

Making Reservations with the Room Plan

Getting to Know protel Step by Step

Video tutorial at
www.protel-net.com

This tutorial introduces the room plan. It mirrors the video tutorial that you can find on protel's website.

What is it about?

You'll learn all about the room plan and discover how to enter a reservation for a particular room quickly and easily. You'll also practice entering data for guests and reservations. Plus, you'll see how to move guests in the room plan.

Why might you be interested in this?

The room plan is probably the easiest and most convenient way to manage rooms and reservations, especially for smaller hotels.

Using protel, one click at a time

If you are new to protel, simply work through the tutorial click by click. Experienced users, too, may discover some new tips and tricks. Just give it a try!

The Structure of the Room Plan

Opening the room plan

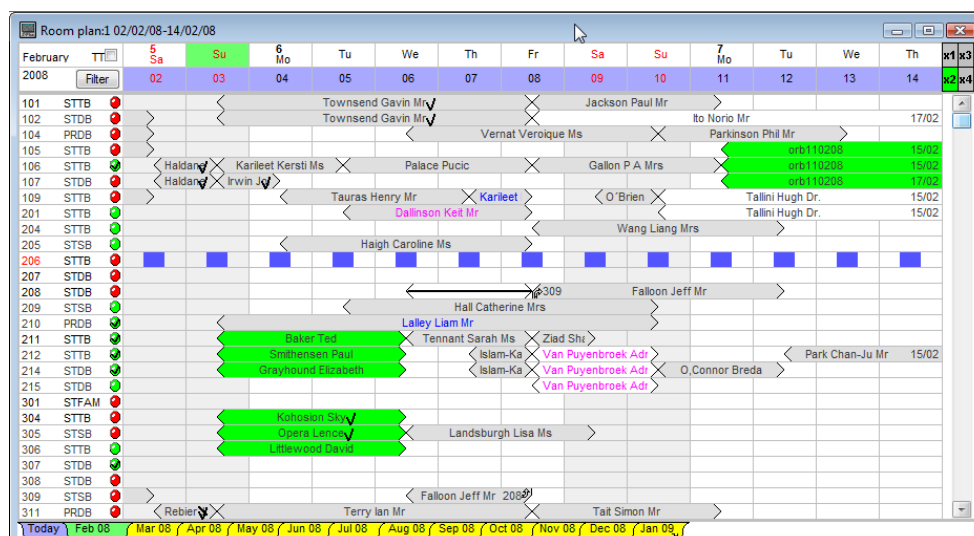
The fastest way to open the room plan is by pressing the [F3] function key, or clicking the toolbar button.

Information on all rooms at a glance

The room plan shows at a glance which rooms are still available and, when - and for how long - a particular guest reserved a room, and for how long.

First, have a look at the basic structure of the room plan. It consists of ...

The top time bar



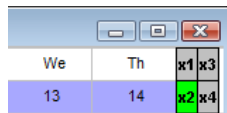
The room list

The reservation area

The bottom time bar

Adjusting the Display

Before you get started: you can use the four buttons in the upper right hand corner of the room plan to zoom in on the display.



BY THE WAY: Many protel users feel most comfortable using a 2x magnification. Just try for yourself!

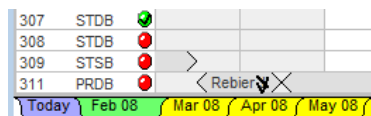
Top and Bottom Time Bars

Use the time bars to select the time period you need. When opened, the room type plan starts with today's date and the next several days. Today's date is easy to identify: it is always highlighted green.

The first column in the table header tells you what time period is displayed.

The current months are color-coded, as are the weekends.

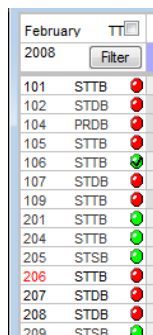
The month tabs are shown at the bottom edge of the window. By clicking on, say, the "September" tab, you can navigate far into the future. However, by clicking the "Today" tab you return to today's date just as quickly:



Of course, you can also navigate "only" a few days or weeks ahead in time. Click on a particular date, and the program will display the time period beginning with this selected date. You can navigate just as easily back in time. Click the first entry to move the time bar back one day at a time. - Then, click the "Today" tab to return to today's view.

The Room List: Room Status Information

On the left-hand side of the screen, the room list shows us all the rooms in our hotel. The first column names room number, room type, and a room's current status. For example, a red dot means the room is still dirty, while a green dot means the room is clean:



Dirty or cleaned?

Selecting the time period

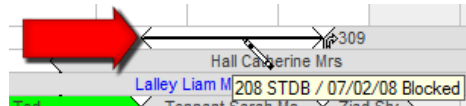
Journeys to the future ...

... and to the past

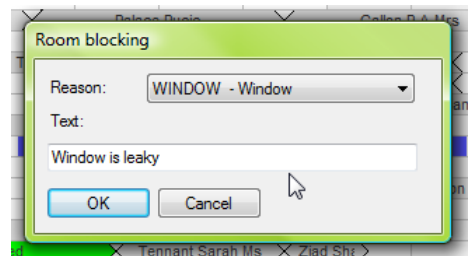
Rooms "Out of Order"

That is not the case with a room marked like this:

You **cannot** reserve rooms that are out of order!



