



CHECK-INN[®]
LODGING SOFTWARE
FOR WINDOWS

A FRONT DESK SOLUTION

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ACKNOWLEDGMENT

We would like to thank all of the motel owners, managers and staff who have contributed their suggestions and ideas for making Check-Inn® for Windows a better and more useful product. Your invaluable help in the development and testing of Check-Inn® is greatly appreciated.

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CHECK-INN® FOR WINDOWS

FEATURES

- * Easy-to-use menus.
- * Supports properties with up to three hundred rooms.
- * Network version available.
- * Link to call accounting available. Charges post directly to folios.
- * Simple check-in with automatic tax calculation.
- * Quick search for past guests.
- * E-mail confirmations and reports.
- * Prints detailed and summary folios.
- * Split folios. (Allows you to split charges between guests.)
- * Quick and easy check-out.
- * Maintains up to sixty-four thousand reservation nights.
- * Instant check-in for guests with reservations.
- * Prints confirmation & cancellation letters.
- * Archives cancellations.
- * Guest, reservation and cancellation numbers.
- * Group check-in, check-out, confirmations, and cancellations.
- * Balance transfer between rooms.
- * Reservation search, reports and grid.
- * Separate entries for cash, credit cards and billing.
- * Credit card report separated by type of card.
- * Automatically calculates credit card discount charges.
- * All guest and financial information is modifiable.
- * Maintains room status (Clean, Dirty, Not Available).
- * Supports daily, weekly, monthly, and package rates.
- * Three tiered daily rates for weekday and weekend rates.
- * Multiple levels of password protection.
- * Automatic zip-code identification.
- * Daily Report with totals for the month.
- * Monthly Report with comparison to previous year.
- * Occupancy and Forecasting Reports.
- * Housekeeping Report.
- * Event tracking.
- * Shift report includes, totals for cash, credit and billing payments for the shift.
- * Managers Shift Report for all shifts for up to 30 days previous.
- * Ability to print property wide shift reports or individual reports by network terminal.

- * Third party billing.
- * Ability to hide Windows desktop for added security.
- * Ability to transfer balances between rooms.
- * Maintenance log for individual rooms or for items on your property.
- * Tracking for extra people in a room.
- * Marketing codes and market segment report.
- * Guest departure list.
- * Stand alone cash register for non-guest sales.
- * Automatically posts charges for stay-overs and ends financial day.
- * Supports separate printers for folio and reports.
- * Multiple display size settings.
- * Prints labels for billing or marketing.
- * Accounts Receivable Aging report.
- * Full backup, auto-backup, and restore for Check-Inn® for Windows data.
- * Maintains a guest list with names & addresses in Dbase format.
- * Exports to Quicken, QuickBooks, Peachtree and others.
- * Electronic cash drawer support.
- * Credit card module available.
- * Guest message and diary functions.
- * Travel agent commission tracking.
- * Occupancy alarm.
- * Automatic reservation conflict sort.
- * Copy last feature for adding rooms.
- * Indicator for bad guests.
- * Repeating charges and automatic repeating charges.
- * Interfaces to central reservations, movie & voice mail available.
- * Works with a mouse.
- * Full keyboard support.

For safekeeping, enter your property name and code number(s) from your invoice below.

Property Name: _____

Check-Inn® Code Number: _____

Check-Inn® Options Code: _____

Interfaces Purchased: _____

INTRODUCTION

Thank you for purchasing Check-Inn® for Windows. By taking this step, you have begun to simplify your property's record keeping. Check-Inn® automates and simplifies many of the tasks involved in front desk management. It gives you more control in the management of your property and saves you many tiresome hours of bookkeeping. You and your staff will be able to update with only a touch of a button. Reports and audits are available quickly and accurately. The simplicity of Check-Inn® for Windows is an asset to any property.

It has been found that it is much easier and less stressful for beginning staff to have a practice period of at least two weeks to learn this new system. This is easiest if your current system is maintained until all staff is trained in Check-Inn® for Windows.

If you have problems running Check-Inn® for Windows, consult the corresponding section of this manual. You may also refer to the Question and Answer section at the end of the manual, which contains the answers to the most common questions. Once you are running Check-Inn® for Windows you may press the **F1** key at any time to receive help throughout the program. The help key will allow you to view tips, hints, and directions. If you still cannot find a solution to your problem, please call CUSTOMER SUPPORT.

IMPORTANT: Your property name and personal code number **must** be entered in the "Name and Address" selection of "Change Settings" for Check-Inn® for Windows to run. Your property name and code number will be found near the middle of your invoice under the information section. Both the property name & code number must exactly match the invoice.

EXAMPLE:

Jeremy's Junction Motel – Portland
651335

* The entire name, "Jeremy's Junction Motel – Portland" including spaces and punctuation must be entered on the name line exactly as they appear on the invoice. *

If you cannot find your invoice, contact Innsoft, Inc. to receive your personal code. You can run Check-Inn® for Windows for a trial period of forty-five to sixty days in Demo mode using the demo code (651335) as your code number.

HARDWARE REQUIRED

- Windows 95 or better (not compatible with 3.1)
- Windows 98 or better for Network Servers.
- Printer that works in Windows.

HARDWARE RECOMMENDATIONS

- Pentium 3-800 MHz processor or better.
- 128 Mb RAM for Windows 98 Second Edition / ME
- 256 Mb RAM for Windows NT / 2000 / XP
- 10 GB Hard Drive or better.
- Modem (for Credit Card Processing); must support Bell212 (B212) protocol.
- 2 Serial Ports
- 1 Parallel Port
- Mouse

INSTALLATION

SETTING UP YOUR COMPUTER

- We highly recommend that your computer be placed at your front desk for easy guest check-in. Computers on a network should be placed in areas that allow for easy installation of networking cables. Purchase of extension cables may be necessary if you are having problems with the placement of your monitor, keyboard or printer.
- Any printer that is Windows compatible will work with the Check-Inn® for Windows software. For dot matrix printers, use TWO PART carbonless 8 ½ X 11 size, pin feed printer paper. This will allow your customer to keep one copy of the folio, and allow you to keep the other copy.
- The computer must have an accurate real time clock that is properly set. Please pay close attention to A.M. & P.M. settings as they are often reversed.

NOTE: The time can be changed by double clicking the left mouse button on the digital clock in the lower right corner of your Windows desktop.

INSTALLING CHECK-INN® ON YOUR HARD DRIVE

- To install Check-Inn® for Windows on a computer, insert the Check-Inn® CD into your CD-ROM drive. If you are not prompted in a few moments, click on Start, then Run, then type: D: Setup and press the **OK** button.

NOTE: D is typically the default CD drive.

- You will be asked which program you wish to install (click on Check-Inn® for Windows).

- You may now choose where Check-Inn® for Windows will be installed. Click on the **Browse** button or type in the directory name for your Check-Inn® installation. Typically this will be the C drive if it is a stand-alone computer, but it may be another drive if there is a network (i.e.: F or G). Check-Inn®'s default directory is C:\CHECKINN.
- Once you have entered the proper directory, click the **Next** button to install the program to your hard drive.

STARTING CHECK-INN® FROM THE HARD DRIVE

- The installation program will create an icon on your desktop. Simply click on the icon to start Check-Inn® for Windows.
- If no icon appears on your desktop:
 1. Right click on an open area of the desktop.
 2. Left click on **New**, and when the menu appears click on **Shortcut**.
 3. When you are prompted at the command line, type C:\CHECKINN\CHECKINN.EXE or file path and click on the **Next** button.
 4. Finally you will be prompted for a name (this typically defaults to CHECKINN). Click on the **Next** button.
 5. Click the **Finish** button on the final screen.

Press “**8**” or click the **Change Settings** button on the *Main Menu* to start the customization process.

CUSTOMIZATION OF CHECK-INN®

Change Settings contains basic information that Check-Inn® for Windows needs in order to operate properly. All the information needs to be entered and kept up-to-date.

This information includes:

- Property name and address (Required)
- Property code number (Required)
- Room numbers and descriptions
- Rate groups (Optional)
- Tax rates and sales categories
- Check-in/out and close out times
- Credit card discount rates
- Default phone limit
- Credit Card Processing (Module Required)
- Printer information
- Electronic cash drawer setup
- Voice mail integration (Module Required)
- Screen settings
- Billing and reservation policy statements
- Passwords and security settings

PROPERTY NAME AND ADDRESS

When customizing Check-Inn® for Windows you should first set the property name and address in **Change Settings**.

IMPORTANT! The personal code number must be set for Check-Inn® for Windows to operate. If you have lost your code number or have changed your property's name, please contact Innsoft, Inc. to receive your personal code number.

The *Property Name & Address* screen contains the name of your property, your property code number, your options code (For Voicemail, Network, etc.) and the property address and contact information.

The name, address, phone number, fax number, and E-mail you enter will appear on all reports and folios.

ENTERING PROPERTY INFORMATION

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “1” or click the **Property Name & Address** button.
3. Enter your property’s name **exactly** as it appears on your invoice under the *Information* section. The property name is not case sensitive, but punctuation and spacing are important.

IMPORTANT! Your “Code Number” is based on the property name line, which is why it needs to match the invoice exactly.

4. Enter your property’s address, phone number, fax number and e-mail address.
5. Enter your Personal Code Number (and options code if you have one) as it appears on your invoice under the *Information* section.
6. Press **F10** or click the **Done** button once you are finished.

NOTE: If this is a demo version of Check-Inn® for Windows, just enter the name as you want it to appear on folios and set the code number to **651335**. The demo code will let you operate Check-Inn® for Windows for a period of sixty days from the day the disk or CD was made.

ROOM RATES AND ROOM INVENTORY

ENTERING YOUR ROOM INVENTORY

Enter the rooms in the order that you wish them to display in your room lists and in your reports. Each new room will be added immediately below the room currently selected with the highlight bar.

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “2” or click the **Rooms & Rates** button.

ADDING A ROOM

1. Press **F2** or click the **Add Room** button.
2. Enter the room number.
3. Enter the room rate. You may enter the room rate in one of two ways:
 - Enter the default amount that you want to charge for the room (i.e.: Rate\Group: 79.00). This will charge a flat rate of \$79.00 for the room each night.
 - Enter the rate groups that will apply to this room (i.e.: Rate\Group: AB). This will display a list of rates from group A or B when selecting or changing a guest's rate for the room. For more information, please see the "Room Rates" section of the manual.

You can override the entry made here when you check guests in using a user-defined rate in the *Guest Information* screens. The user-defined rate feature can be password protected.

4. Enter in the room description. (i.e.: King/Non-Smoking)

IMPORTANT! Make sure you enter the descriptions of similar rooms in EXACTLY the same way, so that Check-Inn® for Windows can properly group the rooms.

5. Press **F10** or click the **Done** button to add the room, otherwise press **ESC** or click the **Cancel** button if you would not like to add the room.

TIPS

- If you are adding multiple rooms of the same description and rate, click on the check box next to **Copy Selected Room**. Check-Inn® for Windows will add the next sequential room number keeping the description and rate the same.
- If you need to add a room in the middle of the list, highlight the room directly above where the new room will be added. Press **F2** or click the **Add Room** button, then enter the room information in the same manner as above.

EDITING A ROOM

1. Select the room you would like to edit.
2. Press **F3** or click the **Edit Room** button.
3. Change the incorrect information in the same manner described for Adding a Room.
4. Press **F10** or click the **Done** button to save the changes. Press **ESC** or click the **Cancel** button to disregard the changes.

DELETING A ROOM

IMPORTANT: Make sure that there are no current guests or reservations for the room you would like to delete.

1. Highlight the room you wish to delete.
2. Press the **DEL** key or click the **Delete Room** button.
3. A message box will be displayed asking, “Delete Room ***?”. Press **F10** or click the **Yes** button to delete the room. Otherwise press **ESC** or click the **No** button.

If a message is displayed saying, “Room Occupied or Reserved. Unable to Delete Room.” move all guests and reservations for this room to other available rooms. Then try deleting the room again.

ENTERING CONFERENCE OR DUMMY ROOMS

NOTE: To activate conference room features, check the “Allow Conference and Dummy Rooms” check box in *Set Colors and Switches* from *Change Settings*.

Conference rooms do not affect occupancy totals, availability totals, or average daily rate.

1. Press **F2** or click the **Add Room** button.
2. Enter the room number with a letter from A-Z (not including S) before the number.
3. Enter the room rate. You may enter the room rate in one of two ways:

- Enter the default amount that you would like to charge for the room (i.e.: Rate\Group: 79.00). This will charge a flat rate of \$79.00 for the room each night.
- Enter the rate groups that will apply to this room (i.e.: Rate\Group: AB). This will display a list of rates from group A or B when selecting or changing a guest's rate for the room. For more information, please see the "Room Rates" section of the manual.

You can override the entry made here when you check guests in using a user-defined rate in the *Guest Information* screens. The user-defined rate feature can be password protected.

4. Enter in the room description. (i.e.: Conference Room)

IMPORTANT! Make sure you enter the descriptions of similar rooms in EXACTLY the same way, so that Check-Inn® for Windows can properly group the rooms.

5. Press **F10** or click the **Done** button to add the room, otherwise press **ESC** or click the **Cancel** button.

ENTERING SPLIT ROOMS

Split rooms do not affect the total number of rooms occupied or available. However, room rental for a split room will affect your average daily rate. Split rooms are not available when making a reservation. Rooms may only be split at check-in or from the guest screen.

1. Press **F2** or click the **Add Room** button.
2. Enter the room number with an "S" before the number.
3. Enter the room rate. You may enter the room rate in one of two ways:
 - Enter the default amount that you would like to charge for the room (i.e.: Rate\Group: 79.00). This will charge a flat rate of \$79.00 for the room each night.
 - Enter the rate groups that will apply to this room (i.e.: Rate\Group: AB). This will display a list of rates from group A or B when selecting or changing a guest's rate for the room. For more information, please see the "Room Rates" section of the manual.

You can override the entry made here when you check guests in using a user-defined rate in the *Guest Information* screens. The user-defined rate feature can be password protected.

4. Enter in the room description. (i.e.: Split Room)

IMPORTANT! Make sure you enter the descriptions of similar rooms in EXACTLY the same way, so that Check-Inn® for Windows can properly group the rooms.

5. Press **F10** or click the **Done** button to add the room, otherwise press **ESC** or click the **Cancel** button.

SORTING THE ROOM LIST

If you have typed in your room list and it is out of order, you may use this utility to automatically sort your rooms. Rooms can be sorted either by room number, or alphabetically by description.

1. Press **F12** or click the **Sort Room List** button, in the bottom left of the *Room Numbers & Descriptions* screen.
2. Select the way you want the rooms sorted by either pressing “**R**” to sort by Room Number or “**D**” to sort by Room Description, or click the check box to the right of the option.
3. Press **F10** or click on the **Done** button to sort the rooms. Otherwise press **ESC** or click on the **Cancel** button to leave the rooms in the current order.

SEARCHING FOR A ROOM IN THE LIST

1. Make sure the cursor is in the *Room Search* box.
2. Type in the Room Number or Description of the room.
 - If the room is listed, the selection bar will move to the room you are searching for as you type.
 - If the room is not listed, a message will be displayed saying, “Room Not Found.” Press **Enter** or click the **OK** button.

CHANGING THE ROOM STATUS

The program will generally keep track of the status of each room in your property. If you find that the status is inaccurate, then you may change it here.

If you have a room that is currently Out of Service you can change the status of the room to <NOT AVAILABLE>. A warning message will be displayed if the room is occupied.

NOTE: Rooms marked as <NOT AVAILABLE> will not appear on the Housekeeping Report.

1. Press **F4** or click the **Change Status** button in the *Room Numbers & Descriptions* screen.
2. This will change the status of the selected room between <Clean>, <Dirty>, or <NOT AVAILABLE>. Continue until you reach the correct status.

CLEANING ALL ROOMS

1. Press **F5** or click the **Clean All Rooms** button in the *Room Numbers & Descriptions* screen.
2. A message box will be displayed asking, "Set All Rooms to Clean?" Press **F10** or click the **Yes** button to set all dirty rooms to clean. Otherwise press the **ESC** key or click the **No** button to leave current status settings.

NOTE: <NOT AVAILABLE> rooms will not change status.

ADJUSTING THE LINEN CHANGE SETUP

Linen status lets you change the number of days a room must be occupied before it is marked for a linen change on the Housekeeping Report (/L).

1. Press **F7** or click on the **Linen Status** button in the *Room Numbers and Descriptions* screen.
2. Set the number of nights the room must be occupied before the linen needs to be changed for daily rate guests. To adjust the

number of nights, type the new number or use the arrow keys to increase or decrease the number listed.

3. Repeat the above procedure for the Weekly, Monthly and Package rate types.
4. Press **F10** or click the **Done** button to save the changes, otherwise press **ESC** or click the **Cancel** button to return to the *Room Numbers and Descriptions* screen without saving the changes.

Guests checking out will be marked for a linen change with a /L in the “Housekeeping Report”. To turn off the linen change feature set the number of nights to “1” for each rate type in the linen change setup.

PRINTING A ROOM LIST

1. Press **F11** or click the **Print Room List** button.
2. A *Print Preview* of the Room List will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the room list.
 - Press **F4** or click the **Print 2X** button to print two copies of the room list.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the room list.
 - Otherwise press **F10** or click the **Done** button to return to *Room Numbers and Descriptions* screen without printing the room list.

SETTING RATE GROUPS

NOTE: This is an optional step. However if you choose not to complete this step and have no set rate for the room, then you must manually enter the rate for each guest.

Rate Groups allow you to set several rates and discounts for each room. These rates can change for different time periods, and/or automatically change between normal and special rates throughout the guest’s stay. Once this step has been completed, you will be able to select the appropriate rate or discount from a list that will be displayed when you enter the rate field of the *Guest Information* screen.

Think about the different types of rooms in your property (i.e.: king, queen, queen with Jacuzzi). You will be assigning a set of rate groups for each type of room. Each type of room may have up to six rate groups. These may include a daily, up to two special daily rates, a weekly, a monthly and a package rate group. Within each rate group you may define the various discount rates that you extend to your guests (i.e.: AAA, AARP, Corporate).

Each group is assigned one of the following rate types:

DAILY: A daily rate is one that is charged per night. A room may have both normal and special rates of this type.

WEEKLY: A weekly rate is charged every seven days. For example, if a guest checks in on a Monday, he would not be charged again until the following Monday.

MONTHLY: A monthly rate type will charge the guest once per month, on the same day of each month. For example, if the guest checked in on 7/4/01, he will not be charged again until 8/4/01.

PACKAGE: A package rate can be set to represent periods of time that can vary from one to ninety-nine days.

The *Room Rates* Screen looks like this:

ROOM RATE SETTINGS

Select Rate Group: **GROUP A** Group Rate Type: **Daily Rates**

Rate Description	1	2	3	4	5	6
	10/11/01 06/12/02	06/13/02 09/03/02	09/04/02 06/11/03	11/22/01 11/25/01	12/22/01 12/25/01	05/25/02 05/27/02
1P RACK	75.00	95.00	75.00	125.00	125.00	125.00
2P RACK	80.00	100.00	80.00	125.00	125.00	125.00
1P 10% DISC	67.50	85.50	67.50	125.00	125.00	125.00
2P 10% DISC	72.00	90.00	72.00	125.00	125.00	125.00
1P CORPORATE	50.00	70.00	50.00	125.00	125.00	125.00
2P CORPORATE	50.00	70.00	50.00	125.00	125.00	125.00
1P TRUCKER	45.00	65.00	45.00	125.00	125.00	125.00
2P TRUCKER	45.00	65.00	45.00	125.00	125.00	125.00
1P COUPON	63.75	80.75	63.75	125.00	125.00	125.00
2P COUPON	68.00	85.00	68.00	125.00	125.00	125.00
MGR. SPECIAL 1P	60.00	75.00	60.00	125.00	125.00	125.00

F2 Print Rates F3 Set Dates F7 Special Days LINK Room Rates

Done <F10>

SETTING RATE DATES

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “2” or click the **Rooms & Rates** button.
3. Press **F6** or click the **Room Rates** button.
4. Click on the column you would like to set the dates for, and press **F3** or click the **Set Dates** button for the rates you will enter.
5. Set the Start Date by typing in the date or clicking the down arrow and selecting a date from the calendar. This is the first day the rate will be active.
6. Set the End Date by typing in the date or clicking the down arrow selecting a date from the calendar. This is the last day the rate will be active.
7. Press **F10** or click the **Done** button.

NOTE: Check-Inn® searches for a current rate from right to left. You may enter a full year regular rate in column 1 and a special day in column 2. When that day arrives the rate will change to column 2 and back to column 1 the next day.

8. Click on the **Link Room Rates** check box. This will allow the rate for a guest to automatically change between the date columns during a guest’s stay. For further information about link rates please see the “Link Rates” section of this manual.

SETTING THE GROUP RATE TYPE

DAILY, WEEKLY, AND MONTHLY RATES

1. Select the *Rate Group* field and choose a group that is not currently assigned (i.e.: Group A) using the arrow keys or clicking the down arrow and selecting a group from the list.
2. Select the *Group Rate Type* by using the arrow keys or by clicking the down arrow to select a rate type. Each type of rate will need its own group.
3. Within each group there are sixteen spaces in which you may name your various rates for that room type (i.e.: 1 person rack

rate, 2 people rack rate, 1 person 10% discount, 2 people 10% discount etc).

4. Enter the appropriate rates for each date column.
5. If you have previously entered your room numbers and descriptions, you will need to go back to the *Room Numbers and Descriptions* screen and edit each of your rooms so that the Rate/Group includes all the group letters for this type of room.

PACKAGE RATES

1. Select a rate group that is not currently being used (i.e.: Group C) either by using the arrow keys or clicking the down arrow and selecting a group from the list.
2. Select "Package" from the *Group Rate Type* list.
3. Enter the number of nights in the package (1-99) by selecting the *Nights* field and typing in the number of nights.
4. Enter your package rates in the same manner as above.
5. If you have previously entered your room numbers and descriptions, you will need to go back to the *Room Numbers and Descriptions* screen and edit each of your rooms so that the Rate/Group includes all the group letters for this type of room.

SETTING SPECIAL RATE DAYS

If your property has different rates depending on the day of the week, Check-Inn® for Windows can adjust guest rates automatically on these days with special rate groups.

NOTE: If your property has higher rates on the weekend, this option is quite useful.

SETTING UP A SPECIAL RATE

1. Press **F7** or click the **Special Days** button on the *Room Rate Settings* screen.
2. Select the days of the week the rate will be active by pressing the number to the left of each day, or clicking the button for the day of the week you are setting. Each day can be set for

NORMAL, SPECIAL A, or SPECIAL B rates. Continue until the correct setting is shown for each day.

IMPORTANT! Be careful to choose the correct setting for each day. These settings apply to ALL rooms on your property.

3. Press **F10** or click on the **Done** button once you are finished.
4. Click on the “LINK Room Rates” check box. This will allow the rate for a guest to change between the normal rate and special rates at the appropriate times during their stay. For further information about link rates, please see the “Link Rates” section of this manual.
5. Select a rate group that is not currently being used (i.e.: Group D). This will be used to create the rates for your SPECIAL A group.
6. Select “Daily” from the *Group Rate Type* either by using the arrow keys or by clicking the down arrow and selecting “Daily” from the list.
7. Enter the NEW rates for SPECIAL A days in this group. Make sure to enter the “Rate Descriptions” exactly as they appear in the NORMAL daily rate group.

NOTE: You may create a rate group for SPECIAL B days in the same manner as above.

8. If you have previously entered your room numbers and descriptions, you will need to go back to the *Room Numbers and Descriptions* screen and add the letter of the NEW daily rate group(s) to the *Rate/Group* field for each room that will use these special rates. Make sure that you include ALL rate groups for this room type, especially if you are using Special A and Special B daily rates.

IMPORTANT! The letter of the normal daily rate group must be listed BEFORE the letter of the special daily rate group from left to right. If you are using two special rate days, be sure that your SPECIAL A rate group is listed before your SPECIAL B rate group from left to right.

EXAMPLE:

- Normal rates apply from Sunday through Thursday.
- Friday's rates are slightly higher than normal.
- Saturday's rates are much higher than normal.
- All Queen rooms use rates from:
 - Group A for Sunday – Thursday rates. (NORMAL)
 - Group D for Friday rates. (SPECIAL A)
 - Group E for Saturday rates. (SPECIAL B)

Thus all Queen rooms must show ADE in the rate column on the *Room Numbers and Descriptions* screen.

NOTE: If the rate column showed AED, then Friday and Saturday would switch, meaning Group E would be charged on Friday and Group D would be charged on Saturday.

LINK RATES

To activate link rates, tab to the “Link Room Rates” check box and press the **Spacebar**, or simply click the check box with your mouse.

ON: Check-Inn® for Windows will automatically adjust room rates based on the date columns and special days for your property.

NOTE: For special rates to work properly, Link Room Rates must be ON.

OFF: Check-Inn® for Windows will not automatically adjust rates. All changes must be made manually on the *Guest Information* screen.

PRINT ROOM RATES

1. Press **F2** or click the **Print Rates** button.
2. A print preview of the room rates will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the rates.
 - Press **F4** or click the **Print 2X** button to print two copies of the rates.

- Press **F6** or click the **E-mail** button to e-mail a copy of the room rates.
- Otherwise Press **F10** or click the **Done** button to return to the *Room Rate Settings* screen without printing the room rates.

ENTERING TAX & SALES CATEGORIES

1. Press “**8**” or click the **Change Settings** button on the *Main Menu*.
2. Press “**3**” or click the **Tax & Sales Categories** button.

SETTING PERCENTAGE TAXES

1. Press **F2** or click the **Modify Taxes** button in the bottom left corner of the screen.
2. Enter the name and percentage of each tax charged in your area. (EXAMPLE “Tax A”: State, “Tax Rate”: 6.5000)
3. Press **F10** or click the **Done** button once you have finished entering the tax types.

SETTING THE FLAT TAX

1. Tax E is a “Flat Tax”. If your guest’s are charged a fixed tax amount with each lodging charge, enter the name and the dollar amount in the *Flat Tax E* slot.

NOTE: This type of tax may only be applied to Lodging charges and is not available on any other type of charge.

2. Press **F10** or click the **Done** button once you have finished setting the tax types.

SETTING TAX EXEMPTION TYPES

You may enter up to three types of tax exemptions. (Type 1, Type 2, Type 3)

1. Press **F2** or click the **Modify Taxes** button.

2. To enter the exemptions, click on the button next to the exemption type.
3. Select the Item Taxes that will not be charged when this exemption type is selected at check-in.

NOTE: On the right side under the “Tax Breakdown”, you will see the total tax percentage from which this type is exempt.

4. Press **F10** or click the **Done** button.

SETTING AUTO TAX EXEMPTION

Your property may be operating in an area that offers tax exemption to certain types of guests.

1. Press **F2** or click the **Modify Taxes** button.
2. Set the *Auto Exemption* that fits your property by clicking on the check box next to the auto exemption type.
 - If there are no exemptions in your area select the “Off” check box.
 - If there is no room tax for monthly guests in your area, select the “All Monthly Guests” check box. This will set the monthly rates to tax exempt.
 - If there is no room tax for monthly guests AND daily guests that have stayed in the hotel over a certain number of nights, check the “After ## days & Monthly”.
3. Press **F10** or click on the **Done** button, once you have selected the correct auto exemption.

SETTING TAXES FOR LODGING, PHONE AND ROOM DEPOSIT CHARGES

1. Click the **Taxes: [your tax]** button next to Lodging.
2. Check all taxes that apply to lodging charges by pressing the **Spacebar** to select the tax, or simply clicking on the check box.
3. On the right side you can see a breakdown of the taxes, and total percentage that will be charged.
4. Press **F10** or click on the **Done** button once you are finished.

5. Repeat the above procedure for the “Phone” charges and “Rm. Deposit” charges.

EXAMPLE:

- *Tax A* is STATE and the tax rate is “5.00%”
 - *Tax B* is CITY and the tax rate is “3.50%”
- Together they comprise a total *Lodging* tax of 8.50%.

SETTING THE TAXES FOR OTHER ITEMS

The bottom section allows you to enter sales categories for goods and services that your property offers. The top three category names are fixed (Lodging, Phone Tax, and Rm. Deposit). There are a total of twenty-one categories, nineteen of which are miscellaneous categories for your property.

1. Enter the Item Name next to the item number.
2. Click on the **Taxes: [your tax]** button next to the Item Name.
3. Select all taxes that apply to the current item by pressing the **Spacebar** or checking the box before each tax.
4. On the right side you will see a breakdown of the taxes, and total percentage that will be charged.
5. Press **F10** or click the **Done** button once the taxes are correct.
6. Repeat the above procedure for all sales categories available.
7. Press **F10** or click the **Done** button once you are finished.

AUTO-CHARGE ALL GUESTS

If you have a repeating charge you wish to charge all guests checked in to your property, you may set up a maximum of three auto-repeating charges in *Tax & Sales Categories*. If you have over three auto-repeating charges set up, only the first three will apply.

NOTE: Lodging and Phone may not have auto-repeating charges.

1. Press **F2** or click the **Modify Taxes** button.
2. Click on the **Taxes: [your tax]** button next to the Item Name you would like to enter a repeating charge for.

