

2. The program you use, is a web browser application used on your computer or tablet.

This program is where you record all your reservations, check your guests in and out, produce invoices etc.
It requires an internet session to be active and cannot operate if your Internet is down.

Overview of the System



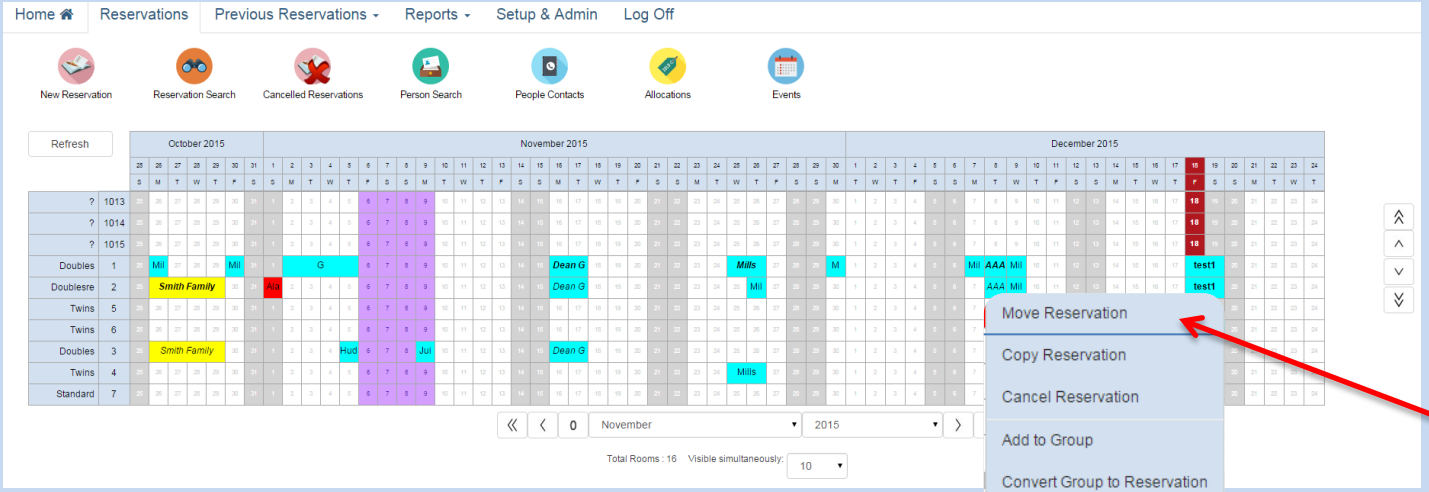
To navigate to a different month or week, use the arrows or select the date picker. The small arrows advance or retreat one week at a time and the large arrows one month.

The O button returns to the current day.

Reservations are recorded on the calendar and managed by you setting a status which is colour coded for ease of identification.
The status indicates the process the reservation is in:

- Blue = Provisional - a deposit is required before the reservation can be confirmed.
- Yellow = Confirmed - a deposit has been paid or there is a company with a pre-arranged contract where no deposit is required.
- Green = In-house reservations.
- Dark Green = Checked-out - Guest has departed and everything has been processed correctly. i.e. no outstanding balance exists and all transactions invoiced.
- Red = Active Out - Guest has departed but an outstanding balance exists or transactions are not invoiced.

Overview of the System



Reservations can be moved from one room to the next.

Point your mouse onto the room and click the right mouse button.

The following screen will be displayed.

Select the Move Reservation option and follow the wizard.

Note: The refresh option re-loads all reservations from your central database

Recording Reservations

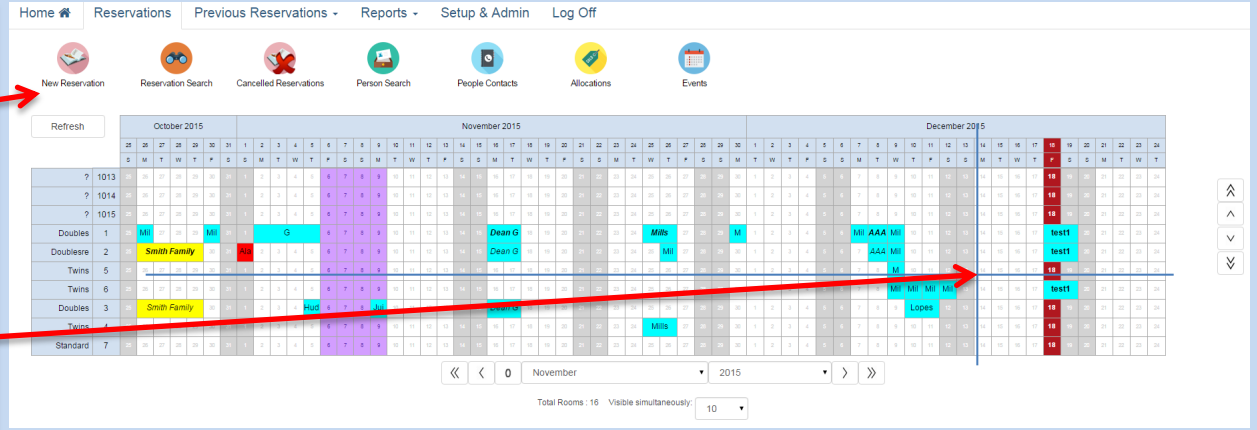
Recording Reservations

To Record a new reservation:

- Select the New Reservations button. This is a step-by-step wizard that is easy to use. Once completed the reservation screen will be displayed with all the details filled in.
- Or Click directly on the calendar where the room and arrival date intersect.

E.g. If you click on the cell indicated here, the arrival date will be set on 14 December and the room selected will be Twins.

The “New Reservation” screen will then be presented for you to complete..
(see next slide)



Recording Reservations

The Reservation Screen:

To record a reservation the minimum you need to enter is:

- The arrival and departure dates.
- The number of adults (and children).
- At least one guest.

Using the Reservation Screen:

(Clicking on the calendar.)

Start at the top and you work your way down.

Click on the first bar called "Reservation Details".
It will then Expand and you can begin entering the bookings information.



Recording Reservations

Reservation Details:

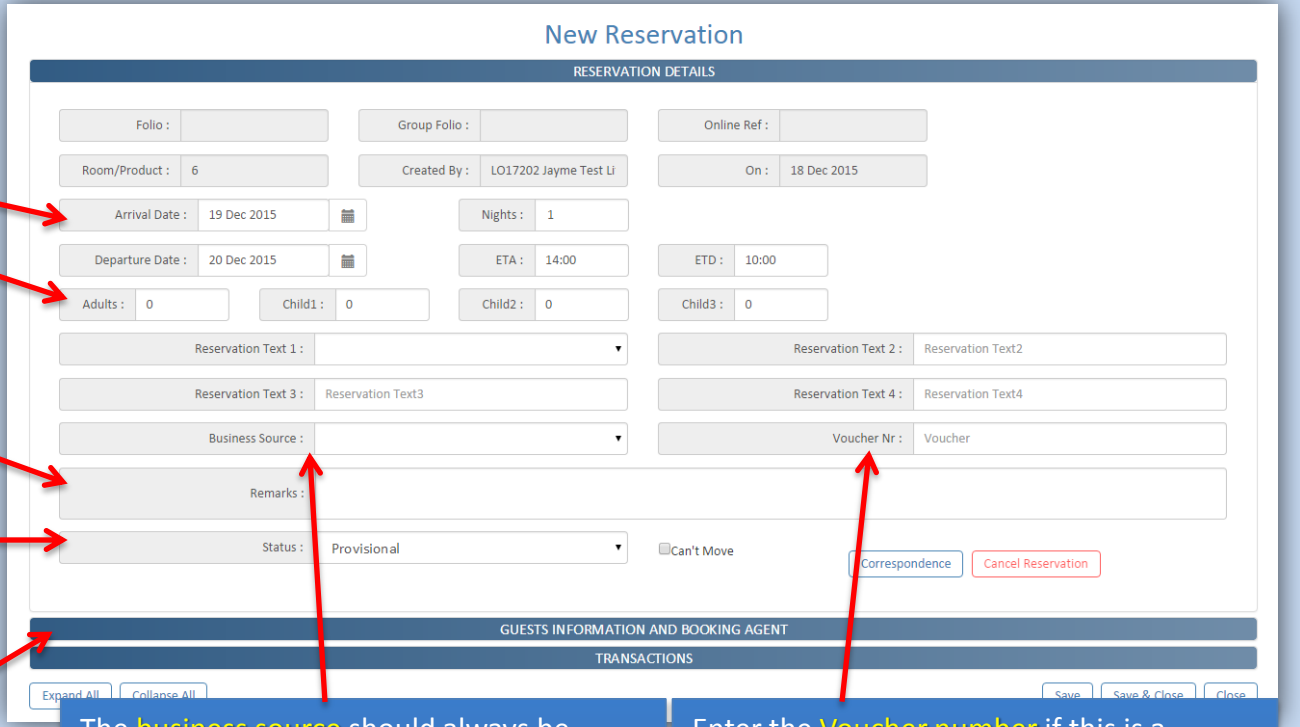
* Remember to fill in all the required fields:
- The arrival and departure dates.
- The number of adults (and children).
- At least one guest (*Done in the next Section)

You may record almost unlimited remarks in the remarks area.

Set the status of the reservation by selecting a value under this drop down.

Once all the information has been filled in, you can move on.

Select the next bar "Guest Information and booking agent".



The business source should always be completed to enable you to analyse where you business comes from.

Enter the Voucher number if this is a company booking where a voucher is issued. This will be displayed on invoice.

Recording Reservations

Guest Information and booking agent:

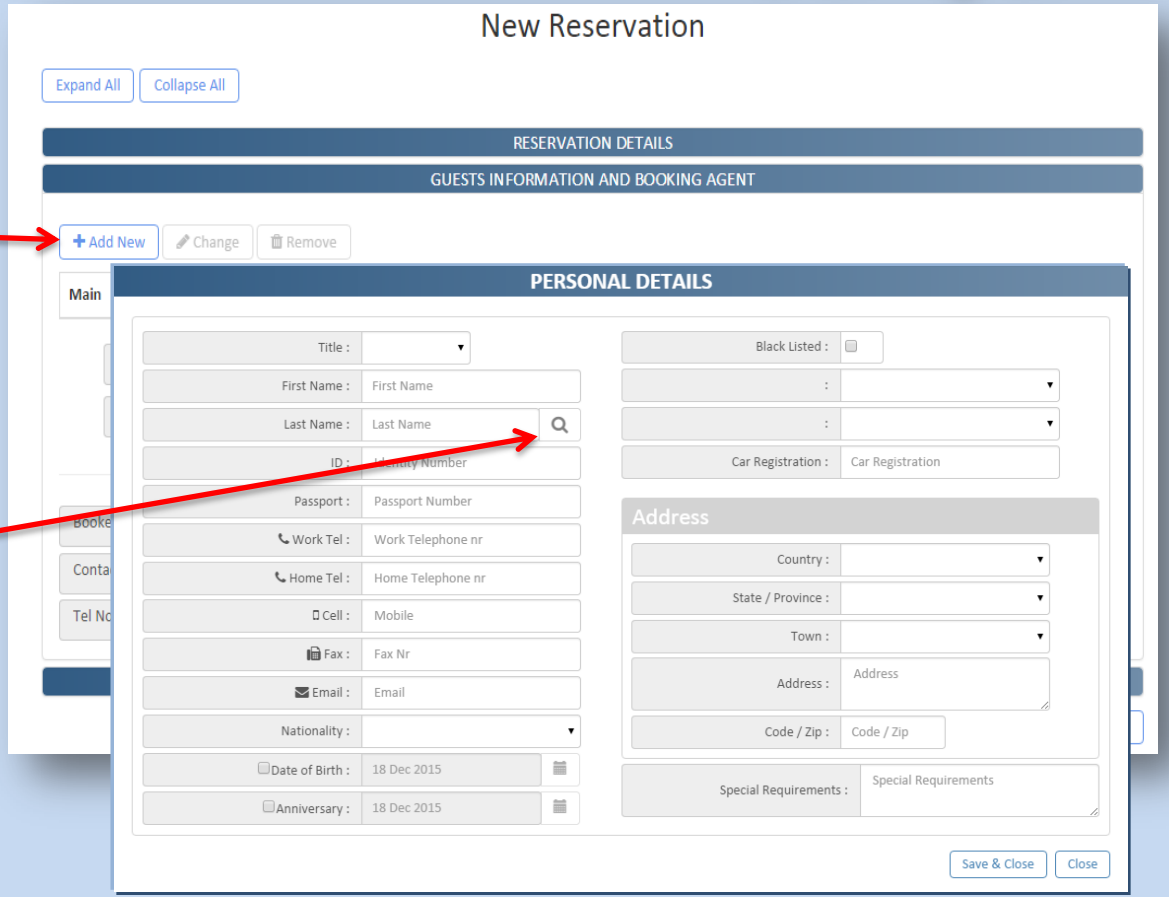
* Remember, you must Select at least one Guest (Using the Add New button).
You can add as many as you like thereafter.

This will Produce a "*Personal Details*" form.

From here you can do one of two things:

- You can search for a existing guest in your database.
- You can create a new guest by filling out the fields and then saving it.

All guests added are saved in your central database.



Recording Reservations

Further look at Personal Details:

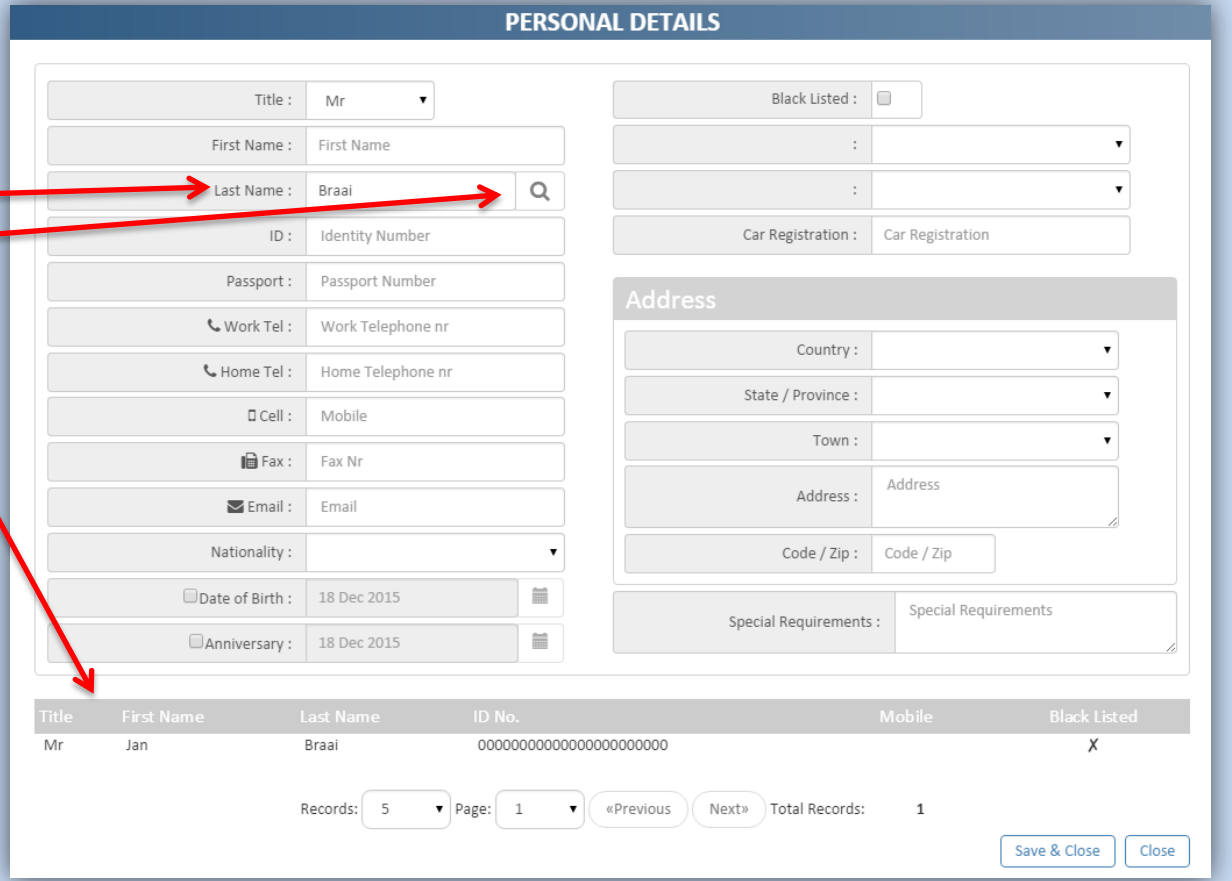
Enter the guest's first name (or part thereof) and/or the last name (or part thereof) then select Search.

This will search your database and return a list that you may select from.

Single click one of the entries to view more information, the fields will fill automatically.

Double click on the name to insert this guest into the reservation.

See next slide ..