This room is "out of order". It is blocked and cannot be reserved during this time. To find out why it's blocked, right-click on the marking:



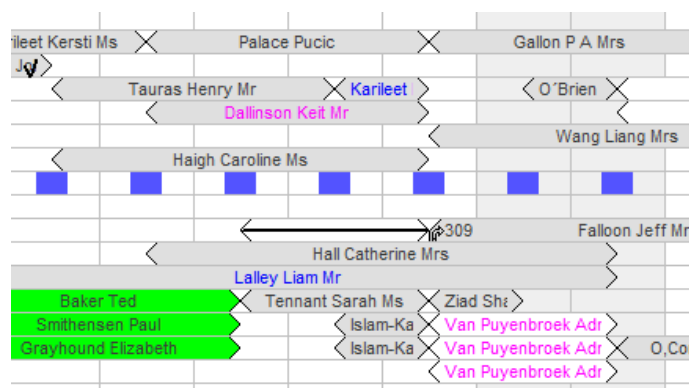
NOTE: You can block and unblock rooms in the "Block / Unblock Rooms" dialog (Menu: Reservations / Block/Unblock Rooms).

In this room, the windows have to be repaired.

The Reservation Area

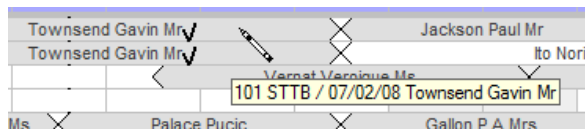
The reservation area tells you which rooms are available, which rooms are assigned, and to whom they are assigned:

Available or assigned?
When? How long?
To whom?



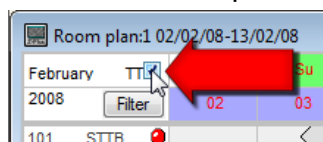
Quick Infos on Every Room: Tool Tips

Have you noticed the tiny windows that pop up when you move the mouse within the room plan?

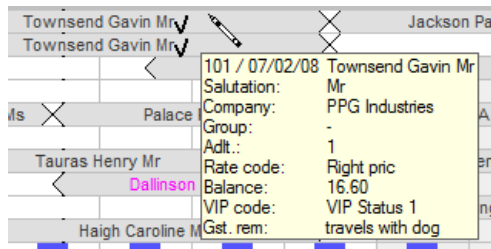


Stay on top of everything: simple or detailed information on every room for every day

These are so called "tool tips". They provide a short summary about the room and the reservation. If you would like more details, simply activate the tool tip checkbox in the top left-hand corner ...



... to get enhanced tool tips with additional information:



Color-coded Reservations

Differentiate between different classes of reservations

All the reservations you see in the reservation area of the room plan are color-coded:

BY THE WAY: You can customize the background colors of the reservation classes in the master data!

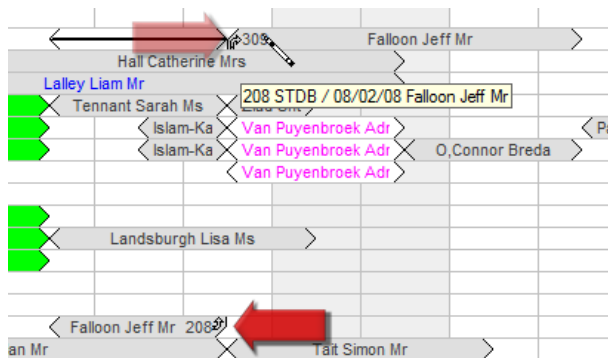
	Green background:	Group Reservation
	White background:	Optional Reservation
	Gray background:	Individual Reservation
	Pink font:	Allocation Reservation
	Blue font:	Room firmly assigned

Moves

Markings that start or end with an arrow and a room number indicate, that a guest will be changing rooms during his stay:

A guest moves from one room

...



... to another

Moves: no problem with protel!

By the way: entering moves in the room plan is easy. You will learn later on how to perform one.

NOTE ON THE TUTORIAL

But first, you will see how easy it is to reserve a room using the room plan.

When completing the remaining chapters in this tutorial, you can select any room category and length of stay. However, please select the name of a guest who already has a guest profile!

Reserving One Room

First, assume that Mrs. Jane Pate, one of your regulars, calls and says she is coming to your hotel on short notice.

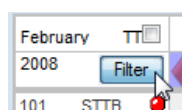
Setting criteria

She asks you to reserve a standard twin room from today to the 7th of February for her.

Since your guest wants to check into her room today, you need to find a clean and checked room.