3. Check the box next to “Auto-Charge All Guests” by pressing the **Spacebar** or simply clicking the check box.
4. Enter the “Charge Amount”.
5. Press **F10** or click the **Done** button once you are finished.

SETTING CHECK-IN/OUT AND CLOSE OUT TIMES

1. Press “**8**” or click the **Change Settings** button on the *Main Menu*.
2. Press “**4**” or click the **Check-In/Out Times** button. It is here that you will set the check-out, check-in, early check-in, close-out time and hold to time for your property.
3. Set the “Check-Out Time” by typing in the time, or by using the arrows. The check-out time will be printed on your guest folios to let your guest know when they are expected to check out.

NOTE: Guests are not charged for the next day unless they fail to check out before the next Check-In time.

4. Set the “Check-In Time” by typing in the time, or by using the arrows. Check-In time is the time when room and tax charges are posted on all checked-in guests.
5. Set the “Early Check-In Time” by typing in the time, or by using the arrows. If a guest checks in prior to this time, they will be charged for the previous night. This is also the time of day when the reservations for the current day will be displayed.
6. Set the “Close Out Time” by typing in the time, or by using the arrows. This time marks the beginning and ending of your financial day. This is a 24-hour period. Your daily reports are based on this time.
7. Set the “Hold to Time” by typing in the time, or by using the arrows. This is a reminder to clerks for non-guaranteed reservations.

NOTE: Reservations are NOT automatically cancelled at this time; it is simply a reminder.

8. Press **F10** or click the **Done** button once all times have been set.

If you need to change the guest's check-in date, you may do so through the *Check-In* or *Guest Screens*. If you need to change the guest's check-out date, you may do so through the *Check-Out* screen.

ENTERING CREDIT CARD INFORMATION

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “5” or click the **Credit Cards & Phone Limit** button.
3. Change the names for the credit cards if you would like, and delete any that you don't accept.

NOTE: If you change the order of the credit cards after you begin entering credit card transactions, the credit card summary on the *Daily Report* will display incorrect totals.

4. If the symbol for the credit card is incorrect, enter in the correct symbol.
5. Enter the “Discount Percentage” for each credit card you accept. This is the percentage of the total sale that each card takes as a processing fee.
6. Click the “Direct Deposit” check box for each card that directly deposits payments to your bank account, or leave it blank if the credit card company issues you a settlement check.
7. Press **F10** or click the **Done** button to save your changes. Otherwise press **ESC** or click the **Cancel** button.

ENTERING A SPECIALTY PAYMENT TYPE

If your property accepts less than six credit card types, Check-Inn® for Windows can track ONE specialty payment type (i.e.: checks or gift certificates) in an unused credit card slot.

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “5” or click the **Credit Cards & Phone Limit** button.
3. Enter an asterisk (*) followed by the name of the specialty item in an unused credit card slot. This name will be listed as a payment type in all *Cash Register* screens.

NOTE: If you enter “checks” or “cheque” for the name you do not need to enter an asterisk (*) before the name.

4. Enter a symbol for the payment type.
5. Make sure the *Discount Percentage* is zero.
6. Press **F10** or click the **Done** button to save the specialty payment type.

The payments to this specialty type will be listed in the “Credit” column on guest folios and daily reports. These entries will be listed with the symbol you have chosen.

If you are using the Credit Card Processing Module, this payment type will be listed separately in the *Cash Register* screens. Payments will not require authorization and will not be sent to credit card batches.

ENTERING A BILLING BALANCE

You may create a miscellaneous billing entry to transfer your existing “Account Receivable” balance. The amount entered in the “Billing Balance” slot will not be affected by activity in Accounts Receivable.

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “5” or click the **Credit Cards & Phone Limit** button.
3. Enter the amount in the “Billing Balance” slot in the lower left corner of the *Credit Cards & Phone Limit* screen.
4. Press **F10** or click the **Done** button to save your changes. Otherwise press **ESC** or click the **Cancel** button to return to the *Change Settings* screen.

SETTING THE DEFAULT PHONE LIMIT

NOTE: Call-Inn™ Call Accounting or Phone Monitor must be purchased to use this feature.

Each guest that you check in will be allowed to make phone calls up to the dollar limit that you define here. Once the set limit has been

reached, an “over limit” warning will be displayed on your terminal and the guest will be added to the *Phone Limit Violation Report*. Credit limits for individual guests can be set through other screens.

If you have set up the Mitel Toll Control feature within the Call-Inn™ Call Accounting software, the guest’s phone will be turned off when this phone credit limit has been reached.

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “5” or click the **Credit Cards & Phone Limit** button.
3. Enter the initial phone credit limit for your guests in the lower right corner of the *Credit Cards & Phone Limit* screen.
4. Press **F10** or click the **Done** button to save your changes. Otherwise press **ESC** or click the **Cancel** button to return to the *Change Settings* screen.

NOTE: To adjust the phone limit for a specific guest you may press “P” or click on the **Phone Credit Limit** button in the *Check-In or Guest Screen Cash Register*.

CREDIT CARD PROCESSING

IMPORTANT! This is a special module that is purchased separately and requires a special code number.

HARDWARE REQUIREMENTS FOR THE CREDIT CARD PROCESSING MODULE

1. Magnetic stripe reader (Either as part of a keyboard or with a wedge).
2. A Windows compatible modem (2400 baud or better).
3. An account with either Chase or Cardnet.

ENTERING MERCHANT SETUP INFORMATION

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “5” or click the **Credit Cards & Phone Limit** button.
3. Press **F3** or click the **Card Processing Setup** button in the lower left corner.
4. Select the Card Processor from the drop down box.

On this screen you may enter all of the Merchant setup information found on the VAR sheet provided by your card processor, as well as modem setup information.

HINT: If you have a Qual. code or 4 digit Terminal Number, the card processor is CHASE.

If you have CHASE:

1. Enter in your 12 digit Merchant Number.
2. Enter in the 4 digit Terminal Number.
3. Enter in your 5 digit Qual. Code
4. Select your state abbreviation from the drop down box.
5. Enter in your 5 digit zip code.
6. Enter in the specific SE numbers for EACH card that is supported.
7. Enter up to 3 dial-up numbers.
8. Press **F10** or click the **Done** button to save merchant setup information. Otherwise press **ESC** or click the **Cancel** button.

NOTE: If a “9” is required to get an outside line at your property, you will want to include a “9,” in the dial-up number.

If you have CARDNET:

1. Enter in your 12 digit Merchant number.
2. Enter in your 6 digit Terminal number.
3. Select your state abbreviation from the drop down box.
4. Enter in your 5 digit zip code.
5. Enter up to 3 dial-up numbers.
6. Press **F10** or click on the **Done** button to save merchant setup information. Otherwise press **ESC** or click the **Cancel** button

NOTE: If a “9” is required to get an outside line at your property, you will want to include a “9,” in the dial-up number.

ENTERING MODEM INFORMATION

Any modem that is compatible with Windows will work with Check-Inn® for Windows.

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “5” or click the **Credit Cards & Phone Limit** button.
3. Press **F3** or click the **Card Processing Setup** button in the lower left corner.
4. Press the **Select Modem** button.
5. Select a modem currently installed within Windows from the drop down box. Click the **OK** button.

NOTE: You should never need to access the *Modem Properties* without an Innsoft, Inc. technician helping you. If you are having trouble connecting to your credit card processor, please see the “Questions and Answers” section of this manual.

CREDIT CARD RECEIPT OPTIONS

On the bottom of the *Credit Card Processing* screen there are two options to customize your credit card receipts.

1. Select a “Receipt Option”, by clicking the check box for that option.
 - **Print Duplicate Receipts:** This will print separate customer and merchant receipts of the “Credit Card Sales Draft” when making a sale or charging a credit card.
 - **Print Pre-Authorization Receipts:** This will print a Credit Card Authorization Draft when a credit card is authorized.
2. Press **F10** or click the **Done** button to save changes, otherwise press **ESC** or click the **Cancel** button.

SELECTING YOUR PRINTER

Any printer that is compatible with Windows will work with Check-Inn[®] for Windows.

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “6” or click the **Select Printer / Install ECD** button to set your Folio printer and Report printer.
3. Click the **Select Printer** button to display the *Printer Setup* screen. Click on the down arrow to and select a printer that is currently installed in Windows. Do not change the page orientation; Check-Inn[®] does not support the landscape layout.
4. Select a font from the drop down box.

NOTE: If you select a font other than “Times New Roman” it may cause reports and folios not to print properly.

5. Select the width of the left margin from the drop down box next to the font selection. Print a sample report before setting a margin. Most printers do not require a margin.
6. Repeat the above procedure for the “Report Printer”.
7. Press **F10** or click on the **Done** button to save the printer settings.

ACTIVATING THE ELECTRONIC CASH DRAWER

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “6” or click the **Select Printer / Install ECD** button.
3. In the bottom left corner of the screen, you will find *Electronic Cash Drawer Settings*.
4. Set the parallel or serial port the cash drawer will use by clicking the down arrow and selecting the port from the list.
5. Enter the Trigger String that will open the drawer. For most serial drawers, the trigger string can be anything, such as “AAAA”. For parallel drawers, the trigger string most often used is “#7#7” which represents ctrl-G ctrl-G.

6. Select the types of transactions that will open the drawer by clicking the down arrow and selecting All Transactions, Cash Only, Cash & Credit, or Cash & Billings.

NOTE: You should not need to change the “Baud Rate” unless instructed to by the electronic cash drawer manufacturer.

7. Press **F10** or click the **Done** button to save the ECD settings.

VOICE MAIL INTEGRATION

NOTE: This requires a special module that may be purchased through Innsoft, Inc.

1. Press “**8**” or click the **Change Settings** button on the *Main Menu*.
2. Press “**6**” or click the **Select Printer/Install ECD** button.
3. In the lower right corner of the screen you will find “Voice Mail Settings”.
4. Set the serial port your voice mail system will use by clicking the down arrow and selecting the port from the list.
5. Select the “Voice Mail Type” by clicking the down arrow and selecting the manufacturer. Check-Inn® for Windows interfaces to Innovation or DuVoice.
6. Press **F10** or click on the **Done** button once you are finished.

SET COLORS AND SWITCHES

ADJUSTING THE DISPLAY SIZE

1. Press “**8**” or click the **Change Settings** button on the *Main Menu*.
2. Press “**7**” or click the **Set Colors & Switches** button.
3. Adjust the Display Size using the sliding bar in the top left corner of the *Set Colors And Switches* screen. Sliding the bar to the right will increase the display size, and sliding it to the left will decrease the display size.
4. Press **F10** or click the **Done** button.
5. A message box will be displayed saying, “Please restart Check-Inn® for scale changes to take effect.” Press **Enter** or click the **OK** button.
6. Press **F10** or click the **Done** button to return to the *Main Menu*.
7. Press “**E**” or click on the **Exit** button.
8. Double click on the icon to re-open Check-Inn® for Windows. If the display still needs adjustment, follow the previous steps until correct.

SET BACKGROUND COLOR

1. Press “**8**” or click the **Change Settings** button on the *Main Menu*.
2. Press “**7**” or click the **Set Colors & Switches** button.
3. Click the down arrow and select a background color for Check-Inn® for Windows.
4. Press **F10** or click the **Done** button to save the setting. Otherwise press **ESC** or click the **Cancel** button to return to the *Change Settings* screen.

SET SELECTION COLOR

Your current field will be indicated by the selection color you select here.

1. Press “**8**” or click the **Change Settings** button on the *Main Menu*.

2. Press “7” or click the **Set Colors & Switches** button.
3. Click the down arrow and choose a selection color for Check-Inn® for Windows.
4. Press **F10** or click the **Done** button to save the setting. Otherwise press **ESC** or click the **Cancel** button to return to the *Change Settings* screen.

OCCUPANCY ALARM

The Occupancy Alarm will alert employees when a set percentage of rooms have been rented at your property. You may set two alarms for each day of the week. The alarm messages will be displayed on both the *Main Menu* and on the *Reservations* screen.

DEFINING THE OCCUPANCY LEVELS

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “7” or click the **Set Colors & Switches** button.
3. Press **F5** or click the **Occupancy Alarm** button.
4. Set the percentage of rooms that must be rented before each message will be displayed. Use the arrow keys to increase or decrease the percentage. If you would like to disable a message on a certain day, set the percentage to zero.
5. Type in the messages that you wish to be displayed in the Alarm Message fields at the bottom of the screen (i.e.: Higher Rates, Maximum Rates, No Discounts, Do Not Rent).

NOTE: This will NOT affect the rates in ANY way.

6. Press **F10** or click the **Done** button once you are finished.

MARKETING CODES

A marketing code is a unique name that you create to track a segment of customers. (i.e.: You may publish a 10% discount coupon and would like to know what kind of revenue this generates, by entering “Coup10” as the marketing code.) These codes are assigned in the guest’s *Remarks* screen.

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “7” or click the **Set Colors & Switches** button.
3. Press **F4** or click the **Marketing Codes** button.

ADDING A MARKETING CODE

The marketing codes that you enter in this screen will be displayed in a drop down box on the guest’s *Remarks* screen.

1. Press **F2** or click the **Add Code** button.
2. Enter the marketing code the way it will be displayed in the drop down box of remarks.
3. Press **F10** or click the **Done** button to save the marketing code, otherwise press **ESC** or click the **Cancel** button.

EDITING A MARKETING CODE

1. Press **F3** or click the **Edit Code** button.
2. Re-enter the marketing code.
3. Press **F10** or click the **Done** button to save the changes to the marketing code, otherwise press **ESC** or click the **Cancel** button.

DELETEING A MARKETING CODE

1. Press **DEL** or click the **Delete Code** button.
2. A message box will be displayed asking, “Delete Marketing Code [selected marketing code]”? ” If you would like to delete the marketing code press **F10** or click the **YES** button, otherwise press **ESC** or click the **NO** button.

PRINTING A LIST OF THE MARKETING CODES

1. Press **F6** or click the **Print List** button.
2. A *Print Preview* screen will be displayed showing an exact copy of what will be printed.
 - Press **F2** or click the **Print** button to pint one copy of the list.

- Press **F4** or click the **Print 2X** button to print two copies of the list.
- Press **F6** or click the **E-mail** button to e-mail a copy of the list.
- Otherwise press **F10** or click the **Done** button.

SELECTING CHECK-INN® FUNCTIONS

1. Press “**8**” or click the **Change Settings** button on the *Main Menu*.
2. Press “**7**” or click the **Set Colors & Switches** button.
3. To select a function, tab to the setting and press the **Spacebar** to check the box, or simply click on the box next to the setting with your mouse.
4. Press **F10** or click the **Done** button to save the settings. Otherwise press **ESC** or click the **Cancel** button.

QUICK SEARCH FOR REPEAT GUESTS

ON: A screen will be displayed at guest check-in and reservations that will allow you to search for a previous guest by entering the guest’s last and first name. A listing of all guests in the guest history that fit the description will be displayed. When you select a guest, that guest’s information will be added to the *Guest Screen* for the current guest check-in.

NOTE: A guest that has stayed at your property more than once will have multiple entries in the list.

OFF: You will not be prompted to search for any past guests that have stayed at the property.

AUTOMATIC ZIP CODE IDENTIFICATION

ON: The city and state of the guest will be determined from the zip code that is typed in the *Guest Information* screen.

OFF: You must manually type the city, state, and zip code in the appropriate fields for each guest.

FORCE GUEST INFORMATION

ON: The clerk will be forced to enter the guest's first and last name, clerk name, and rate to complete a check-in. The clerk will also be forced to enter the guest's first and last name, phone number, and clerk name to make a reservation.

OFF: Only guest name and rate are required to complete a check in. Or only guest name to make a reservation.

FORCE SEQUENTIAL GUEST NUMBERS

ON: Check-Inn® will keep the last four digits of the guest number sequential for checked-in guests. This may be useful if you want to be assured that no guest has been deleted from the system. The additional numbers in the guest number will not be sequential.

OFF: Guest numbers will increase but will not be sequential.

LAST NAME FIRST IN GUEST INFORMATION

ON: Will display the last name first when viewing guest information.

OFF: Will display the first name first when viewing guest information.

ADD FIELD FOR MANUAL FOLIO NUMBER

ON: Changes the "Remarks to Guest" field to "Folio". This could be useful for having your own folio number on folios.

OFF: The "Remarks to Guest" field will be displayed in the *Guest Information* Screen.

NOTE: Any information that is typed into this field will be printed on the guest folio.

ALLOW BILLING AS A PAYMENT OPTION

ON: Will allow “Billing” as a payment option in guest *Cash Register* screens. This applies to *Check-In*, *Check-Out*, *Reservations*, and the *Guest Screen*.

OFF: This will remove billing as an option for payment in the guest *Cash Register* screens.

NOTE: This will not stop No-Shows from being sent to billing if they have a balance.

ALLOW BALANCE TRANSFER

Check-Inn® for Windows will allow the transfer of charges and credits between rooms. Only one transfer may be entered during each cash register transaction. Room transfers should ALWAYS cancel each other, however if they do not, an entry will appear on the Daily Report.

ON: Will allow “Rm Transfer” as a payment option on a guest *Cash Register* screens. This applies to *Check-In*, *Check-Out*, and the *Guest Screen*.

OFF: This will remove “Rm Transfer” as a payment option on the guest *Cash Register* screens.

CHARGE NO-SHOWS AUTOMATICALLY

ON: Automatically applies one night’s lodging charges or a forfeit amount to no-show guests and transfers the balance to Accounts Receivable.

OFF: No-show charges must be added manually to the guests.

NOTE: If a no-show has an advance deposit, that amount will be sent to Accounts Receivable as a credit.

AUTO-SORT RESERVATIONS

ON: The program will automatically sort reservations to resolve conflicts. Existing reservations will be transferred to other rooms of the exact same description to better accommodate a new reservation.

OFF: The program will not sort reservations for you. Any reservation conflicts that occur will result in a night count adjustment.

HIDE WINDOWS DESKTOP

ON: Check-Inn® for Windows will hide the Windows desktop and disable all Windows functions including the screen saver while Check-Inn® is running. If you are running Windows NT/ XP/ or 2000, users may be able to exit Check-Inn® for Windows using Alt + Tab or Ctrl + Alt + Del.

OFF: You will be able to minimize Check-Inn® for Windows and access other programs and functions.

ALLOW CONFERENCE OR DUMMY ROOMS

ON: Allows you to enter conference rooms (or dummy rooms, garages, boat slips, RV spaces, etc.) in the computer so that these rooms will not affect your total number of rooms occupied or available. Enter a letter (not including S) before the room number to make it a “Dummy Room”. (i.e.: C101)

OFF: Rooms with a letter before the room number will behave no differently than other rooms entered in the system.

RECORD AND REPORT AUDIT CHANGES

ON: Any changes made in the *Audit* or *Edit* screens will be recorded on the Shift Report. In addition, the time and date that this feature was turned on, the time and date that the changes were made, the date affected, and a separate *Shift Summary for Audit* section will be displayed on the Shift Report. An “Audit Tracking” notation will display at the top of each page of the Shift Report.

OFF: Changes in the *Audit* or *Edit* screens will not be recorded. However, the time and date that this feature was turned off will still be recorded on the *Shift Report*.

DATE AND TIME STAMP ON PRINTED REPORTS

ON: This will place the date and time on all reports when they are printed out. This could be useful for keeping track of when the reports were printed.

OFF: No reports will have the date and time on them when they are printed out.

DATE & TIME STAMP ON FOLIOS

ON: Records the date and time that the folio was printed.

OFF: The time and date that the folio was printed will not be displayed on the folio.

INCLUDE FOLIO NUMBER ON GUEST RECEIPTS

ON: Displays the Check-Inn® folio number on guest receipts.

OFF: Will not display the Check-Inn® folio number on guest receipts.

INCLUDE GUEST STATUS ON FINANCE REPORTS

ON: Will display the status of a guest on finance reports (i.e.: CI/CO/SO/?)

OFF: Will not display the status, (i.e.: CO for Check-out), of a guest on finance reports.

INCLUDE GUEST NAMES ON HOUSEKEEPING REPORT

ON: Displays the guest name on Housekeeping Reports.

OFF: Will not display the guest name on Housekeeping Reports. Rooms will be listed as “Dirty” or “Dirty-Unoccupied”.

INCLUDE BILLING INVOICE NUMBER

ON: Will place a sequential invoice number on each invoice printed from Accounts Receivable.

OFF: Will not place an invoice number on invoices printed from *Accounts Receivable*. The system will put “Invoice” in its place.

BREAKDOWN TAXES BY CATEGORY

ON: Breaks down taxes into there separate categories (i.e.: State, City, etc.) on the guest folio.

OFF: Will not show a tax breakdown on the folio.

HIDE SALE ITEMS 8 & 9 ON GUEST FOLIOS

ON: Allows you to post a charge for sale items 8 and 9 but does not show the breakdown on the folio. This might be useful if you need to track the various expenses that make up a package (i.e.: golf, breakfast, etc.), but you do not want the customer to be aware of the breakdown.

NOTE: The amount will still be added to the miscellaneous charge total on guest folios.

OFF: Will list sale items 8 and 9 just like any other item on guest folios.

SECOND ADDRESS LINE FOR GUEST INFORMATION

ON: Will place a second address line on the *Guest Information* screen.

OFF: Will re-place the second address line with a remarks line in the guest information section. The remarks line displayed here is the “Remarks & Marketing Codes” field on the *Remarks* screen. Any information changed in either field will change the information in the other.

SET STATEMENTS

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “8” or click the **Set Statements** button.

RESERVATION STATEMENTS

1. Select the reservation statement that best matches your property’s policy. This statement will be printed on all confirmations.
2. Press **F4** or click the **Edit Reservation Statement** button if you would like to customize the reservation statement. (For Edit Options please see below.)
3. Press **F10** or click the **Save and Exit** button to save the statement. Press **ESC** or click the **Cancel** button to return to the *Set Statements* screen without saving the changes.

You may also create your own reservation statement. Select “User Defined Reservation Statement” and press **F4** or click the **Edit Reservation Statement** button. This will display a blank *Statement Editor* that will allow you to enter any statement you would like.

BILLING STATEMENTS

1. Select the billing statement that best matches your property's policy. This statement will be printed on all billing invoices and statements.
2. Press **F5** or click the **Edit Billing Statement** button, if you would like to customize the billing statement (For Edit Options please see below.)
3. Press **F10** or click the **Save and Exit** button to save changes to the billing statement. Press **ESC** or click the **Cancel** button to return to the *Set Statements* screen without saving the changes.

You may also create your own billing statement. Select "User Defined Billing Statement" and press **F5** or click the **Edit Billing Statement** button. This will display a blank *Statement Editor* that will allow you to enter any statement you would like.

EDITING OTHER TEXT FILES

1. Press **F6** or click the **Edit Other Statements** button to display a menu of files that can be edited.
2. Press the corresponding function key or click the statement button you wish to edit. (i.e.: Folio/Receipt)
3. Press **F10** or click the **Done** button once you are finished.

FOLIO/RECEIPT

Pressing **F2** allows you to change the statement at the bottom of the guest's folio.

MAINTENANCE

Pressing **F3** allows you to keep a list of general maintenance problems that require attention.

HOT KEY 1

Pressing **F4** allows you to make a Hot Key (CTRL-F1) that will display a pop-up screen anywhere in the program. This can be used for such things as to keep a list of undesirables, emergency phone numbers or the phone numbers of local attractions.

HOT KEY 2

Pressing **F5** allows you to make a second Hot Key (CTRL-F2). Please see above.

HOUSEKEEPING ORDER

Pressing **F6** allows you to define the order of your rooms in Housekeeping Reports. On the blank screen that is provided, you will want to list your rooms, each on its own line, down the left-hand side of the screen. A blank line between rooms will indicate where one housekeeper's list will end and the next housekeeper's list will begin.

AUTOEXEC.BAT (system)

IMPORTANT! Please exercise extreme caution when editing this file.

Pressing **F7** allows you to edit your Autoexec.Bat file. This is one of your computer's startup files. Upon completion you will need to save, exit and reboot the computer for any changes to take effect.

CONFIG.SYS (system)

IMPORTANT! Please exercise extreme caution when editing this file.

Pressing **F8** allows you to edit your Config.Sys file. This is one of your computer's startup files. Upon completion you will need to save, exit and reboot the computer for any changes to take effect.

OTHER

Pressing **F9** will allow you to create and edit your own text files. This is useful for writing letters and other text documents.

NOTE: If you have purchased the credit card processing module, you may view past batches through this screen. The file name is in the following format: CCYYMMDD.001 (YY = year, MM = month, DD = day. If you have more than one batch submitted in a day, you may have another extension such as .002).

USING THE STATEMENT EDITOR

1. Press the corresponding function key or click the statement button you wish to edit.
2. Press **F10** or click the **Save and Exit** button, to save your changes to the statement. Otherwise press **ESC** or click the **Cancel** button.

DELETING A STATEMENT

1. Press **F8** or click the **Delete & Exit** button.
2. A message box will be displayed asking, "DELETE Current file and exit?" Press **F10** or click the **YES** button to delete the text, otherwise press **ESC** or click the **NO** button.

PRINTING A STATEMENT

1. Press **F2** or click the **Print** button.
 - Press **F2** or click the **Print** button to print one copy of the statement.
 - Press **F4** or click the **Print 2X** button to print two copies of the statement.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the statement.
 - Press **F10** or click the **Done** button to return to the statement editor.

DATE AND TIME STAMP THE STATEMENT

1. Press **F3** or click the **Date & Time** button.
2. The current date and time will be inserted after the cursor in the statement.
3. To delete the date and time, use the **Back Space** key.

SEARCH THE TEXT

1. Press **F4** or click the **Search** button.
2. Enter the word or phrase you would like to find.
3. Press "**F**" or click the **Find Next** Button. Continue to press the **Find Next** button until the cursor is in the correct location.

SET PASSWORD

For protection against unauthorized access to Check-Inn® for Windows, you may set up to three levels of password protection, (clerk, auditor, and security).

CLERK PASSWORD: The Clerk password is a global password for all the clerks and has limited power to password locks. This password may be used on the “password lock” function on the *Main Menu* or upon entry into Check-Inn® for Windows.

AUDITOR PASSWORD: The Auditor password gives access to all clerk functions plus partial access to the *Audit* screen(s). Access to the *Audit* screen is limited to the last three days’ activities.

SECURITY PASSWORD: The Security password allows access to all functions. Using the security password you may limit clerk and auditor access to such screens as full use of *Daily Audit*, customization screens, etc.

1. Press “8” or click the **Change Settings** button on the *Main Menu*.
2. Press “9” or click the **Set Password** button.
3. To achieve all levels of protection enter clerk, auditor, and security passwords. You will be asked to confirm each password as you are entering them. All passwords must be different.
4. If you don’t have an auditor or would not like to use the auditor’s password just leave it blank.
5. You may use both letters and numbers in the passwords. We recommend that you keep the passwords relatively short (three to five letters) for quick access.
6. Press **F2** or click the **Password Options** button.
7. Select the items you would like to password protect.
8. Press **F10** or click the **Done** button once you are finished.

PASSWORD OPTIONS

(SECURITY PASSWORD REQUIRED)

Tab to the setting and press the **Space Bar** or click on any of the following options to activate them:

DAILY & MONTHLY REPORTS

A Security password will be required to view Daily & Monthly Reports.

DELETE GUEST

A Security password will be required to delete guest in the *Guest Screen*.

CHANGE CHECK-IN/OUT-DATE

A Security password will be required to change the check-in or check-out date of a guest.

USER-DEFINED ROOM RATE

A Security password will be required to type in a user-defined rate for a guest.

EDIT PHONE CALLS

A Security password will be required to edit phone calls.

CLEAN ALL ROOMS

A Security password will be required to set all rooms to clean at one time from the *Room Status* screen and *Housekeeping Report*.

LOCK/UNLOCK RESERVED ROOM

A Security password will be required to lock or unlock a reservation's room number.

GROUP CHECK-IN/OUT

A Security password will be required to perform a group check-in or check-out.

CREDIT CARD PROCESSING

A Security password will be required for any credit card processing functions, such as submitting batches, printing batch totals, authorizing

credit cards, modifying entries, and deleting transactions in the *Credit Card Audit*.

BILLING FUNCTIONS

A Security or Auditor password will be required to perform any billing functions in *Accounts Receivable*.

BALANCE TRANSFERS

A Security password will be required to transfer a room balance to another room.

BACKUP CHECK-INN® DATA

A Security password will be required to backup the Check-Inn® data in any way other than auto-backups.

EXIT CHECK-INN® FOR WINDOWS

A Security password will be required to exit the Check-Inn® program.

E-MAIL FUNCTIONS

A Security password will be required to change e-mail settings, manage and send e-mail messages.

PASSWORD OPTIONS

(AUDITOR PASSWORD REQUIRED)

Tab to the setting and press the **Space Bar** or click on any of the following options to activate them:

EXIT CHECK-INN® FOR WINDOWS

Allows the auditor to exit Check-Inn® for Windows.

VIEW MONTHLY TOTALS ON REPORTS

Allows the auditor to view monthly totals on financial reports.

ALLOW AUDITOR TO CLEAR LOGS

Allows the auditor to clear the Central Reservations Log, Long Distance Breakdown, Phone House Account, Phone Misc., and POS/Movie interface.