Recording Reservations

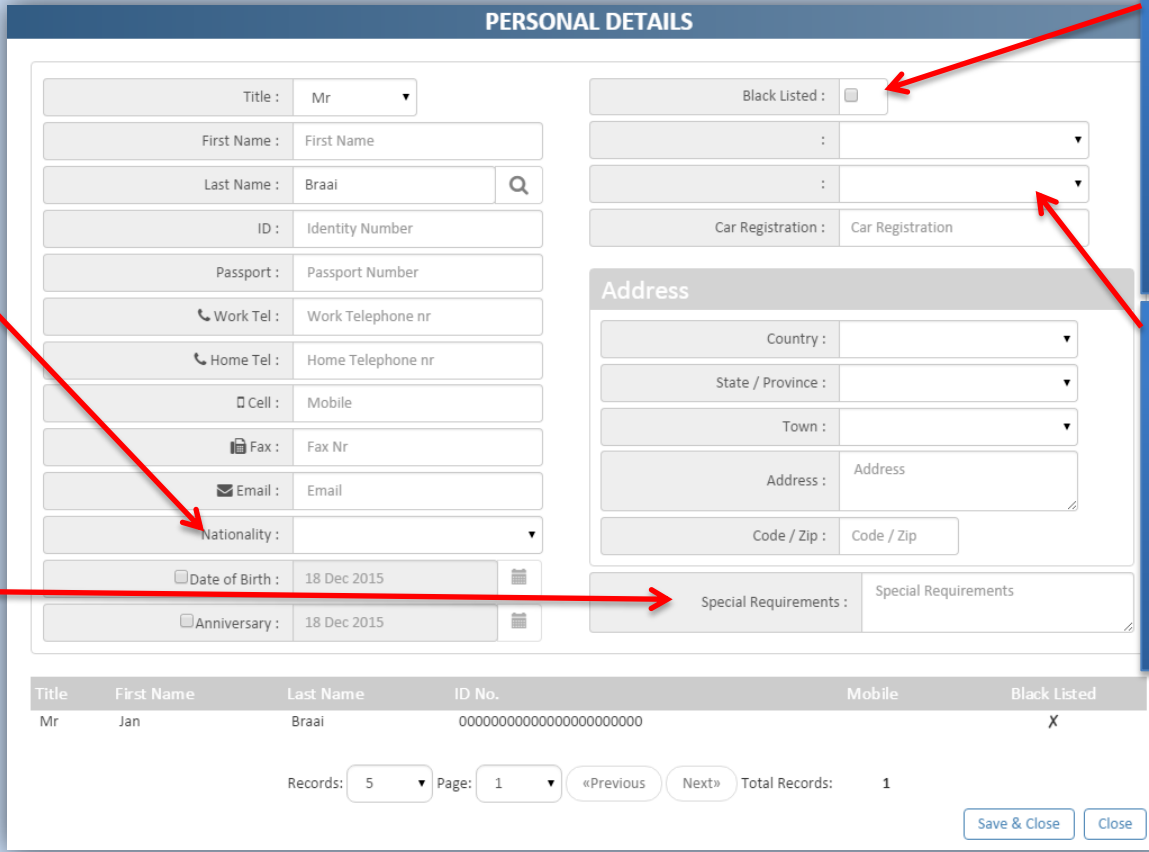
Further look at Personal Details:

This screen contains personal information of the guest.

Nationality should always be captured to enable you to analyse and better understand the demographics of your guests.

Special requirements, if this field is captured it will automatically be inserted in the remarks of your reservation, when the guest is added to the reservation.

Select "Save and Close".



Note: you are able to black list guests. You will be warned when black listed guests are selected for future reservations.

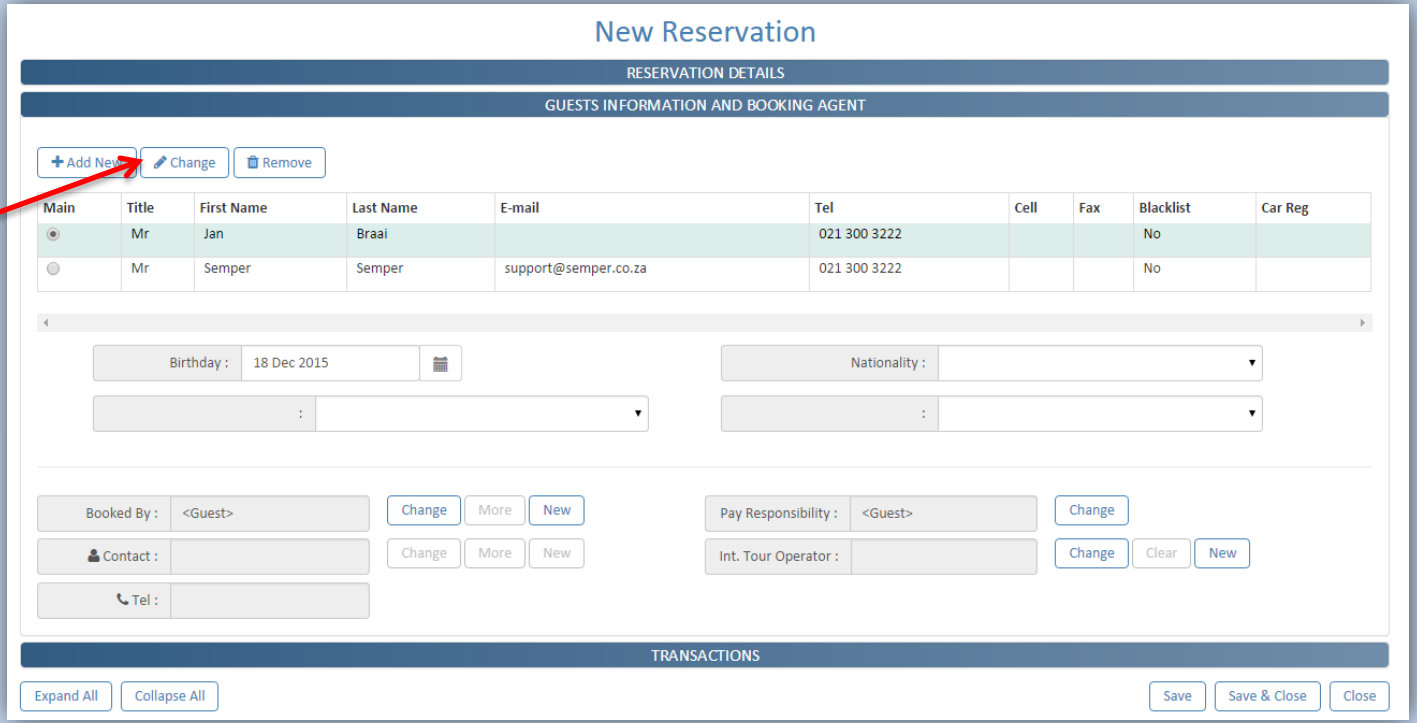
Capture the two guest profile fields that you have setup.

Utilise your guest registration card to obtain this information.

Recording Reservations

Guest Information and booking agent:

If you have captured more than one person on a reservation, single click any of the guests in the grid and then select Change to view details of the guest information or to make changes.



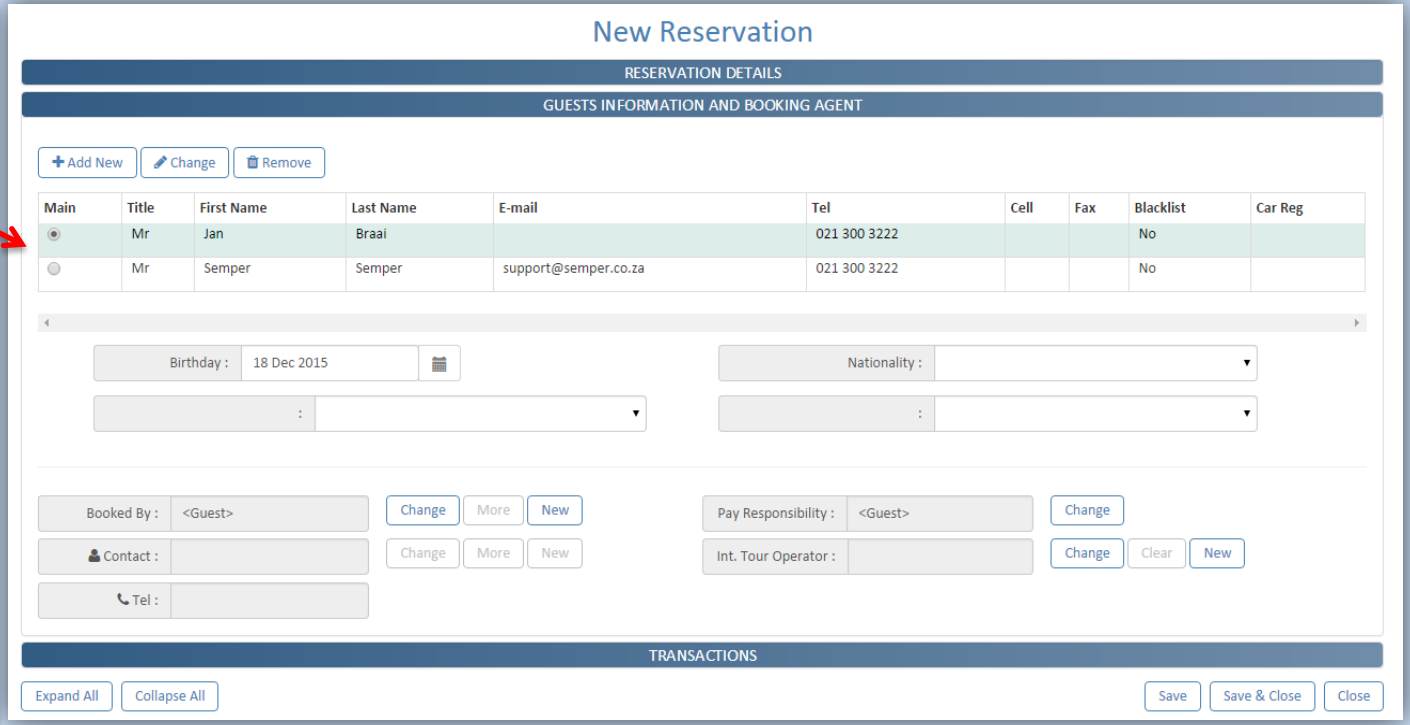
Recording Reservations

Guest Information and booking agent:

The system supports two accounts per reservation.

This is used when a company requests a reservation and/or is going to pay for the accommodation.
One account is then used for the company and the second for the guest.

Important: Both accounts must be processed when the guest checks out (i.e. transactions recorded and invoiced).



Recording Reservations

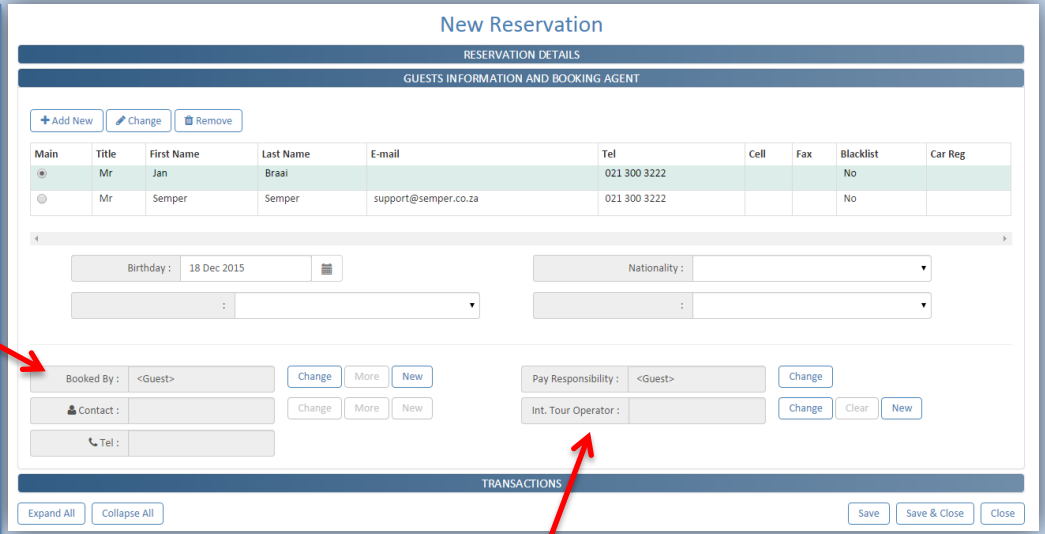
Guest Information and booking agent:

The system requires that you indicate who requested the reservation (the Booked by) and who is paying for the accommodation (Pay Responsibility) .
If a guest requested the reservation, set this value as “Guest”. By default the guest is selected.

If a company (Travel agent, tour operator or corporate) requests the booking then:

1. Insert the company – use the Change button.
2. If the company does not exists in your system, select the New button to first create the company.
3. The company record includes details such as the rate that must be used for this company, any commission that must be applied as well as the deposit % required.
   These values are automatically applied when the company is selected (i.e. the correct rate is inserted).

Select the next bar called “Transactions” to continue.



The International Tour Operator. If the reservation was made by a local agent who received it from an international tour operator.

Recording Reservations

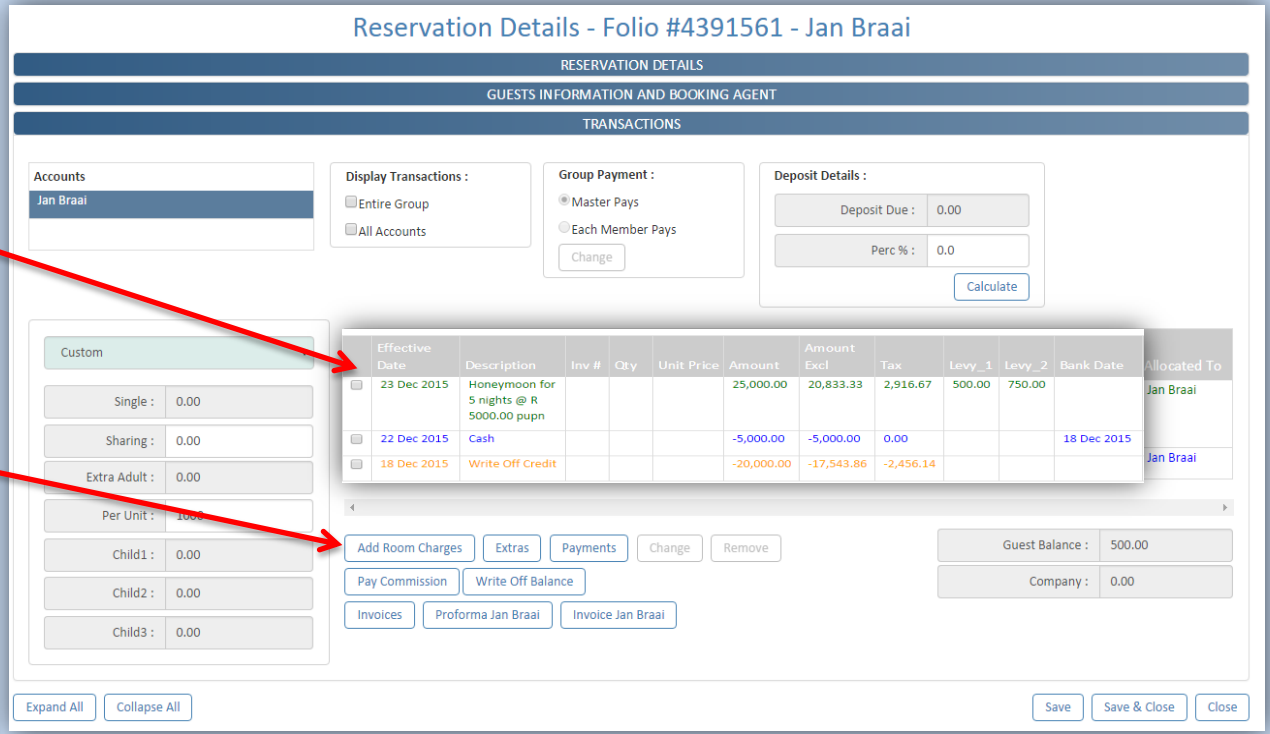
Transactions Screen:

In this section all Transactions are recorded.
Charges (Sales) are coloured Green,
Payments are Blue and
Expenses (Cost of Sale items) are Orange.

When you add the Room charges, the commission is automatically inserted (called trade discount).

When an invoice is produced, commission will be deducted and a net invoice created.

You can switch between the two accounts by selecting one or the other.
The transactions associated with the account will be displayed in the transaction box.



Recording Reservations

Transactions Screen:

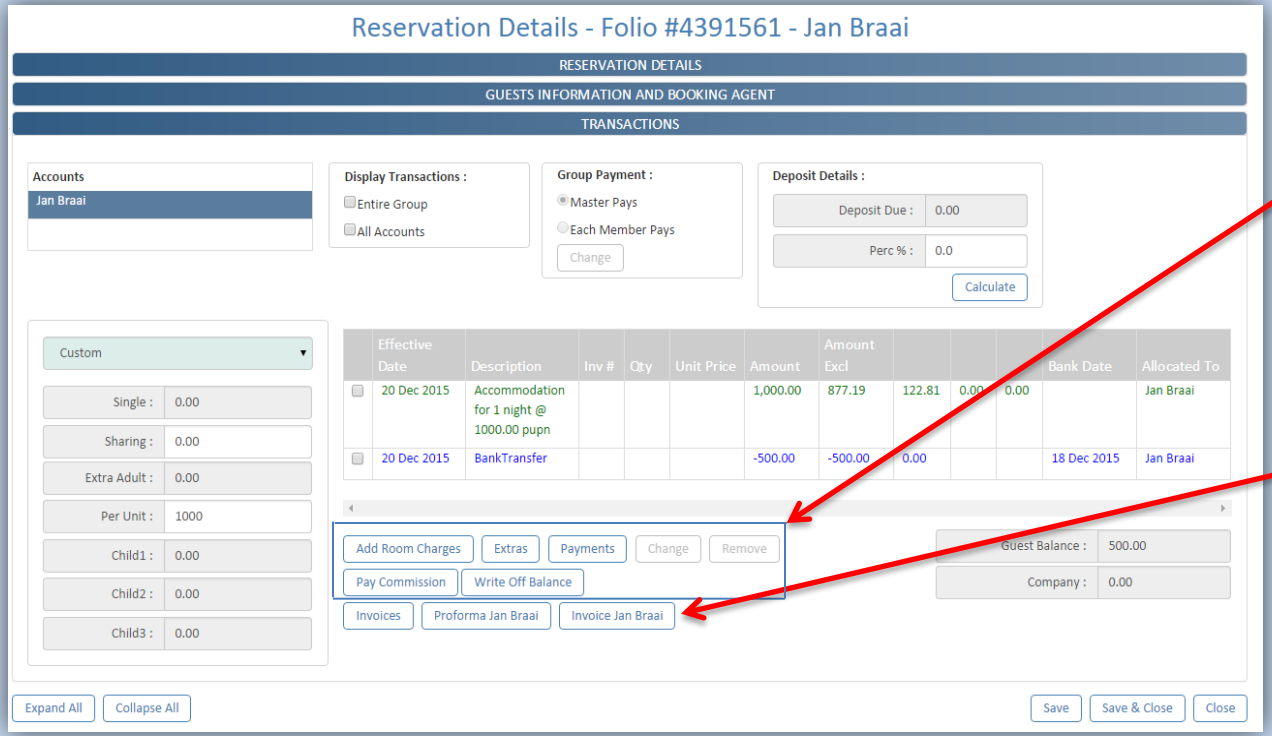
For all reservations there is the option to select a rate from your pre-defined rate tables or you can select a Custom Rate
The custom rate is used when you wish to enter your own price.
If you select a **custom rate**, this price will be used when changes are made to the reservation (increasing the number of nights, adding more guests etc.)