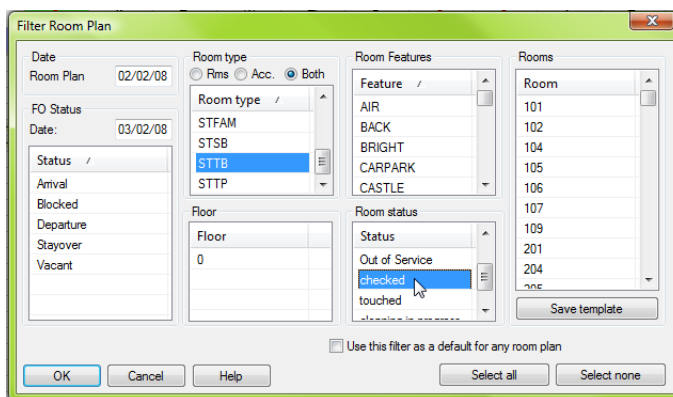
Filtering the Room Display

The fastest way to do this is to let protel display only those standard twin rooms that have already been checked. To do this, you click the [Filter] button in the upper left-hand corner:



In the dialog "Filter Room Plan" select "Standard Twin Room" as the room type and "Checked" as the status:

Select Filters



BY THE WAY: This is a very useful feature especially for larger hotels. As you can see, you can combine several filters to adapt the room plan precisely to your current needs.

Click [OK] to confirm your selection and now the room plan only displays standard twin rooms that have been checked. This makes it much easier to select a suitable room.

Selecting checked rooms in a category

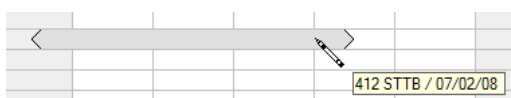
Room No.	Room Type	Status
106	STTB	✓
211	STTB	✓
212	STTB	✓
314	STTB	✓
412	STTB	✓
414	STTB	✓
505	STTB	✓
512	STTB	✓
514	STTB	✓
601	STTB	✓
606	STTB	✓
608	STTB	✓
612	STTB	✓
614	STTB	✓

That makes the selection a lot easier!

Entering a Reservation in the Room Plan

Have you noticed that the cursor turns into a pencil when you move the mouse to the reservation area? Now, place this pencil on the arrival date next to the chosen room, press the left mouse key, and drag it to the departure date. Then release the key, and protel shows the selected time period as a grey marking:

Scheduling reservations with the mouse



To continue working on the reservation, simply press [Enter].

Entering Data for a Reservation: Name

In the "Reservation" dialog" you enter the data for the reservation. Start with the guest's name:

Entering the guest's name

Once you exit the field, protel searches the guest database and tells you that it already contains a guest profile with this name:

Has this guest stayed with us before? Do we already have his information on file?

Name	City	Company	Birthday	Street	Remarks
Pate Ms	STRANRAER			5 Dalymple Ter...	
Pate Jane Mrs	HEMEL HEIMP...			2 Great Palmers	
Patel Mrs	WOLVERHAM...			110 Wergs Road	
Patel Anjan					

Double-click the entry of Mrs Jane Pate to select her guest profile.

By the way, protel reminds you that Mrs. Pate is a regular guest if this is recorded in her guest profile.

Information on known guests is shown immediately for every new reservation.

In this case, click [OK] to confirm the message and to return to the reservation dialog.

Entering Data for a Reservation: Details

protel has already inserted the guest's name and shows us the reservation data that you previously selected with the mouse:

Information on the guest

Information on the reservation

Status	Arrival	Ngh	Dprt.	Qty	R. type	R. no.	Adit	Rate code	Rate	Cn.	Det	Sp.
1	GTD CC	03/02/08	4	07/02/08	1	STTB	412 che	1	Right.pric	100.00	GBP	
									0.00			

Now, you can enter details on our reservation in the lower portion of the window, such as details on the market and the source. Open the pull-down menu and select one of the options displayed:

Collecting statistics

BY THE WAY: In the .ini file, you can determine yourself which fields in the Reservation dialog are mandatory.

Click "OK" to confirm the reservation.

protel shows the new reservation in the room plan:

<	Pate Jane Mrs	>		
			412 STTB / 07/02/08	Pate Jane Mrs

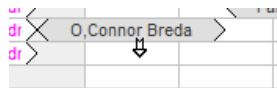
NOTE: To make sure you see the entire room plan for the next reservation, close and reopen the room plan.

Apropos ...

Entering Moves

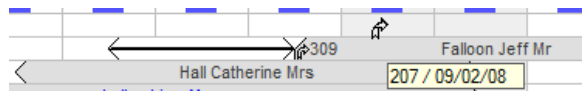
Begin by moving a complete reservation, which is often necessary to optimize room occupancy. To do this, simply place the cursor on the marking, press the Control key, and drag the entire reservation to another location in the room plan:

Moving a complete reservation



In some cases, a guest may want or need to move from one room to another during his or her stay. Simply place the cursor on the desired relocation date in the reservation, press the left mouse key, and then drag the mouse to the row of the room that the guest wishes to move to:

Moving during a stay



By the way: We can undo a move just as quickly, too. Simply select one part with the mouse, hold down the Control key, and re-combine the reservation.

Partings and Reunions

For more tutorials, go to
www.protel-net.com

We hope this tutorial showed you how protel works. On our website you will find more in-depth instructions for the beginners and the advanced users.

Join us in one of the other tutorials to learn how how to perform an End of Day process in protel, among many other things.

Comments welcome!

We look forward to receiving your comments. FeeFeel free to send any praise and criticism to documentation@protel-net.com.