MANAGE E-MAIL MESSAGES

Allows the auditor to manage saved e-mail messages.

PASSWORD OPTIONS

(CLERK PASSWORD REQUIRED)

PASSWORD LOCK

A password is required to access Check-Inn® for Windows once it has been locked from the Main Menu.

The password lock is a way of protecting against access by the general public.

1. Press “9” or click the **Password Lock** button on the *Main Menu*.
2. A message box will be displayed asking, “Do you wish to lock this computer?” Press **F10** or click the **YES** button to lock the computer.
3. To unlock Check-Inn® for Windows, press **Enter** or click the **OK** button and enter your password.

EVENT TRACKING

Event tracking allows you to track events in your area that affect your property’s occupancy. Events display on the *Main Menu* and on the *Reservations* screen on the day of the event.

NOTE: Events will NOT affect room rates in ANY way.

1. Press “8” or click the **Changes Settings** button on the Main Menu.
2. Press “A” or click the **Event Tracking** button.

ADDING AN EVENT

1. Press **F2** or click the **Add Event** button.
2. Enter the “Event Name” (Ex.: DOG SHOW).
3. Enter the start date for the event by typing in the date or clicking the down arrow and selecting a date from the calendar.

4. Enter the end date for the event in the same manner you entered the start date.
5. Select the “Effect” this event will have on your property from the drop down box. (Very Slight, Slight, Moderate, Heavy).

NOTE: This is simply a reminder; it will NOT affect your rates.

6. Press **F10** or click the **Done** button to save the event, otherwise press **ESC** or click the **Cancel** button.
7. Repeat this procedure for each event you would like to enter.

EDITING AN EVENT

1. Press **F3** or click the **Edit Event** button.
2. Re-enter any incorrect information in the same manner as above.
3. Press **F10** or click the **Done** button to save the changes to the event. Otherwise press **ESC** or click the **Cancel** button.

DELETEING AN EVENT

1. Press **F4** or click the **Delete Event** button.
2. A message box will be displayed asking, “ Delete the event: [selected event]?” Press **F10** or click the **YES** button to delete the event. Otherwise press **ESC** or click the **NO** button.

E-MAIL

IMPORTANT! You must already have an e-mail provider for this feature to function. AOL is NOT compatible.

Any item that you can print may be e-mailed as an attachment along with an optional memo. Now you can e-mail reservation confirmations to your guests, saving the amount you pay for postage. You may also have the property e-mail reports to you at home, saving you time and allowing you to easily stay up-to-date with the property’s daily business.

SETTING UP THE E-MAIL FEATURE

From any *Print Preview* screen, you may choose to e-mail the report, folio, confirmation, etc.

1. Press **F6** or click the **E-mail** button.
2. Press “**S**” or click the **Settings** button.
3. Enter your mail host. This is your Internet Service Provider. (i.e.: YourHost.com or mail.YourHost.com)
4. Enter your reply address. This is the address where replies to your e-mail will be sent. (i.e.: YourName@YourHost.com)
5. If you login with a name and password (usually not required), check the “Login with User Name and Password” check box. Enter your User Name and Password in the correct fields.
6. Select the E-Mail attachment size. Each page is formatted to fit on one 8¹/₂x11 page. If you need to change the size of the attached page, click the down arrow and select the percentage of the original size for the attachment. (120% to 40%)
7. Press **F10** or click the **Save** button to save your settings, other press **ESC** or click the **Cancel** button.

CREATING AN E-MAIL

1. Select the pages you would like to e-mail by entering the start page and end page in the “Print Pages” field. You may enter the page numbers by typing the page numbers, or by using the arrows to select the pages. E-mail attachments are limited to 36 pages.
2. Press **F6** or click the **E-mail** button.
3. Enter the e-mail address of the person to whom you are sending the confirmation or report. If the e-mail address has been previously entered, you may click the down arrow and select the address from the list.
4. If you are sending the e-mail to more than one person enter the additional e-mail address in the CC field.
5. Enter the subject of the of the e-mail. If the subject is left blank, “Check-Inn for Windows” will be inserted in the subject field.
6. If you would like to enter a message to include with the e-mail, simply type the message in the space provided.

7. Each page will be sent as a separate attachment to the e-mail. You may view a list of the attachments by pressing **ALT+D** or clicking the **Details** tab.

SENDING AN E-MAIL

1. Press **F10**, click the **Send** button, or click on the **File** tab and select “**S**end Message” to send the e-mail.
2. A message box will be displayed saying, “Message Sent!” if the message was sent successfully. Press **Enter** or click the **OK** button.
3. Press **F10** or click the **Done** button to exit the *Print Preview* screen.

SAVING AN E-MAIL

1. Press **F3**, click the **Save** button, or click on the **File** tab and select “**S**ave Message” to save the e-mail to send at a later time.
2. A message box will be displayed saying, “Your Message Has Been Saved.” Press **Enter** or click the **OK** button.
3. Press **ESC** or click the **Done** button to return to the *Print Preview* screen.
4. Press **F10** or click the **Done** button to exit the *Print Preview* screen.

MANAGING MESSAGES

If you have previously saved e-mail messages, you may use *Manage Messages* to send or delete the saved messages.

1. Press **F4**, click the **Manage** button, or click on the **File** tab and select “**M**anage Message” to manage your saved messages.
2. Once you have finished press **ESC** or click the **Done** button.

SELECTING AND DE-SELECTING MESSAGES

1. **Tab** to the address and press the **Spacebar** to check the box, or simply click on the box next to the e-mail address with your mouse. (A box with a check is selected.)

2. Press **F5** or click the **Select All** button to select all the messages in the list.
3. Press **F6** or click the **De-select All** button to de-select all the messages in the list.

DELETING MESSAGES

1. Select the message or messages you would like to delete.
2. Press **DEL** or click the **Delete** button to delete the selected messages.
3. A message box will be displayed asking, "Delete Marked Messages?" Press **F10** or click the **YES** button to delete the marked messages. Otherwise press **ESC** or click the **NO** button.

SENDING SAVED MESSAGES

1. Select the message or messages you would like to send.
2. Press **F10** or click the **Send** button to send the selected messages.
3. A message box will be displayed asking, "Send Marked Messages?" Press **F10** or click the **YES** button to send the marked message. Otherwise press **ESC** or click the **NO** button.

You have now completed the customization process of Check-Inn® for Windows. Press **F10** or click the **Done** button until you return to the *Main Menu* and you may begin to use the software.

RUNNING CHECK-INN® FOR WINDOWS

1. To start Check-Inn® for Windows simply double click the icon that Check-Inn® creates when the program is installed. This will place you at the *Main Menu* of Check-Inn® for Windows, as shown below.
2. Verify that the date and time are correct in the bottom right-hand corner of the screen. If necessary, click on the digital clock in the lower right corner of the Windows desktop to change the date or time.
3. The *Main Menu* displays your property's current status and allows you access to all the features available in Check-Inn®. To select an item on the *Main Menu*, click on the button or simply type the number shown at the left of the item.

The Main Menu looks like this:

The screenshot shows the 'Check-Inn for Windows' application window. At the top, it displays 'Check-Inn for Windows' and 'JEREMY'S JUNCTION'. Below this, there are several sections:

- EVENTS:** A table with two columns. The first row shows 'HIGHER RATES' and 'O.A.'. The second row shows 'SALMON FESTIVAL' and 'MOD'.
- Room Status:** A table with two columns. The first row shows 'Available' and '11/3'. The second row shows 'Occupied' and '5'. The third row shows 'Percent Occupied' and '24'.
- Reservations:** A table with two columns. The first row shows 'Today's Reservations' and '2'. The second row shows 'Today's Cancellations' and '1'. The third row shows 'Reservation Status' and 'OK'.
- Navigation Menu:** A vertical list of buttons numbered 1 through 9, and 'E.'. The buttons are: 1. Guest Check-In, 2. Guest Check-Out, 3. Guest Screen, 4. Cash Register, 5. Audit, 6. Reservations, 7. Reports, 8. Change Settings, 9. Password Lock, and E. Exit Check-Inn.
- Footer:** A bar at the bottom right displaying the date and time: 'Monday, October 15, 2001 - 2:34 PM'.

The status boxes on the left side of the *Main Menu* display the number of clean and dirty rooms available, the number of rooms currently rented and the percentage of rooms occupied. It also shows the number of reservations and cancellations today, and whether or not you have any conflicts between reservations and guests currently checked-in.

MAIN MENU ITEMS

1. GUEST CHECK-IN

Allows you to check in walk-in guests or a guest with a reservation.

2. GUEST CHECK-OUT

Allows you to check out a currently checked-in guest.

3. GUEST SCREEN

Allows you to modify guest information, including room number, and make charges or payments to current guest accounts.

4. CASH REGISTER

Allows you to sell front desk items such as cards and maps, etc. to customers that are not checked in to the property.

5. AUDIT

Allows you to edit the daily information, credit card payments, billing and cash register totals.

NOTE: Credit card processing is also done in the audit if your property has purchased the Check-Inn® Credit Card Processing Module.

6. RESERVATIONS

Allows you to make, modify or cancel reservations.

7. REPORTS

Allows you to generate operational reports such as Daily and Monthly financial reports, Reservation Reports, Occupancy Reports, Housekeeping Reports and others.

8. CHANGE SETTINGS

Allows you to customize Check-Inn® for Windows for your property.

9. PASSWORD LOCK

Locks the computer from unauthorized access while the terminal is not in use.

NOTE: Any password in Check-Inn® for Windows will work to unlock the program.

E. EXIT CHECK-INN®

Allows you to close the program and return to the Windows desktop.

CHECK-INN® FOR WINDOWS FUNCTION KEYS

There are seven “Function Keys” that may be pressed at any time while running Check-Inn® for Windows for additional reports:

GUEST LIST (BY NAME)

Pressing **ALT-F1** will bring up a listing of all currently checked-in rooms in alphabetical order by the guests’ last name.

GUEST LIST (BY ROOM)

Pressing **ALT-F2** will bring up a list of all rooms in numerical order, showing either the guest name if the room is occupied or the room description if it is available.

GUEST LIST (BY COMPANY)

Pressing **ALT-F3** will bring up a company sorted guest list. This will show the guest’s name, room number, company, when the guest is expected to depart, the balance they owe and any remarks.

AVAILABILITY LIST

Pressing **ALT-F4** will display the rooms that are currently available with their descriptions.

CURRENT GUEST SEARCH

Pressing **ALT-F5** will bring up a *Quick Guest Search*, which allows you to do a search for current guests.

USER DEFINED HOT KEYS

Pressing **CTRL-F1 & CTRL-F2** will bring up a User Defined List. These Hot Keys can be modified from the Change Settings menu in the *Set Statements* screen. They may be used to log emergency phone numbers, track undesirables, or keep other information that needs to be easily accessed.

CHECK-IN

Guest Check-In is the first item on the *Main Menu*. This function is used to check in walk-in guests or guests with reservations. “Guest Check-In” should only be used to check-in current guests. If you wish to add a guest not currently checked-in to a past daily report, you may add them through the *Daily Audit*.

NOTE: Guests added through Audit will not be added to your Guest History file.

1. Press “1” or click the **Guest Check-In** button on the *Main Menu*.
2. A message box will be displayed asking, “Does the guest have a reservation?” Press “Y” or click the **Yes** button if the guest has a reservation. Otherwise press “N” or click the **No** button.

The *Room Selection* screen looks like this:

Rm. #	Room Status	Room Type	Next Reservation
103	<Clean>	QUEEN	NOT RSRVD
104	<Clean>	QUEEN	NOT RSRVD
105	<Clean>	QUEEN	NOT RSRVD
107	<NOT AVAILABLE>	KING	NOT RSRVD
108	<Clean>	KING	NOT RSRVD
109	<Dirty>	KING	NOT RSRVD
110	<Clean>	DOUBLE DOUBLE	NOT RSRVD
111	<Clean>	DOUBLE DOUBLE	NOT RSRVD
113	<Clean>	DOUBLE DOUBLE	NOT RSRVD
116	<Dirty>	DOUBLE DOUBLE	NOT RSRVD
117	<Clean>	DOUBLE DOUBLE	NOT RSRVD
118	<Clean>	JACUZZI SUITE	NOT RSRVD

GUESTS WITHOUT A RESERVATION

1. Select a room from the list of available rooms and either press **F10**, click the **Continue** button, or double-click on the desired room. You may search for the room by typing in the room number or room description in the *Room Search* field.

NOTE: For information on other features in *Check-In Room Selection* please see “Room Selection Options” below.

2. If you have “Quick Search for Repeat Guests” checked in *Set Colors and Switches*, a *Quick Guest Search* screen will be displayed allowing you to enter a previous the guest’s name. All guests matching the search criteria who have stayed at the property will be listed.

- Type in the guest’s name that you would like to find.
- Select the correct guest by selecting them on the list and pressing **F10**, clicking the **Done** button, or double-clicking on the guest.

Information from the guest’s previous stay will be added to the *Guest Information* screen. At the top of the screen, a box will be displayed showing the room number, room rate, date, and number of nights the guest stayed on their last visit.

3. Enter the guest’s name and address, pressing the **Tab** key or **Enter** key to move through the guest information.

NOTE: If you have “Automatic Zip Code Identification” turned on in *Change Settings*, the cursor will skip the city and state fields by typing in the zip code, Check-Inn® will auto-fill the city and state.

4. If the guest is with a company in *Accounts Receivable* you may use the arrow keys or click on the down arrow to select a group from the list.
5. Set the guest’s rate. When you enter the Rate field, a message box will be displayed with additional options.
 - Enter the rate amount.
 - Select how often the rate will be changed by pressing D for Daily, W for Weekly, M for Monthly, or P for Package. See the section on “Setting Your Room Rates” for more

- information on how to set Check-Inn® so your rates will pop up.
- If the guest is tax exempt due to their length of stay or government status, you may select a “Tax Exempt” type from the drop down box at the bottom of the *Room Rates* pop up screen. If you have set partial exemptions in *Change Settings*, you may select exemption type 1, 2, or 3 here also.
 - Press **F10** or click the **Done** button once you are finished.
6. Enter the total number of nights, weeks, months, or packages the guest will be staying by typing a new number or using the arrows to increase or decrease the number. Enter the number of adults and children in the same way.
 7. Enter the clerk’s initials.
 8. Enter the credit card information. You have two options in entering credit card information.
 - If you have a magnetic stripe reader, you may swipe a credit card on the *Guest Check-In* screen and it will auto-fill the credit card information.
 - If you do not have a magnetic stripe reader, you may type the number manually. If the number entered is not a valid card number (i.e.: mistyped, or not a correct card number), you will see an “INVALID” message to the right of the credit card number.
 9. Enter the guest vehicle information. You may use these slots in any manner you would like. (i.e.: driver’s license number, passport number, license plate number, etc.) If you swipe a driver’s license with a magnetic stripe, the guest’s name and license number will be filled automatically.
 10. Press **F11** or click the **Remarks** button to add guest remarks and marketing codes. (Please see the “Remarks” section below for further instructions.)
 11. Press **F12** or click the **Extra People** button to add extra people to the room. (Please see the “Extra People” section below for further instructions.)
 12. Press **F10** or click the **Continue** button once you are finished.
 13. This will bring you to the *Cash Register* screen. See “Completing the Check-In Process” after the next section to finish the check-in.

NOTE: For information on other features on the *Check-In Guest Information* screen please see “Guest Information Options” below.

TIPS

If you have a magnetic stripe reader, you may swipe a credit card and/or a driver’s license with a magnetic stripe and Check-Inn® will auto-fill the appropriate fields on the *Guest Information* screen.

Use “Package” rates when you charge a fixed amount for a given number of days.

Example:

A three-day weekend package sells for \$200.00.

- Press “P” for package on the *Room Rates* pop up screen.
- Type “200.00” or select it from the list if you have already set up package rates in *Change Settings*.
- Type “3” in the “Custom Package Nights” slot.

GUESTS WITH A RESERVATION

1. Select a guest name from the list of reservations and either press **F10**, click the **Continue** button, or double click the reservation. You may search for the reservation by typing in the room number or the guest name.

NOTE: For information on other features in *Check-In Reservation Room Selection*, please see “Room Selection Options” below.

2. Enter any additional guest information and confirm the rate and number of nights. A “\$” icon will display in the lower left corner of the *Guest Information* screen if a deposit was entered when the reservation was made.
3. Press **F10** or click the **Continue** button.

4. This will bring you to the *Cash Register* screen. See “Completing the Check-In Process” below to finish the check-in process.

NOTE: For information on other features on the *Check-In Guest Information* screen please see “Guest Information Options” below.

CHECKING IN A SPLIT ROOM

1. Select a split room from the list of available rooms and either Press **F10**, click the **Continue** button, or double-click on the split room. You may search for a room by typing the room number or room description in the *Room Search* field. All split rooms must have an “S” before the room number.

NOTE: For information on other features in *Check-In Room Selection* please see “Room Selection Options” below.

2. Enter the guest information as described in the “Guests Without a Reservation” section above.
3. Press **F2** or click the **Change Room** button.
4. Press “2” or click the **Split Room** button.
5. Select the room that the current guest will share by clicking the down arrow and selecting a room-guest from the list. Conference and Split rooms will not be available for selection; they are unable to be split.
6. Press **F10** or click the **Continue** button to split the room
7. Press **F10** or click the **Continue** button to finish the Check-In.
8. This will bring you to the *Cash Register* screen. See “Completing the Check-In Process”, after the next section, to finish the check-in.

NOTE: An icon will be displayed showing a square divided into four sections. The master room will have a red section, and the split rooms will be entirely blue. To view the guest names for the room press **F2**, click the **Change Room**, or double click on the icon.

COMPLETING THE CHECK-IN PROCESS

The guest's room balance, including tax, for the entire stay will be displayed on the *Cash Register* screen.

1. Enter any additional charges.
 - Enter the amount of the additional charge (not including tax). There is no need to type the decimal point when entering the amount in the cash register.
 - Press the function key or click the button for the appropriate sales category button. You may need to press the **Shift** key to access the additional charge keys.

Example:

Entering a \$10.00 phone charge.

- Press “1”, “0”, “0”, “0”
- Press **F1** or click the **Phone** button.

Important! DO NOT press ENTER when entering a charge. Always use the appropriate function key.

2. Entering Payments.
 - Enter the amount of the payment. There is no need to type the decimal point when entering the amount in the cash register.
 - Press **Enter** or click the **Select Payment Type** button.
3. Select the payment type from the drop down box. Press **F10** or click the **Done** button to apply the payment. Depending upon your settings you may have very different payment options to choose from.

CASH

Cash is to be used for any cash or check payments made.

CREDIT CARD

- If you have purchased the Credit Card Processing module, you will have “C. Card Sale” as a payment option. Check-Inn® will dial out and get an approval to charge the card when your batch is sent. Press “A” to use the credit card listed in the *Guest Information* screen, type the card number and expiration date, or swipe a new credit card.

- If you do NOT have Credit Card Processing, a separate payment option for each credit card type will be listed. Select the appropriate type from the list.

IMPORTANT! If the guest leaves an open credit card number, do not enter a payment for the guest until the amount is actually paid. This usually when the guest checks out.

BILLING

You will be prompted to enter the guest's address and company information to create the billing entry in Accounts Receivable. If you have already entered the guest's information, Check-Inn® will auto-fill the billing entry. The billing option can be removed in *Set Colors & Switches*.

RM. TRANSFER

Select the room this amount will be sent to by clicking the down arrow and selecting a room from the list. This amount will be Credited to the current from and Charged to the room you have selected. Press **F10** or click the **Done** button to transfer the amount, otherwise press **ESC** or click the **Cancel** button. Rm. Transfer will only be displayed if it is turned on in *Set Colors & Switches*.

4. Press **F10** or click the **Continue** button once you are finished.
5. A *Print Preview* of the guest's folio will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the guest folio.
 - Press **F4** or click the **Print 2X** button to print two copies of the guest folio.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the guest folio.
 - Otherwise press **F10** or click the **Done** button to return to the *Main Menu*.

ROOM SELECTION OPTIONS

QUICK GUEST CHECK-IN

You may use Quick Check-In for a guest with or without a reservation. If the guest has a reservation, the check-in will be completed using information from their reservation. If the guest does not have a reservation, the guest name will be “Check-In, Quick” and the room’s default rate will be assigned.

1. Press “**1**” or click the **Guest Check-In** button.
2. A message box will be displayed asking, “Does the guest have a reservation?” Press “**Y**” or click the **Yes** button if the guest has a reservation, otherwise press “**N**” or click the **No** button.
3. Select the first guest or room you would like to check in.
4. Hold down the **CTRL** key and click on the rest of the rooms you would like to check-in, or arrow to each room and press the * key.
5. Press **F12** or click the **Quick Check-In** button.
6. A message box will be displayed asking, “ Quick check-in all selected rooms?” If you want to check them in, press **F10** or click the **YES** button. Otherwise press **ESC** or click the **NO** button

ROOM SEARCH

1. On the *Check-In Room Selection* screen, type the room number or room description that you are searching for. If you are checking in a guest with a reservation, type the room number or guest name that you would like to find.
 1. If the room is found, the selection bar will move to the desired room.
 2. If the room is not found, a message box will be displayed saying, “Room Not Found”.
2. Press **ENTER** or click the **OK** button.

CHANGING THE ROOM STATUS

This program will generally keep track of the status of each room in your property. However, if you find that the status is inaccurate, you may change it here.

1. Select the room you would like to change.
2. Press **F4** or click the **Change Room Status** button.
3. This will change the status between <Clean>, <Dirty>, or <Not Available>. Click on the button until you reach the appropriate status.

SETTING ALL ROOMS TO CLEAN

1. Press **F5** or click the **Clean All Rooms** button to change all unoccupied rooms to <Clean> status while checking in a guest. Do not do this after check-in time, as your Housekeeping Reports will be wrong for the next day.
2. A message will be displayed asking, "Set unoccupied rooms to CLEAN?" Press **F10** or click the **YES** button if you would like to set the rooms to clean, otherwise press **ESC** or click the **NO** button.

STATUS SCREEN OPTIONS

1. Press **F9** or click the **Status Screen** button from the *Check-In Room Selection* screen.

CHANGING THE ROOM STATUS

1. Select the room you would like to change.
2. Press **F4** or click the **Change Room Status** button.
3. This will change the status between <Clean>, <Dirty>, or <Not Available>. Click the button until you reach the appropriate status.

SETTING ALL ROOMS TO CLEAN

1. Press **F5** or click the **Clean All Rooms** button to change unoccupied rooms to <Clean> status. Do not do this after check-in time, as your *Housekeeping Report* will be wrong for the next day.
2. A message will be displayed asking, "Set unoccupied rooms to CLEAN?" Press **F10** or click the **YES** button if you would like to set the rooms to clean, otherwise press **ESC** or click the **NO** button.

MAINTENANCE LOG

NOTE: For additional help using the maintenance log editor, please see “Statement Editor” in the “Set Statements” section of this manual.

1. Select the room that requires a maintenance log.
 2. Press **F8** or click the **Maintenance Log** button to create a Maintenance Log.
 3. Press **F2** or click the **Print** button to print the log.
 4. Press **F3** or click the **Date & Time** button to insert the date and time into your log.
 5. Press **F4** or click the **Search** button to search for a word or phrase within the log.
 6. Press **F8** or click the **Delete & Exit** button to delete the entry and return to the *Status* screen.
 7. Press **F10** or click the **Save & Exit** button to save the new entry and return to the *Status* screen, otherwise press **ESC** or click the **Cancel** button.
-

NOTE: When a maintenance log has been entered for a room a “[L]” will display next to the room description or guest’s name.

GUEST INFORMATION SCREEN OPTIONS

CHANGING THE GUEST’S ROOM NUMBER

1. Press **F2** or click the **Change Room** button.
 2. Press “1” or click the **Change Room Number** button if you are checking in a split room or use the card lock interface, otherwise the *New Room Selection* screen will be displayed automatically.
 3. Select the new room for the guest on the *New Room Selection* screen, and press **F10**, click the **OK** button, or double-click the new room.
-

NOTE: If another guest currently occupies the room, the guests will switch rooms.

CHANGING THE GUEST'S CHECK-IN DATE

If the guest's check-in date is incorrect, you may change the check-in date in the *Guest Information* screen. This is useful if you forget to enter the guest into the system or because you are allowing an especially early check-in time.

1. Press **F3** or click the **Check-In Date** button.
2. Type in the correct check-in date or click on the down arrow and select a date from the calendar.

NOTE: The check-in date cannot be changed beyond today's date.

3. Press **F10** or click the **OK** button to save the new check-in date and return to the *Guest Information* screen.

SEARCH MASTER GUEST HISTORY

1. Press **F4** or click the **Search Master** button.
2. Enter any part of the first name, last name and phone number. Check-Inn® will also search your guest history for the information you entered in the *Other* search field.
3. Press **F10** or click the **Search** button to start the search.
4. A guest record that matches your search criteria will be displayed. You may continue to cycle through found guests by pressing **F5** or clicking the **Continue Search** button. The most recent guest stay will be displayed first, followed by stays that occurred further in the past.

COPY PREVIOUS GUEST

1. Press **F5** or click the **Copy Last** button.
2. A message box will be displayed asking, "Copy previous guest?" Press **F10** or click the **YES** button to copy the previous guest information.

REMARKS AND MARKETING CODES

1. Press **F11** or click the **Remarks** button.
2. Enter your remarks for the guest. Check-Inn® has several types of remarks that are handled differently in the program.
 - *Remarks to Guest/Folio*
This field will be printed on guest folios. If you are using custom folio numbers, enter the folio number in this field.
 - *Market Codes & Remarks*
This field will only be printed on guest reports and will not be seen by the guest. Press **F2** or click the **Insert Market Code** button, to select a marketing code from the list of codes set up in *Set Colors & Switches*. You may also enter a market code beginning with a “/”. (i.e.: If you use the code “COM” for commercial guests or “AAA” for Triple A guests, enter “/COM” or “/AAA” in this field.)

NOTE: The *Market Segment Report* will search this field for the market codes you enter.

 - Flag as “Bad Guest”
Press **F3** or click the check box next to “Flag as Bad Guest”. This will add a red slash on the clipboard icon of the guest and will list the guest’s name in red on the *Quick Search* screen.
 - Additional Remarks
These remarks will not appear on reports or folios. They may be viewed or changed here at any point during the guest’s stay or in *Guest Tracking* after the guest’s stay.
 3. Press **F4** or click the **Print Remarks** button, to print the guest’s remarks.
 4. Press **F10** or click the **Done** button when you are finished.

NOTE: A clipboard icon will be displayed in the lower left corner of the *Guest Information* screen once a remark is entered. To view the remarks either press **F11**, click the **Remarks** button, or click on the “Clipboard” icon.

EXTRA PEOPLE

1. Press **F12** or click the **Extra People** button.
2. To save changes, press **F10** or click the **Done** button. If you do not want to save your changes press **ESC** or click the **Cancel** button.

ADDING A PERSON

1. Press **F2** or click the **Add Person** button.
2. Enter the name of the extra person in the room.
3. Press **F10** or click the **Done** button to save the name, otherwise press **ESC** or click the **Cancel** button.

EDITING A PERSON

1. Select the name you would like to edit.
2. Press **F3** or click the **Edit Person** button.
3. Enter the correct name.
4. Press **F10** or click the **Done** button to save the changes, otherwise press **ESC** or click the **Cancel** button.

DELETING A EXTRA PERSON

1. Select the name you would like to delete.
2. Press **F4** or click the **Delete Person** button.
3. A message box will be displayed asking, "Delete extra person?" Press **F10** or click the **YES** button to delete the extra person, otherwise press **ESC** or click the **NO** button.

PRINTING AN EXTRA PERSON LIST

1. Press **F6** or click on the **Print List** button to print a list of all extra people in a room.
2. A *Print Preview* of the extra person list will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the list.
 - Press **F4** or click the **Print 2X** button to print two copies of the list.

- Press **F6** or click the **E-mail** button to e-mail a copy of the list.
- Press **F10** or click the **Done** button to return to the *Extra People* screen.

NOTE: An icon showing three people will be displayed in the lower left corner of the guest information screen once an extra person is entered. To view the extra people either press **F11**, click the **Extra People** button, or click on the “Extra Person” icon.

CASH REGISTER OPTIONS

ROOM DEPOSITS

A room deposit is used to track a refundable deposit that you will be prompted to return at the end of the guest’s stay. This would be useful for such things as phone deposits, key deposits, remote control deposits, room damage deposits, etc. You will be reminded when the guest checks out and asked if you would like to refund the amount to the guest.

1. Enter the total amount of all deposits.
2. Press **F2** or click the **Rm Deposit** button to create the charge.

NOTE: Room deposits may also be made after check-in in the *Guest Screen Cash Register*.

SET PHONE CREDIT LIMIT

1. Press “**P**” or click the **Phone Credit** button.
2. Enter the phone credit limit that you would like to extend to the guest. This amount only applies to this guest.
3. Press **F10** or click the **Done** button to save the credit limit, otherwise press **ESC** or click the **Cancel** button.

REPEATING CHARGE

A repeating charge will be applied each time a guest is charged for lodging. (i.e.: If a guest's rate type is weekly, the charge will repeat once per week.)