The venue default rate is always loaded when you define a new reservation
You may then select a different rate from this drop down.

For companies, the company rate will automatically be inserted.



Recording Reservations



To record and manage transactions use this group of buttons.

To produce invoices, use these buttons. The pro-forma invoice can be produced as many times as you wish.

The Invoice function assigns a unique invoice number and allocates it to all un-invoiced transactions.

You may add more transactions thereafter and produce additional invoices if you wish.

Recording Reservations



Using the Reservation Screen:

When you are satisfied that all the details are correct you can click on "*Save and Close*".

Managing Reservations

Managing Reservations

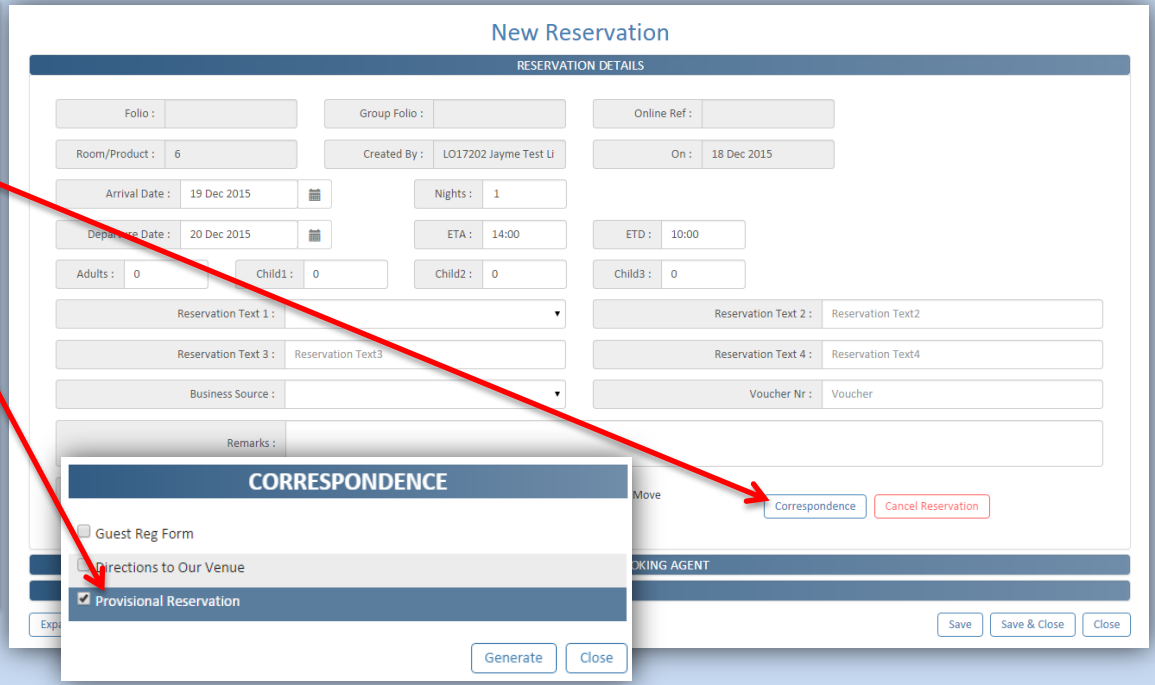
Deposit Collection:

To collect your deposit, generate the Provisional Reservation document which you will find in the Correspondence documents.
This document is designed to inform the guest (or company) that a provisional reservation has been recorded and a deposit is required to confirm.

Make sure you select the correct document.

Note: Documents can be customised.

Generate the document and email it to the guest or company that requested the booking.



Managing Reservations

Deposit Collection and Confirmations:

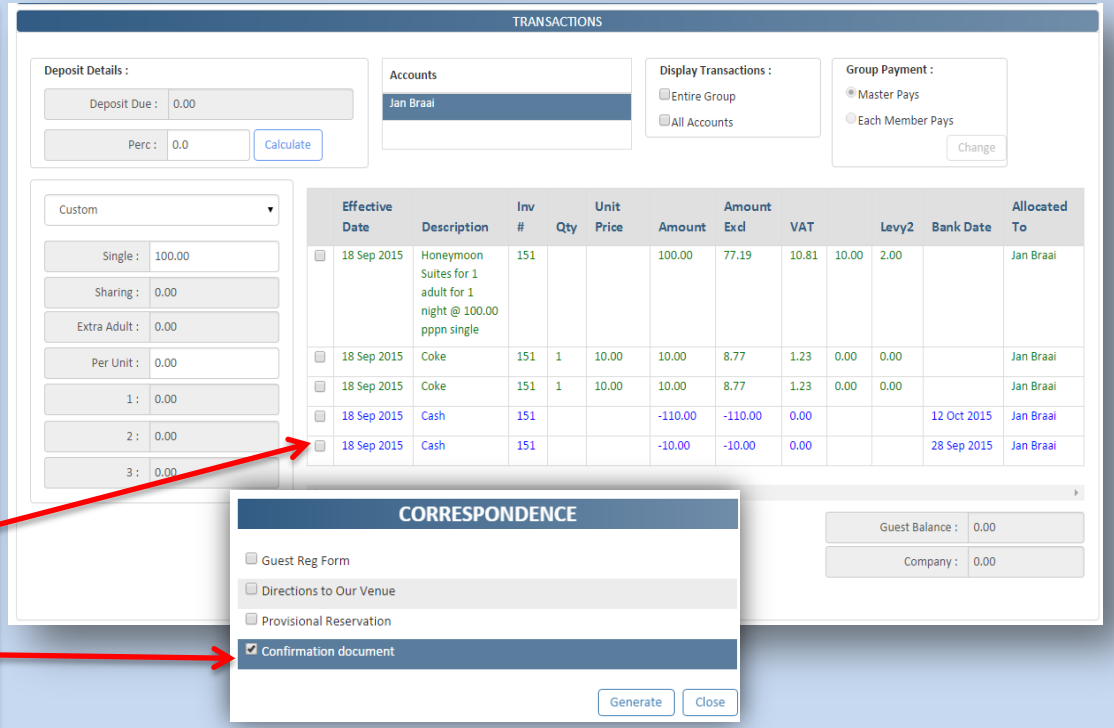
Monitor all provisional reservations (coloured in blue on your calendar screen) and follow up to ensure deposits are paid.

You can also use the report labelled Reservations by status. Select the provisional status which will produce a list of all reservations where deposits are required.

Cancel reservations that will not materialise.

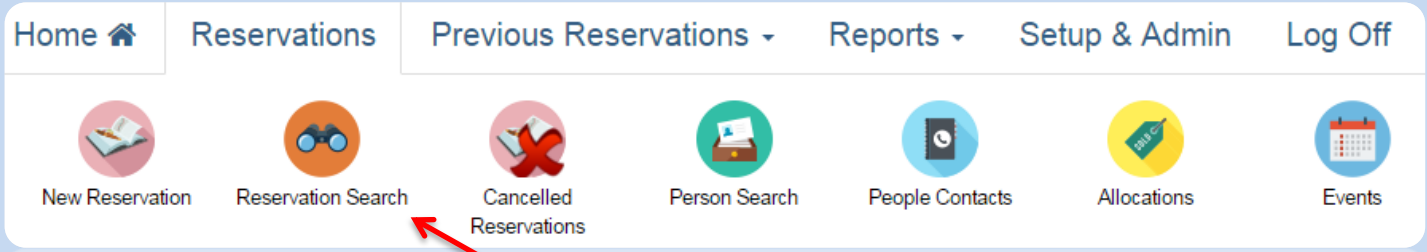
Record deposit payments directly on the reservation and change the status to Confirmed.

Select the Correspondence documents. Generate a Confirmation document and email it to the guest or company.



Checking in Guests

Checking in Guests



Checking in your guest:

Locate the guest that is checking in. Use the Reservation Search facility if you are unable to locate them on the calendar screen.
Open the reservation.

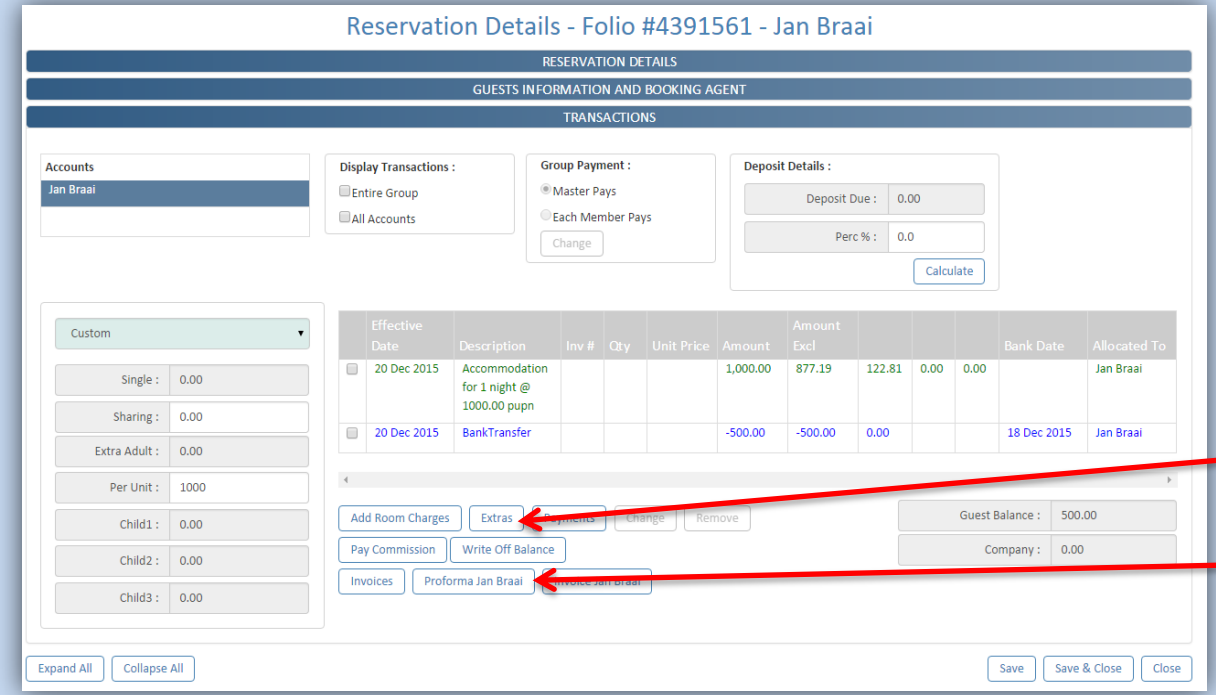
Select correspondence documents as shown previously (slide 22) and generate the Guest registration form.

The guest must complete and sign this form.
Once they have complete the form, return to the reservation and high-light the guest's name, then select Change and capture the guests information from the registration form.

Change the status of the reservation to In-House.

During the Guests Stay

During the Guests stay



During the guests Stay:

Record any extras purchased.

You can produce a pro-forma invoice as often as you please which will enable your guest to view details of their account.

Departure of the Guest

Departure

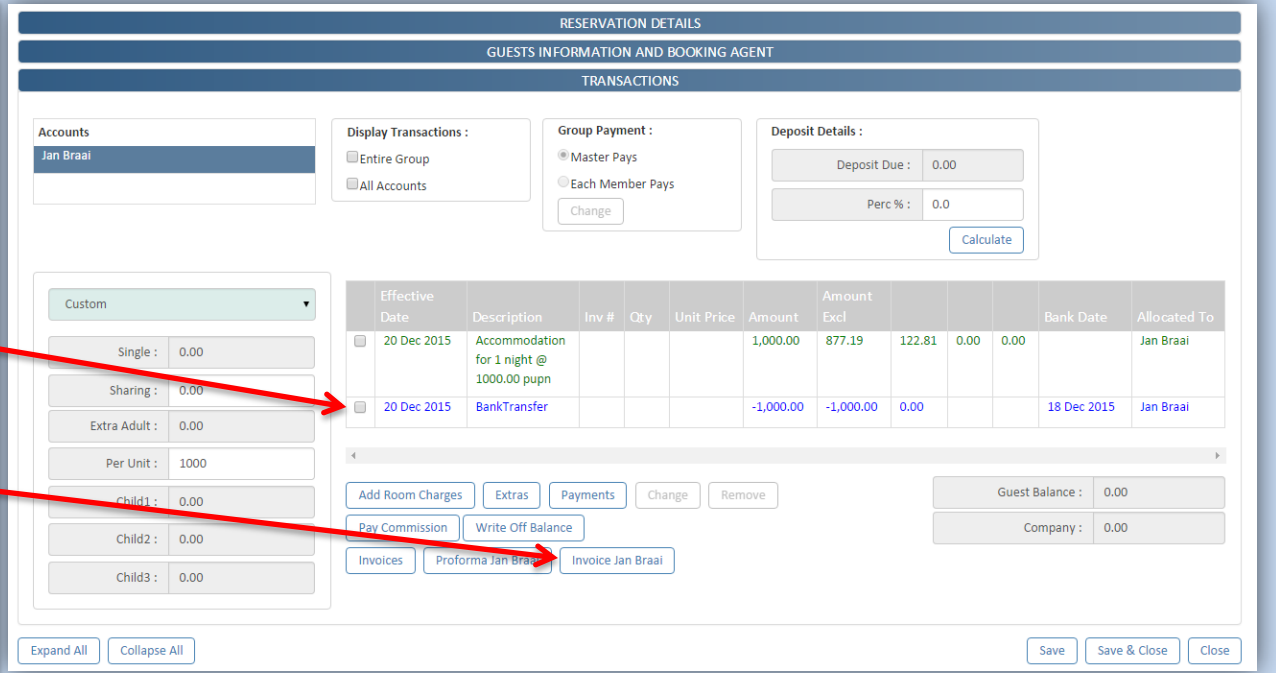
Departure of the guests:

On the day of departure:

- Produce a pro-forma invoice and hand it to the guest for verification and payment.
- Record the final Payment.
- Verify that the balance is zero.
- Invoice all transactions.

* From the "*Reservation details*" screen Change the status to Checked-out.

* If an outstanding balance exists or all charges have not yet been invoiced, then the reservation status can only be set to Active-Out.



Departure

Departure of the guests – Company Account:

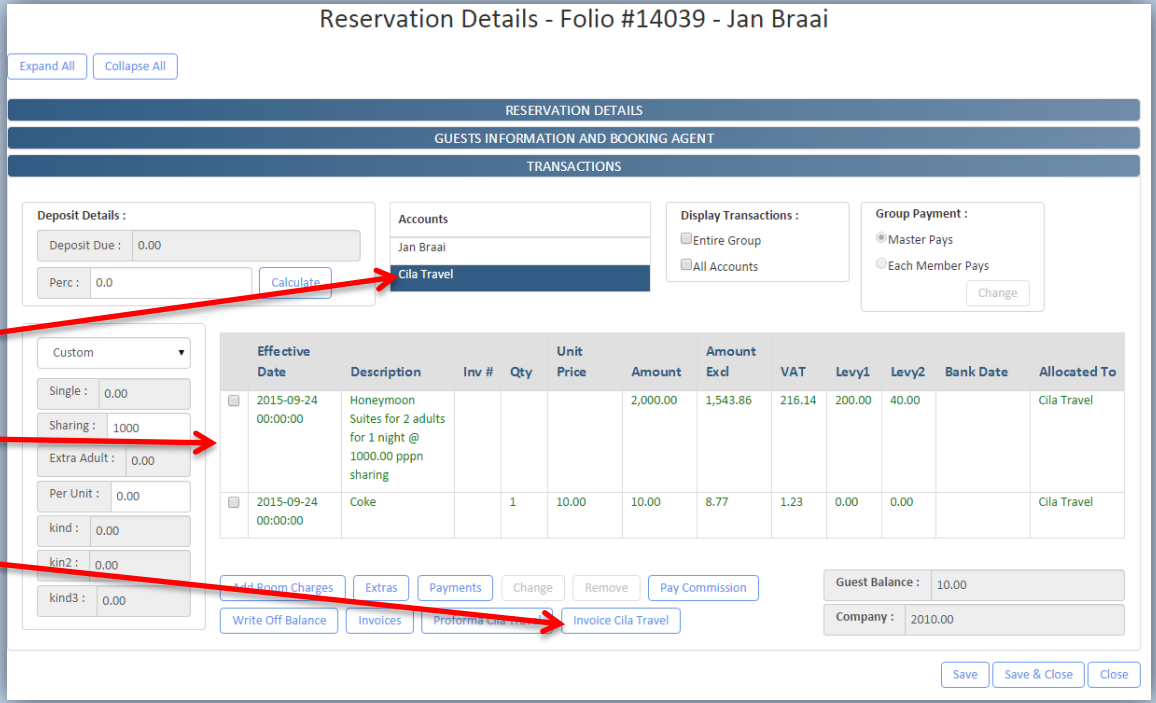
If there are two accounts
(e.g. a travel agent or corporate who is paying the accommodation) then the company account must be processed as follows:

High-light the company account.
All transactions allocated to the company will be displayed in the transaction grid.