NOTE: You may enter up to three repeating charges.

1. Press "**R**" or click the **Repeating Charge** button.
2. Enter the amount that you would like to charge the customer each time in the *Charge Amount* field.
3. Enter the charge type by clicking the arrow and selecting a type in the "Charge Type" drop down box.
4. Press **F10** or click the **Done** button when finished, otherwise press **ESC** or click the **Cancel** button.

TRAVEL AGENCY

1. Press "**T**" or click the **Travel Agency** button to assign a travel agent to a guest. (This is to remind you that a commission will need to be paid).
2. Press the down arrow to select an agency from the current list. Choose "None Selected" if you would not like to assign an agency or would like to remove the current agency.
3. Press **F2** or click the **New Agency** button if you need to add or edit a travel agency, this will display the "Travel Agent Audit". Please see "Adding an Agency" for details.
4. Press **F10** or click the **Done** button to save the selected travel agency, otherwise press **ESC** or click the **Cancel** button.

NOTE: An airplane icon will display in the lower left-hand corner if a travel agency has been selected.

COPY LAST CHARGE

1. Press the **Spacebar** or click the **Copy Last** button to repeat the last charge.

Example:

A guest has made three phone calls, each costing \$1.73.

- Press “1”, “7”, “3”
- Press **F1** or click the **Phone** button.
- Then press **Spacebar, Spacebar**.

DELETE ITEM

1. Press “**D**” or click the **Delete Item** button.
2. Select the item you would like to delete by entering the transaction number or using the arrows to increase or decrease the number shown.
3. Press **F10** or click the **Done** button to delete the item, otherwise press **ESC** or click the **Cancel** button.

REFUND

1. Press the “-” (minus sign or hyphen) key, and then enter the amount that you would like to refund.
2. Press the function key or click the button for the appropriate refund type.

Example: You would like to refund a \$5.00 phone charge to a guest.

- Press “-”, “5”, “0”, “0”
- Press **F1** or click the **Phone** button.

VOID SALE / RETURN TO CHECK-IN SCREEN

1. Press **ESC** or click the **Void Sale** button, if you would like to return to the *Check-In* screen without saving the current changes.
2. A message box will be displayed asking, “Do you wish to VOID Sale?”
 - Press **F10** or click the **YES** button to void the sale, and return to the *Guest Information* screen.
 - Press **ESC** or click the **Cancel** button to remain on the *Cash Register* screen with no changes.

CREDIT CARD PRE-AUTHORIZATIONS

IMPORTANT! The Credit Card Processing Module is required for this function. This is a special module that is purchased separately and requires a special code number.

1. To pre-authorize an amount without actually charging the guest, press “**A**” or click on the **Authorize** button.
2. Enter the total amount that you would like to pre-authorize. Check-Inn® will not add pre-authorizations, so the total amount will need to be authorized each time.
3. Enter the card information.
 - If you have not swiped the guest’s card already, either type the card number and expiration date or swipe the guest’s credit card.
 - If you have already swiped the guest’s credit card, press “**A**” or click the **Press “A” to Authorize** button.
4. Press **F10** or click the **Done** button once you are finished.

NOTE: Pre-authorizations should be re-authorized every two weeks to ensure that the authorization is still valid.

CHECK-OUT

Guest Check-Out is the second item on the *Main Menu* of Check-Inn® for Windows. This function allows you to check-out any guest that is currently checked into the system.

NOTE: Before checking-out a “Master” split room, all “Additional” split rooms must be checked out or un-split.

CHECKING OUT A GUEST:

1. Press “2” or click the **Guest Check-Out** button on the *Main Menu*.
2. The *Check-Out Room Selection* screen displays the guests that are currently checked in to your property. You will see the guest’s room number, name, room type, current balance, departure date, and the date of the next reservation for their room.
3. Select the person you would like to check out and either press **F10**, click the **Continue** button, or double click on the correct guest. You may search for the guest by typing in the guest’s name or room number in the *Room Search* field.
4. The *Cash Register* screen will be displayed with the guest’s current balance, including tax. The guest’s balance must be zero before the guest’s check-out may be completed.
5. Enter any additional charges.
 - Enter the amount of the additional charge (not including tax). There is no need to type the decimal point when entering the amount in the cash register.
 - Press the function key or click the button for the appropriate sales category. You may need to press the **Shift** key to access additional charge keys.

Example:

Entering a \$10.00 phone charge.

- Press “1”,”0”,”0”,”0”
- Press **F1** or click on the **Phone** button.

Important! DO NOT press ENTER when entering a charge. Always use the appropriate function key.

6. Entering Payments.
 - Enter the amount of the payment. There is no need to type the decimal point when entering the amount in the cash register.
 - Press **Enter** or click the **Select Payment Type** button.
7. Select the payment type from the drop down box. Press **F10** or click the **Done** button to apply the payment. Depending upon your settings you may have very different payment options to choose from.

CASH

Cash is to be used for any cash or check payments made.

CREDIT CARD

- If you have purchased the Credit Card Processing module, you will have “C. Card Sale” as a payment option. Check-Inn® will dial out and get an approval to charge the card when your batch is sent. Press “**A**” to use the credit card listed in the *Guest Information* screen, type the card number and expiration date, or swipe a new credit card.
- If you do NOT have Credit Card Processing, a separate payment option for each credit card type will be listed. Select the appropriate type from the list.

IMPORTANT! If the guest leaves an open credit card number, do not enter a payment for the guest until the amount is actually paid.

BILLING

You will be prompted to enter the guest’s address and company information to create the billing entry in Accounts Receivable. If you have already entered the guest’s information, Check-Inn® will auto-fill the billing entry. The billing option can be removed in *Set Colors & Switches*.

RM. TRANSFER

Select the room this amount will be sent to by clicking the down arrow and selecting a room from the list. This amount will be Credited to the current room and Charged to the room you have selected. Press **F10** or click the **Done** button to transfer the amount, otherwise press **ESC** or click the **Cancel** button. Rm. Transfer will only be displayed if it is turned on in *Set Colors & Switches*.

8. Press **F10** or click the **Continue** button once the guest's balance is zero.
9. A *Print Preview* of the guest's folio will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the guest folio.
 - Press **F4** or click the **Print 2X** button to print two copies of the guest folio.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the guest folio.
 - Otherwise press **F10** or click the **Done** button to return to the *Main Menu*.

CHECK-OUT ROOM SELECTION OPTIONS

GUEST MESSAGES

NOTE: For additional help using the message editor, please see the "Statement Editor" in the "Set Statements" section of this manual.

1. Select a guest from the list and press **F6** or click the **Guest Message** button to view the guest message or make a new entry.
2. Press **F2** or click the **Print** button to print the message.
3. Press **F3** or click the **Date & Time** button to insert the date and time into your message.
4. Press **F4** or click on the **Search** button to search for a word or phrase within the guest's message.
5. Press **F8** or click the **Delete & Exit** button to delete the message and return to the *Guest Room Selection* screen.
6. Press **F10** or click the **Done** to save the new message and return to the *Guest Room Selection* screen, otherwise press

ESC or click the **Cancel** button to exit the message with no changes.

NOTE: If a message has been entered for a guest a “[M]” will be displayed next to the guest’s name.

QUICK CHECK-OUT

If a guest has a zero balance, Check-Inn® will allow you to check the guest out without entering any additional information.

1. Select the guest or room you would like to check-out from the *Check-Out room Selection* screen.
2. Hold down the **CTRL** key and click on the rest of the rooms you would like to check-out, or arrow to each room and press the * key. Split rooms are not available for Quick Check-Out.
3. Press **F12** or click on the **Quick Check-Out** button.
4. A message box will be displayed asking, “Quick Check-Out all selected rooms?” Press **F10** or click the **YES** button to check out the rooms, otherwise press **ESC** or click the **Cancel** button.

NOTE: If the guest balance is not zero, a message box will be displayed saying, “Guest balance is not zero. Please use regular check-out.” Press **Enter** or click the **OK** button then use the regular check-out procedure.

CHECK-OUT CASH REGISTER OPTIONS

REFUNDING A ROOM DEPOSIT

If a guest has paid a room deposit, you may need to refund the amount to the guest at check-out time. Room deposits are not required to be refunded, you will simply see a reminder at check-out.

1. Press “**2**” or click the **Guest Check-Out** button.
2. Select the person that you would like to check out and press **F10** or click the **Continue** button.

3. You will be reminded of the amount of the deposit. Press **Enter** or click the **OK** button to continue.
4. Enter a credit for the amount that you are refunding (i.e.: \$-20.00) and press **F2** or click the **Rm Deposit** button. This amount will be credited to the guest. Press **F10** or click the **Continue** button.
5. If the guest has “Change”, a message box will be displayed asking, “Refund \$##.## due to guest?” Press **F10** or click the **YES** button to issue the refund.

CREDIT CARD PRE-AUTHORIZATIONS

IMPORTANT! The Credit Card Processing Module is required for this function. This is a special module that is purchased separately and requires a special code number.

1. To pre-authorize an amount without actually charging the guest, press “**A**” or click on the **Authorize Card** button.
2. Enter the total amount that you would like to pre-authorize. Check-Inn® will not add pre-authorizations, so the total amount will need to be authorized each time.
3. Enter the card information.
 - If you have not swiped the guest’s card already, either type the card number and expiration date or swipe the guest’s credit card.
 - If you have already swiped the guest’s credit card, press “**A**” or click the **Press “A” to Authorize** button.
4. Press **F10** or click the **Done** button once you are finished.

LATE CHECK-OUT

If a guest has stayed beyond the check-in time and has been charged for an extra day, you may remove the extra charge at check-out.

1. Press “**C**” or click the **Check-Out Date** button.
2. Enter the last day of the guests’ stay either by typing in the date or clicking the down arrow and selecting a date from the calendar.

NOTE: You may not select a date beyond today's date.

3. Press **F10** or click the **OK** button. You must complete the check-out for the change to take effect.

TRAVEL AGENCY

1. Press **"T"** or click the **Travel Agency** button to assign a travel agent to a guest. (This is to remind you that a commission will need to be paid).
2. Press the down arrow to select an agency from the current list. Choose "None Selected" if you would not like to assign an agency or would like to remove the current agency.
3. Press **F2** or click the **New Agency** button if you need to add or edit a travel agency, this will display the "Travel Agent Audit". Please see "Adding an Agency" for details
4. Press **F10** or click the **Done** button to save the selected travel agency, otherwise press **ESC** or click the **Cancel** button.

NOTE: An airplane icon will display in the lower left-hand corner if a travel agency has been selected.

COPY LAST CHARGE

1. Press the **Spacebar** or click the **Copy Last** button to repeat the last charge.

Example: A guest has made three phone calls, each costing \$1.73.

- Press "1", "7", "3"
- Press **F1** or click the **Phone** button.
- Then press **Spacebar, Spacebar**.

DELETE ITEM

1. Press **"D"** or click the **Delete Item** button.
2. Select the item you would like to delete by entering the transaction number or using the arrows to increase or decrease the number shown.

3. Press **F10** or click the **Done** button to delete the item, otherwise press **ESC** or click the **Cancel** button.

REFUND

1. Press the “-” (minus sign or hyphen) key, and then enter the amount that you would like to refund.
2. Press the function key or click the button for the appropriate refund type.

Example: You would like to refund a \$5.00 phone charge to a guest.

- Press “-”, “5”, “0”, “0”
- Press **F1** or click the **Phone** button.

VOID SALE / RETURN TO MAIN MENU

1. Press **ESC** or click the **Void Sale** button, if you would like to return to the *Main Menu* without completing the check-out.
2. A message box will be displayed asking, “Do you wish to VOID Sale?”
 - Press **F10** or click the **YES** button to void the sale, and return to the *Main Menu* without processing the check-out.
 - Press **ESC** or click the **Cancel** button to remain on the *Cash Register* screen with no changes.

GUEST SCREEN

The *Guest Screen* is the third item on the *Main Menu*. It allows you to change a guest's room number or check-in date, add or edit guest charges and payments, access guest messages and reports, delete guests and reinstate guests checked-out today.

1. Press "3" or click the **Guest Screen** button on the *Main Menu*.
2. The *Guest Selection* screen will be displayed with a list of your current guests and several additional features. For information on selecting a guest and using the guest screen features, please see the sections below.

NOTE: If you would like to change the information for a guest who is no longer in the *Guest Screen*, please see "Daily Audit".

The *Guest Information* screen looks like this:

Check-Inn for Windows (Guest #1015)

GUEST SCREEN / (ROOM: 109 KING)

GUEST INFORMATION

First Name: JACOB Last Name: JOHNSON

Address (Line 1): 155 UPPER WILDER TRAIL

Address (Line 2):

City: BEAVERTON State: OR Zip Code: 97005

Country: USA Phone: (503)555-4537

Company: ABC TRUCKING E-mail: JJOHNSON@ABC.COM

RATE INFORMATION CLERK

Rate: 80.00 L2 Nights: 3 A: 2 C: 1 JC

CREDIT CARD INFORMATION

Card Number: 6011008746579987 Exp: 0204 Invalid

VEHICLE INFORMATION

Make: ACCORD License: VOR 154 State: OR

In: Monday, October 15, 2001 **Out:** Thursday, October 18, 2001

RUNNING BALANCE: \$71.20 **PROJECTED BALANCE: \$161.80**

Continue <F10>

GUEST SCREEN ROOM SELECTION OPTIONS

SELECTING A CURRENT GUEST

1. Select the guest you would like to change or view and either press **F10**, click the **Continue** button, or double click the correct guest. You may search for the guest by typing the guest's name or room number in the "Room Search" field.
 - A "C/O" after the guest name indicates the guest was checked-out on the current day, the guest's name will also be displayed in red.
 - A "+" after the guest name indicates there are extra people added to the room.
 - An "M" before the guest name indicates that there is a message for the guest.
 - An "L" before the guest name indicates a maintenance log has been entered for the room.
2. After selecting the guest, the *Guest Information* screen will be displayed. You will be able to make any appropriate changes to the guest from this screen.

NOTE: For information about the features on the *Guest Information* screen please see "Guest Information Screen Options" below.

GUEST REPORTS

You may view and print eight different guest reports.

NOTE: If you have purchased the Credit Card Processing Module, pre-authorization amounts will be displayed below the guest names on any of these reports.

1. Press **F2** or click the **Guest Reports** button.
2. Select the desired report by clicking on the button or pressing the corresponding number. (i.e.: Press "1" for the Alphabetical Guest List)

3. A *Print Preview* of the selected report will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the report.
 - Press **F4** or click the **Print 2X** button to print two copies of the report.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the report.
 - Press **F10** or click the **Done** button to return to the *Guest Reports* menu without printing.

ALPHABETICAL GUEST LIST

Press “**1**” or click the **Alphabetical Guest List** button to display a list of all occupied rooms in alphabetical order by the guest’s last name. Each guest’s rate, dates of stay, payments, balance, number of adults and children, and remarks are also shown on this report.

ROOM ORDER GUEST LIST

Press “**2**” or click the **Room Order Guest List** button to display a list of all occupied rooms in order by the room number. Each guest’s rate, dates of stay, payments, balance, number of adults and children and remarks are also shown on this report.

COMPANY ORDER GUEST LIST

Press “**3**” or click the **Company Order Guest List** button to display a list of all guests alphabetically by company name. Each guest’s departure date, balance, and remarks are also shown on this report.

DEPARTURE LIST

Press “**4**” or click the **Departure List** button to display a list of all guests that are expected to depart that day. Each guest’s rate, payments, balance and remarks are also shown on this report.

ALL ROOM LIST

Press “**5**” or click the **All Room List** button to display a list of all occupied and non-occupied rooms. Each guest’s name, dates of guest stay, rate, payment, balance, and remarks are also shown on this report for occupied rooms.

PHONE LIMIT VIOLATION

Press “**6**” or click the **Phone Limit Violation** button to display a listing of all guests who have exceeded their phone credit limit. Each guest’s name, charges, phone credit limit, phone balance, and remarks are also shown on this report.

NOTE: The *Phone Limit Violation Report* is only useful if you have purchased Call-Inn™ Call Accounting.

PHONE LIMIT LIST

Press “**7**” or click the **Phone Limit List** button to display a listing of each guest’s, phone charges, phone credit limit, phone balance, and remarks.

NOTE: To update the phone balances for your current guest’s, Press **F3** or click the **Recalculate Phone** button on the *Guest Room Selection* screen.

MAINTENANCE LOG

Press “**8**” or click the **Maintenance Log** button to display a list of all rooms with maintenance problems and displays the problems that were recorded.

RECALCULATE PHONE CALLS

Press **F3** or click on the **Recalculate Phone** button to ensure that all current phone calls have been processed and will be included in the guest balances.

GUEST MESSAGES

NOTE: For additional help using the message editor, please see the “Statement Editor” in the “Set Statements” section of this manual.

1. Select a guest from the list and press **F6** or click the **Guest Message** button to view the guest message or make a new entry.

2. Press **F2** or click the **Print** button to print the message.
3. Press **F3** or click the **Date & Time** button to insert the date and time into your message.
4. Press **F4** or click on the **Search** button to search for a word or phrase within your message.
5. Press **F8** or click the **Delete & Exit** button to delete the guest message and return to the *Guest Room Selection* screen.
6. Press **F10** or click the **Save & Exit** button to save the new message and return to the *Guest Room Selection* screen, otherwise press **ESC** or click the **Cancel** button.

NOTE: If a message has been entered for a guest a “[M]” will be displayed next to the guest name.

QUICK PRINT

If you would like to print folios for several guests at once you may do a quick print.

1. Select each guest by holding the **CTRL** key and clicking on each guest, or by pressing the * key while the guest is selected. All the guests you would like to print should be selected.
2. Press **F12** or click the **Quick Print** button.
3. A message will be displayed asking, “Print folios for all selected rooms?” Press **F10** or click the **YES** button to print the selected folios, otherwise press **ESC** or click the **NO** button.

GUEST INFORMATION SCREEN OPTIONS

1. Press “**3**” or click the **Guest Screen** button on the *Main Menu*.
2. Select a guest from the *Room Selection* screen. (For more information please see “Selecting A Current Guest” at the beginning of this section.)

NEW ROOM OPTIONS

CHANGING THE GUEST'S ROOM NUMBER

1. Press **F2** or click the **Change Room** button.
2. Press “**1**” or click the **Change Room Number** button if you use split rooms or the card lock interface, otherwise the *New Room Selection* screen will be displayed automatically.
3. Select a new room for the guest on the *New Room Selection* screen, and press **F10**, click the **OK** button, or double-click the new room.

NOTE: If another guest currently occupies the room, the guests will switch rooms.

SPLITTING / UNSPLITTING A ROOM

1. Press **F2** or click the **Change Room** button.
2. Press “**2**” or click the **Split/Unsplit** button.
 - If the room has not been split, a drop down box will be displayed, allowing you to select the “Master” room from the list by clicking the down arrow and selecting a room-guest.
 - If the room has already been split, this room will be removed from the “Master” and the unsplit room number (beginning with the letter S) will be restored.

NOTE: If a guest is “unsplit”, this does not change the split room status on previous days.

VIEWING THE GUEST'S BILL

You may view and print the guest's folio from the *Guest Information* screen.

1. Press **F3** or click the **View Bill** button.
2. A *Print Preview* of the selected report will display.

- Press **F2** or click the **Print Folio** button to print one copy of the folio.
- Press **F4** or click the **Print X2** button to print two copies of the folio.
- Otherwise, press **F10** or click the **Done** button to return to the *Guest Information* screen.

Select the type of folio you would like to view or print from the following choices:

NOTE: You have the option of including phone call details on a folio. If you would like to include the phone call details, click on the check box to the right of “Include Phone Detail”.

PROJECTED SUMMARY

Press **F2** or click the **Projected Summary** button. The *Projected Summary* folio displays a summary of all charges until the end of the guest’s stay, as well as any payments made up to the current date.

PROJECTED DETAILED

Press **F3** or click the **Projected Detailed** button. The *Projected Detailed* folio displays a detailed listing of all charges and payments up to the current date as well as a summary all future charges until the end of the guest’s stay.

RUNNING SUMMARY

Press **F4** or click the **Running Summary** button. The *Running Summary* folio displays a summary of all charges and payments that have taken place from the beginning of the guest’s stay to the current date.

RUNNING DETAILED

Press **F5** or click the **Running Detailed** button. The *Running Detailed* folio displays a detailed report of all charges and payments that have taken place from the beginning of the guest’s stay to the current date.

EDITING THE GUEST'S BILL

If you would like to correct a mistake on a guest's bill you may make changes using Edit Bill from the *Guest Information* screen.

1. Press **F4** or click the **Edit Bill** button.
2. Select a column to edit by clicking on the column or using the arrow keys.
3. Enter the new amount of the charge or payment in the place of the incorrect figure, Check-Inn® will re-calculate the guest's balance automatically when you press **Enter**.
4. Press **F10** or click the **Done** button when you have completed your corrections.

USING THE CASH REGISTER

If you would like to add a charge, make a payment, enter a phone credit limit, add a travel agency, enter a repeating charge, or authorize a credit card you may the *Guest Screen Cash Register*.

1. Press **F5** or click the **Cash Register** button.
2. For information on using the cash register, please see "Cash Register Options" section below.

CHANGING THE GUEST'S CHECK-IN DATE

If the guest's check-in date is incorrect, you may change the check-in date in the *Guest Information* screen. This is useful if you forget to enter a guest into the system or because you are allowing an especially early check-in time.

1. Press **F3** or click the **Check-In Date** button.
2. Type the correct check-in date or click the down arrow and select a date from the calendar.

NOTE: The check-in date cannot be changed beyond today's date.

3. Press **F10** or click the **OK** button to save the new check-in date and return to the *Guest Information* screen. Check-Inn® will recalculate the guest balance if necessary.

DELETING A GUEST FROM THE SYSTEM

Periodically it may become necessary for a guest to be deleted from the system. (i.e.: If the guest checks-in and decides that they cannot stay.) In this case you may wish to completely remove the guest from the system. Keep in mind, this information will be completely removed from the system and cannot be restored without re-entry.

1. Press **F7** or click the **Delete Guest** button.
2. A message box will be displayed asking, “Do you wish to remove guest?” Press **F10** or click the **YES** button to remove the guest. Otherwise press **ESC** or click the **NO** button to keep the guest in the system.
3. If you have purchased the Credit Card Processing Module, a message box will be displayed saying, “WARNING! Deleting the guest will not affect (refund) CREDIT CARD sales. Continue?” Press **F10** or click the **YES** button if you would still like to delete the guest, otherwise press **ESC** or click the **NO** button.

NOTE: If you have deleted a guest that has a credit card payment, go the *Audit* screen, select *Credit Card Processing*, and remove the charge from your batch. For further instructions refer to the “Audit” section of this manual.

4. Another message box will be displayed asking, “Is the Guest’s Current Room Clean?” Press **F10** or click the **YES** button if the room is clean, otherwise press **ESC** or click the **NO** button to mark the room dirty.

NOTE: Deleting a guest is recorded in the *Shift Report*.

EDITING PHONE CALLS AND CHARGES

This screen allows you to add, view, or modify a guest's phone calls.

1. Press **F9** or click the **Phone Charges** button from the *Guest Information* screen.

ADDING A CALL

1. Press **F3** or click the **Add Call** button.
2. Enter the Date, Time, Duration, Extension, Phone Number, and Cost of the phone call.
3. Press **F10** or click the **Done** button to add the call, otherwise press **ESC** or click the **Cancel** button.

MODIFYING A CALL

1. Select the call you would like to modify.
2. Press **F2** or click the **Modify Call** button.
3. Change any information that is incorrect.
4. Press **F10** or click the **Done** button to save the changes, otherwise press **ESC** or click the **Cancel** button.

DELETING A CALL

1. Select the call you would like to delete.
2. Press **DEL** or click the **Delete Call** button.
3. A message will be displayed where the phone number was saying, "(Phone Call Deleted)".
4. Press **F10** or click the **Done** button when you have finished.

REMARKS AND MARKETING CODES

1. Press **F11** or click the **Remarks** button.
2. Enter your remarks for the guest. Check-Inn® has several types of remarks that are handled differently in the program.
 - *Remarks to Guest/Folio*
This field will be printed on guest folios. If you are using custom folio numbers, enter the folio number in this field.
 - *Market Codes & Remarks*
This field will only be printed on guest reports and will not be seen by the guest. Press **F2** or click the **Insert Market Code** button, to select a marketing code from the list of codes set up in *Set Colors & Switches*. You may also enter

a market code beginning with a “/”. (i.e.: If you use the code “COM” for commercial guests or “AAA” for Triple A guests, enter “/COM” or “/AAA” in this field.)

NOTE: The Market Segment Report will search this field for the market codes you enter.

- **Flag as *Bad Guest***
Press **F3** or click the check box next to “Flag as Bad Guest”. This will add a red slash on the clipboard icon of the guest and will list the guest’s name in red on the *Quick Search* screen.
 - ***Additional Remarks***
These remarks will not appear on reports or folios. They may be viewed or changed here at any point during the guest’s stay, or in “Guest Tracking” after the guest’s stay.
3. Press **F4** or click the **Print Remarks** button, to print the guest remarks.
 4. Press **F10** or click on the **Done** button when you are finished.

NOTE: A clipboard icon will be displayed in the lower left corner of the *Guest Information* screen once a remark is entered. To view the remarks either press **F11**, click the **Remarks** button, or click on the “Clipboard” icon.

EXTRA PEOPLE

1. Press **F12** or click the **Extra People** button.
2. To save changes, press **F10** or click the **Done** button. Press **ESC** or click the **Cancel** button if you would not like to save your changes.

ADDING A PERSON

1. Press **F2** or click the **Add Person** button.
2. Enter the name of the extra person in the room.
3. Press **F10** or click the **Done** button to save the name, otherwise press **ESC** or click the **Cancel** button.

EDITING A PERSON

1. Select the name you would like to edit.
2. Press **F3** or click the **Edit Person** button.
3. Enter the correct name.
4. Press **F10** or click the **Done** button to save the changes, otherwise press **ESC** or click the **Cancel** button.

DELETING A EXTRA PERSON

1. Select the name you would like to delete.
2. Press **F4** or click the **Delete Person** button.
3. A message box will be displayed asking, "Delete extra person?" Press **F10** or click the **YES** button to delete the extra person, otherwise press **ESC** or click the **NO** button.

PRINTING AN EXTRA PERSON LIST

1. Press **F6** or click the **Print List** button to print a list of all extra people in a room.
 - Press **F2** or click the **Print** button to print one copy of the list.
 - Press **F4** or click the **Print 2X** button to print two copies of the list.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the list.
 - Press **F10** or click the **Done** button to return to the *Extra People* screen.

NOTE: An icon showing three people will be displayed in the lower left corner of the *Guest Information* screen once an extra person is entered. To view the extra people either press **F11**, click the **Extra People** button, or click on the "Extra Person" icon.

REINSTATING A GUEST

If a guest was accidentally checked-out, or would like to check back in, you may reinstate the guest if they are still listed in the *Guest*

Screen. “Additional” split room entries will not be available on the *Guest Screen* for reinstatement.

NOTE: Checked out guests have a C/O beside the guest name and are listed in red in the *Guest Screen*.

1. Press “**3**” or click the **Guest Screen** button on the *Main Menu*.
2. Select the guest you would like to reinstate, and press **F10** or click the **Continue** button.
3. Press **F8** or click the **Reinstate Guest** button.
4. A message box will be displayed asking, "Do you wish to reinstate guest?"
 - Press **F10** or click the **YES** button if you would like the guest will be returned to the system as if he were never checked out.
 - Press **ESC** or click the **NO** button to leave the guest checked-out.

CHANGING THE RATE TYPE

1. If you would like to change the rate type of a guest (i.e.: from daily rate to weekly rate, from weekly to daily etc.), the guest will need to be checked out from his current rate type and checked back in at the new rate type.
2. To transfer a balance from one rate type to the other, pay the balance off as cash payment and complete the check out procedure. When you check the person back in at the new rate type, add the same balance in as a negative amount.

NOTE: This will have no net effect on your cash intake.

GUEST SCREEN CASH REGISTER OPTIONS

1. Press “**3**” or click the **Guest Screen** button on the *Main Menu*.
2. Select the guest you would like to view or change, and press **F10** or click the **Continue** button.
3. Press **F5** or click the **Cash Register** button.

The *Guest Screen Cash Register* looks like this:

	Transaction Type	Amount
#1	BALANCE	251.80
#2	PHONE	10.00
#3	MASSAGE	100.00
#4	CASH	200.00

ENTER CHARGE / PAYMENT

Amount: 0.00

Select Payment Type

Total Tax Amount: 0.00

New Balance: 161.80

Rm: 109 Rate: \$85.60 incl. tax / Bal today: \$70.60 / Travel

Continue <F10> Void Sale <ESC>

The guest's room balance, including tax, for the entire stay will be displayed on the *Cash Register* screen.

ENTERING A CHARGE

1. Enter the amount of the charge (not including tax). There is no need to type the decimal point when entering the amount in the *Cash Register*.
2. Press the function key or click the button for the appropriate sales category. You may need to press the **Shift** key to access the additional charge keys.

Example:

Entering a \$10.00 phone charge.

- Press "1", "0", "0", "0"
- Press **F1** or click the **Phone** button.

Important! DO NOT press ENTER when entering a charge. Always use the appropriate function key.

ENTERING A PAYMENT

1. Enter the amount of the payment. There is no need to type the decimal point when entering the amount in the *Cash Register*.
2. Press **Enter** or click the **Select Payment Type** button.
3. Select the payment type from the drop down box. Press **F10** or click the **Done** button to apply the payment. Depending upon your settings you may have very different payment options to choose from:

CASH

Cash is to be used for any cash or check payments made.

CREDIT CARD

- If you have purchased the Credit Card Processing module, you will have “C. Card Sale” as a payment option. Check-Inn® will dial out and get an approval to charge the card when your batch is sent. Press “A” to use the credit card listed in the *Guest Information* screen, type the card number and expiration date, or swipe a new credit card.
- If you do NOT have Credit Card Processing, a separate payment option for each credit card type will be listed. Select the appropriate type from the list.

IMPORTANT! If the guest leaves an open credit card number, do not enter a payment for the guest until the amount is actually paid.

BILLING

You will be prompted to enter the guest’s address and company information to create the billing entry in Accounts Receivable. If you have already entered the guest’s information, Check-Inn® will auto-fill the billing entry. The billing option can be removed in *Set Colors & Switches*.

RM. TRANSFER

Select the room this amount will be sent to by clicking the down arrow and selecting a room from the list. This amount will be Credited to the current from and Charged to the room

you have selected. Press **F10** or click the **Done** button to transfer the amount, otherwise press **ESC** or click the **Cancel** button. Rm. Transfer will only be displayed if it is turned on in *Set Colors & Switches*.

4. Press **F10** or click the **Continue** button once you are finished.
5. A *Print Preview* of the guest's folio will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the guest folio.
 - Press **F4** or click the **Print 2X** button to print two copies of the guest folio.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the guest folio.
 - Press **F10** or click the **Done** button to return to the *Main Menu*.

SET PHONE CREDIT LIMIT

1. Press "**P**" or click the **Phone Credit** button.
2. Enter the phone credit limit that you would like to extend to the guest. This amount only applies to this guest.
3. Press **F10** or click the **Done** button to save the credit limit, otherwise press **ESC** or click the **Cancel** button.

REPEATING CHARGE

A repeating charge will be applied each time a guest is charged for lodging. (i.e.: If a guest's rate type is weekly, the charge will repeat once per week.)

NOTE: You may enter up to three repeating charges.

1. Press "**R**" or click the **Repeating Charge** button.
2. Enter the amount that you would like to charge the customer each time in the *Charge Amount* field.
3. Enter the charge type by clicking the arrow and selecting a type in the "Charge Type" drop down box.
4. Press **F10** or click the **Done** button when finished, otherwise press **ESC** or click the **Cancel** button.

TRAVEL AGENCY

1. Press “**T**” or click the **Travel Agency** button to assign a travel agent to a guest. (This is to remind you that a commission will need to be paid).
5. Press the down arrow to select an agency from the current list. Choose “None Selected” if you would not like to assign an agency or would like to remove the current agency.
6. Press **F2** or click the **New Agency** button if you need to add or edit a travel agency, this will display the “Travel Agent Audit”. Please see “Adding an Agency” for details.
2. Press **F10** or click the **Done** button to save the selected travel agency, otherwise press **ESC** or click the **Cancel** button.

NOTE: An airplane icon will display in the lower left-hand corner if a travel agency has been selected.

CREDIT CARD PRE-AUTHORIZATIONS

IMPORTANT! The Credit Card Processing Module is required for this function. This is a special module that is purchased separately and requires a special code number.

1. To pre-authorize an amount without actually charging the guest, press “**A**” or click the **Authorize** button.
2. Enter the total amount that you would like to pre-authorize. Check-Inn® will not add pre-authorizations, so the total amount will need to be authorized each time.
3. Enter the card information.
 - If you have not swiped the guest’s card already, either type the card number and expiration date or swipe the guest’s credit card.
 - If you have already swiped the guest’s credit card, press “**A**” or click the **Press “A” to Authorize** button.
4. Press **F10** or click the **Done** button once you are finished.

NOTE: Pre-authorizations should be re-authorized every two weeks to ensure that the authorization is still valid.

COPY LAST CHARGE

1. Press the **Spacebar** or click the **Copy Last** button to repeat the last charge.

Example: A guest has made three phone calls, each costing \$1.73.

- Press “1”, “7”, “3”
- Press **F1** or click the **Phone** button.
- Then press **Spacebar, Spacebar**.

DELETE ITEM

1. Press “**D**” or click the **Delete Item** button.
2. Select the item you would like to delete by entering the transaction number or using the arrows to increase or decrease the number shown.
3. Press **F10** or click the **Done** button to delete the item, otherwise press **ESC** or click the **Cancel** button.

REFUND

1. Press the “-” (minus sign or hyphen) key, and then enter the amount that you would like to refund.
2. Press the function key or click the button for the appropriate charge type. If you are refunding a payment, press **ENTER** and select the correct payment type.

Example: You would like to refund a \$5.00 phone charge to a guest.

- Press “-”, “5”, “0”, “0”
- Press **F1** or click the **Phone** button.

VOID SALE / RETURN TO GUEST SCREEN

1. Press **ESC** or click the **Void Sale** button if you would like to return to the *Check-In* screen without saving the current changes.
2. A message box will be displayed asking, “Do you wish to VOID Sale?”
 - Press **F10** or click the **YES** button to void the sale and return to the *Guest Information* screen.
 - Press **ESC** or click the **Cancel** button to remain on the *Cash Register* screen with no changes.

CASH REGISTER

The Cash Register is the fourth item on the *Main Menu*. Use this screen to make sales to customers who are not checked into the property. For example, a person driving through town wants to buy a map but does not want to stay overnight. This is the cash register that you would use in this case. If a checked-in guest wanted to make a purchase, you would use the cash register on the *Guest Screen*.

USING THE CASH REGISTER:

1. Press “4” or click the **Cash Register** button on the *Main Menu*.

ENTERING A CHARGE

1. Enter the amount of the charge (not including tax). There is no need to type the decimal point when entering the amount in the cash register.
2. Press the function key or click the button for the appropriate sales category. You may need to press the **Shift** key to access the additional charge keys.

Example:

Entering a \$10.00 phone charge.

- Press “1”, “0”, “0”, “0”
- Press **F1** or click the **Phone** button.

Important! DO NOT press ENTER when entering a charge. Always use the appropriate function key.

ENTERING A PAYMENT

1. Enter the amount of the payment. There is no need to type the decimal point when entering the amount in the cash register.
2. Press **Enter** or click the **Select Payment Type** button.
3. Select the payment type from the drop down box. Press **F10** or click the **Done** button to apply the payment. Depending upon your settings you may have very different payment options to choose from.

CASH

Cash is to be used for any cash or check payments made.

CREDIT CARD

- If you have purchased the Credit Card Processing module, you will have “C. Card Sale” as a payment option. Check-Inn® will dial out and get an approval to charge the card when your batch is sent.
- A signature line and a statement of responsibility for the charge will be provided on the guest folio.
- If you do NOT have Credit Card Processing, a separate payment option for each credit card type will be listed. Select the appropriate type from the list.

IMPORTANT! If the guest leaves an open credit card number, do not enter a payment for the guest until the amount is actually paid.

4. Press **F10** or click the **Continue** button once you are finished.
5. A *Print Preview* of the receipt will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the receipt.
 - Press **F4** or click the **Print 2X** button to print two copies of the receipt.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the receipt.
 - Otherwise press **F10** or click the **Done** button to return to the *Main Menu*.

COPY LAST CHARGE

1. Press the **Spacebar** or click the **Copy Last** button to repeat the last charge.

Example: A guest has made three phone calls, each costing \$1.73.

- Press “1”, “7”, “3”
- Press **F1** or click the **Phone** button.
- Then press **Spacebar, Spacebar**.

DELETE ITEM

1. Press **"D"** or click the **Delete Item** button.
2. Select the item you would like to delete by entering the transaction number or using the arrows to increase or decrease the number shown.
3. Press **F10** or click the **Done** button to delete the item, otherwise press **ESC** or click the **Cancel** button.

REFUND

1. Press the **"-"** (minus sign or hyphen) key, and then enter the amount that you would like to refund.
2. Press the function key or click the button for the appropriate charge type. If you are refunding a payment, press **ENTER** and select the correct payment type.

Example:

You would like to refund a \$5.00 phone charge to a guest.

- Press **"-"**, **"5"**, **"0"**, **"0"**
- Press **F1** or click the **Phone** button.

VOID SALE

1. Press **ESC** or click the **Void Sale** button if you would like to cancel the sale.
2. A message box will be displayed asking, "Do you wish to VOID Sale?"
 - Press **F10** or click the **YES** button to void the sale.
 - Press **ESC** or click the **Cancel** button to remain on the *Cash Register* screen with no changes.

AUDIT

Check-Inn® for Windows provides several features for maintaining and correcting your daily information. The *Audit* screen consists of six parts:

- 1. DAILY AUDIT:** This screen displays all guest charges and payments for occupied rooms on the selected day. It also includes payments of advance deposits for reservations. If necessary, guest entries may be added or edited in this screen.
- 2. CREDIT CARD AUDIT:** This screen displays a breakdown of the charges by credit card company, including the amount held back in the form of processing charges or charge-backs.
- 3. ACCOUNTS RECEIVABLE:** This screen allows you to print, edit, or pay bills for guest charges sent to “Billing”. It also includes reports for guest and company billing histories.
- 4. CASH REGISTER AUDIT:** This screen allows you to change the charges and payments entered on the stand-alone cash register for the selected day.
- 5. TRAVEL AGENT AUDIT:** This screen allows you to track Travel Agency information, fees and current commissions.
- 6. CREDIT CARD PROCESSING:** This screen allows you to print, modify, and submit batches of credit card transactions to your card processor.

NOTE: The Credit Card Processing Module is required. The credit card feature requires a special code to be activated. Contact Innsoft, Inc. to purchase the credit card module.

DAILY AUDIT

AUDITING THE DAILY INFORMATION

1. Press “5” or click the **Audit** button on the *Main Menu*.
2. Press “1” or click the **Daily Audit** button.
3. Enter the date you would like to view/edit by typing the date or by clicking the down arrow and selecting a date from the calendar.
4. Press **F10** or click the **OK** button.

The Daily Audit looks like this:

Daily Audit - (Guest 1 of 7)

DAILY AUDIT

Guest Search	Guest Name <input type="text"/>	Room # <input type="text"/>	Audit Date	< F5	<input type="text" value="10/15/01"/>	F6 >
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Guest Name	Rm. #	Guest Charges				Guest Payments			
		Room	Phone	Misc.	Rm. Tax	Cash		Credit	Billing
SAVOY, HELEN	101	80.00	0.00	5.00	5.60	0.00		0.00	0.00
WELLINGTON, SAR	102	72.00	0.00	5.00	5.04	0.00		0.00	0.00
SIMPSON, RALP/R	106	0.00	0.00	0.00	0.00	10.00		0.00	0.00
KING, HANK	112	50.00	0.00	5.00	3.50	0.00	VM	100.00	0.00
SIMPSON, JEFF	114	65.00	0.00	5.00	4.55	0.00		0.00	0.00
CASTILLO, JENNIFE	115	50.00	0.00	15.00	3.50	0.00		0.00	0.00
THOMPSON, SCOTT	116	65.00	0.00	5.00	4.55	298.20		0.00	0.00

F2	Guest Properties	F3	Add Guest	F4	Delete Guest
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Balance: 330.30

Done <F10>

SEARCHING FOR A GUEST

1. Enter the Guest Name or the Room Number you would like to find in the top left corner of the screen.
 - If the guest or room number is found, the selection bar will move to the entry you searched for.

- If the Room is not found a message box will be displayed saying, “Room number not found”, or “Guest name not found”. Press **Enter** or click the **OK** button.

MODIFYING GUEST PROPERTIES

These features will allow you to change the guest’s dates of stay, advance deposit amount, tax exemptions, and split room status, making it easier to correct mistakes.

MODIFYING GUEST DATES

1. Press **F2** or click the **Guest Properties** button.
2. Press **F2** or click the **Change Guest Dates** button.
3. Set the correct guest check-in dates by typing the new date or by clicking the down arrow and selecting a date from the calendar.

NOTE: If the guest is currently checked in, only the check-in date will be displayed.

4. Press **F10** or click the **OK** button to save new dates.

MODIFYING THE TAX-EXEMPT STATUS

1. Press **F2** or click the **Guest Properties** button.
2. Press **F3** or click the down arrow to change the tax-exempt status between Non-Exempt, Fully Exempt, Exempt 1,2, or 3.
3. Press **F10** or click the **Done** button to save the current exemption status.

NOTE: This will only affect the current day in the audit.

MODIFYING ADVANCE DEPOSIT OR NO-SHOW STATUS

1. Press **F2** or click the **Guest Properties** button.
2. Press **F4** or click either the **YES** or **NO** check box.
3. Press **F10** or click the **Done** button once you are finished.

NOTE: See “Reservations” for instructions on how to correctly handle a no-show guest.

MODIFYING THE ADVANCE DEPOSIT AMOUNT

1. Press **F2** or click the **Guest Properties** button.
2. Press **F5** or click the **Set Adv. Deposit** button.
3. Enter the “Deposit” amount.
4. Press **F10** or click the **Done** button.

NOTE: This will not affect any number on the *Daily Report* other than that guest’s balance. The deposit will be added to the first day of the guest’s stay as a normal advance deposit and the balance will be changed by the deposit amount.

MODIFYING THE SPLIT ROOM STATUS

1. Press **F2** or click the **Guest Properties** button.
2. Press **F6** or click either the **YES** or **NO** checkbox.
3. Press **F10** or click the **Done** button when you have finished.

ADDING A GUEST

1. Press **F3** or click the **Add Guest** button.
2. Enter the start date for the guest entry by typing in the date or clicking the down arrow and selecting a date from the calendar. This will be the first day an entry will be added for the guest.
3. Enter the end date for the guest entry in the same way you entered the start date. This will be the last day an entry will be added for the guest.

NOTE: You may not place the final day of the guest's stay beyond the current date.

4. Enter the guest’s first and last name.
5. Enter the guest’s room number.
6. Enter the room rate.

7. Enter any payments made on the first day of the guest's stay. If payments were made on different days, save the entry and then find the day of the payment and enter it manually.
8. Press **F10** or click the **Done** button to add the new guest information, otherwise press **ESC** or click the **Cancel** button.

NOTE: Adding a guest directly to the daily audit will not add the guest to your guest history.

DELETING A GUEST ENTRY

1. Change the Audit date to the first day that you would like to delete the guest. Check-Inn® will delete the entries for the guest from this date forward. Any guest entries before this Audit date will not be deleted.
2. Select the guest you would like to delete.
3. Press **F4** or click the **Delete Guest** button.
4. A message box will be displayed asking, "Delete [guest name] to the end of stay?" Press **F10** or click the **YES** button to remove the guest entries. If you would not like to delete the guest, press **ESC** or click the **NO** button.

NOTE: This is not a substitute for Check-out.

CHANGING THE AUDIT DATE

You may change the Audit Date at the top of the *Daily Audit* in several ways.

1. Press **F5** to view the previous day's Daily Audit.
2. Press **F6** to view the following day's Daily Audit.
3. You may also press the down arrow and select the day you wish to view from the calendar.

MARKING AN ENTRY AS OCCUPIED/NOT OCCUPIED

If an entry modified in the *Daily Audit* screen has no rental charges associated with it, Check-Inn® for Windows may incorrectly mark the room as occupied.

1. Select the audit entry you would like to change. When a room with no rental charges is selected, an “Occupied” option will be displayed below the guest search.
2. Press the **F7** key or click on the “Occupied” field to change the room between “Occupied” and “Unoccupied” status.

CREDIT CARD AUDIT

AUDITING CREDIT CARD COMPANY PAYMENTS

The *Credit Card Audit* allows you to enter payments and adjustments for each credit card company on the selected date. This provides a way to keep track of each credit card company’s payments and outstanding balance.

NOTE: This section will only be useful if the credit card company sends you a check for balances charged to that card type. If you have “direct deposit” turned on then Check-Inn® will keep the card company’s balance at zero.

1. Press “**5**” or click the **Audit** button on the *Main Menu*.
2. Press “**2**” or click the **Credit Card Audit** button.
3. Enter the date of the credit card audit you would like to view/edit by typing the correct date, or by clicking the down arrow and selecting the date from the calendar. You may press **F5** to go back one day or press **F6** to go forward one day.
4. If the credit card is not set for direct deposit, you may enter the amount the card company paid you that day in the “payments received” column.

5. If there are charge-backs or other adjustments beyond the discount charged, you may enter them in the “Audit Adjust” column for the appropriate credit card.
6. Press **F10** or click the **Done** button once you are finished.

ACCOUNTS RECEIVABLE

USING ACCOUNTS RECEIVABLE

Accounts Receivable allows you to send guest charges to a separate section for future payment. Sending charges to “Billing” from the *Cash Register* will add the amount to your totals in this section. This is most useful on you bill companies or organizations directly for guest charges.

1. Press “5” or click the **Audit** button on the *Main Menu*.
2. Press “3” or click the **Accounts Receivable** button.

BILLING YOUR GUESTS

1. Select the guests that will have bills printed/viewed. You may view or print several bills at once by holding down the **CTRL** key and clicking on each guest, or by pressing the * key.
2. Press **F2** or click the **View/Print Bill** button when you have selected all the bills you would like to print.
3. A *Print Preview* of the guest bills will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the bill.
 - Press **F4** or click the **Print 2X** button to print two copies of the bill.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the bill.
 - Press **F10** or click the **Done** button to return to *Accounts Receivable* without printing the bill.

EDITING A BILL

You may need to edit a bill to make a payment or update the billing information.

1. Select the guest bill you would like to edit.
2. Press **F3** or click the **Edit Bill** button.
3. If you need to make changes to the billing information, click on the appropriate field and correct the information.

ENTERING A PAYMENT FROM EDIT BILL

1. Select the guest that has made a payment in their bill.
2. Press the **F3** button or click the **Edit Bill** button.
3. Press **F2** or click the **Make Payment** button.
4. Enter the amount of the payment.
5. Click the **Select Payment Type** button.
6. Select the "Payment Type" from the drop down box.
7. Press **F10** or click the **Done** button.
8. You may adjust the guest's bill without a payment by entering the adjustment amount and pressing **F2** or clicking the **Audit Adj.** button.
9. You may press the **Spacebar** or click the **Copy Last** button if you would like to copy the last transaction.
10. You may press **Delete** or click the **Delete Item** key to delete a transaction. Select the item number you would like to delete. Press **F10** or click the **Done** button to delete the item.
11. Press **F10** or click the **Continue** button.

PRINTING A BILL IN EDIT BILL

1. Press **F3** or click the **Print Bill** button.
2. A *Print Preview* of the guest's bill will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the bill.
 - Press **F4** or click the **Print 2X** button to print two copies of the bill.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the bill.
 - Press **F10** or click the **Done** button to return to *Accounts Receivable* without printing the bill.

PRINTING A FOLIO IN EDIT BILL

1. Press **F4** or click on the **Print Folio** button.
2. A *Print Preview* of the guest's folio will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the folio.
 - Press **F4** or click the **Print 2X** button to print two copies of the folio.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the folio.
 - Press **F10** or click the **Done** button to return to *Accounts Receivable* without printing the folio.

GROUP BILLING

Group Billing allows you to bill a guest's company or organization for their charges.

1. Press **F4** or click the **Group Billing** button.

ADDING A GROUP

1. Press **F2** or click the **Add Group** button.
2. Enter the "Group Name". This name will reflect the company you have made arrangements to bill.
3. Enter the "Billing Address".
4. Enter the "Contact" for the group.
5. Enter the "Phone Number" for the group.
6. Enter any "Other" information that you would like to keep.
7. Enter the amount due for the group, if applicable, in the "Balance" field.

NOTE: Unless you are entering a group that already has a balance due, leave this field blank.

8. Press **F10** or click the **Done** button to enter the group into billing. Press **ESC** or click the **Cancel** button if you would not like to save the group information.

EDITING A GROUP

1. Press **F3** or click the **Edit Group** button.
2. Change any incorrect information in the manner listed for “Adding a Group”.
3. Press **F10** or click the **Done** button to save your changes, otherwise press **ESC** or click the **Cancel** button.

PRINTING A GROUP BILL

1. Select the Group you wish to print a bill for.
2. Press **F4** or click the **Print Bill** button.
3. Enter the “Start Date” by typing in the date, or by clicking the down arrow and selecting a date from the calendar. Any billing entries before this date will not be included.
4. Enter the “End Date” in the same manner that you entered the start date. Any billing entries after this date will not be included.
5. Select the “Billing Type” by clicking the down arrow and selecting either Invoice or Statement.
6. Press **F10** or click the **OK** button.
7. A *Print Preview* of the group bill will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the group bill.
 - Press **F4** or click the **Print 2X** button to print two copies of the group bill.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the group bill.
 - Press **F10** or click the **Done** button, to return to *Group Billing* without printing.

MAKING A PAYMENT TO A GROUP BILL

If a company or organization makes a single payment for several guests, you may apply the payment to the company directly. Check-Inn® for Windows will pay the oldest entries first until the entire payment has been applied.

1. Select the group that has made a payment on their bill.
2. Press **F5** or click the **Make Payment** button.

3. Enter the amount of the payment.
4. Click the **Select Payment Type** button.
5. Select the “Payment Type” from the drop down box.
6. Press **F10** or click the **Done** button.
7. You may adjust the guest’s bill without a payment by entering the adjustment amount and pressing **F2** or clicking the **Audit Adj.** button.
8. Press the **Spacebar** or click the **Copy Last** button to copy the last transaction.
9. Press “**D**” or click the **Delete Item** button to delete an item.
10. Press **F10** or click the **Continue** button once you are finished.

NOTE: These payments do not affect your Daily Audit in anyway. They will not be included in the summary line on the *Daily Report*, but will be reflected in the “Accounts Receivable Summary” section at the end of the report.

PRINTING A LIST OF CURRENT GROUPS

1. Press **F6** or click the **Print List** button.
2. A *Print Preview* of the group billing list will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the group billing list.
 - Press **F4** or click the **Print 2X** button to print two copies of the group billing list.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the group billing list.
 - Press **F10** or click on the **Done** button to return to *Group Billing* without printing a list of current companies.

DELETING A GROUP

1. Press **DEL** or click on the **Delete Group** button.
2. A message box will be displayed asking, “Remove selected group?” Press **F10** or click the **YES** button to remove the group, otherwise press **ESC** or click the **NO** button.

DELETING A BILL

You may delete a bill when it is paid in full and will no longer be used.

1. Select the entry you would like to delete.
2. Press **DEL** or click the **Delete Bill** button.

NOTE: If an entry is deleted by mistake, you may restore it by going to the daily audit for the day the bill was entered and increasing the guest's billing amount by \$1. This will make the entry reappear in Accounts Receivable. Re-enter the original billing amount in the daily audit; the entry will show in accounts receivable with a \$0 balance.

AUDIT ADJUSTMENTS (UNCOLLECTABLE BILLS)

1. If any part of a guest's bill is un-collectable, you will need to make an audit adjustment to remove the amount from Accounts Receivable. Select the entry that requires the adjustment.
2. Press **F3** or click the **Edit Bill** button.
3. Press **F2** or click the **Make Payment** button to enter the *Cash Register* screen.
4. Press the "-" (minus) key, enter the un-collectable amount, and press **F2** for **AUDIT ADJ**. This amount will show in the billing summary on the bottom of the Daily Report, as well as under the Room Deposit item in the Misc. Breakdown section of the Daily Report. The reason for it being shown under the room deposit key is that all items using the **F2** key are broken down in that category.

ACCOUNTS RECEIVABLE REPORTS

There are three Accounts Receivable reports available in Check-Inn® for Windows.

1. Press **"3"** or click the **Accounts Receivable** button.
2. Press **F5** or click the **A/R Reports** button.

COMPANY AGING REPORT

Press “**1**” or click the **Company Aging Report** button. The Company Aging Report lists all companies with a balance due. The balance is broken down by the age of the amounts and is totaled on the right. The grand total of all company balances is listed at the bottom of the report. Any entry without a company assigned will be listed under “Unlisted Co.”.

ACCOUNT AGING REPORT

Press “**2**” or click the **Account Aging Report** button. The Account Aging Report is a list of all guest bills in Accounts Receivable. The amount of each bill is listed in the column that represents its age. All the billings are totaled at the bottom of the report.

ACCOUNT HISTORY REPORT

Press “**3**” or click the **Account History Report** button. The Account History Report This report is a listing of all billing payments, including group-billing payments, for up to the last six months.

1. Select a start date by either typing in a date or clicking on the down arrow and selecting a date from the calendar.
2. Select an end date in the same manner as above.
3. Select a specific company or select “All Companies” from the drop down list.
4. Press **F10** or click the **OK** button to display the report, otherwise press **ESC** or click the **Cancel** button to return to *Accounts Receivable*.

CASH REGISTER AUDIT

AUDITING THE CASH REGISTER TOTALS

Only the balances from the *Cash Register* Screen (Item 4 on the *Main Menu*) are shown in this screen. Any charges associated with a room will show up in the Daily Audit. These totals are listed in the “Cash Register” breakdown on the “Daily Report”.

1. Press “**5**” or click the **Audit** button on the *Main Menu*.
2. Press “**4**” or click the **Cash Register Audit** button.

3. Enter the date you would like to view/edit by typing in the date or by pressing the down arrow and selecting a date from the drop down calendar. You may also press **F5** to view the previous day or **F6** to advance one day.
4. Press the Tab key to move between columns or click the column you would like to change.
 - The total charges entered in the *Cash Register* screen are listed in the columns marked “Sales”.
 - The total payments entered in the cash register are listed in the column marked “Payment”.
5. Press **F2** or click the **View Totals** button to view sales, taxes, total charges, total payments, and balance.
6. Press **F10** or click the **Done** button once you are finished.

TRAVEL AGENT AUDIT

This section is very similar to Accounts Receivable. Begin by entering the names, addresses and commission rates of the travel agencies that regularly send guests to your property. A * will be displayed next to the names of travel agents that are currently owed commissions.

1. Press “**5**” or click the **Audit** button on the *Main Menu*.
2. Press “**5**” or click the **Travel Agent Audit** button.

ADDING AN AGENCY

1. Press **F2** or click the **Add Agency** button.
2. Enter the “Agency Name”.
3. Enter the “Address” for the agency.
4. Enter the “Contact” person for the agency.
5. Enter the “Phone” number for the agency.
6. Enter the “Agency ID” if provided.
7. Enter the “Percent” of room rental or the “Flat Fee” that this agency will receive in commissions.
8. Click the “Charge Daily” check box if the flat fee is applied to each day of the guest stay.
9. Press **F10** or click the **Done** button to add the agency, otherwise press **ESC** or click the **Cancel** button to exit without saving the entry.

EDITING AN AGENCY

1. Press **F3** or click the **Edit Agency** button.
2. Change any incorrect information about the agency.
3. Press **F10** or click the **Done** button to save your changes, otherwise press **ESC** or click the **Cancel** button to exit the screen without saving changes.

PRINTING A STATEMENT

1. Press **F4** or click the **Statement** button to print a commission's statement for an agent (includes total owed).
2. A *Print Preview* of the commissions statement will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the statement.
 - Press **F4** or click the **Print 2X** button to print two copies of the statement.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the statement.
 - Press **F10** or click the **Done** button to return to the *Travel Agencies* screen without printing a statement.
3. A message box will be displayed asking, "Clear Travel Agency Entries?" Press **F10** or click the **YES** button to clear the entries. Otherwise press **ESC** or click the **NO** button.

MAKING CHANGES TO THE STATEMENT

1. Press **F5** or click the **Audit Statement** button.

ADDING AN ENTRY

1. Press **F3** or click the **Add Entry** button.
2. Select the date for the entry by typing the date in manually, or by clicking the down arrow and selecting a date from the calendar.
3. Enter the "Guest Name".
4. Enter the "Reservation #".
5. Enter the "Room Rate" and "Number of Nights".

6. Enter the “Percent” of commission or the “Flat Fee” that this agency will receive.
7. Enter any “Remarks” about the entry.
8. Press **F10** or click the **Done** button to add the entry, otherwise press **ESC** or click the **Cancel** button.

MODIFYING AN ENTRY

1. Press **F2** or click the **Modify Entry** button.
2. Change any incorrect information about the entry.
3. Press **F10** or click the **Done** button to save your changes, otherwise press **ESC** or click the **Cancel** button to exit the screen without saving changes.

DELETING AN ENTRY

1. Press **DEL** or click the **Delete Entry** button.
2. The guest’s name will now display “(Deleted Entry)”. If you wish to reinstate the entry, click the **Undelete Entry** button again.

PRINTING A TRAVEL AGENCY LIST

1. Press **F6** or click the **Print List** button.
2. A *Print Preview* of the travel agency list will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the list.
 - Press **F4** or click the **Print 2X** button to print two copies of the list.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the list.
 - Press **F10** or click on the **Done** button to return to the *Travel Agent Audit* screen without printing.