Invoice the account and email it to the company for payment (if a balance is outstanding).

* From the "*Reservation details*" screen, Change the status to Checked-out.

* If an outstanding balance exists or all charges have not been invoiced, then the reservation status can only be set to Active-Out.



Group Reservations

Group Reservations

Making Group Reservations:

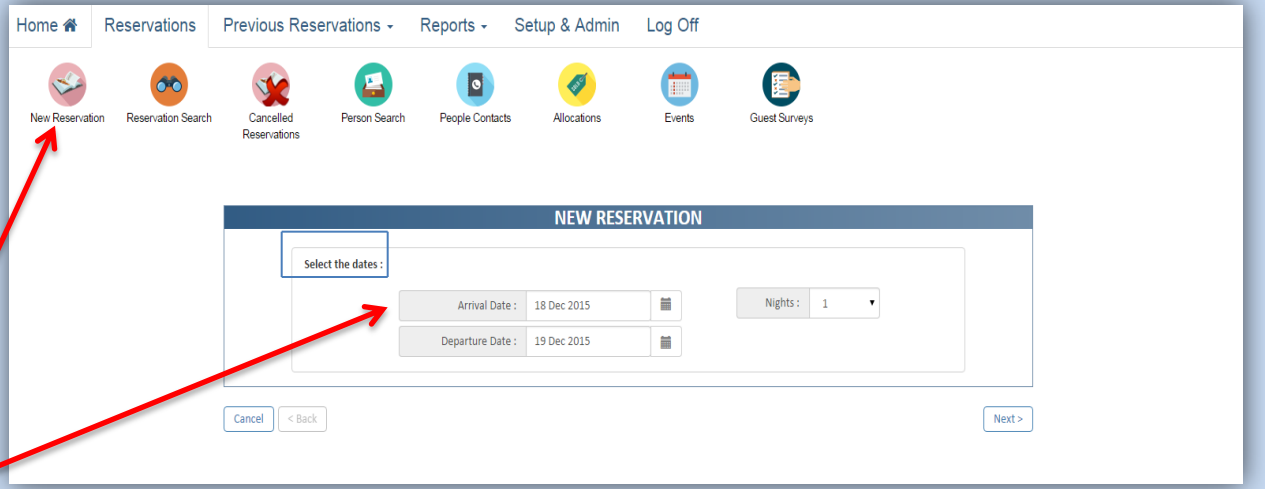
Up to now we have only worked with single room reservations.

Groups are used when more than one room was required.

To record a group booking, select the "New Reservation" wizard.

Enter the arrival and departure date for the entire group.

If some members arrive or depart on different dates, this can later be changed once the group has been recorded.



Group Reservations

Making Group Reservations:

Only available rooms are displayed here.
Select the rooms for the group.



Group Reservations

Making Group Reservations:

The rooms selected are displayed on this screen.

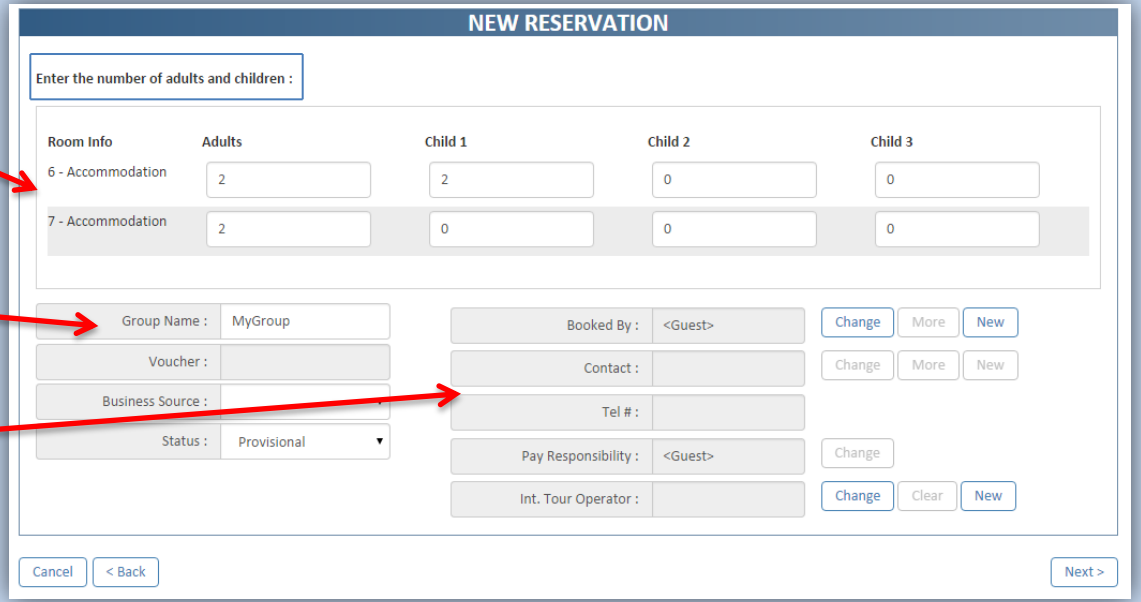
Enter the number of adults and/or children in each room.

Enter the group name. This can be any name that enables you to uniquely identify the group

Set the booked by and pay responsibility, as with a single reservation.

Remember to add in the business source.

Select “Next” which will take you to the “Rates” screen.



Group Reservations

Making Group Reservations:

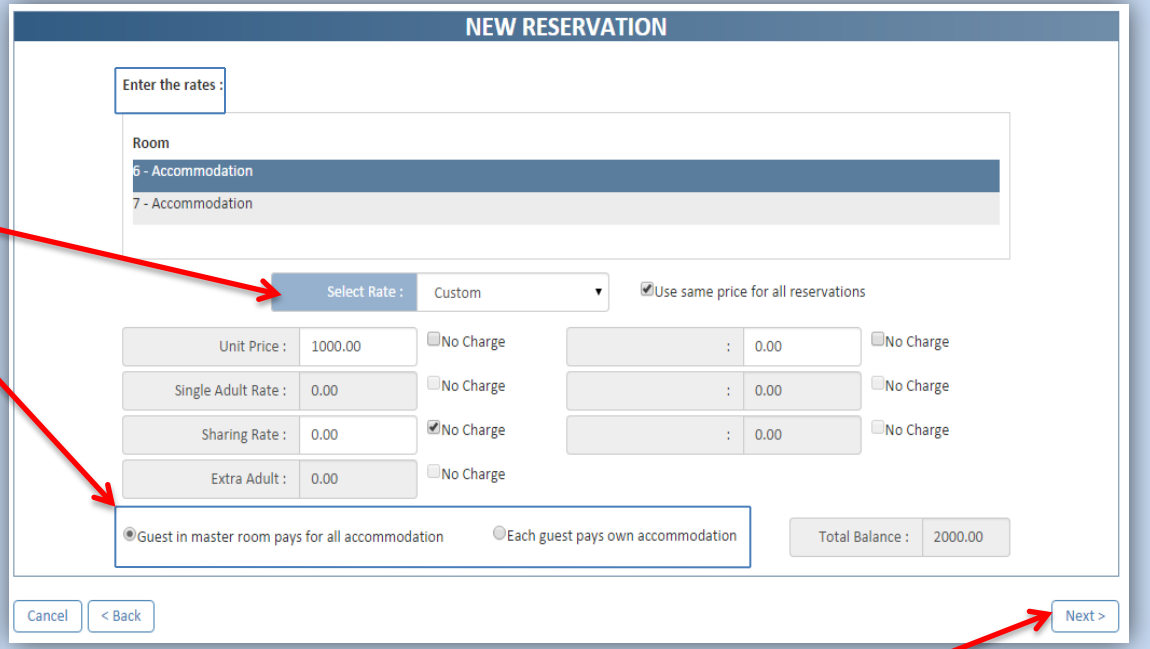
The rooms selected are displayed on this screen.

Select the Rate that must apply to the group.

Indicate how accounts and payment must be dealt with for the group.

One account for all accommodation for all rooms (i.e. Master Room pays all accommodation).
Or
Each room pays their own accommodation.
This can later be changed if not correct.

Irrespective of which option is chosen, you will always be able to record extra sales against each member for which they will be responsible for paying.



Select Next which will display a summary screen where you can select “finish” to save the reservation on the calendar.

Managing Group Reservations

Group Reservations

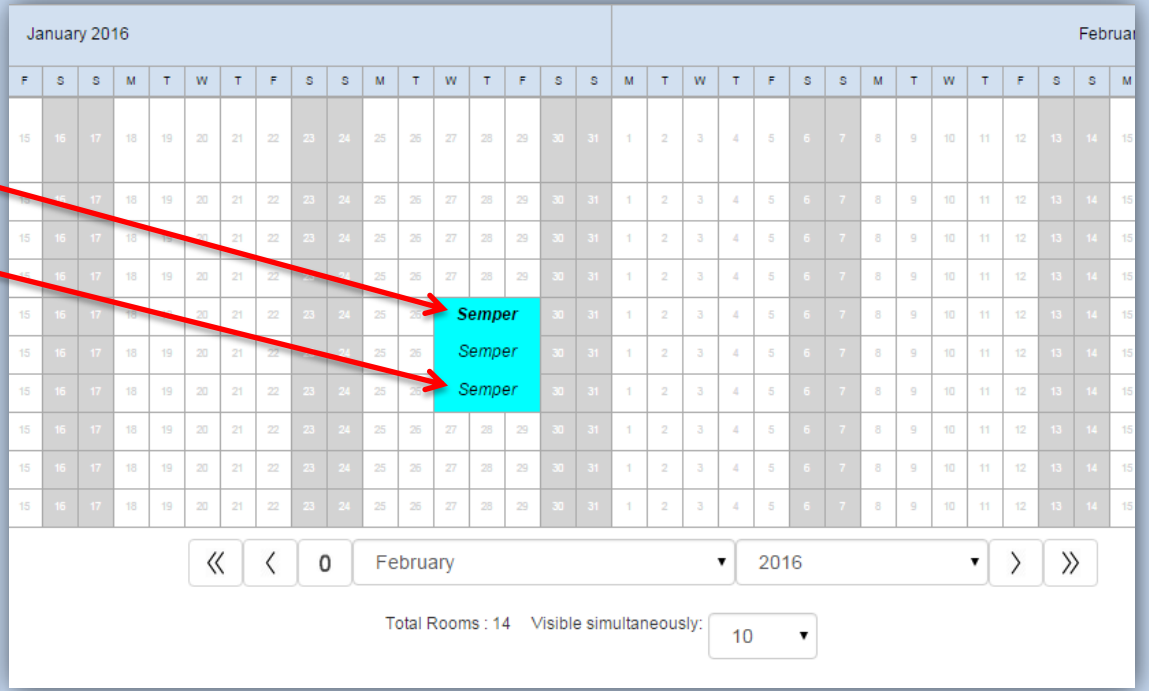
Managing Group Reservations:

The Master Room of the group is displayed in ***bold Italics***.
Other members are displayed in *normal italics*.

Click on any of the reservations to open it.

If the Master Room pays all accommodation then open the master room to work with the accommodation transactions.
Open individual reservations to work with the extras.

If every member pays their own accommodation, then you work with each reservation separately
Or
You can use the Rooming List (see slide #).



Group Reservations

Managing Group Reservations:

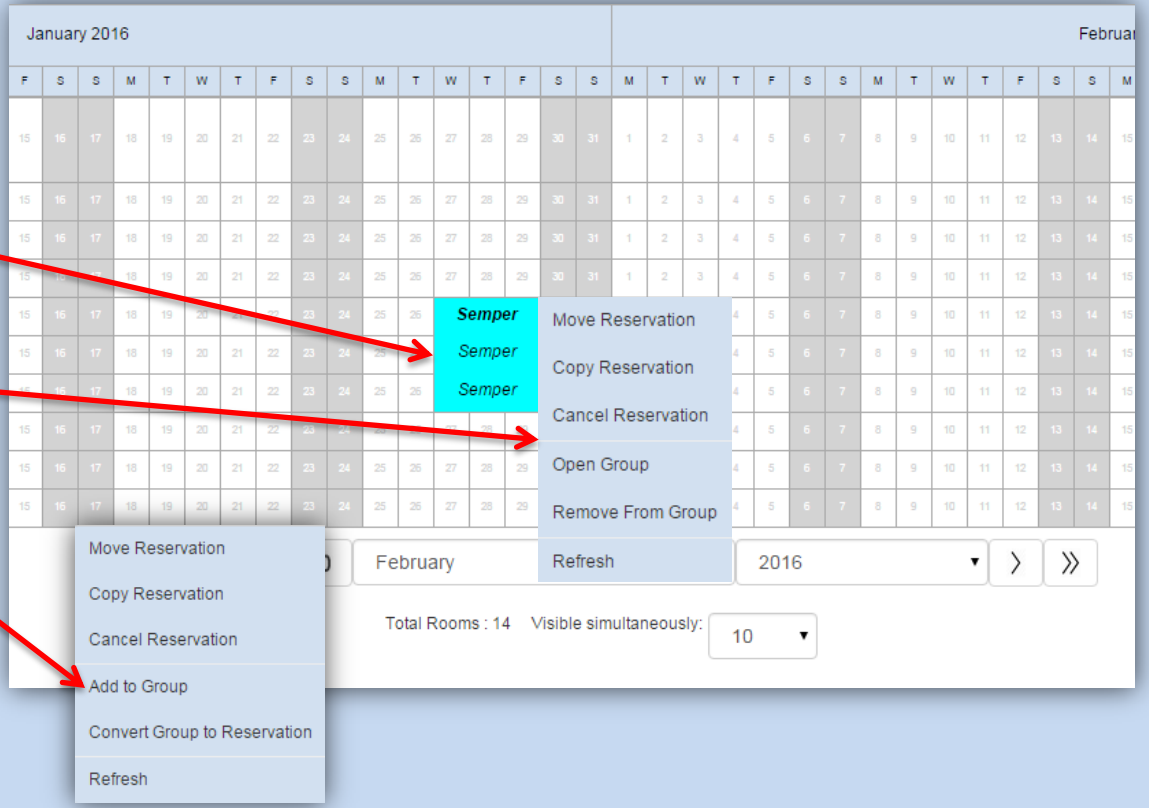
You are able to perform certain group functions from your calendar screen.

Point your mouse on any member of the group you wish to work with and right click on the reservation.

This menu will be displayed.
Select the action you wish to perform.

If you wish to add another room onto an existing group:

1. First create a single reservation.
2. Then Point you mouse on the new reservation created and right click to display this menu.
3. Select the Add to Group option and follow the wizard.



Group Reservations

Managing Group Reservations:

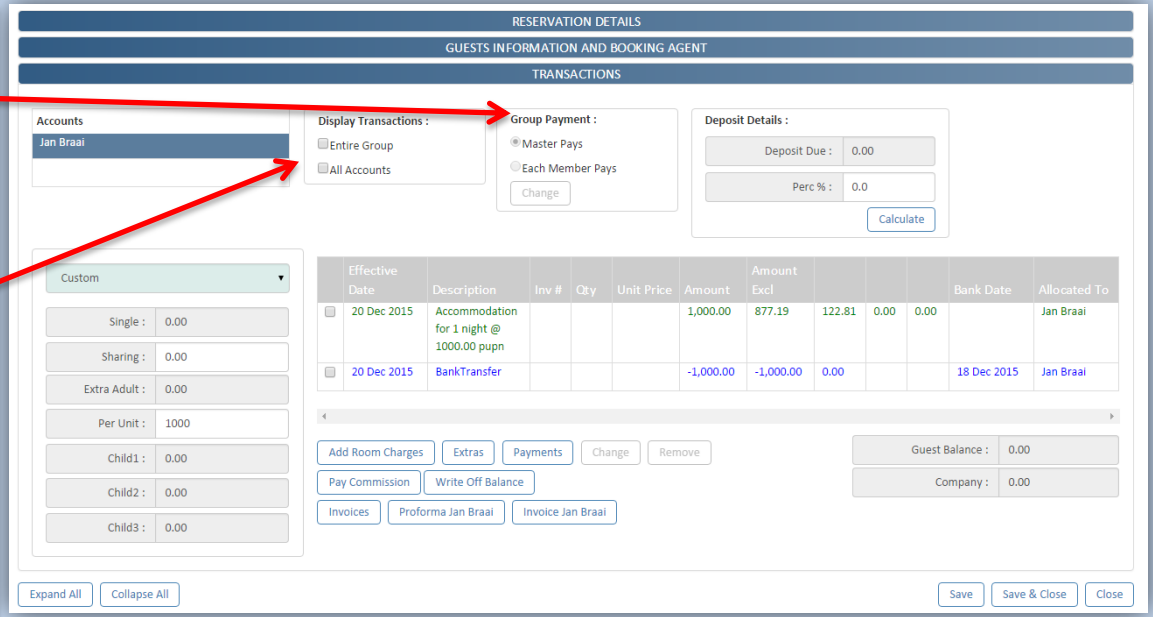
Open the Master Room.
The group processing buttons are now active.
The first one indicates if the Master Room pays for all accommodation or if each room pays their own.
You can change this by using the change button.

The Display Transactions enables you to view all transactions for the group "Entire group" and "All accounts".

- Entire group refers to ALL accommodation transactions for the entire group (only relevant if each member pays for their own accommodation).

- All accounts refers to company and guest accounts. If both boxes are selected then all accounts for all reservations in the group will display.