DELETEING A TRAVEL AGENCY

1. Press the **Delete** key or click the **Delete** button.
2. A message box will be displayed asking, “Remove travel agency [Travel Agency]?” Press **F10** or click the **YES** button

to delete the agency, otherwise press **ESC** or click the **NO** button.

NOTE: You will not be able to delete an agency that is currently assigned to a guest or reservation.

CREDIT CARD PROCESSING

NOTE: A special module must be purchased from Innsoft, Inc. and a permanent code number is required for this feature. Contact Innsoft, Inc. to purchase this module.

AUDITING AND SUBMITTING CREDIT CARD BATCHES

1. Press “**5**” or click the **Audit** button on the *Main Menu*.
2. Press “**6**” or click the **Credit Card Processing** button.
3. A list of all current credit card transactions that will be submitted will be displayed. Each entry will have the transaction number, room number, cardholder’s name, card number, type of credit card, expiration date, approval code and amount of the transaction. This list of transactions will be sent to your card processing network in your next batch.

CREDIT CARD PROCESSING OPTIONS

BATCH TOTALS

The *Batch Totals* screen displays a total dollar amount for all transactions in the batch. This can also be used if you would like to get a printout of all the transactions before submitting or changing something in the batch.

1. Press “**T**” or click the **Batch Totals** button.
2. A *Print Preview* of the Batch Totals will be displayed.

- Press **F2** or click the **Print** button to print one copy of the batch totals.
- Press **F4** or click the **Print 2X** button to print two copies of the batch totals.
- Press **F6** or click the **E-mail** button to e-mail a copy of the batch totals.
- Press **F10** or click the **Done** button to return to the *Credit Card Processing Audit* screen without printing a copy of the batch totals.

SUBMIT BATCH

Once you have finished editing your entries, use this key to submit the batch to the Processing Network.

1. Press "**B**" or click the **Submit Batch** button.

NOTE: If an error occurs, none of the batch will be submitted or removed from the screen. See the Questions and Answers section for help with batch errors.

AUTHORIZE CARD (ADD AN ENTRY TO THE BATCH)

Entries added to the credit card batch must have an approval code. Entering an approval code here will not change the authorization amount in the *Guest Screen*. The amount that is entered here will be the amount that is sent to your bank for settlement

1. Press "**A**" or click the **Authorize** button.
2. Enter the amount to be authorized.
3. Enter the credit card number and expiration date, or swipe the credit card.
4. Press **F2** if you are authorizing a charge for a no show guest.
5. Press **F10** or click the **Done** button if you would like this transaction to be sent for collection with the batch, press **ESC** or click the **Cancel** button if you would not like to charge the card.

NOTE: A * will display beside the transaction number (TX #) to indicate that the credit card information or an approval code was entered manually.

PRINT BATCH

1. Press “**P**” or click on the **Print Batch** button.
2. A *Print Preview* with all information on the *Credit Card Batch* screen including totals for each credit card will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the batch.
 - Press **F4** or click the **Print 2X** button to print two copies of the batch.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the batch.
 - Press **F10** or click the **Done** button to return to the *Credit Card Batch* screen without printing the batch.

MODIFY ENTRY

1. Press “**M**” or click the **Modify** button.
2. Modify Entry allows you to edit information about a credit card sale. If the amount is changed, the system may need to get another authorization.
3. Enter the new sale amount for the transaction.
4. Press **F10** or click the **Done** button to return to the *Credit Card Batch* screen. Otherwise press **ESC** or click the **Cancel** button to cancel the change.

DELETING ENTRY

1. Select the entry that you would like to delete and press “**D**” or click the **Delete** button.
2. A message box will be displayed asking, “Do you wish to delete/undelete the credit card transaction?”
3. Press **F10** or click the **YES** button to delete the transaction, otherwise press **ESC** or click the **NO** button.
4. Under “Cardholder Name” it will be marked “(Entry Deleted)”. You may press the **Undelete** key to reinstate the information.

NOTE: This will not update the audit if you are attempting to remove a payment.

PRINT SALES RECEIPT

1. Select the desired entry and press “**R**” or click the **Receipt** button.
2. A *Print Preview* of the sales draft will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the sales draft.
 - Press **F4** or click the **Print 2X** button to print two copies of the sales draft.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the sales draft.
 - Press **F10** or click the **Done** button to return to the *Credit Card Batch* screen without printing a copy of the sales draft.

NOTE: The breakdown of the charges will NOT be listed when you print the receipt from this screen.

VIEWING PAST CREDIT CARD BATCHES

You may view past credit card batches using the statement editor.

1. Press “**8**” or click the **Change Settings** button on the *Main Menu*.
2. Press “**8**” or click the **Set Statements** button.
3. Press **F6** or click the **Edit Other Statements** button.
4. Press **F9** or click the **Other Text Flies** button.
5. Enter the “Name Of The File to Edit”. Each batch will have the same file name format: CCYYMMDD.001 (CC= Credit Card, YY= Year, MM= Month, DD= Day). The extension (.001) will indicate the number of the batch that day (there may be more than one).

Example: To view the second batch on December 25, 1901 (12/25/01) the file name would be: CC011225.002

RESERVATIONS

Reservations is item six on the *Main Menu*. The reservation system lets you view, change, add and cancel reservations as well as keep a diary.

The main *Reservations* screen looks like this:

The screenshot shows the 'RESERVATIONS' screen with the following elements:

- Reservation Date: 10/15/01
- Calendar for October 2001 with the 15th selected.
- Buttons: S (Search Reservations), C (View Cancellations), R (View Reservation Reports), G (View Reservation Grid), D (Edit Diary Entries).
- Summary: Available: 14, Occupied: 7, AVAILABILITY.
- Table of Room Types:

Room Type	Room Count	Room Type	Room Count
QUEEN	3	KING	
DOUBLE DOUBLE	5	JACUZZI SUITE	3
CONFERENCE ROOM	2		

Pop-up window 'EVENTS' (X):

HIGHER RATES	O.A.
SALMON FESTIVAL	MOD

Buttons: Continue <F10>, Done <ESC>

1. Press “6” or click the **Reservations** button on the *Main Menu*.
2. Select the reservation date by typing the date, clicking on the date from a calendar, or using the arrow keys.

NOTE: If the reservation is more than a year from the current date you may change the year by pressing “Y+” or typing the year.

3. The availability of each type of room for the day selected is displayed in the availability chart at the bottom of the screen. (For instructions on “Adding a Reservation” please see below.)

ADDING A RESERVATION

DATE SELECTION

1. Press “6” or click the **Reservations** button on the *Main Menu*.
2. You may select the reservation date in several ways:
 - Type the new date.
 - Use the **M+**, **M-**, **Y+**, and **Y-** buttons to change the month and year of the reservation.
 - Click the correct date on the calendar.The availability of each room type on the date entered will be displayed.
3. Press **F10** or click the **Continue** button to select a room.

ROOM SELECTION

You must select an available room in order to make a reservation. The reservation may be moved to another room at any time after the reservation has been entered.

NOTE: If you have “Reservation Sort” turned ON in *Change Settings*, Check-Inn® for Windows may change the room number (but not room type) to avoid reservation conflicts.

1. Select the room you would like to reserve by entering the room number, clicking on the room, or using the arrow keys and pressing **F10** or clicking the **Continue** button.
2. Press **F10** or click the **Continue** button.

QUICK GUEST SEARCH

NOTE: “Quick Search for Repeat Guests” can be turned On/Off in *Set Colors and Switches* in the *Change Settings*.

1. A *Quick Guest Search* screen will be displayed allowing you to enter a previous guest's name. All guests matching the search criteria who have stayed at the property will be listed.
 - Type in the guest's name that you would like to find.
 - Select the correct guest by selecting them on the list and pressing **F10**, clicking the **Done** button, or double-clicking on the guest.
 - If there is no match, the *Reservation Guest Information* screen will be displayed.

RESERVATION GUEST INFORMATION SCREEN

1. Enter the guest's name and address, pressing the **Tab** key or **Enter** key to move through the guest information.

NOTE: If you have "Automatic Zip Code Identification" turned on in *Change Settings*, the cursor will skip the city and state fields. Check-Inn® will auto-fill the city and state from the zip code entered.

2. If the guest is with a company in *Accounts Receivable* you may use the arrow keys or click the down arrow to select a group from the list.
3. Set the guest's rate. When you enter the *Rate* field, message box will be displayed with additional options.
 - Enter the rate amount.
 - Select how often the rate will be charged by pressing D for Daily, W for Weekly, M for Monthly, or P for Package. See the section on "Setting Your Room Rates" for more information on how to set Check-Inn® so your rates will pop up.
 - If the guest is tax exempt due to their length of stay or government status, you may select a "Tax Exempt" type from the drop down box at the bottom of the *Room Rates* pop up screen. If you have set partial exemptions in *Change Settings*, you may select exemption type 1, 2, or 3 here also.
 - Press **F10** or click the **Done** button once you are finished.
4. Enter the total number of nights, weeks, months, or packages the guest will be staying by typing a new number or using the

arrows to increase or decrease the number. Enter the number of adults and children in the same way.

NOTE: If you have “Reservation Sort” turned ON in *Change Settings*, Check-Inn® will attempt to move other reservations to allow a longer reservation from the current room.

5. Enter the clerk’s initials.
6. Enter the credit card information. You have two options in entering credit card information.
 - If you have a magnetic stripe reader, you may swipe a credit card on the *Guest Information* screen and it will auto-fill the credit card information.
 - If you do not have a magnetic stripe reader, you may type the number manually. If the number entered is not a valid card number (i.e.: mistyped, or not a correct card number), you will see an “INVALID” message to the right of the credit card number.
7. Enter the guest vehicle information. You may use these slots in any manner that you wish. (i.e.: driver’s license number, passport number, license plate number, etc.) If you swipe a driver’s license with a magnetic stripe, the guest’s name and license number will be filled automatically.
8. Enter the expected arrival time of the guest.
9. If the reservation is guaranteed and you would like to charge a forfeit amount other than one night’s room rental, enter the charge amount in the *forfeit amount* slot.
10. Click the "Guaranteed" checkbox if the reservation is guaranteed. Reservations with valid credit card number are automatically guaranteed.

Important! If you have “Charge No Shows” turned on in *Change Settings* and a guaranteed reservation no-shows, a forfeit amount (usually one night’s rental) will be charged. This amount will appear in the Daily Report with a /R after the guest’s name and will be sent to *Accounts Receivable* for collection. It is the responsibility of the clerk or manager to go into *Accounts Receivable* and post a payment for the guest.

11. Click the "6:00PM Hold" checkbox if you are going to hold the room to 6pm for a non-guaranteed reservation.
12. Press **F11** or click the **Remarks** button to add guest remarks and marketing codes. (Please see the "Remarks" section below for further instructions.)
13. Press **F12** or click the **Extra People** button to add extra people to the room. (Please see the "Extra People" section below for further instructions.)
14. Press **F10** or click the **Continue** button to save the reservation.
15. Press **ESC** or click the **Cancel** button if you would like to cancel the reservation.
 - A message box will be displayed asking, "Do you wish to cancel the reservation?" Press **F10** or click the **YES** button to cancel the reservation, otherwise press **ESC** or click the **NO** button to resume the reservation.

NOTE: Check-Inn® will track the date that a reservation was made or cancelled and display that date along with the Reservation Number.

RESERVATION SEARCH

Check-Inn® will allow you to search for a reservation or cancellation.

1. Press "6" or click the **Reservation** button.
2. Press "S" or click the **Search Reservations** button.
3. Enter the last and/or first name or the reservation number of the guest. Press **F10** or click the **Search** button.
4. A message box will be displayed asking, "Do you wish to restrict search dates?"
 - Press "Y" or click the **YES** button to restrict the dates. If you answered "YES", enter the start and end dates by typing in the date, or clicking the down arrow and selecting the dates from the calendar.
 - Press "N" or click the **NO** button.
5. Press **F10** or click the **OK** button, otherwise press **ESC** or click the **Cancel** button to abort the search.
6. If the reservation or cancellation is found it will be displayed on the screen. Press **F5** or click on the **Continue Search** button to view the next matching reservation.

RESERVATION GRID

This screen allows you to view room reservations and availability for a period of 28 days at a time.

1. Press "**6**" or click the **Reservations** button on the *Main Menu*.
2. To determine room availability when making a reservation, first select the reservation date from the calendar.
3. Press "**G**" or click the **View Reservation Grid** button.
4. To complete the reservation, simply locate the desired room, and double click the box on the grid to go to the *Guest Information* screen. Otherwise press **F10** or click the **Done** button to return to the *Reservations* screen.

Reservations will be displayed in color, depending on the type of reservation. A small gap between reservations will indicate where one reservation ends and another begins. By placing your cursor over the reservation, the guest's name will be displayed in the hint box.

Green	Indicates an occupied room.
Red	Indicates a Non-Guaranteed Reservation.
Yellow	Indicates a Guaranteed Reservation.

RESERVATION GRID OPTIONS

SELECT ROOM TYPE

1. Press **F3** or click the **Select Room Type** button.
2. Click on the check box before the room types you would like displayed.
3. Press **F10** or click the **Done** button to display the selected rooms. Click on the **Clear Selection** button if you would like to remove your selections.

DAILY STATISTICS

This will display the number of stay-overs, check-ins and check-outs on an future date. This can be useful for determining future staffing needs.

NOTE: Statistics are not available for the current day.

1. Enter the date for the statistics you would like to view.
2. Press **F8** or click the **Daily Statistics** button.
3. Press **F10** or click the **Done** button when finished viewing the daily statistics.

ROOM SORT

You may sort the rooms in the reservation grid by room number, room type, or availability.

1. Press **F9** or click the down arrow to display the drop down box next to Room Sort.
2. Select whether you would like to view the grid by “Room Type Sort”, “Room Number Sort”, or “Availability”.
3. If you select “Availability”, enter the number of nights by typing in the number or by using the arrows to increase or decrease the number of available nights.

ADJUSTING RESERVATION GRID START DATE

You may view various segments of time by adjusting your Start Date.

1. Press **F5** to move backward one month, or press **F6** to move forward one month. You may also use the horizontal scroll bar at the bottom of the reservation grid to adjust the calendar within a two month period. Otherwise click the down arrow and select the date you would like to view from the calendar.
2. The vertical scroll bar on the right side allows you to view all rooms if there is more than one page.

PRINTING THE RESERVATION GRID

1. Press **F2** or click the **Print** button.
2. A *Print Preview* of the reservation grid will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the Reservation Grid.
 - Press **F4** or click the **Print 2X** button to print two copies of the Reservation Grid.

- Press **F6** or click the **E-mail** button to e-mail a copy of the Reservation Grid.
- Press **F10** or click the **Done** button to return to the Reservation Grid without printing a copy.

KEEPING A DIARY

The diary is a place to record the times, dates and details of events occurring on your property that may need to be accessed at some future time.

NOTE: For additional help using the diary editor, please see the “Statement Editor” in the “Set Statements” section of this manual.

1. Press **“D”** or click the **Edit Diary Entries** button to edit or view the diary for that date.
2. Press **F2** or click the **Print** button to print the entry.
3. Press **F3** or click the **Date & Time** button to insert the date and time into your entry.
4. Press **F4** or click the **Search** button to search for a word or phrase within the diary entry.
5. Press **F8** or click the **Delete & Exit** button to delete the entry and return to the *Reservations* screen.
6. Press **F10** or click the **Done** button to save the new entry and return to the *Reservations* screen, otherwise press **ESC** or click the **Cancel** button.

GROUP BOOKING

1. Begin your group booking with the first person (the group leader) and make a reservation as you would normally. Include personal information and advance deposits, etc. (For more information please see “Adding a Reservation” at the beginning of this section.)
2. Press **F9** or click the **Group Booking** button on the *Reservation Guest Information* screen.
3. A message box will be displayed asking, “Do you wish to pick rooms?”

- Press “**Y**” or click the **YES** button to pick the rooms yourself. The *Room Reservation* screen will be displayed. You may select multiple rooms by holding down the **CTRL** key and clicking on the various rooms, or by pressing the * key while each room is selected and press **F10** or click the **Done** button.
- Press “**N**” or click the **NO** button if you would like Check-Inn® to select the rooms. When allowing Check-Inn® to select the rooms, all rooms selected will be of the same **TYPE** and not necessarily together. Enter the number of additional rooms that you would like to include in the group reservation. Check-Inn® will inform you as to how many additional rooms are available.
- Press **ESC** or click the **Cancel** button if you wish to abort the group booking.

NOTE: The computer will copy all guest and deposit information into the additional rooms. However if you wish to put individual guest information into each room, you may do so in the *Reservation Guest Information* screen.

GROUP CONFIRMATION

1. Press “**6**” or click the **Reservations** button on the *Main Menu*.
2. Select a date for the reservation.
3. Press **F10** or click the **Continue** button.
4. Select the rooms you would like to print a group confirmation for by pressing the * key while each room is selected, or you may select multiple rooms by holding down the **CTRL** key and clicking on the rooms.
5. Press **F12** or click the **Group Functions** button.
 - Press “**1**” or click the **Print Selected Reservations** button to print an individual confirmation for each room. A message box will be displayed asking, “Do you wish to print all selected reservations?” Press **F10** or click the **YES** button to print the confirmations. Otherwise press **ESC** or click the **NO** button.

- Press “**2**” or click the **Print Reservations AS GROUP** button to print the total for all reservations selected on one confirmation.
6. A *Print Preview* of the confirmations will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the confirmation(s).
 - Press **F4** or click the **Print 2X** button to print two copies of the confirmation(s).
 - Press **F6** or click the **E-mail** button to e-mail a copy of the confirmation(s).
 - Press **F10** or click the **Done** button to return to the *Reservations* screen without printing the confirmations.

GROUP CANCELLATION

1. Press “**6**” or click the **Reservations** button on the *Main Menu*.
2. Select a date for the reservation.
3. Press **F10** or click the **Continue** button.
4. Select the rooms you would like to cancel by pressing the * key while each room is selected, or you may select multiple rooms by holding down the **CTRL** key and clicking on each room.
5. Press **F12** or click the **Group Functions** button on the *Reservations Room Selection* screen.
6. Press “**3**” or click **Cancel Selected Reservations** button.
7. A message box will be displayed asking, “Cancel all selected Guests?” Press **F10** or click the **YES** button to cancel the reservations.

CHANGING RESRVATION NUMBER OR DATE

1. Press **F2** or click the **Change** button on the *Reservation Information* screen. You will be given three options:

CHANGING THE GUEST’S ROOM NUMBER

1. Press **F2** or click the **Change Room** button.
2. Press “**1**” or click the **Change Room Number** button if you use split rooms or the card lock interface, otherwise the *New Room Selection* screen will be displayed automatically.

3. Select a new room for the guest on the *New Room Selection* screen, and press **F10**, click the **OK** button, or double-click the new room.

NOTE: If another guest currently occupies the room, the guests will switch rooms.

CHANGE RESERVATION DATE

1. Press “**2**” or click the **Change Reservation Date** button to change the date of the reservation.
2. Select the new reservation date by typing the date or by clicking a new date on the calendar.
3. If that room is already reserved on the day you are attempting to move to, a message box will be displayed saying, “Room already reserved for this date”. Press **F10** or click the **OK** button. You may change the reservation to another room and attempt the reservation again.
4. Press **F10** or click the **Done** button to change the date, otherwise press **ESC** or click the **Cancel** button to keep the original date.

LOCK ROOM NUMBER

1. If turned “On” this guest will remain assigned to this room. He will not be sorted to a room of the same type to solve future reservation conflicts. A small picture of a lock will display on the bottom left corner of the *Reservations Guest Information Screen*.

VIEW CENTRAL RESERVATIONS

If you have purchased the Central Reservations Interface module, you will have an additional option to view reservations that have been posted through the interface.

1. Press “**6**” or click the **Reservations** button on the *Main Menu*.
2. Press “**R**” or click the **View Reservation Reports** button.

3. Press “4” or click the **Central Reservations** button. The reservation will be displayed exactly as it was sent to Check-Inn® by the central reservation system.
4. A *Print Preview* of the Central Reservations log will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the reservation.
 - Press **F4** or click the **Print 2X** button to print two copies of the reservation.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the reservation.
 - Press **F10** or the **Done** button to return to the *Reservations* screen without printing a copy of the reservation.

ENTERING A RESERVATION DEPOSIT

IMPORTANT! Only enter a deposit if you have actually collected money. If you choose to pre-authorize a credit card, it will not automatically transfer when you check-in a guest.

1. Press “6” or click the **Reservations** button on the *Main Menu*.
2. Select a date for the reservation.
3. Press **F10** or click the **Continue** button.
4. Select an existing reservation or an available room from the room list by pressing **F10** or clicking the **Continue** button.
5. Press **F3** or click the **Enter Deposit** button. The guest’s name and room rate must be entered before you may enter a deposit.
6. Enter the amount of the deposit in the *Reservation Cash Register*. Click on the **Select Payment Type** button and select the type of payment that was received. Press **F10** or click the **Done** button.

NOTE: Do not enter amount under "Extra Deposit" as this would be used for an extra charge in addition to the advance deposit (i.e.: security fee for damage to the room).

7. Press **F10** or click the **Continue** button when you are finished. Otherwise press **ESC** or click the **Void Sale** button if you do not want to enter a deposit.
8. A *Print Preview* of the confirmation will be displayed.

- Press **F2** or click the **Print** button to print one copy of the confirmation.
- Press **F4** or click the **Print 2X** button to print two copies of the confirmation.
- Press **F6** or click the **E-mail** button to e-mail a copy of the confirmation.
- Press **F10** or click the **Done** button if you would like to return to the reservation without printing.

CASH REGISTER OPTIONS

REPEATING CHARGE

A repeating charge will be applied each time a guest is charged for lodging. (i.e.: If a guest's rate type is weekly, the charge will repeat once per week.)

NOTE: You may enter up to three repeating charges.

1. Press "**R**" or click the **Repeating Charge** button.
2. Enter the amount that you would like to charge the customer each time in the *Charge Amount* field.
3. Enter the charge type by clicking the arrow and selecting a type in the "Charge Type" drop down box.
4. Press **F10** or click the **Done** button when finished, otherwise press **ESC** or click the **Cancel** button.

COPY LAST CHARGE

1. Press the **Spacebar** or click the **Copy Last** button to repeat the last charge.

Example:

A guest has made three phone calls, each costing \$1.73.

- Press "1", "7", "3"
- Press **F1** or click the **Phone** button.
- Then press **Spacebar, Spacebar**.

DELETE ITEM

1. Press “**D**” or click the **Delete Item** button.
2. Select the item you would like to delete by entering the transaction number or using the arrows to increase or decrease the number shown.
3. Press **F10** or click the **Done** button to delete the item, otherwise press **ESC** or click the **Cancel** button.

REFUND

1. Press the “-” (minus sign or hyphen) key, and then enter the amount that you would like to refund.
2. Press the function key or click the button for the appropriate refund type.

Example: You would like to refund a \$5.00 phone charge to a guest.

- Press “-”, “5”, “0”, “0”
- Press **F1** or click the **Phone** button.

VOID SALE / RETURN TO RESERVATION SCREEN

1. Press **ESC** or click the **Void Sale** button, if you would like to return to the *Check-In* screen without saving the current changes.
2. A message box will be displayed asking, “Do you wish to VOID Sale?”
 - Press **F10** or click the **YES** button to void the sale, and return to the *Guest Information* screen.
 - Press **ESC** or click the **Cancel** button to remain on the *Cash Register* screen with no changes.

CREDIT CARD PRE-AUTHORIZATIONS

IMPORTANT! The Credit Card Processing Module is required for this function. This is a special module that is purchased separately and requires a special code number.

5. To pre-authorize an amount without actually charging the guest, press “**A**” or click on the **Authorize** button.
6. Enter the total amount that you would like to pre-authorize. Check-Inn® will not add pre-authorizations, so the total amount will need to be authorized each time.
7. Enter the card information.
 - If you have not swiped the guest’s card already, either type the card number and expiration date or swipe the guest’s credit card.
 - If you have already swiped the guest’s credit card, press “**A**” or click the **Press “A” to Authorize** button.
8. Press **F10** or click the **Done** button once you are finished.

NOTE: Pre-authorizations should be re-authorized every two weeks to ensure that the authorization is still valid.

PRINTING A CONFIRMATION

1. Press “**6**” or click the **Reservations** button on the *Main Menu*.
2. Enter the date of the reservation and press **F10** or click the **Continue** button.
3. Select an existing reservation from the list or select an available room and make a reservation as described in the “Adding A Reservation” section.
4. Press **F4** or click the **Print Confirm.** button.
5. A *Print Preview* of the confirmation will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the confirmation.
 - Press **F4** or click the **Print 2X** button to print two copies of the confirmation.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the confirmation.
 - Press **F10** or click the **Done** button if you would like to return to the reservation without printing

VIEWING A RESERVATION

1. Press “**6**” or click the **Reservation** button on the *Main Menu*.

2. Select a date for the reservation and press **F10** or click the **Continue** button.
3. All reservations for that day will be listed along with the available rooms. Select a reservation and press **F10** or click the **Continue** button.
4. Press **F10** or click the **Continue** button to return to the *Reservations* screen.

CANCELLING A RESERVATION

1. Press “**6**” or click the **Reservations** button on the *Main Menu*.
2. Select a date for the reservation and press **F10** or click the **Continue** button.
3. All reservations for that day will be listed along with the available rooms. Select a reservation and press **F10** or click the **Continue** button.
4. Press **F6** or click the **Cancel** button.
5. A message box will be displayed asking, “Cancel the reservation?”. Press **F10** or click the **YES** button to cancel the reservation, otherwise press **ESC** or click the **NO** button.
6. If a deposit has been made on the room, a message box will be displayed saying, “A deposit of \$###.## was made to guarantee room”.
 - Press **OK** or click the **Enter** button, and enter the refund to the guest.
 - If there is a cancellation fee, enter the amount into the *Cash Register* and press **F2** or click the **Room Deposit** button.

NOTE: If you don't wish to handle the refund at this time you may send the deposit into billing for later payment. Enter the amount of the refund, press “-”(minus), click the **Payment Type** button and selecting *Billing*.

- Press **F10** or click **OK** to continue.
7. Press **F10** or click the **Done** button when you have finished.
 8. If the reservation has any remaining deposit, a message will be displayed to refund the remainder.
 - Press **F10** or click the **YES** button to refund the remaining amount to cash.

- Press **ESC** or click the **NO** button to return to the *Cash Register*.
9. A *Print Preview* of the cancellation notice will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the cancellation confirmation.
 - Press **F4** or click the **Print 2X** button to print two copies of the cancellation confirmation.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the cancellation confirmation.
 - Press **F10** or click the **Done** button to exit without printing the cancellation confirmation.

VIEWING A CANCELLATION

1. Press “**6**” or click the **Reservations** button on the *Main Menu*.
2. Press “**C**” or click the **View Cancellations** button.
3. Select the cancellation you would like to view by pressing **F10** or clicking the **Continue** button. You may search for the cancellation by the room number, description, or guest name.

RESTORING A RESERVATION

1. Press “**6**” or click the **Reservations** button on the *Main Menu*.
2. Select the date of the reservation from the calendar.
3. Press “**C**” or click the **View Cancellations** button.
4. Select the reservation that you would like to restore and press **F10** or click the **Continue** button.
5. Press **F6** or click the **Restore** button.
6. A message box will be displayed asking “Restore the Reservation?”. Press **F10** or click the **YES** button to restore the reservation, otherwise press **ESC** or click the **NO** button.
7. You should notice that the header at the top of the screen now says “Reservation” and not “Cancellation”.
8. Press **F10** or click on the **Continue** button when you are finished.

COPYING A RESERVATION

Check-Inn® will allow you to copy guest information from the last reservation entered for your property. If the program has been turned off and restarted, you will not be able to copy a reservation until after a new reservation has been entered.

1. Press “**6**” or click the **Reservations** button on the *Main Menu*.
2. Select the start date of the reservation from the calendar.
3. Press **F10** or click the **Continue** button.
4. Select an available room from the list.
5. Press **F10** or click the **Continue** button.
6. Press **F5** or click the **Copy Last** button.
7. A message box will be displayed asking, “Copy previous guest?” Press **F10** or click the **YES** button to copy the guest information, otherwise press **ESC** or click the **NO** button. All of the information that was entered in the previous reservation will now be copied into this reservation.
8. Press **F10** or click the **Continue** button when you are finished.

ASSIGNING A TRAVEL AGENCY

1. Press “**6**” or click the **Reservations** button on the *Main Menu*.
2. Select the start date of the reservation from the calendar.
3. Press **F10** or click the **Continue** button.
4. Select the reservation you would like to assign the travel agency, or click on an available room to make a new reservation. (For instructions on adding a reservation please see “Add Reservation” section.)
5. Press **F7** or click the **Travel Agency** button.
6. Select a travel agency from the drop down list. If you need to add or change a travel agency, you may do so in *Travel Agent Audit*.
7. Press **F10** or click the **Continue** button to save the agency for the reservation, otherwise press **ESC** or click the **Cancel** button.