All accounts on its own, will display the two accounts for the open reservation only.



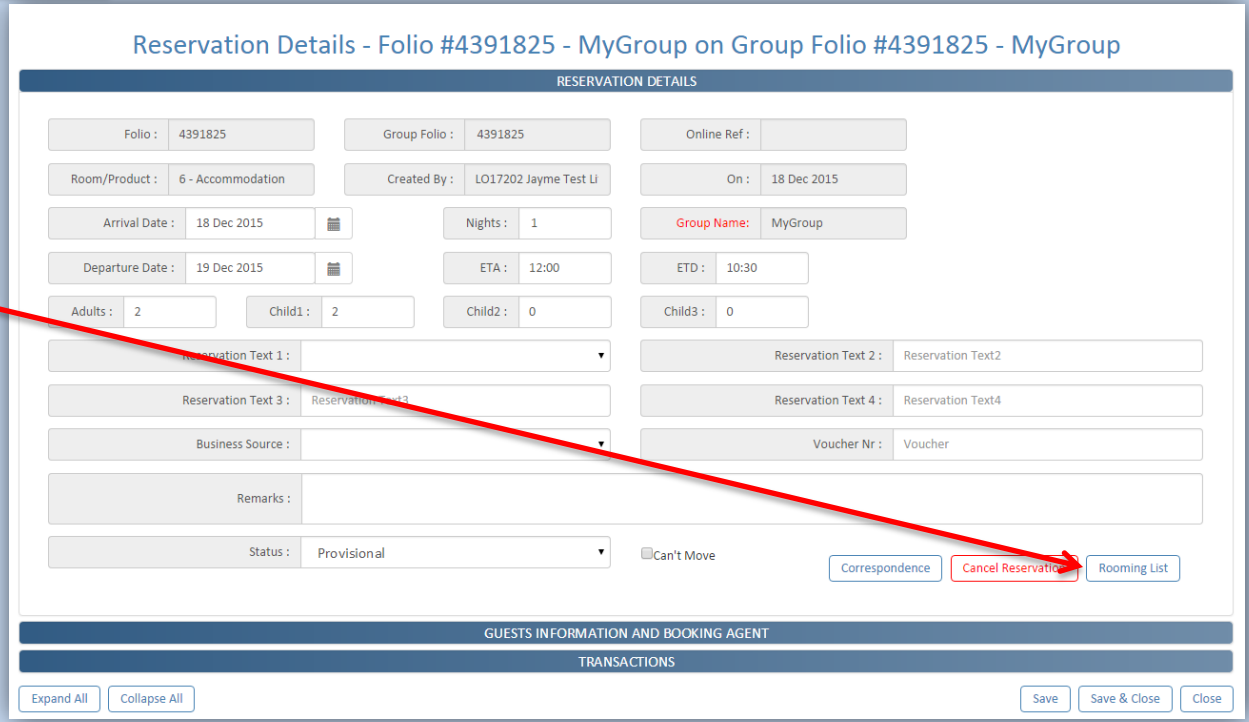
Important: If you wish to change the Booked by or Payment Responsibility for the group, you must do so from the Master Room or from the Rooming list. Changing this will effect all members of the group.

Group Reservations

Managing Group Reservations:32

The Rooming List of the group.

The Rooming List enables you to display all members in a group and perform certain tasks against the members as a whole.



Group Reservations

Managing Group Reservations:

The Rooming List of the group.

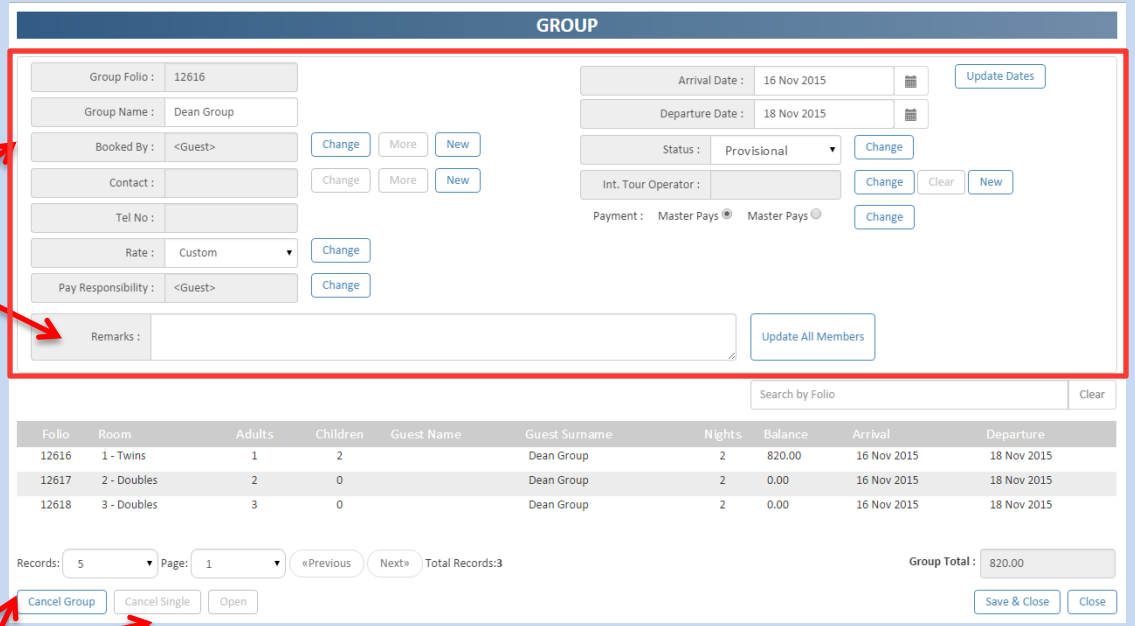
All the information in the red box is designed to perform changes to all member reservations within the group.

The Remarks displayed here belong to the Master Room of the group.
The same remarks can be copied to all members of the group by selecting the "Update All Members" button.

Important: This action will overwrite any existing remarks that may have been recorded on individual member reservations.

The "Cancel Single" will cancel the reservation in the grid that is high-lighted.

"Cancel Group" will cancel all reservations in the group



Group Reservations

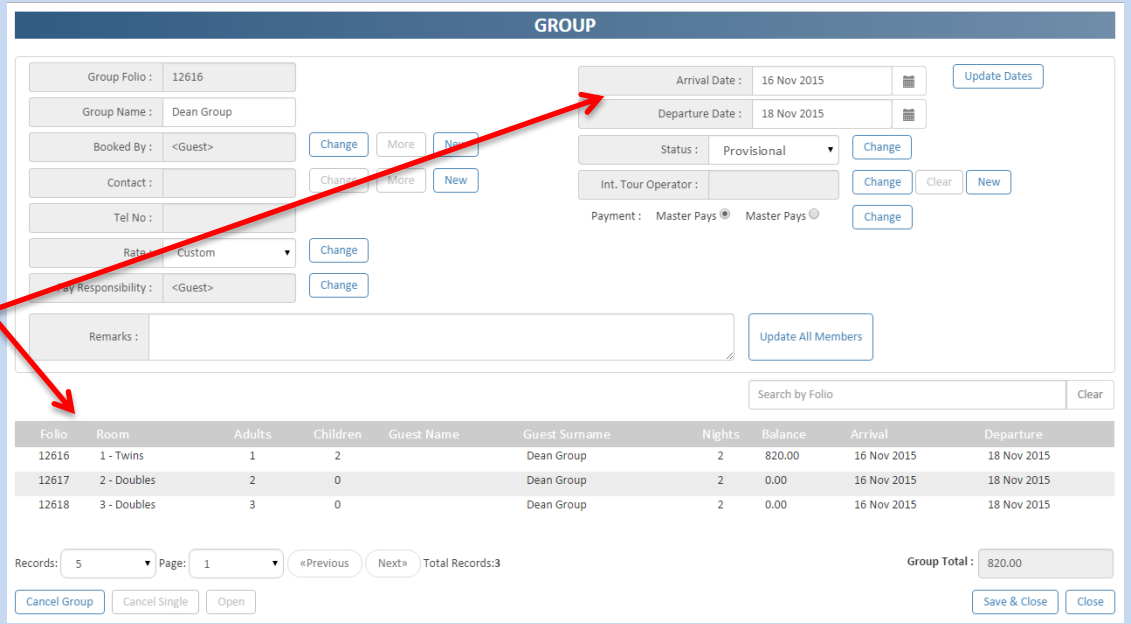
Managing Group Reservations:

The Rooming List of the group.

This grid displays all members of the group
You can change the arrival and/or departure dates by highlighting the booking and then changing the dates in the dates fields and then selecting the “Update Dates” button.

Important Note: Select “Save & close” to confirm any changes.

If you wish to insert the guest name into each room, click on the room and select Open which will display the individual reservation (see next slide).



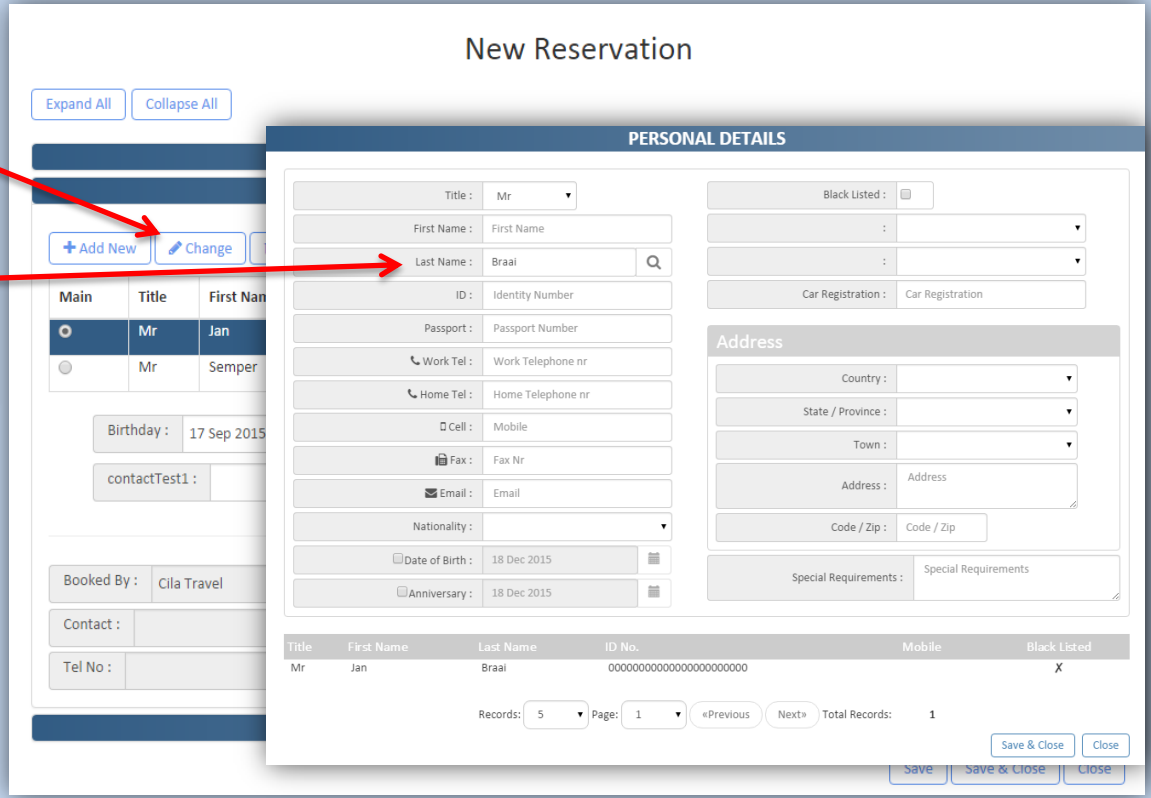
Group Reservations

Managing Group Reservations:

To insert the guest name, select the Change button to open the personal details screen.

Enter the guest's first and last name.
Remember to search your database for a return guest.

Enter all guest information and select the "Save & Close" to return to the rooming list.



Group Transactions

Managing Group Transactions:

Various options are possible:

1. The Guest in the Master Room pays for all accommodation and each guest pays for their own extras.
2. The Guest in the Master Room pays for all accommodation and extras for all the guests in the group.
3. Each Guest pays for their own accommodation and extras.
4. A Company pays for all accommodation and each guest pays their own extras.
5. A Company pays for all accommodation and extras for all guests in the group.

Important Note: Irrespective of which condition has been setup, every guest account must be processed separately (i.e. at the end of their stay, check each guest account for outstanding balances, record final payment for each guest account and invoice the account)

**** The following slides deals with each of the 5 conditions***

Group Transactions

Managing Group Transactions:

1) The Guest in the Master Room pays for all accommodation and each guest pays their own extras.

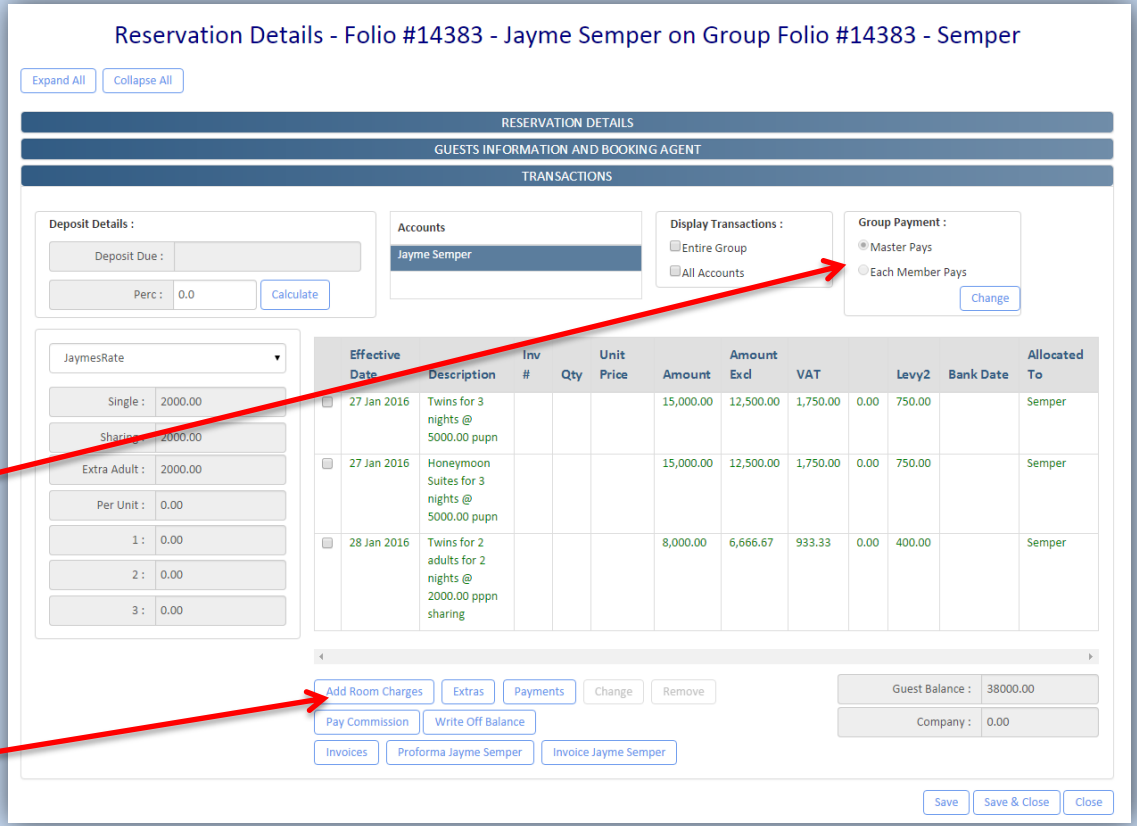
When recording the reservation select Master room pays and set the Booked by and Pay Responsibility as Guest.

Once recorded open the Master Room (The ***Bold Italic*** reservation of the group).

The Master Room Pays must be selected. (if this is not the case change it here).

The Booked by and Pay Responsible must indicate Guest (this is done under "Guest information and booking agent", if this is not the case go to "Reservation details" , select the "Rooming List" and change it).

Select Add Room changes – changes for all rooms in the group will be displayed here.



Group Transactions

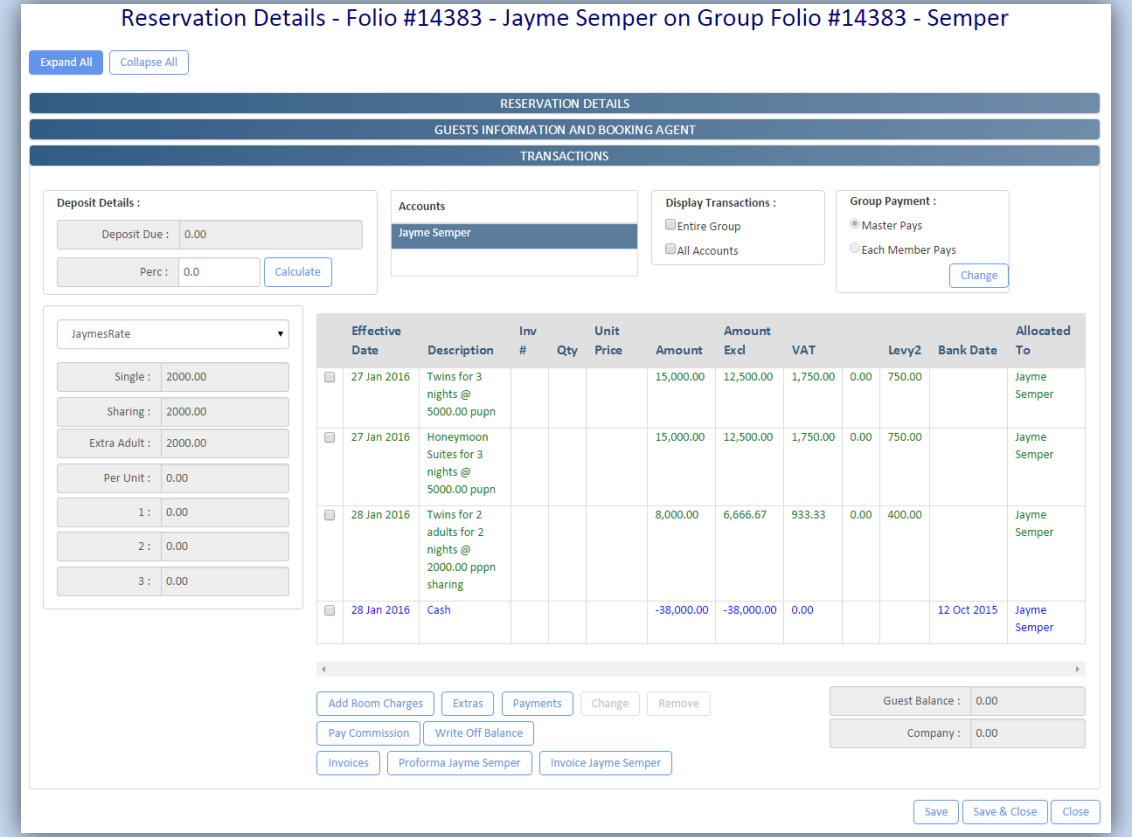
Managing Group Transactions:

1) The Guest in the Master Room pays for all accommodation and each guest pays their own extras.