SEARCH MASTER GUEST HISTORY

1. Press “6” or click the **Reservations** button on the *Main Menu*.
2. Select the start date of the reservation from the calendar.
3. Press **F10** or click the **Continue** button.
4. Select an available room for the new reservation by pressing **F10** or clicking the **Continue** button. (For instructions on adding a reservation, please see the “Add Reservation” section.)
5. Press **F4** or click on the **Search Master** button.
6. Enter any part of the first name, last name and phone number. Check-Inn® will also search your guest history for the information you entered in the “Other” search field.
7. Press **F10** or click the **Search** button to start the search.
8. A guest record that matches your search criteria will be displayed. You may continue to cycle through found guests by pressing **F5** or clicking the **Continue Search** button. The most recent guest stay will be displayed first, followed by stays that occurred further in the past.

REMARKS AND MARKETING CODES

1. Press “6” or click the **Reservations** button on the *Main Menu*.
2. Select the start date of the reservation from the calendar.
3. Press **F10** or click the **Continue** button.
4. Select the reservation you would like to enter remarks and marketing codes, or click on an available room to make a new reservation. (For instructions on adding a reservation, please see the “Add Reservation” section.)
5. Enter your remarks for the guest. Check-Inn® has several types of remarks that are handled differently in the program.
 - *Remarks to Guest/Folio*
This field will be printed on guest folios. If you are using custom folio numbers, enter the folio number in this field.
 - *Market Codes & Remarks*
This field will only be printed on guest reports and will not be seen by the guest. Press **F2** or click the **Insert Market Code** button, to select a marketing code from the list of codes set up in *Set Colors & Switches*. You may also enter

a market code beginning with a “/”. (i.e.: If you use the code “COM” for commercial guests or “AAA” for Triple A guests, enter “/COM” or “/AAA” in this field.)

NOTE: The *Market Segment Report* will search this field for the market codes you enter.

- **Flag as *Bad Guest***
Press **F3** or click the check box next to “Flag as Bad Guest”. This will add a red slash on the clipboard icon of the guest and will list the guest’s name in red on the *Quick Search* screen.

 - ***Additional Remarks***
These remarks will not appear on reports or folios. They may be viewed or changed here at any point during the guest’s stay, or in *Guest Tracking* after the guest’s stay.
6. Press **F4** or click the **Print Remarks** button, to print the guest remarks.
 7. Press **F10** or click the **Done** button when you are finished.

NOTE: A clipboard icon will be displayed in the lower left corner of the *Guest Information* screen once a remark is entered. To view the remarks either press **F11**, click the **Remarks** button, or click on the “Clipboard” icon.

OVERBOOKING WITH CHECK-INN®

Because Check-Inn® does not print the room numbers on confirmations, you may use the Conference Room feature to create dummy rooms for overbooking your reservations. You may create additional rooms up to the limit of your license (Example: if your property has 37 actual rooms, and you are licensed to 50 rooms, you will be able to create 13 dummy rooms).

1. To create a dummy room, press “8” or click the **Change Settings** button from the *Main Menu*.
2. Press “2” or click the **Rooms and Rates** button.

3. Press **F2** or click the **Add Room** button.
4. Enter the information for the Dummy Room. The room number must begin with the letter “C” (i.e.: C101)
5. Press **F10** or click the **Done** button to finish adding the room.
6. To turn the switch on so that the computer will not count these rooms against your occupancy rate or your ADR, press “**8**” or click the **Change Settings** button.
7. Press “**7**” or click the **Set Colors & Switches** button.
8. Check the box beside the switch marked “Allow Conference or Dummy Rooms”.
9. Press **F10** or click the **Done** button when you are finished.
10. You may make reservations for these rooms just like you do for regular rooms. When a guest arrives, you may change the room assignment from a dummy room into a regular room.

RESERVATION REPORTS

Reservation Reports will allow you to view reservations and cancellations that have been made, and any deposits that have been received.

1. Press “**6**” or click the **Reservation** button on the *Main Menu*.
2. Press “**R**” or click the **View Reservation Reports** button.

There are eight reservation reports available on this screen.

DAILY RESERVATIONS

The Daily Reservations Report lists all reservations for a specific day or days. The information provided in the report includes the guest name, room number, confirmation number, room rate, number of adults, number of children, deposit amount, arrival time, guaranteed status, hold to time (if any), number of nights, and remarks.

1. Press “**1**” or click the **Daily Reservations** button.
2. Enter the start date and end date for the report by typing in the date or by clicking on the down arrow and selecting a date from the calendar.
3. Select the format of the report.
 - Room- lists the reservations by room number.
 - Name- lists the reservations by guest name.

4. Press **F10** or click the **OK** button to view the report.

RESERVATION DEPOSITS

The Reservation Deposit Report will list the advance deposits that you have already received for each reservation made. The report also includes the total amount of cash or credit card payments that you have received, the guest name, room number, confirmation number, room rate, number of adults, number of children, deposit amount, arrival time, guaranteed status, hold to time (if any), number of nights and remarks.

1. Press “**2**” or click the **Reservation Deposits** button to view and print the report.

ALL RESERVATIONS

The All Reservations Report is a listing of all future reservations that you currently have in the system for future dates. The information provided in the report includes the guest name, room number, confirmation number, room rate, number of adults, number of children, deposit amount, arrival time, guaranteed status, hold to time (if any), number of nights, and remarks.

1. Press “**3**” or click the **All Reservations** button to view and print the report.

CENTRAL RESERVATIONS

NOTE: A special Central Reservations Option Code is required to connect your central reservations computer with your Check-Inn® computer. Please contact Innsoft, Inc. if you wish to purchase this module.

The Central Reservations Report is a log of all reservations that were received by Check-Inn® from your central reservations computer. These reservations are automatically added to your existing reservations. If Check-Inn® has added or changed any Central Reservations, they will be logged in this report. If there were problems making the requested change or addition, it will be logged with an explanation of the error. If Check-Inn® receives a reservation it is unable to process, the entire reservation will be sent to this report for

entry by hand. This report should be reviewed each night to insure accurate posting for your central reservations. Contact Innsoft, Inc. technical support if you have problems with the Central Reservation link.

1. Press “4” or the **Central Reservations** button to view and print the report.
2. To force all reservations to post, press **F3** at the *Main Menu*.

DAILY CANCELLATIONS

The Daily Cancellations Report is a listing of cancellations for a certain day or days. The information provided in the report includes the guest’s name, room number, confirmation number, room rate, number of adults, number of children, deposit amount, arrival time, guaranteed status, hold to time (if any), number of nights, and remarks.

1. Press “5” or click the **Daily Cancellations** button.
2. Enter the start date and end date for the report by typing in the date or by clicking on the down arrow and selecting a date from the calendar.
 - Room- lists the reservations by room number.
 - Name- lists the reservations by guest name.
3. Press **F10** or click on the **OK** button to view or print the report.

FORECASTING

The Forecasting Report will allow you to view occupancy statistics and expected revenue for a future date or date range. It will give a summary breakdown with the number of days, total rooms rented, total rooms occupied, total reservations made, percent occupied, average daily rate, as well as a breakdown for each of your room types.

1. Press “6” or click the **Reservation Forecasting** button.
2. Enter the start date and end date for the report by typing in the date or by clicking on the down arrow and selecting a date from the calendar.
3. Press **F10** or click the **OK** button to view and print the report.

EXPIRED RESERVATIONS

NOTE: Check-Inn® does NOT automatically cancel reservations with delinquent deposits.

The Expired Reservations Report will list the reservations that have not yet sent their advance deposit. The information provided on the report includes the guest's name, room number, confirmation number, room rate, number of adults, number of children, deposit amount, arrival time, guaranteed status, hold to time (if any), number of nights, and remarks.

1. Press **"7"** or click the **Expired Reservations** button.
2. Select the number of days a reservation must be held without a deposit before it is considered expired by clicking the down arrow and selecting the number of days.
3. Press **F10** or click the **OK** button to view the report.

RESERVATIONS AND CANCELLATIONS BY DATE MADE

The Reservations and Cancellations by Date Made Report will sort reservations and cancellations by the date they were made. The information provided on the report includes the guest name, room number, confirmation number, room rate, number of adults, number of children, deposit amount, arrival time, guaranteed status, hold to time (if any), number of nights, and remarks. Below each reservation, a separate line will tell you the type of room, when the reservation was made or cancelled and the arrival date.

1. Press **"8"** or click the **Reservations (Date Made)** button.
2. Enter the start date and end date for the report by typing in the date or by clicking on the down arrow and selecting a date from the calendar.
3. Enter the start date and end date for the report by typing in the date or by clicking on the down arrow and selecting a date from the calendar.
 - Room- lists the reservations by room number.
 - Name- lists the reservations by guest name.
4. Press **F10** or click the **OK** button to view this report.

PRINTING REPORTS

1. A *Print Preview* of the selected report will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the report.
 - Press **F4** or click the **Print 2X** button to print two copies of the report.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the report.
 - Press **F10** or click the **Done** button to return to the *Reservation Reports* menu.

REPORTS

You may view and/or print the Daily Report, Monthly Report, Reservation Reports, Housekeeping Report, Occupancy Report, Shift Reports, Marketing Report, Room Revenue Report, Tax Exempt Report, Phone Report, POS & Movie Reports and create mailing labels from this menu.

VIEWING/PRINTING THE DAILY REPORT

The Daily Report contains all of the financial information for a 24-hour period based upon the “Close Out Time” that is set in the check-in/out times screen. You may view reports for one day or several days.

1. Press “7” or click the **Reports** button from the *Main Menu*.
2. Select “1” or press the **Daily Financial Report** button.
3. Enter the start date and end date for the reports by typing in the date or by clicking on the down arrow and selecting a date from the calendar.
4. Select the format for the reports, either “Detailed” or “Summary”.
5. Press **F10** or click the **OK** button to generate the report.
6. A “Please Wait” message will be displayed to notify you as to the current status of the creation of the Daily Report(s).
7. Check-Inn® for Windows will create a Daily Report for each day in the date range you selected.
8. A *Print Preview* of the Daily Report will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the Daily Report.
 - Press **F4** or click the **Print 2X** button to print two copies of the Daily Report.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the Daily Report.
 - Press **F10** or click the **Done** button to return to the *Report Menu* without printing a copy of the Daily Report.

The property name, address, page number and date are printed at the top of each Daily Report. There is an option to time and date stamp

when the report was printed in *Set Colors & Switches* from the *Change Settings* menu.

The beginning of the *Daily Report* contains the information on charges and payments for each guest during the date specified. The top section of the report contains the following information:

GUEST'S NAME

Contains the guest's last and first name, the guest number and the guest's status (advance deposit, stay-over etc.)

ROOM NO.

Contains the guest's room number.

BALANCE DUE YESTERDAY

Contains the guest's balance before today's charges and payments.

ROOM RENTAL

Contains the daily room rate, not including taxes.

TELEPHONE

Contains any phone charges entered for the selected date.

MISC.

Contains a total of all miscellaneous charges for the selected date.

TAX

Contains all taxes charged to the room for the selected date. This includes, room tax, telephone taxes and taxes charged for miscellaneous items.

TOTAL CHARGES

Contains a total of the charges for the room for the date.

CASH

Contains the amount collected in cash or check for the room.

CREDIT CARD

Contains the credit card symbol (i.e.: VM = Visa/Master card) and the amount paid using a credit card.

ACCTS. REC. BILLING

Contains the total amount sent to Accounts Receivable for the room on the selected date.

TOTAL AMOUNT

Contains the total amount paid for the room for the selected date.

BALANCE DUE TODAY

Contains the new balance after adding today's charges and subtracting today's payments.

MISCELLANEOUS BREAKDOWN

This contains a breakdown by category of the total miscellaneous charges for that day. The categories are set in *Tax and Sales Categories* from the *Change Settings* menu.

NOTE: The reports are created from scratch every time they are generated. Therefore you may change the name of a category and have it change that name on older reports.

OCCUPANCY SUMMARY

This section shows the total rooms occupied, the occupancy rate and the average daily rate for the selected date. A month-to-date summary is also displayed (occupancy for days from the beginning of the month to the date of the report). If you have Conference Rooms set to "ON" in *Change Settings*, you will find separate calculations for those rooms.

NOTE: Rooms rented using weekly, monthly, and package rates of 2 or more nights do not affect the "Occupancy Rate" or the "Average Daily Rate".

TAX EXEMPT SUMMARY

This section contains a breakdown of all tax-exempt room rental charges. This will show a breakdown for each tax type, starting with "Y" for completely tax exempt, followed by 1,2, and 3 for the exempt types you have set in *Tax and Sales Categories*. A month-to-date

summary is also displayed (tax exemptions from the beginning of the month to the date of the report).

NOTE: Columns will not be displayed if you do not have tax-exempt guests of a particular type.

CASH REGISTER REPORT

This section contains a breakdown of all charges, payments and taxes made in the stand-alone cash register on the *Main Menu* that were NOT associated with a room.

SUMMARY TAX BREAKDOWN

This section shows the amount of tax paid that day for each category of taxes (Example: Lodging, Sales, Etc.).

BILLINGS REPORT

This section will display all billings made to *Accounts Receivable*, billings paid and net billings.

ADVANCE DEPOSIT REPORT

This section will display a previous deposit balance, the amount of deposits made that day, the deposits used that day and a new deposit balance. Below the balances, the number of new deposits made, the number of deposits used and the number of no-shows will be displayed.

SUMMARY

This section summarizes the charges, taxes, payments, and balances for the day and the month-to-date (from the beginning of the month to date of report).

NOTE: In the “month to date” row the beginning balance is always zero on the first day of the month.

The balance can be found by using the following calculation.

Previous Balance + Total Charges + (Adv. Deposits Made – Adv. Deposits Used) – Total Payments = New Balance

Example: Previous Balance: \$608.00, Total charges \$150.00, Adv. Deposits Made: \$25, Adv. Deposit Used: \$14, Total Payments: \$135. Then the following would be true:

\$608	+\$150	=	\$758	(Previous Balance + Total Charges)
+\$25	-\$14	=	\$11	(Adv. Deposits made – Adv. Deposits Used)
	-\$135	=	-\$135	(Total Payments)
<hr/>				
Total			\$634	(New Balance)

ACCOUNTS RECEIVABLE SUMMARY

This section contains a breakdown of the credit card and billing activity for the selected date.

1. The "Balance Yesterday" column contains the amount owed to the property each credit card company and billing as of yesterday.
2. The "Today's Charges" column is the total charges for each card for the date.
3. The "Discount" column gives the amount each credit card company is taking as a processing fee.
4. The "Today's Net" column is the actual credit card amount that should be received from the credit card company.
5. If the credit card is directly deposited into your account, "Payments Received" will equal "Today's Net", otherwise the "Payments Received" column is the amount entered in the Credit Card Audit screen.
6. "Audit Adjustment" is the amount entered in the Credit Card Audit screen and is equal to the amount of extra credit card charges, charge-backs and other adjustments.
7. The "Balance" column is the new balance after all charges and payments have been applied.

TOTAL CASH RECEIVED

This section will display all cash received, for both the day's business and cash payments applied to *Accounts Receivable*.

NOTE: The Total Cash received will **only** display if you have made a cash payment to billing.

VIEWING/PRINTING THE MONTHLY REPORT

1. Press “7” or click the **Reports** button on the *Main Menu*.
2. Press “2” or click the **Monthly Financial Report** button.
3. Enter the start date and end date for the reports by typing in the date or by clicking the arrows to increase or decrease the month and year.
4. Select the format for the reports, either “Detailed” or “Summary”. You may choose “Detailed – Compare” or “Summary – Compare” if you would like to compare last year’s totals with this year’s totals,
5. Press **F10** or click the **OK** button to generate the report.
6. A “Please Wait” message will be displayed for the month that is being calculated. Check-Inn® for Windows will create a Monthly Report for each month in the date range you select.
7. A *Print Preview* of the monthly report.
 - Press **F2** or click the **Print** button to print one copy of the report.
 - Press **F4** or click the **Print 2X** button to print two copies of the report.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the report.
 - Press **F10** or click the **Done** button to return to the *Report Menu* without printing the Monthly Report.

The beginning of the *Monthly Report* contains the information on charges and payments for each day during the period specified. The top section of the report contains the following information:

BALANCE DUE YESTERDAY

Contains the total balance before today's charges and payments have been applied.

ROOM RENTAL

Contains a summary of the daily room rates not including taxes for the day.

TELEPHONE

Contains a summary of the phone charges for the day.

MISC.

Contains a summary of the miscellaneous charges for the day.

TAX

Contains a summary of all taxes charged for the day, including room tax, telephone taxes and taxes charged for miscellaneous items.

TOTAL CHARGES

Contains a total of the charges for the room for the day.

CASH

Contains the amount collected in cash or checks for day.

CREDIT CARD

Contains the amount collected in credit card payments for the day.

ACCTS. REC.

Contains the total amount sent to Accounts Receivable for the day.

TOTAL AMOUNT

Contains the total amount paid for the day.

BALANCE DUE TODAY

Contains the new balance after that day's charges and payments have been applied.

MISCELLANEOUS BREAKDOWN

This section contains a category breakdown of the total miscellaneous charges for that month. The categories are set in Tax and Sales Categories.

NOTE: The reports are created from scratch every time they are viewed. Therefore you may change the name of a category and have it change that name on all older reports.

OCCUPANCY SUMMARY

This selection shows the total number of days in the date range, the total rooms occupied, the average occupancy rate and the average daily rate for the period that you have selected. If you have

Conference Rooms set to “on” in Change Settings, you will find separate calculations for those rooms.

NOTE: Rooms rented using weekly, monthly, and package rates of 2 or more nights do not affect the "Occupancy Rate" or the "Average Daily Rate".

ROOMS RENTED

This section shows a breakdown of the number of rooms rented per day during that month.

TAX EXEMPT SUMMARY

This section contains a breakdown of all tax-exempt room rental charges. This will show a breakdown for each tax type, starting with “Y” for completely tax exempt, followed by 1,2, and 3 for the exempt types you have set in “Tax and Sales Categories”.

NOTE: Only exemptions with current charges will be listed.

SUMMARY TAX BREAKDOWN

This section shows the amount of tax paid that month for each category of taxes (i.e.: Lodging, Sales, Etc.).

BILLING REPORT

This section will display a summary of billing entries made, billing entries paid and the net billing activity for the month.

ADVANCE DEPOSIT REPORT

This report will display a summary of the previous deposit balance, the amount of deposits made, the deposits used and a new deposit balance for the month.

SUMMARY

This section summarizes the charges, taxes, payments, and balances for the month and the Year To Date (from the beginning of the Year to date of report).

NOTE: In the "Year to Date" row the beginning balance is always zero on the first day of the year.

The balance can be found by using the following calculation.
(Total Charges + Adv. Deposits Made) – (Adv. Deposits Used + Total Payments) = New Balance

Example: Total charges \$150.00, Adv. Deposits Made: \$25, Adv. Deposit Used: \$14, Total Payments: \$135. Then the following would be true:

$$\begin{array}{rcl} (\$150 - \$135) & = & \$15 \quad (\text{Total Charges} - \text{Total Payments}) \\ + (\$25 - \$14) & = & \$11 \quad +(\text{Adv. Deposits Made} - \text{Adv. Deposits Used}) \\ \hline \text{Total} & = & \$26 \quad (\text{New Balance}) \end{array}$$

ACCOUNTS RECEIVABLE SUMMARY

This section contains a breakdown of the credit card and billing activity for the selected date.

1. The "Balance Yesterday" column contains the amount owed to the property each credit card company and billing as of yesterday.
2. The "Today's Charges" column is the total charges for each card for the date.
3. The "Discount" column gives the amount each credit card company is taking as a processing fee.
4. The "Today's Net" column is the actual credit card amount that should be received from the credit card company.
5. If the credit card is directly deposited into your account, "Payments Received" will equal "Today's Net", otherwise the "Payments Received" column is the amount entered in the *Credit Card Audit* screen.
6. "Audit Adjustment" is the amount entered in the *Credit Card Audit* screen and is equal to the amount of extra credit card charges, charge-backs and other adjustments.
7. The "Balance" column is the new balance after all charges and payments have been applied.

TOTAL CASH RECEIVED

This section will display all cash received, both for the month's business and cash payments applied to Accounts Receivable.

EXPORTING TO QUICKEN AND QUICKBOOKS

To export to Quicken or QuickBooks, you must already have a checkbook account setup in one of these programs. See your program help for more information on how to do this.

NOTE: In addition to Quicken & QuickBooks, Check-Inn® for Windows is also capable of exporting to Wolfpack and any other comma delimited format such as Peachtree.

1. Press "7" or click the **Reports** button on the *Main Menu*.
2. Select either "Daily Reports" or "Monthly Reports".
3. Select the dates that you would like the report to begin and end by typing in the dates or by clicking on the down arrow and selecting a date from the calendar. You may select up to 31 days at a time or 31 months at a time.
4. Once the report is displayed, press "E" or click the **Export Menu** button at the lower left of the screen.
5. At the Export Menu, type in the export file name. For Quicken and QuickBooks for DOS, the file should be "CHECKIN.QIF". QuickBooks for Windows should be "CHECKIN.IIF".
6. Press **F2** or use the "Export File Type" drop down box to select the type of program to which you will be exporting.
7. Press the corresponding function key or use the drop down box to choose the export options for each category.
8. Once your export data and file has been selected, exit Check-Inn® for Windows completely and enter Quicken or QuickBooks. For Quicken: press "2" (Register), press **F2** for Acct/Print and select "6" for Import. Enter the path and filename (i.e.: c:\inn\checkin.qif) and press **Enter**. Your data will then be imported. For QuickBooks(DOS): Select "7" (Setup/Customize), then select "2" (backup) and "6" (import company data). Then type the path and file name (c:\inn\checkin.exp). Your data will then be imported.

9. If this is the first time that you have imported data, you may encounter several messages before your import can complete. QuickBooks may send you a message "This file not created by QuickBooks..." which is a normal message and should be passed by pressing **Enter**. In both Quicken and QuickBooks will want you to set up categories the first time that you import. Consult your Quicken or QuickBooks manual to complete this process.

EXPORT TO QUICKBOOKS FOR WINDOWS

QuickBooks for Windows uses an IIF format rather than QIF and requires a more complicated setup. Although QuickBooks is recommended as a useful back-office accounting program, it can be a very complicated program to set up. Contact Intuit, Inc. for information on setup and use.

SETTING UP AN ACCOUNT CODE FILE

Use Check-Inn®'s editor to set up a file for your accounting codes.

1. Press "**8**" or click the **Change Settings** button on the *Main Menu*, to access the statement editor.
2. Press "**8**" or click the **Set Statements** button.
3. Press **F6** or click the **Edit Other Statements** button.
4. Press **F9** or click the **Other Text Files** button.
5. Enter "Account.cds" for the name of the file. This file must be created for the export to QuickBooks for Windows to function.
6. An entry must be made for each category to be exported. Each entry must be entered on it's own line. Below is a list of each category to be exported from Check-Inn® for Windows and its assigned number, which you will use in the Account.cds file. Please note that if you are not planning to export a particular category, it is not necessary to include an entry in the accounts.cds file. However, it is mandatory that the #55 Guest Ledger Balance Acct. entry be made (a QuickBooks IIF file requirement).

The format for each entry is as follows:

Export Category, Trans type, Account, Reverse Sign

Export Category = See chart below.

Trans Type = Type of account as defined in QuickBooks.
(i.e.: bank, accts. rec., income etc.)

Account = Type of category to be tracked.
(i.e.: Room rental.)

Reverse Sign = Allows you to change a + or - sign if the entry is incorrectly recorded.

(i.e.: Y or N. Typically his will be N.)

Example:

If you wanted to track your total room rental in your income account, your entry in the account.cds file will be as follows:

1,income, room rental, N

EXPORT CATEGORIES AND ASSIGNED NUMBERS

The following is a listing of all categories that can be exported to QuickBooks for Windows and the numbers that are assigned to each category by Check-Inn® for Windows.

- 1 Room Rental Total (includes taxed and tax exempt)
- 2 Phone
- 3 Misc. Total
- 4 Total Tax
- 5 Cash or (Cash + Billing payment cash)
- 6 Total Credit Card
- 7 Total Billing
- 8 ..16 Misc. categories from Room Deposit through Category 10
- 17..22 Credit cards itemized (up to 6 credit cards)
- 26..31 Credit card discounts itemized (up to 6 discounts)
- 33..42 Categories #11 through #20 Misc.
- 43..47 Tax A through E itemized
- 48 Room Rental (no tax exempt included)
- 49 Total Tax Exempt

- 50 Tax Exempt #1
- 51 Tax Exempt #2
- 52 Tax Exempt #3
- 55 Guest Ledger Balance Account (mandatory)

VIEWING/PRINTING THE HOUSEKEEPING REPORT

The Housekeeping Report displays the rooms that need cleaning. If the room is empty and dirty, the room will be listed as <DIRTY>, otherwise it will show the guest's name and guest identification. If the guest is a stay-over it will display the guest's name with an "S/O".

NOTE: Including guest names in the Housekeeping Report is optional. You can change this setting in the *Set Colors & Switches* screen.

1. Press "7" or click the **Reports** button on the *Main Menu*.
2. Press "4" or click the **Housekeeping Report** button.
3. The options on this screen will allow you to print:
 - Even and odd rooms separately.
 - Print all rooms.
 - Print just dirty rooms.
 - Print a separate list for each housekeeper.
4. You may set the housekeeping order on this screen by defining your rooms in a specific order. On the blank screen that is provided, you will want to list your rooms, each on its own line, down the left side of the screen. A blank line between rooms will indicate where one housekeeper's list will end and the next housekeeper's list will begin.
5. Select whether you would like to have even and odd numbered rooms separated on the list.
6. Choose whether you would like to have clean rooms included on the Housekeeping Report.
7. Choose whether you would like to have a separate report printed for each housekeeper. You may define the number of housekeepers by clicking on the arrows to increase or decrease the number of housekeepers.

8. Press **F10** or click the **Create Report** button to view the Housekeeping Report. Otherwise press **ESC** or click on **Cancel** to exit from this screen.
9. A *Print Preview* of the Housekeeping Report will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the Housekeeping Report.
 - Press **F4** or click the **Print 2X** button to print two copies of the Housekeeping Report.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the Housekeeping Report.
 - Press **F10** or click the **Done** button to return to *Reports* menu without printing the Housekeeping Report.
10. When you exit the Housekeeping Report, a message box will be displayed asking, “Clear Housekeeping?”
 - Press **F10** or click the **YES** button to clear the Housekeeping Report. All rooms will be marked clean and the Housekeeping Report will be empty until the next day.
 - Press **ESC** or click the **NO** button to exit without clearing the report.

NOTE: Do not change all rooms to clean after your check-in time, as it may create problems on the next day’s report.

REMOTE ROOM STATUS CHANGE

NOTE: This section only applies if you are using the Call-Inn™ Call Accounting, which connects your phone system to the computer.

Using this feature, your housekeepers may dial into the computer and change the room status (i.e.: clean, dirty and not available) for a particular room.

1. To set the codes for your property, exit out of Check-Inn® for Windows completely.
2. Click on the red telephone at the lower right corner of your Windows screen.
3. Click on Settings, the “Housekeeping Codes” on the menu that pops up.

4. There are default codes that you may use or you may make up your own codes.
5. To change the status from the room, pick up that room's extension and dial 321 for "clean", 322 for "dirty" or 323 for "not available". You will need to remain on the line longer than the grace period set by your phone switch (you may need to do some experiments to find out how long you will have to wait).

NOTE: You may have to dial 9 first for an outside line.

VIEWING/PRINTING THE OCCUPANCY REPORT

The Occupancy Report gives a room-by-room report and a summary of your occupancy rates for the date range specified.

1. Press "7" or click the **Reports** button on the *Main Menu*.
2. Press "5" or click the **Occupancy Report** button.
3. Enter the start and end dates of the date range, by typing in the date or by clicking on the down arrow and selecting a date from the calendar.
4. Press **F10** or click the **OK** button to generate the report.
5. A *Print Preview* of the Occupancy Report will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the Occupancy Report.
 - Press **F4** or click the **Print 2X** to print two copies of the Occupancy Report.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the Occupancy Report.
 - Press **F10** or click the **Done** button to return to the Reports menu without printing the Occupancy Report.

The Occupancy Report contains:

- The total number of days in the date range.
- The total rooms occupied.
- The percentage of rooms occupied.
- The Average Daily Rate (both by occupied rooms and by number of guests).

- The total number of guests.
- The Average Daily Rate per guest.

The information is broken down by room at the bottom of the report.

NOTE: Rooms rented using weekly, monthly, and package rates of 2 nights or more do not affect the "Percentage Occupied" (% Occ.) or the "Average Daily Rate" (ADR per Guest).

VIEWING/PRINTING THE STANDARD SHIFT REPORT

The Shift Report displays all transactions made since the last Shift Report was cleared. It reflects the exact time, screen, room and amount of each transaction as they happen. Shift Reports are an exact accounting of each transaction in the order that it was made and therefore cannot be edited or changed.

NOTE: Shift Reports will not reflect changes that are made in the *Audit* or *Edit* screens unless the "Record and Report Audit Changes" switch is turned on in *Set Colors & Switches* from *Change Settings*.