The Master Room account is also where you record extras sold to the guest in the Master Room.

At check-out:

- use the pro-forma invoice to enable the guest to verify their account
- Record the final payment on the reservation
- Invoice the account
- Change the status to checked out



Group Transactions

Managing Group Transactions:

1) The Guest in the Master Room pays for all accommodation and each guest pays their own extras.

For Members in the group.

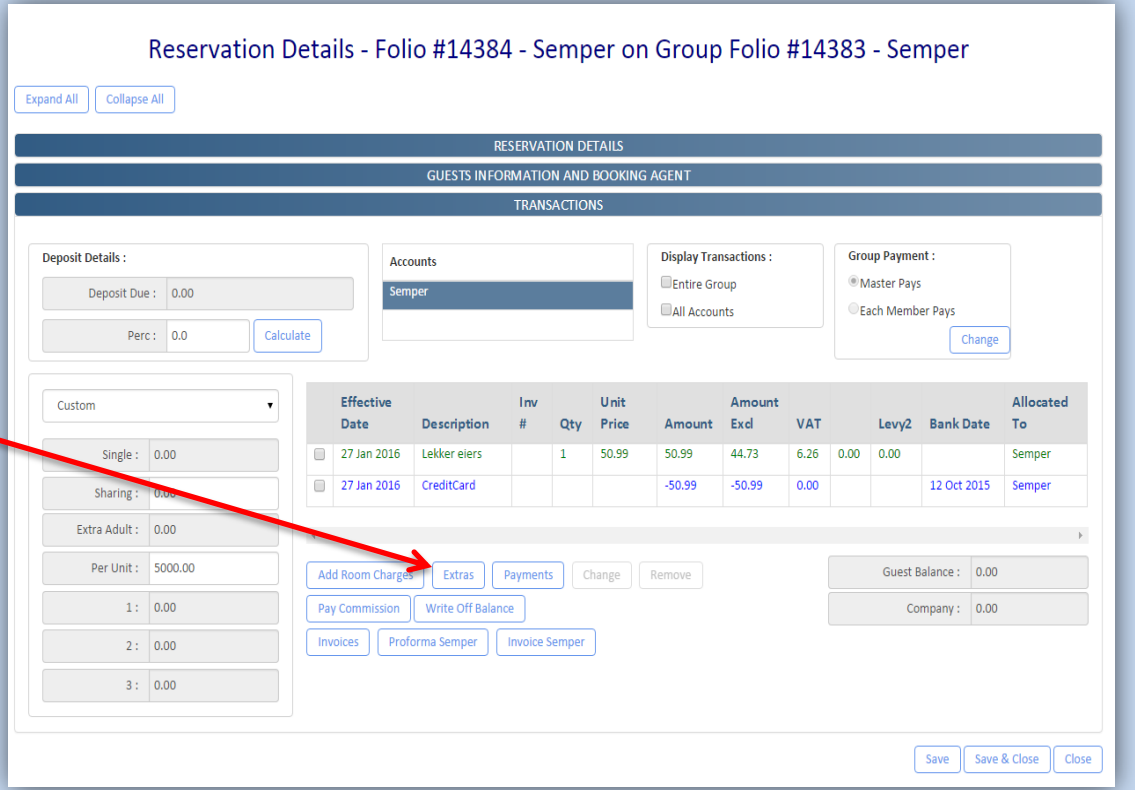
Work with each room separately.

Record any extras sold on the guest reservation.

At check-out:

- use the pro-forma invoice to enable the guest to verify their account.
- Record the final payment.
- Invoice the account.
- Change the status to checked out.

If no charges recorded, change the status to checked out.



Group Transactions

Managing Group Transactions:

2) The Guest in the Master Room pays for all accommodation and all extras for every group member.

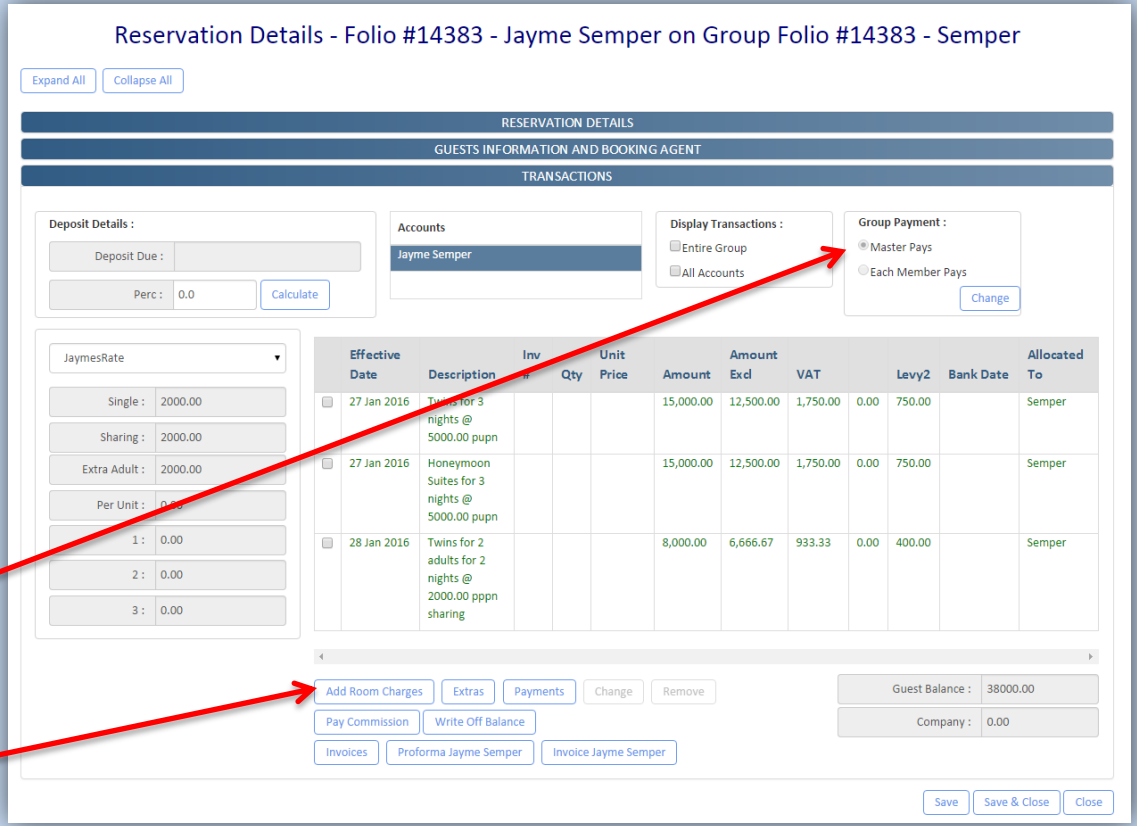
For this condition:

When recording the reservation select Master room pays. Booked by and Pay Responsibility must be set as Guest (under Guest information and booking agent).

Once recorded, open the Master Room (The ***Bold Italic*** reservation of the group).

The Master Room Pays must shown here (if this is not the case change it here).

The Booked by and Pay Responsible must indicate Guest (if this is not the case select the "Rooming List" under "Reservation details" and change it).
Select Add Room changes - all members room changes will be listed here.



Group Transactions

Managing Group Transactions:

2) The Guest in the Master Room pays for all accommodation and all extras for every group member.

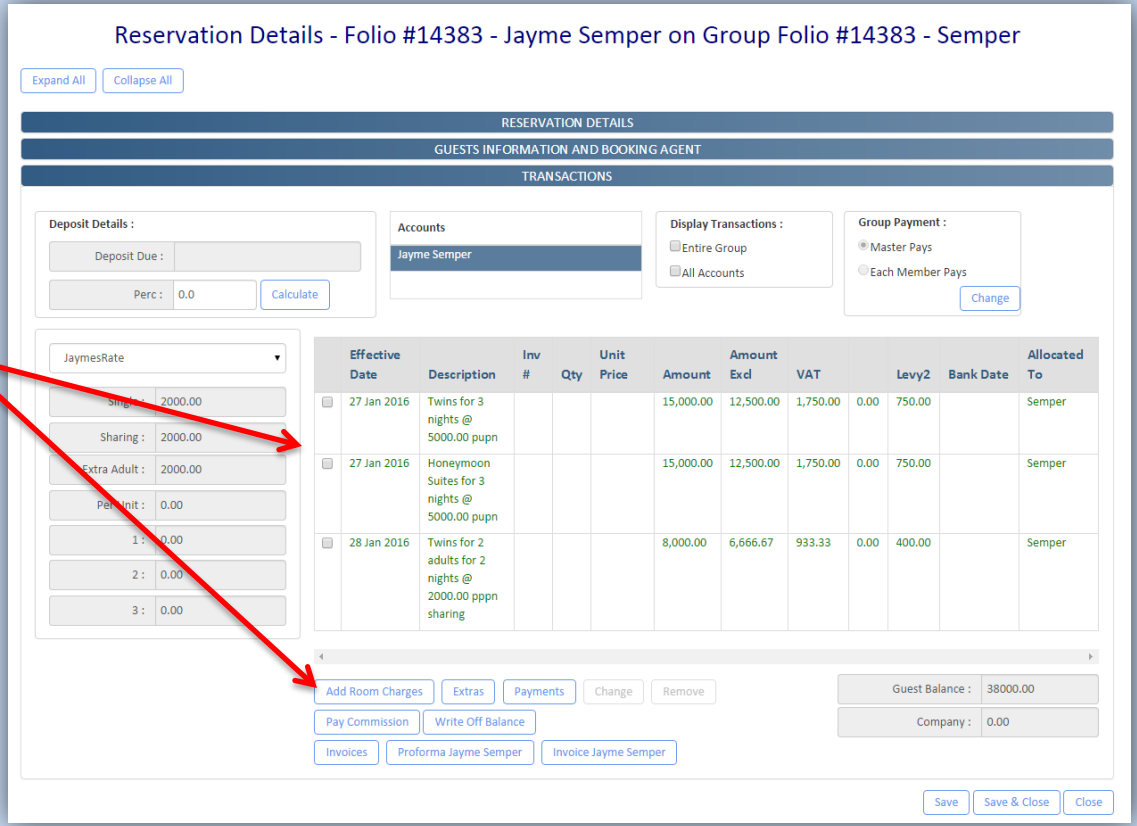
Work with Master Room reservation only.

Record any extras sold by any member of the group onto the Master Room reservation.

The guest in this room is responsible for settling the full account.

At check-out:

- use the pro-forma invoice to enable the guest to verify their account
- Record the final payment
- Invoice the account
- Change the status to checked out.
- Check out the entire group if all depart on the same day. If not check out each member separately.



Group Transactions

Managing Group Transactions:

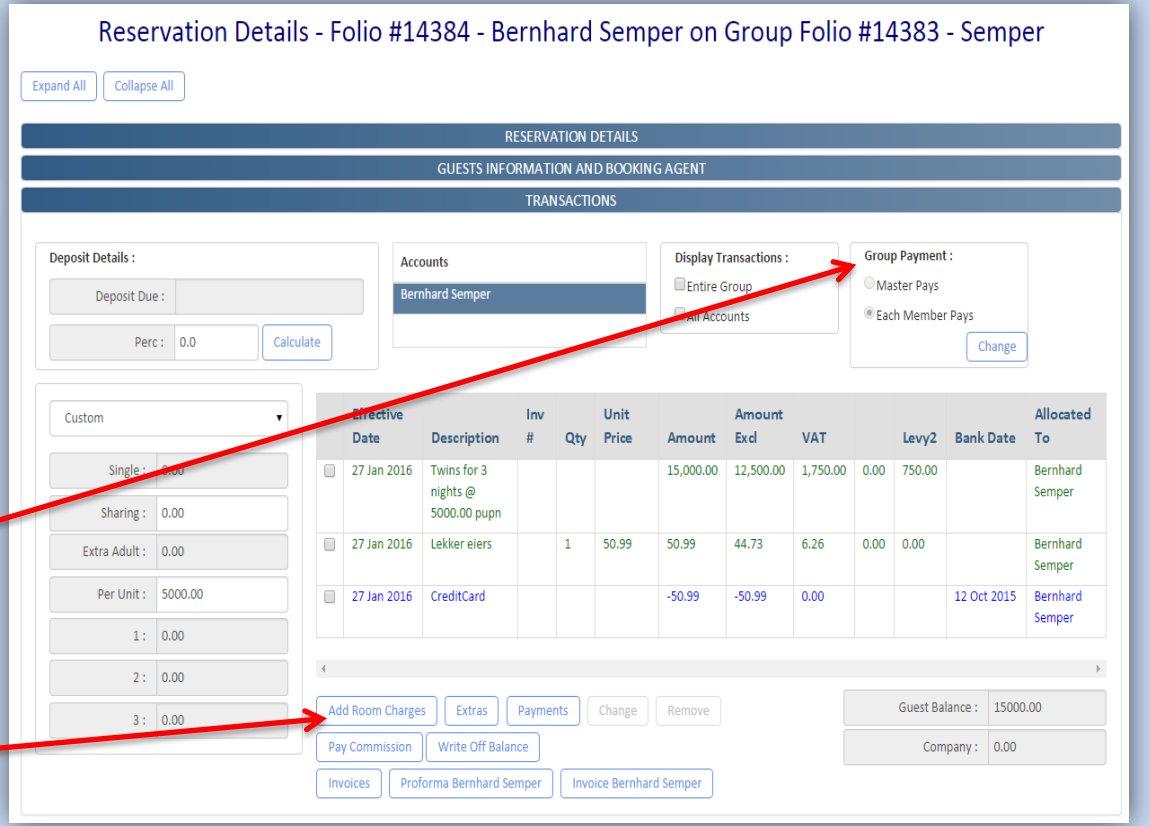
3) Each member Guest pays for their own accommodation and extras.

For this condition:
When recording the reservation select Each Member Pays. Booked by and Pay Responsibility must both be set as Guest. (under Guest information and booking agent)

Once you have recorded the reservation open the Master Room (The ***Bold Italics*** reservation of the group).

The Each Member Pays must be selected as shown here (if this is not the case change it here).

The Booked by and Pay Responsibility must indicate Guest (if this is not the case select the "Rooming List" under "Reservation details" and change it).
Select Add Room changes – only this rooms accommodation charges will be present.



Group Transactions

Managing Group Transactions:

3) Each member Guest pays for their own accommodation and extras.

For Members in the group:

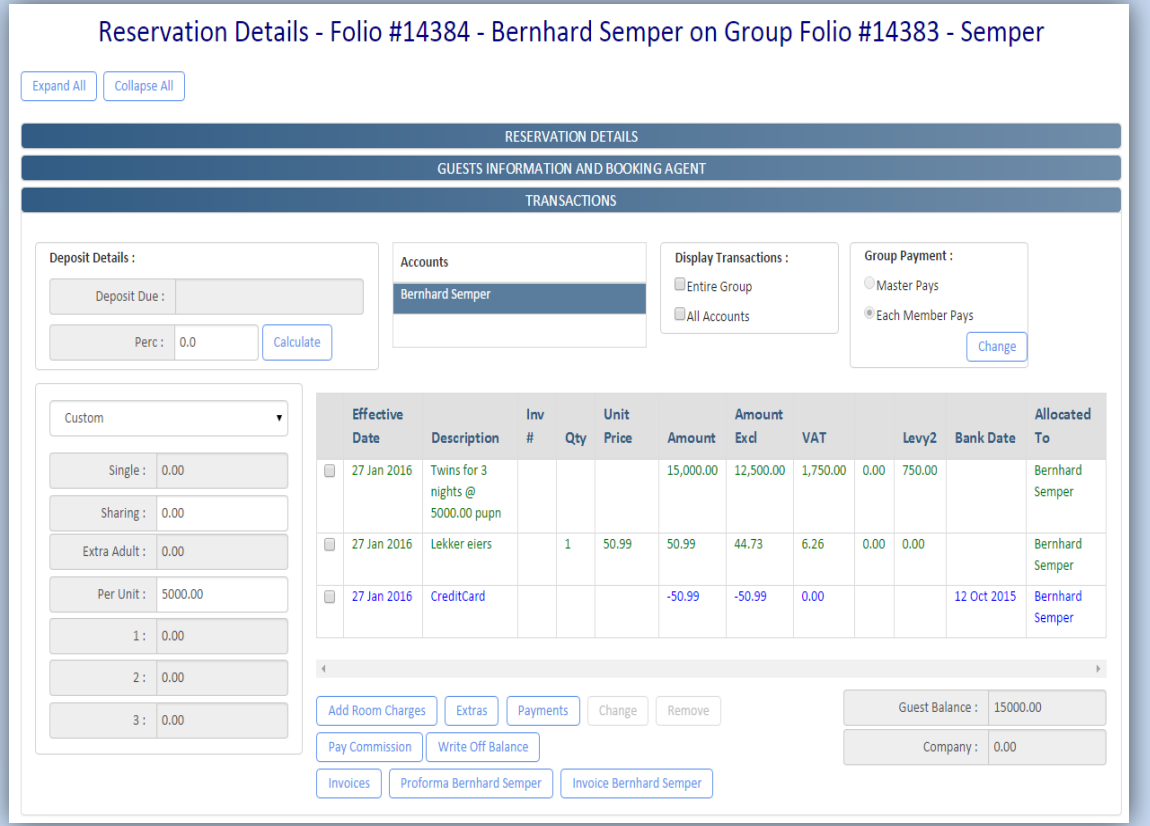
Work with each room separately.

Add Room Changes if not present.

Record any extras sold onto each members reservation.

At check-out:
use the pro-forma invoice to enable the guest to verify their account.

- Record the final payment
- Invoice the account
- Change the status to checked out.



Group Transactions

Managing Group Transactions:

4) A Company pays for all accommodation and each guest pays their own extras.

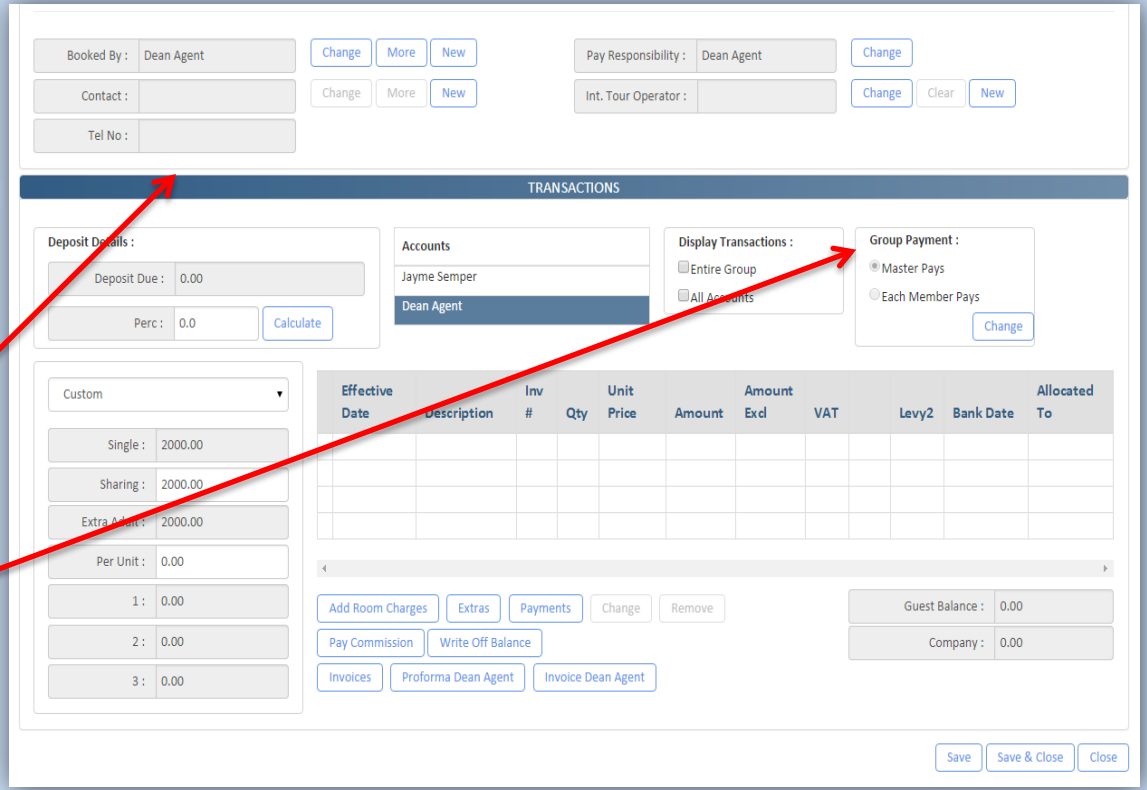
For this condition:

When recording the reservation select Master room pays. Booked by and Pay Responsibility must both be set as the company that will pay the accommodation.
(if this is not the case change it here).

Once recorded open the Master Room (The ***Bold Italics*** reservation of the group).

The Master Room Pays must be selected as shown here

The Booked by and Pay Responsible must indicate the company (if this is not the case select the Rooming List and change it).



Group Transactions

Managing Group Transactions:

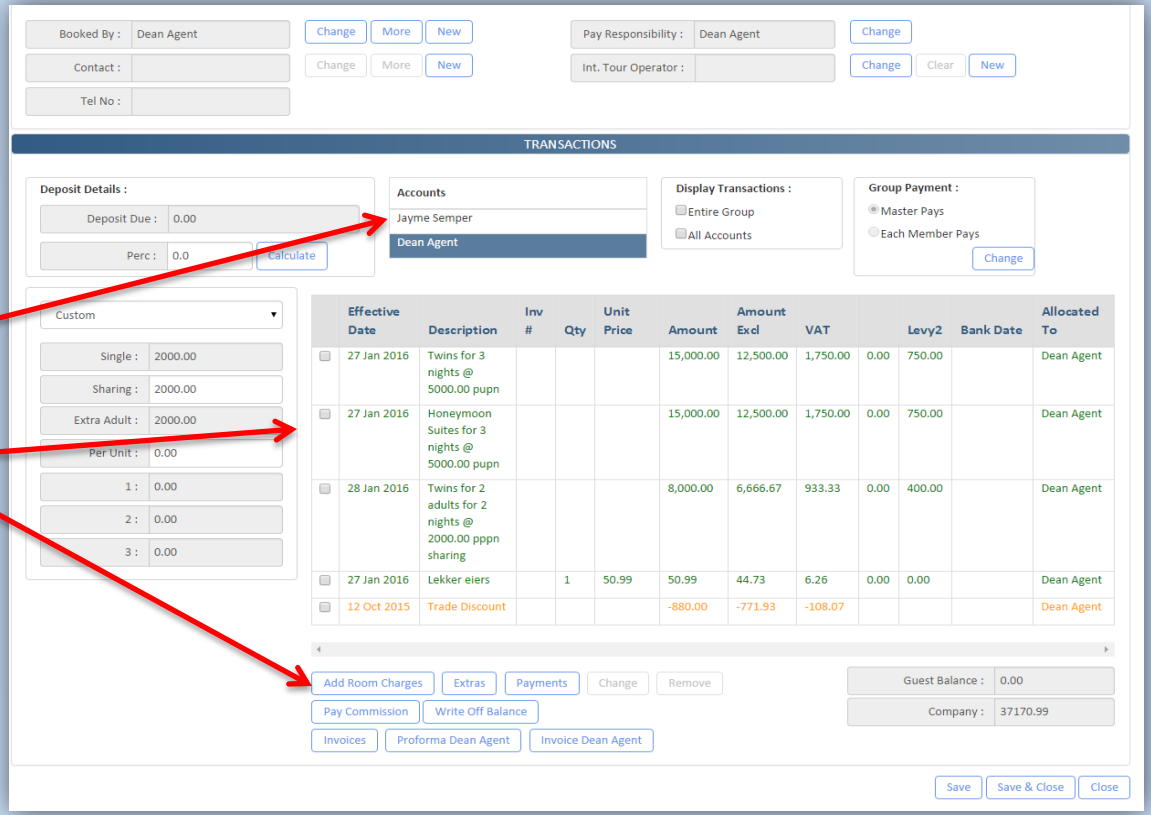
4) A Company pays for all accommodation and each guest pays their own extras.

From the Master Room reservation

Note: that 2 accounts are now present. One for the company and one for the guest in the Master Room.

Select Add Room changes - The accommodation transactions will automatically be allocated to the company account (The account high-lighted in the Accounts box).

The Commission transaction (called Trade Discount) will automatically be inserted (if setup in the company record).



Group Transactions

Managing Group Transactions:

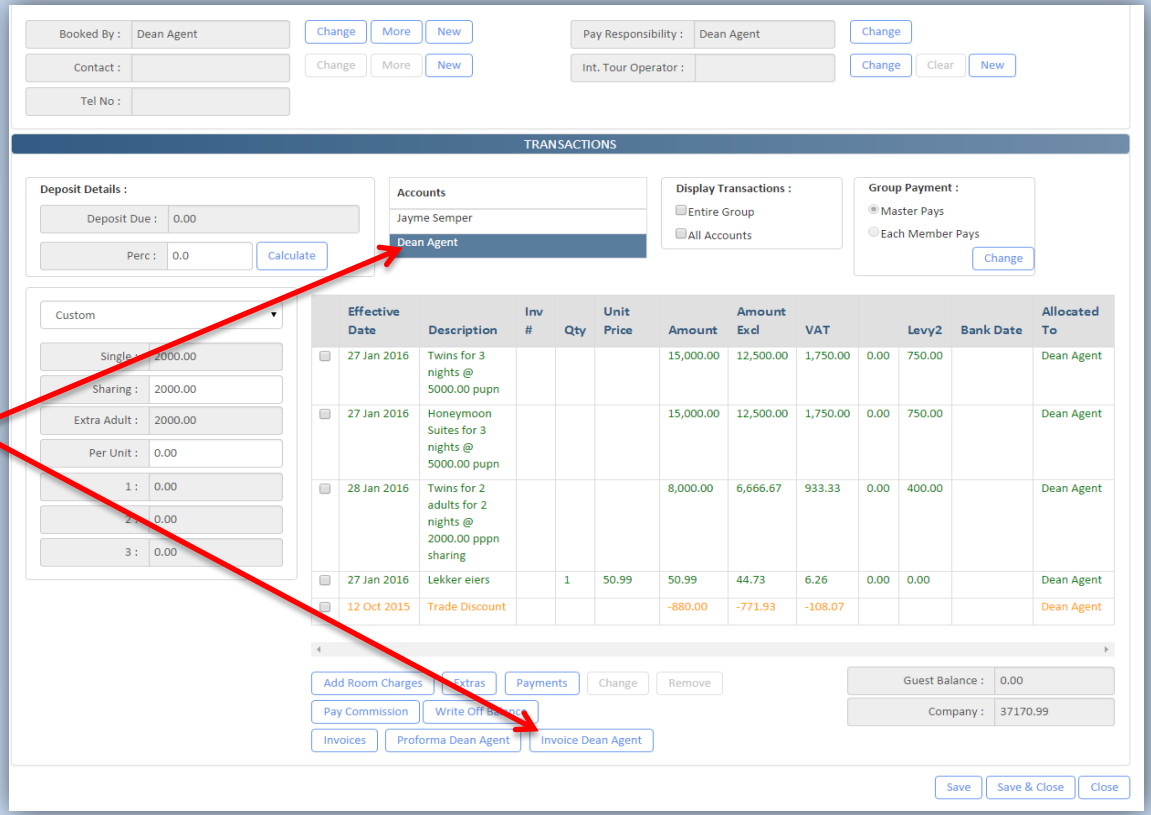
4) A Company pays for all accommodation and each guest pays their own extras.

Still from the Master Room reservation

At the end of the stay, the company responsible for paying the accommodation must be processed:

- Invoice the company by high-lighting the company in the Accounts box and selecting the invoice button.
- Email the invoice to the company for payment.

Note: This reservation can only be set as Active-Out if a balance exists and until the payment has been received. (see next slide)



Group Transactions

Managing Group Transactions:

4) A Company pays for all accommodation and each guest pays their own extras.

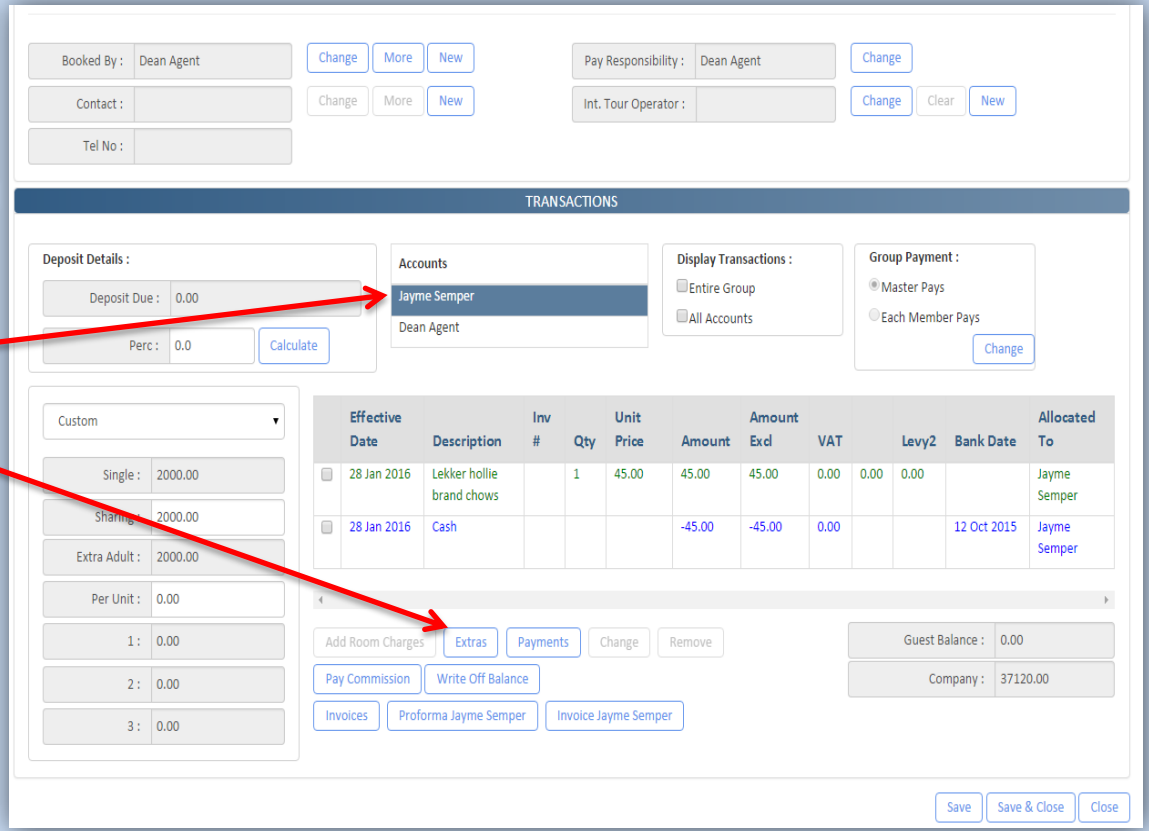
Still from the Master Room reservation

Work with the Guest in the Master Room.
High-light the guest account in the Accounts box.

Record extras sold onto this guest account.

At check-out: (Select the guest account in the Accounts Box)

- Use the pro-forma invoice to enable the guest to verify the details.
- Record the final payment on the guest account.
- Invoice the account.
- Change the status to checked out.
  (Note: if the company account has an outstanding balance then the status can only be set as Active out even if this account has a zero balance)



Group Transactions

Managing Group Transactions:

4) A Company pays for all accommodation and each guest pays their own extras.

Once payment is received from the company:

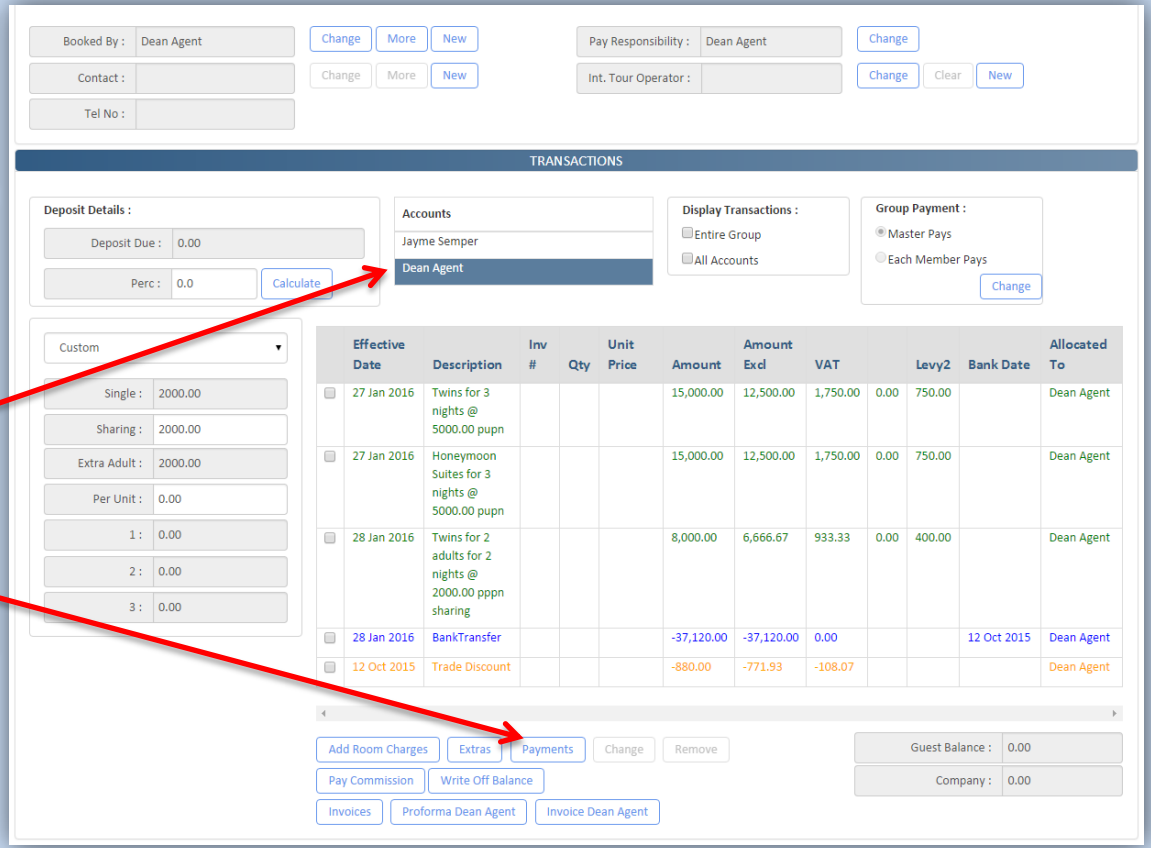
Open the Master Room reservation.

Makes sure the company account has been selected in the Accounts box.

Record the payment received.

Change the status to Checked out.

Note: Do not invoice the payment received.



Group Transactions

Managing Group Transactions:

5) A Company pays for all accommodation and extras for all guests in the group.

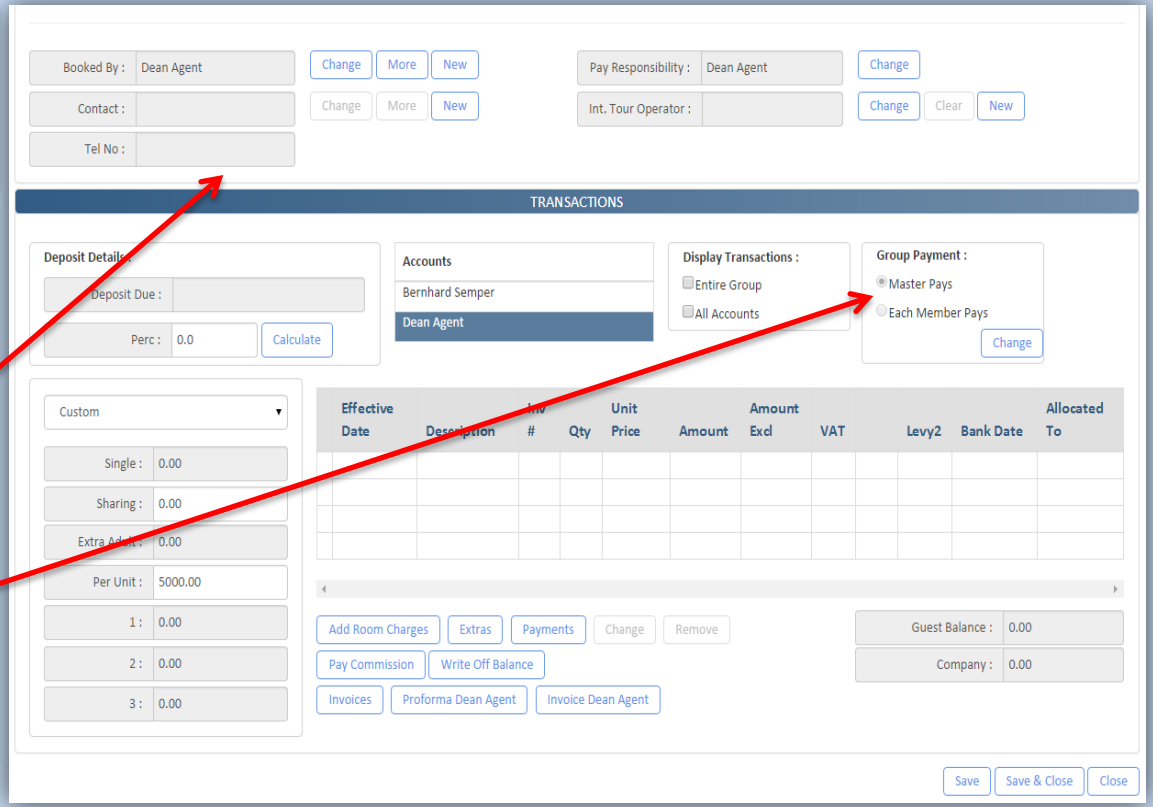
For this condition:

When recording the reservation select Master room pays. Booked by and Pay Responsibility must both be set as the company that will pay the accommodation.

Once recorded open the Master Room. (The ***Bold Italics*** reservation of the group)

The Master Room Pays must be selected as shown here (if this is not the case change it here)

The Booked by and Pay Responsible must indicate the company (if this is not the case select the Rooming List and change it)



Group Transactions

Managing Group Transactions:

5) A Company pays for all accommodation and extras for all guests in the group.

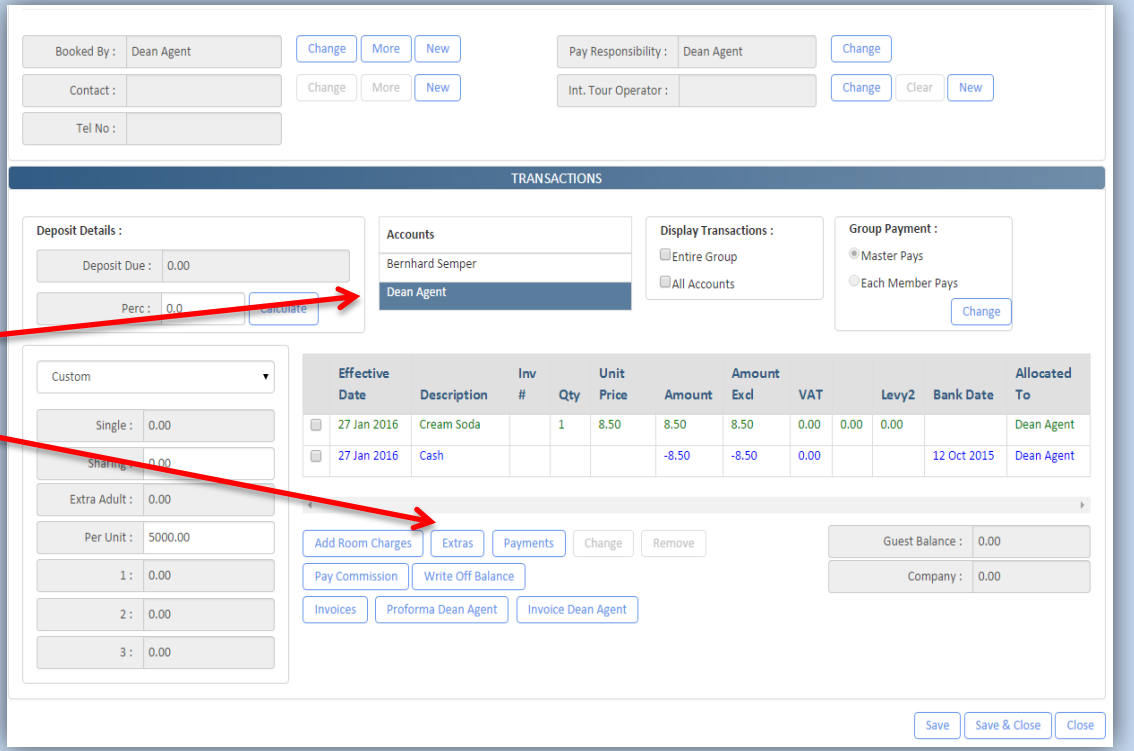
Work only with the Master Room reservation.

Ignore the Guest in the Master Room and only work with the company account.

Record extras sold onto the company account.

At check-out: (Select the company account in the Accounts Box)

- Invoice the account.
- Email the account to the company if they are not paying immediately.
- If they pay immediately then record the payment on the reservation.
- Change the status to checked out.
  (Note: if the company account has an outstanding balance then the status can only be set as Active out)



Managing Outstanding Debt

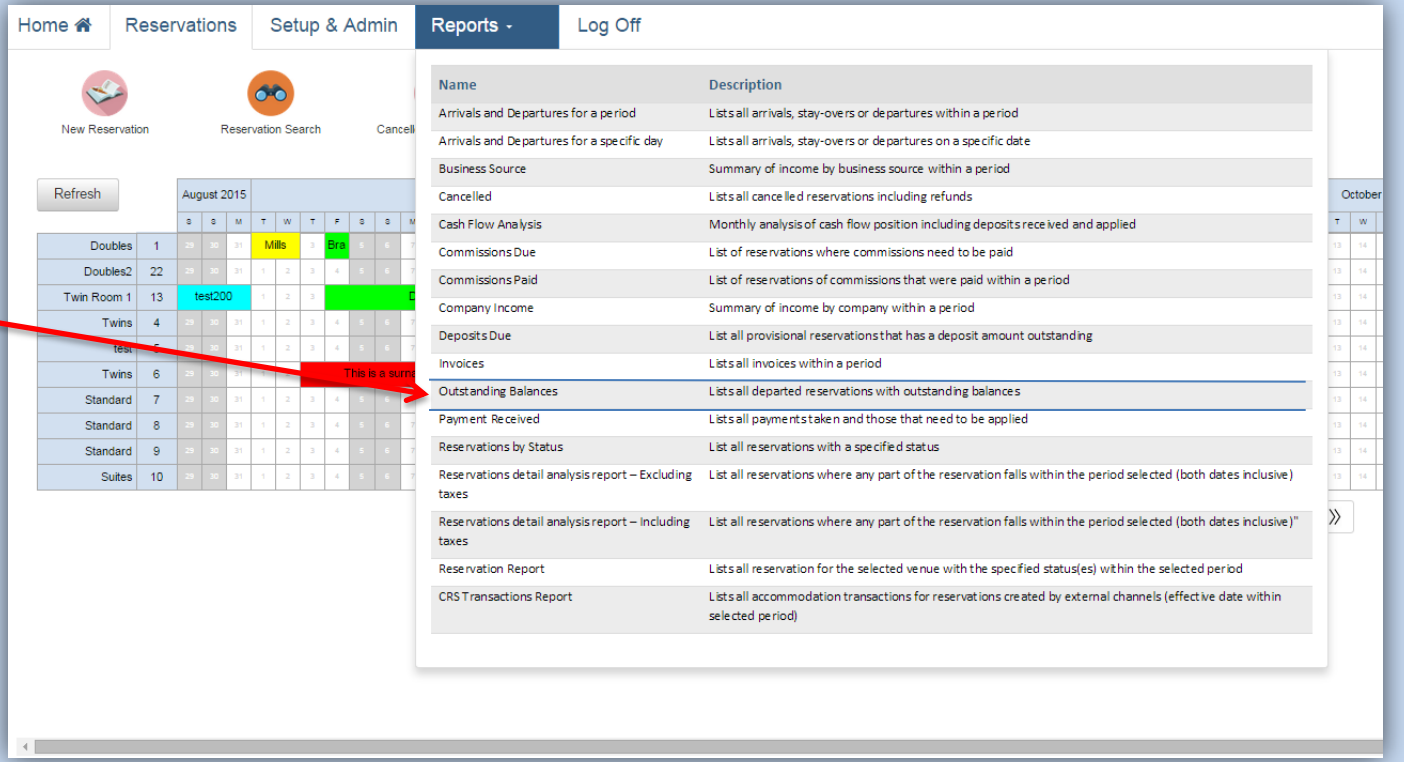
Managing Outstanding Debt

Managing outstanding Debt:

Reservations with outstanding balances will all be recorded as Active out.

The report Outstanding Balances will list all reservations that qualify.

Follow up regularly on outstanding debt.

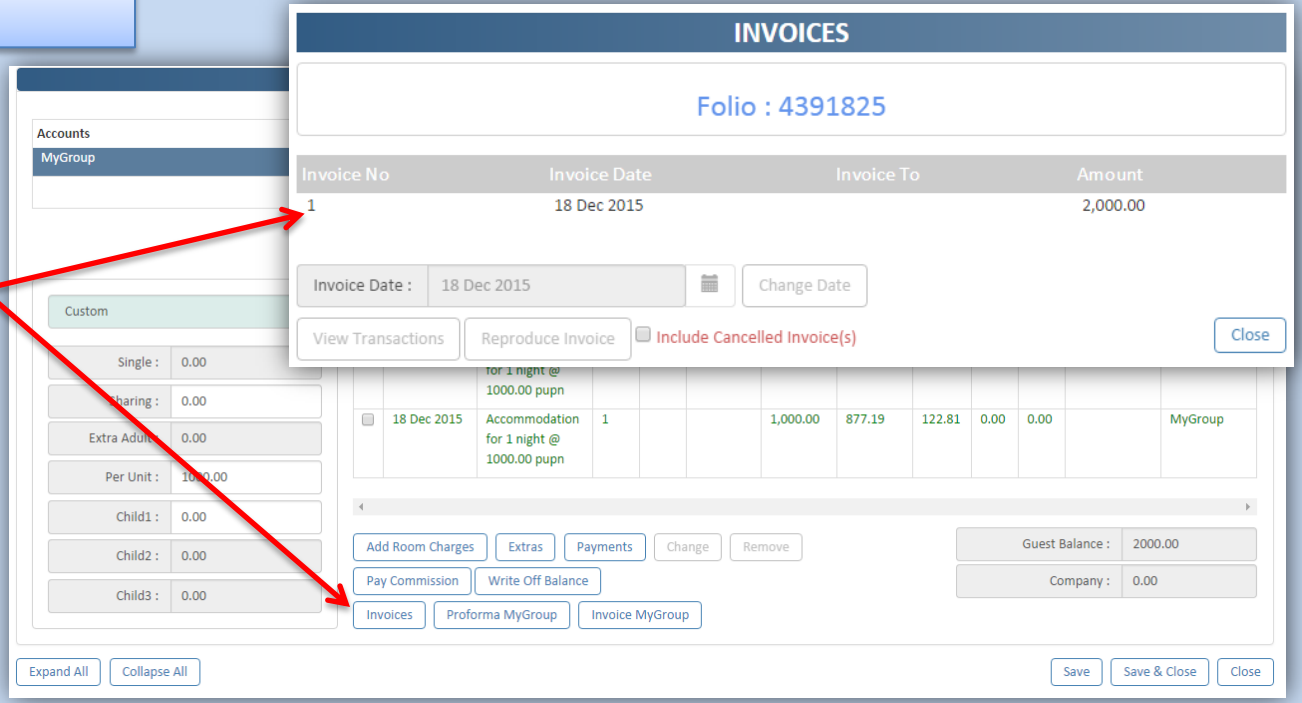


Managing Outstanding Debt

Managing outstanding Debt:

You may return to the reservation to re-produce any invoice.

Open the reservation and select the Invoice button which will list all invoices produced for the reservation. From here you can re-produce a copy of the original invoice or view the transactions on the invoice.



Managing Outstanding Debt

Applying Payments Received:

Once a payment is received, locate the reservation, then record the payment on the reservation.

Change the status to Checked-out
(in the "reservation Details" section).

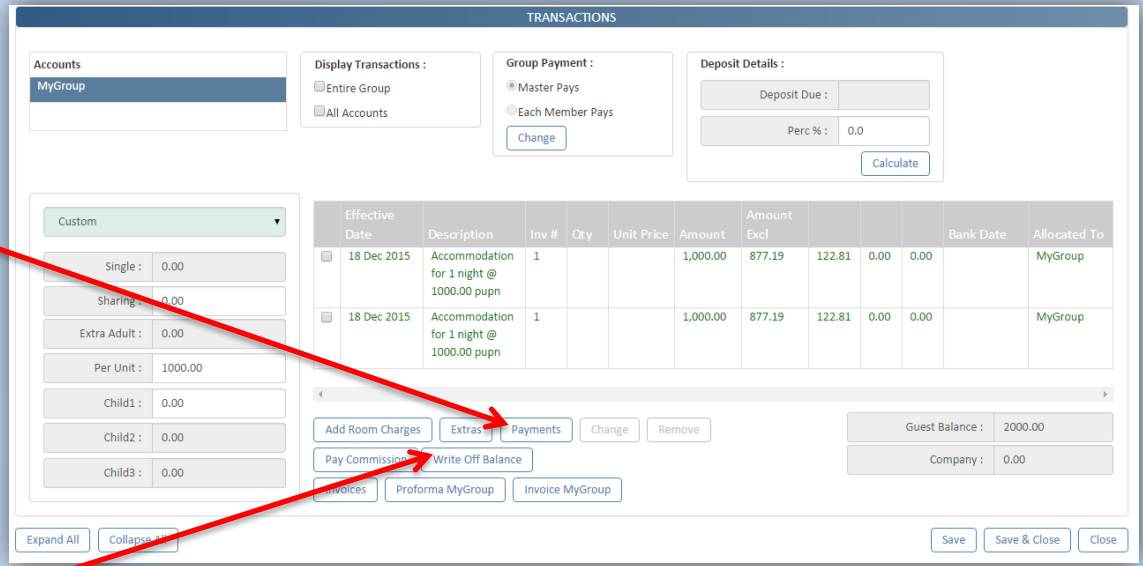
Which is only possible once the outstanding balance reaches zero.

Write Off Bad Debt:

If you are NOT able to collect the payment, you may wish to write off the debt.

To do so, select the Write Off Balance.

This can also be used if a credit balance exists (i.e. over payment) which you will not be refunding.



Ensuring Accuracy

Ensuring Accuracy

To ensure accurate figures, practice the following:

1. Record and manage reservations by setting the status that correctly reflects each stage of the reservation.
2. Check that no provisional or confirmed reservations have a departure date in the past. These reservations must either be cancelled or invoiced and checked out.
3. Record all transactions (sales and payments) on each reservation .
4. When the guest departs make sure all transactions are invoiced and the reservation either checked-out (with zero balance) or active-out with a balance outstanding .
5. Monitor the active out reservations (use the report Outstanding Balances which reflects your debtors position) .
6. When you receive payment (for outstanding reservations) , record the payment on the reservation and change the status to Checked Out .

End training module

Semper Lite

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email Semper at Support@semper.co.za

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