1. Press "7" or click the **Reports** button on the *Main Menu*.
2. Select the type of Shift Report format you would like by pressing **F2** or clicking on the arrow to the right of the drop down box to display the choices. These choices include:
 - ALL: Includes all transactions and phone charges.
 - SUMMARY: Shows totals only.
 - PAYMENT: Shows payment transactions only.
 - SKIP PHONE: Shows all transactions except the phone calls.
3. Press "6" or click the **Shift Report Menu** button.
4. Press "1" or click the **Standard Shift Report** button.
5. Enter the name(s) of the clerks for the shift.

NOTE: This will display the name of the clerks on the report, but will not break down transactions by clerk.

6. If you have purchased the network version of the software, you may select to print the Shift Reports for all terminals combined, or you may print the Shift Reports individually for each computer terminal.
7. Press **F10** or click the **Continue** button.

The top of the Shift Report will display the clerk's names, the time and date that the Shift Report was printed, the type of Shift Report format and a Shift Report number. The Shift Report number is sequential so that you may easily see if a report is missing.

The Shift Report has five columns:

- **Date:** Displays the date the transaction occurred.
- **Time:** Displays the time the transaction occurred.
- **Room No.:** Contains the room number, if any, associated with the transaction.
- **Amount:** Shows the amount of the transaction and the category to which it was applied.
- **Transaction Type:** Displays the screen where the transaction was made, such as Check-In, Cash Register, etc.

At the end of the Shift Report there is a Shift Summary. It will list the charges that were applied to each category, a total of the charges, the amount of payments received for each payment type and a total of the payments for the shift. This report is what the clerks will use to balance their drawer at the end of their shift.

1. Press **F10** or click the **Done** button to exit the Shift Report.
2. A message box will be displayed asking, "Clear Shift Report?".
 - Press **F10** or click the **YES** button to clear the report for the next shift.
 - Press **ESC** or click the **NO** button if you would not like to clear the report.

VIEWING/PRINTING THE MANAGER'S SHIFT REPORT

The Manager Shift Report is accessible only by someone with a Security password. You may view Shift Reports for any time and day within the past thirty days.

1. Press “7” or click the **Reports** button on the *Main Menu*.
2. Press “6” or click the **Shift Report Menu** button.
3. Select the type of Shift Report format you would like by pressing **F2** key or clicking on the arrow to the right of the drop down box to display the choices. These choices include:
 - **ALL**: Includes all transactions and phone charges.
 - **SUMMARY**: Shows totals only.
 - **PAYMENT**: Shows payment transactions only.
 - **SKIP PHONES**: Shows all transactions except the phone calls.
4. Press “2” or click the **Manager Shift Report** button.
5. Enter the start date and end date by typing in the date or by clicking the arrow and selecting a day from the calendar.
6. Enter the start time and end time by typing in the time or by clicking the arrows to increase or decrease the number.
7. If you have purchased the network version of the software, you may select to print the Manager's Shift Reports for all terminals or for a single terminal. Select which terminal you wish to view by typing in the number or by using the arrows to increase or decrease the number.
8. Press **F10** or click the **Continue** button.
9. Enter your Security Password if required.
10. Press **F10** or click the **Done** button.
11. A *Print Preview* of all shift transactions that fall between the set dates will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the Manager's Shift Report.
 - Press **F4** or click the **Print 2X** button to print two copies of the Manager's Shift Report.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the Manager's Shift Report.

- Press **F10** or click the **Done** button to exit the report without printing.

GUEST TRACKING MENU

The *Guest Information* screen allows you to view and print guest information and guest folios from your guest history file. These guests must have checked in, checked out and cleared the *Guest Screen* within the system. No audit entries will be recorded in guest history.

NOTE: Purging data will destroy this information.

There are five different screens that you may access through the *Guest Tracking* menu:

1. **Guest History** Use this to view folios from past guest stays.
2. **Guest labels** Use this to print mailing labels for past guests.
3. **Marketing Report** Use this to track revenue for your marketing codes.
4. **Room Revenue Report** Use this to view occupancy and revenue records for individual rooms.
5. **Tax Exempt Report** Use this to track tax-exempt guests.
6. **Mange E-Mail** Use this to send and manage stored e-mail messages.

GUEST HISTORY

You may search for any guest that has stayed at the property in the past. You may also re-print past folios, the re-printed folios will contain all financial information with the exception of phone call details (totals will be displayed).

NOTE: No entries added directly to the “Audit” will be displayed.

1. Press “7” or click the **Reports** button on the *Main Menu*.
2. Press “7” or click the **Guest Tracking Menu** button.

3. Press “1” or click the **Guest History** button.
4. Enter the information asked for on the *Search Master* screen. You may enter only partial information, such as a last name, if desired. The “Other” field will search all guest info fields for the desired information.
5. Press **F10** or click the **Search** button to begin the search. The *Guest History* screen will bring up the guest's information in reverse date order, beginning with most recent stay.
6. Press **F2** or click the **Print Folio** button to print a past folio for the guest displayed.
7. You may view remarks or marketing codes for the guest by pressing **F3** or clicking the **View Remarks** button. To enter a market code, press **F2** or click the **Insert Market Code** button. Select a market code and press **F10** or click **Insert**.
8. Press **F5** or click the **Continue Search** button to continue searching the guest history for the information that you have already typed in.
9. Press **F4** or click the **New Search** button to begin another search.
10. Press **F10** or click the **Done** button when you are finished.

PRINTING MAILING LABELS FOR GUESTS THAT HAVE STAYED IN THE PROPERTY

The *Print Label* screen allows you to print mailing labels in zip code order for guests who have stayed at your property.

1. Press “7” or click the **Reports** button on the *Main Menu*.
2. Press “7” or click the **Guest Tracking Menu** button.
3. Press “2” or click the **Guest Labels** button.
4. Enter the date range you would like to draw the list from.
5. If you want to restrict the zip code range of the list, enter new zip codes for the “Start Zip” and “End Zip”.
6. If you want to search for specific codes or references in the guest remarks field, enter up to three search entries to look for. If any of the three entries are found and the other search criteria are met, the guest's label will be printed.
7. Select the print format for the type of labels that you will be using by pressing **F2** or clicking on the down arrow and selecting a format from the list.

8. Press **F10** or click the **Continue** button.
9. A *Print Preview* of the mailing labels will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the labels.
 - Press **F4** or click the **Print 2X** button to print two copies of the labels.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the labels.
 - Press **F10** or click the **Done** button to exit without printing the labels.

CREATING A MARKETING REPORT

The Marketing report will break down your room revenue based upon codes placed in the Remarks section of the guest's information.

1. Press “7” or click the **Reports** button on the *Main Menu*.
2. Press “7” or click the **Guest Tracking Menu** button.
3. Press “3” or click the **Marketing Report** button.
4. Enter a start date and end date for the report (only revenue in this date range will be used) by typing the dates or by clicking the arrow and selecting a date from the calendar. You may either type in the date or click on the down arrow to display a calendar that you may select a date from.
5. Press the **F10** or click the **OK** button.
6. Enter the market categories that you would like to search for by typing them in or by selecting the codes from the drop down boxes. Press the **F10** or click the **Continue** button.
7. A Market Segment report will include the following information for each market code:
 - Revenue.
 - % of Total Revenue.
 - Room Count.
 - Average Daily Rate.
 - Daily occupancy.
8. A *Print Preview* of the Market Segment Report will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the marketing report.

- Press **F4** or click the **Print 2X** button to print two copies of the Marketing Report.
- Press **F6** or click the **E-mail** button to e-mail a copy of the Marketing Report.
- Press **F10** or click the **Done** button to return to the “Guest Reports” menu without printing.

CREATING A ROOM REVENUE REPORT

The Room Revenue report will display the guest and revenue history of a room over any period of time.

1. Press “7” or click the **Reports** button on the *Main Menu*.
2. Press “7” or click the **Guest Tracking Menu** button.
3. Press “4” or click the **Room Revenue Report** button.
4. Enter the start date and end date for the reports by typing in the date or by clicking on the down arrow and selecting a date from the calendar.
5. Press **F10** or click the **OK** button.
6. On the *Revenue Report Room Selection* screen, select the rooms that you wish to view by holding down the **CTRL** key and clicking on the desired rooms, or by pressing the * key and press **F10** or click the **Continue** button.
7. A *Print Preview* of the Revenue report will be displayed with the dates the room was rented, the name of the guest it was rented to, the number of days the guest stayed, and the total lodging revenue generated by that guest.
 - Press **F2** or click the **Print** button to print one copy of the report(s).
 - Press **F4** or click the **Print 2X** button to print two copies of the report(s).
 - Press **F6** or click the **E-mail** button to e-mail a copy of the report(s).
 - Press **F10** or click the **Done** button to return to the *Report* menu without printing the report(s).

TAX EXEMPT REPORT

This will provide a list of all guests for a defined period of time that are exempt from a particular tax.

1. Press “7” or click the **Reports** button on the *Main Menu*.
2. Press “7” or click the **Guest Tracking Menu** button.
3. Press “5” or click the **Tax Exempt Report** button.
4. Enter the start date and end date for the report by typing in the date or by clicking on the down arrow and selecting a date from the calendar
5. Select the type of tax that the report will display by typing in the letter, or by clicking the down arrow and selecting the “Tax Exempt” type from the list.
6. Press **F10** or click the **OK** button to generate the report
7. A *Print Preview* of the tax exempt report will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the Tax Exempt report.
 - Press **F4** or click the **Print 2X** button to print two copies of the Tax Exempt report.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the Tax Exempt report.
 - Otherwise press **F10** or click the **Done** button to return to the *Reports* menu without printing a copy of the report.

MANAGING E-MAIL MESSAGES

If you have previously saved e-mail messages, you may use *Manage Messages* to send or delete the saved messages.

1. Press **F4**, click the **Manage** button, or click on the **File** tab and select “Manage Message” to manage your saved messages.
2. Once you have finished press **ESC** or click the **Done** button.

SELECTING AND DE-SELECTING MESSAGES

1. **Tab** to the address and press the **Spacebar** to check the box, or simply click on the box next to the e-mail address with your mouse. (A box with a check is selected.)
2. Press **F5** or click the **Select All** button to select all the messages in the list.
3. Press **F6** or click the **De-select All** button to de-select all the messages in the list.

DELETING MESSAGES

1. Select the message or messages you would like to delete.
2. Press **DEL** or click the **Delete** button to delete the selected messages.
3. A message box will be displayed asking, "Delete Marked Messages?" Press **F10** or click the **YES** button to delete the marked messages. Otherwise press **ESC** or click the **NO** button.

SENDING SAVED MESSAGES

1. Select the message or messages you would like to send.
2. Press **F10** or click the **Send** button to send the selected messages.
3. A message box will be displayed asking, "Send Marked Messages?" Press **F10** or click the **YES** button to send the marked message. Otherwise press **ESC** or click the **NO** button.

VIEWING/ PRINTING/ CLEARING THE PHONE REPORTS

There are two phone reports available. The *Phone House Account* displays all phone calls made from house extensions. The *Phone Miscellaneous Report* displays all calls from checked-out rooms, scrambled phone records, phone system reports or any other phone information that is not part of the phone house account or the room records.

PHONE HOUSE ACCOUNT REPORT

1. Press "7" or click the **Reports** button on the *Main Menu*.
2. Press "8" or click the **Phone House Acct.** button.
3. A *Print Preview* of the Phone House Account Report will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the Phone House Acct. report.
 - Press **F4** or click the **Print 2X** button to print two copies of the Phone House Acct. report.

- Press **F6** or click the **E-mail** button to e-mail a copy of the Phone House Acct. report.
 - Press **F10** or click the **Done** button to return to the Reports menu without printing a copy of the report.
4. A message box will be displayed asking, “Clear Phone House Account Report?”
 - Press **F10** or click the **YES** button if you would like to clear the report.
 - Press **ESC** or click the **NO** button if you would not like to clear the report.

NOTE: A security password may be required to clear the report.

MISCELLANEOUS PHONE REPORT

The Phone Miscellaneous Report records all calls that do not belong to a checked-in guest or house phones. These calls include wake-up calls and calls from checked-out rooms (marked with an *), and incomplete phone records.

1. Press “**7**” or click the **Reports** button on the *Main Menu*.
2. Press “**9**” or click the **Phone Miscellaneous** button.
3. A *Print Preview* of the Phone Miscellaneous Report will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the Phone Miscellaneous Report.
 - Press **F4** or click the **Print 2X** button to print two copies of the Phone Miscellaneous Report.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the Phone Miscellaneous Report.
 - Press **F10** or click the **Done** button or return to the *Reports* menu without printing the Phone Miscellaneous Report.
4. A message box will be displayed asking, “Clear miscellaneous phone information?”
 - Press **F10** or click the **YES** button if you would like to clear the Phone Miscellaneous Report.
 - Press **ESC** or click the **NO** button if you would not like to clear the Phone Miscellaneous Report.

NOTE: A security password may be required to clear the report.

POS/MOVIE INTERFACE

NOTE: This is a special module that requires an Options Code to activate. If you would like to purchase this module, please contact Innsoft, Inc.

This log will record transactions and details provided by an interfaced point of sale system or entertainment system. When connected, this information will display on the guest folio as well.

NOTE: Movie titles will not be listed on the guest folio.

1. Press “7” or click the **Reports** button on the *Main Menu*.
2. Press “A” or click the **P.O.S. & Movie Logs** button.
3. A *Print Preview* of the P.O.S. and Movie Logs will be displayed.
 - Press **F2** or click the **Print** button to print one copy of the P.O.S. and Movie Log report.
 - Press **F4** or click the **Print 2X** button to print two copies of the P.O.S. and Movie Log report.
 - Press **F6** or click the **E-mail** button to e-mail a copy of the P.O.S. and Movie Log report.
 - Press **F10** or click the **Done** button to return to the Reports menu without printing a copy of the P.O.S. and Movie Log Report.
4. A message box will be displayed asking, “Clear POS/Movie Log?”
 - Press **F10** or click on the **YES** button if you would like to clear the P.O.S. & Movie Log Report.
 - Press **ESC** or click the **NO** button if you would not like to clear the P.O.S. & Movie Log Report.

NOTE: A security password may be required to clear the report.

MAINTAIN CHECK-INN® FILES

MAKING BACKUPS TO DISK

Backups are a **VERY IMPORTANT** part of Check-Inn® for Windows. They help you prevent the possible loss of your properties financial information in the event of a computer breakdown. Full backups will contain a complete record of all information contained in Check-Inn® for Windows. You should backup your data daily and use a separate set of disks for each day of the week. (i.e.: For floppy disks, label each set of disks for a day of the week; a Monday set, Tuesday set, etc. Then use Monday disks on Monday, Tuesday disks on Tuesday, etc.)

NOTE: Disks can be rotated for 2 to 3 months and will then need to be replaced.

Compression will reduce the number of backup disks that you use at a ratio of 10 to 1. The backup process will tell you how many blank formatted disks you will need, based on the type of disks you are using. For maximum effectiveness, use high-density, formatted disks. Check-Inn® for Windows has the ability to backup to other computers on a network, as well as to a separate place on the hard drive or to a zip drive.

BACKUP CHECK-INN® FOR WINDOWS DATA

1. Press “**8**” or click the **Change Settings** button on the *Main Menu*.
2. Press “**B**” or click the **Maintain Check-Inn Files** button. If you have set a security password, but do not require it to backup Check-Inn® data, you may press **ESC** at the password prompt that appears when trying to access *Change Settings*.
3. To backup your current data, press “**1**” or click the **Backup Data** button.
4. Select the directory that will contain the backup by typing the new drive letter and path, or by clicking the **Set Backup Path** button and choosing a location. The type of disk you have selected will be displayed.

5. If you are backing up to floppy disks, click the “ON” check box next to “Compression is:”. Compression will backup your data using less floppy disks.
6. If you are backing up to floppy disks, Check-Inn® will try to estimate the number of disks you will need to complete the backup.
7. Press **F10** or click the **Start Backup** button.
8. A progress bar will be displayed, showing the amount of the backup that is complete.
9. If you are using floppy disks, insert them into the computer as the program requests. When you remove each disk, be sure to number the disks to maintain their order.
10. Press **ESC** or click the **Cancel** button if you wish to abort the backup.

AUTOMATIC BACKUP

You may set the computer to do an automatic backup to your current hard drive or to an alternate drive. This **DOES NOT REPLACE** a full nightly backup to a disk (if your drive becomes corrupted, you will be unable to retrieve your data). However, this will provide some added protection against data loss in case a regular backup has not been made. The current month’s information is backed up when using this method each time an auto-backup is preformed.

NOTE: Previous monthly data and guest history files are **NOT** backed up using the automatic backup.

1. Press “**8**” or click the **Change Settings** button on the *Main Menu*.
2. Press “**B**” or click the **Maintain Check-Inn Files** button.
3. Press “**3**” or click the **Set Auto Backup** button.
4. You may set up to two auto-backup times per day; use the drop down box to activate the backup(s).
 - Select “ON- Active A” to do one backup only.
 - Select “ON-Active A & B” to backup twice during a twenty-four hour period.
 - Select “Off” and Check-Inn® will not back up your data automatically.

5. Set the time(s) you would like the auto-backups to start by selecting the part of time that you wish to change (hours, minutes, AM/PM). You may either type in the new time or use the arrows to increase or decrease the numbers and change between AM and PM.
6. Select the directory that will contain the auto-backup by typing the new drive letter and path, or by clicking the **Set Auto-Backup Path** button and choosing a location. The type of disk you have selected will be displayed. The auto-backup will default to the AUTO\ path on the same hard drive that Check-Inn® for Windows is installed.
7. You may make a full disk backup automatically by checking the box next to “Full Backup”. If the “Full Backup” option is checked, Check-Inn® will perform the same backup functions it does when making a full disk backup (it will save all files that have been created since you began to use the software). If “Full Backup” is not selected, the master.dbf file (your guest history) will not be backed up and only the current month’s data will be saved.
8. Press **F10** or click the **Done** button when you are finished.

RESTORING FULL BACKUP DATA

WARNING! All information in the system will be lost and replaced with the information of the backup data you select.

1. Press “**8**” or click the **Change Settings** button on the *Main Menu*.
2. Press “**B**” or click the **Maintain Check-Inn Files** button.
3. Press “**2**” or click the **Restore Data** button to restore Check-Inn® data from a previous disk backup.
4. You must specify the location of your backed up files from which you would like the system to restore. If the correct path is not listed, click on the **Change Location...** button. Select location of the backup you wish to restore. Click the **OK** button.
5. If you are restoring from a floppy disk, insert the first disk of your backup.

6. Press **F2** or click the **Restore Full Backup** button.
7. A message box will be displayed asking, “WARNING- Restore will destroy your existing data. Do you wish to continue?” Press **F10** or click the **YES** button to start restoring, otherwise press **ESC** or click the **NO** button.
8. If you selected “Yes”, another message box will be displayed asking, “Are you sure you wish to restore?” Press **F10** or click the **YES** button if you are. Otherwise, press **ESC** or click the **NO** button.
9. The system will then ask if you would like to clear restored guests. If you would like to remove the guests in the *Guest Screen* when the backup was made, press **F10** or click the **YES** button. If you would like to keep the guests that were on the *Guest Screen* when the backup was made, press **ESC** or click the **NO** button.
10. Once you are finished press **F10** or click the **Done** button.

RESTORING AUTOMATIC BACKUP DATA

WARNING! This will overwrite any information currently in the system and restore all data to the day and time that the auto-backup was made.

1. Press “**8**” or click the **Change Settings** button on the *Main Menu*.
2. Press “**B**” or click the **Maintain Check-Inn Files** button.
3. Press “**2**” or click the **Restore Data** button to restore data from the automatic backup.
4. Select the auto backup you would like to restore by clicking the down arrow, and selecting a dated backup set from the list. The backups will be displayed in reverse date order so that the last one made will be the first one displayed.
5. Press **F3** or click the **Restore Auto-Backup** button.
6. A message box will be displayed asking, “WARNING – Restore will destroy your existing data. Do you wish to continue?” Press **F10** or click the **YES** button to start restoring, otherwise press **ESC** or click the **NO** button.

7. If you selected “YES”, another message box will be displayed asking, “Are you sure you wish to restore?” Press **F10** or click the **YES** button if you are sure about restoring the files, otherwise press **ESC** or click the **NO** button.
8. The system will then ask, “Do you wish to clear restored guests?” If you would like to remove the guests in the *Guest Screen* when the backup was made press **F10** or click the **YES** button. If you would like to keep the guests that were on the *Guest Screen* when the backup was made, press **ESC** or click the **NO** button.

PURGING CHECK-INN®'S INFORMATION

Please remember that purging your data completely destroys your data from the beginning of your data to the date entered. The destroyed data will include but not be limited to: guest history, billing information, audit and all financial information. We highly recommend that you perform several backups of Check-Inn® for Windows data files before you continue with the purge. Purging your data **WILL NOT** increase the speed of your computer. Purging should only be done when you are absolutely sure that you no longer need the information in the software. We strongly recommend that a technician from Innsoft, Inc. technical support assist you through this procedure.

1. Press “**8**” or click the **Change Settings** button on the *Main Menu*.
2. Press “**B**” or click the **Maintain Check-Inn Files** button.
3. Press “**4**” or click the **Purge Data** button.
4. Enter the last date that will have data removed from the system. Any information after this date will not be purged.
5. A message box will be displayed saying, “This will clear daily data prior to ##/##/####, but not reservations. Continue?” Press **F10** or click the **YES** button to purge the data, otherwise press **ESC** or click the **NO** button. **This is your last warning!**

IMPORTANT! Do not turn off the computer while the purge is in progress, as it may permanently damage your data files.

6. To cancel the purge, press **ESC** or click the **Cancel** button.

ERROR MESSAGES

Some errors are caused by issues with the computer or computer's resources and are not issues with the Check-Inn® of Windows program. These errors should not occur. If they are common, you may want to have the computer system examined by a certified computer technician for viruses, memory, and hard drive issues.

LOW DISK SPACE

You are currently very close to running out of hard drive space. If you continue without any corrective action you will not be able to operate Check-Inn®.

Possible Corrections:

1. If there are old files on your hard drive that you no longer need. You may wish to erase them to free up disk space for Check-Inn®. Please make sure you back up any files you want to keep before deleting. See your Windows documentation on how to delete files.

IMPORTANT! We do NOT recommend that you purge Check-Inn® data to clear space on the hard drive.

OUT OF DISK SPACE

You have insufficient hard drive space to run Check-Inn® for Windows.

1. See the corrective action for low disk space above.

OUT OF MEMORY

You have insufficient memory (RAM) to run Check-Inn® for Windows. Your computer should have at least 128 Mbs of memory installed.

Possible Corrections:

1. Make sure that your computer has at least 128 Mbs if you are running Windows 95,98 or ME. We recommend that you have 256 Mbs if you are running Windows NT, 2000 Professional or XP.
2. Remove resident programs from the computer when you are running Check-Inn®. This will provide more memory for Check-Inn® to run.

NO PERSONAL CODE NUMBER

Check-Inn® requires a personal code number to run. This code number is found on your invoice under the *Information* section, if you have purchased the software. If you do not have a personal code number or cannot find your invoice, contact Innsoft, Inc.

If your copy of Check-Inn® for Windows is less than two months old you may be able to use the software by entering the demo code. The demo code for Check-Inn® is 651335.

CHECK-INN SYSTEM ERROR

Check-Inn® for Windows may stop and write a system error on the screen. This can be caused by an internal error in Check-Inn®, corrupted data files, or computer problems. Please write down the error number and what you were doing on the computer at the time of the error and call Innsoft, Inc. technical support.

Examples:

Disk error drive C, Data Error, Sector Not Found, General Failure, Error 205, Error 208.

If Check-Inn® for Windows reports any of these errors for your hard drive your computer is having hard drive problems that must be corrected.

1. You should answer “Y” to “Retry?” at least several times to try correcting this problem.
2. Your computer should be taken to a service technician immediately if retrying does not correct the problem.

If Check-Inn® reports an error on drive “A” or “B” it probably means that your floppy disk has not been formatted or the disk or disk drive may be damaged.

1. Either reformat the disk or use a new disk.
2. You may also need to clean your floppy drive as dust may interfere with the reading of the disk.
3. Cleaning disks are available at computer supply stores or you may purchase a can of compressed air to blow out the dust.

QUESTIONS AND ANSWERS

WHY DOES MY CHECK-INN® PROGRAM SAY MY CODE IS EXPIRED?

Check-Inn® for Windows will display this message for several reasons.

1. Your Demo copy of Check-Inn® for Windows has expired.
 - Your demonstration copy of Check-Inn® for Windows will work for 60 days from the day the disk was installed. Once the 60 days have passed, Check-Inn® will no longer function without a valid code. Please call Innsoft, Inc. to purchase the software.
2. The property name has been changed or the Code number has been deleted.
 - When the property name is changed on the *Property Name and Address* screen, from *Change Settings*, this changes the code that the program looks for to activate itself, the existing code will no longer work.
 - If you need to change the name of your property within Check-Inn® please call Innsoft, Inc. There will be a administration fee for name changes.
3. You added more rooms to your property than the version Check-Inn® for Windows was set for originally.
 - When more rooms are added to a property and entered into Check-Inn® from the *Room Numbers & Descriptions* screen from *Change Settings*, it will change the code number if you exceed your limit. (i.e.: You are licensed for 50 rooms and you have entered 55 rooms on the *Room Numbers & Descriptions* screen.) Please call Innsoft, Inc. for an immediate room upgrade.

I CHECKED OUT A GUEST, BUT THEY ARE STILL IN THE GUEST SCREEN. WHY?

A guest will remain in the *Guest Screen* after check-out with the guest's name and "C/O" listed in red. These guests will be removed at your Check-in time or when another guest checks into that room. This is useful if a checked-out guest must be reinstated for correction.

I DELETED A GUEST ON THE DAILY AUDIT SCREEN. HOW CAN I GET THEM BACK?

I deleted the guest in the middle of his stay.

1. Change the date on the *Audit* screen to the first date of the guest's stay.
2. Press **F2** or click the **Guest Properties** button.
3. Press **F2** or click the **Guest Dates** button.
4. Change the end date to today (or the last date of the guest's stay).
5. Make sure to re-enter any payments made on the correct dates, if they were made on dates that were deleted.

I deleted the guest on the first/only night of their stay.

1. Change the date on the *Audit* screen to the first/only day of the guests stay.
2. Press **F3** or click the **Add Guest** button.
3. Enter the first date of the guest's stay.
4. Enter the end date of the guest's stay; if the guest is currently checked into the property enter today as the end date.
5. Make sure to re-enter all payment information on the date made.

CHECK-INN® STILL SHOWS YESTERDAY'S RESERVATIONS, WHY?

The *Guest Check-In* screen still shows yesterday's reservations because the property has not passed the time set for Early Check-In. Early Check-In is the time when the property stops charging for the night before and starts charging for today.

To change your Early Check-In time

1. Press "**8**" or click the **Change Settings** button.
2. Press "**4**" or click the **Check-In/Out Times** button.
3. Change the "Early Check-In Time" by typing in the time, or by using the arrows.

I CAN'T FIND MY GUEST'S RESERVATION, WHAT CAN I DO?

1. Search for the reservation to make sure it was not changed to another room or date.
2. Check to make sure the reservation was not cancelled.
3. Make sure the guest is not currently checked in.
4. If you are still unable to find the record of the reservation, you may have a damaged reservations file. Please call Innsoft, Inc. technical support.

HOW DO I KEEP PEOPLE OUT OF CHANGE SETTINGS & THE DAILY AUDIT?

1. Check-Inn® for Windows has three levels of password protection.
 - Clerk
 - Auditor
 - Manager
2. Setup a different password for each level. Make sure to choose a password that you can remember. The Clerk password is a global password for all the clerks and has limited power to password locks. The Auditor password gives access to all clerk functions plus partial access to the *Audit* screen(s). Auditor access to the *Audit* screen is limited to the last three days' activities. The Security password allows access to all functions. Using the security password you may limit clerk and auditor access to such screens as full use of *Daily Audit*, customization screens, etc.
3. From the password options screen you may select certain screens you would like to password protect.

WHY IS THERE A LETTER IN BRACKETS[] NEXT TO THE GUEST'S NAME ON THE GUEST SCREEN?

1. An "L" indicates that there is a maintenance log entry for that particular room. To view the log entry, go to *Guest Check-In*, press **F9** or click the **Status Screen** button. Select the room with the [L] beside it and press **F8** or click the **Maintenance**

Log button. To clear it, press **F8** or click the **Delete & Exit** button.

2. An “M” indicates that there is a guest message for that particular guest. To view the guest entry, go to the *Guest Screen* and select the room with the [M] beside it and press **F6** or click the **Guest Messages** button. To clear it, press **F8** or click the **Delete & Exit** button.

I AM CHECKING OUT A GUEST WHO HAS BEEN CHARGED FOR AN EXTRA DAY. HOW DO I REMOVE THE CHARGE?

1. At the *Check-Out Cash Register* screen, press “C” or click the **Check-Out Date** button.
2. Change the Check-Out date back by one day.
3. Press **F10** or click the **Continue** button.

This will remove all lodging and tax for the extra day.

I HAVE A WEEKLY GUEST THAT I WANT TO CHANGE TO A DAILY RATE. HOW DO I DO THAT?

1. If you would like to change the rate type of a guest (i.e.: from daily rate to weekly rate, from weekly to daily etc.), the guest will need to be checked out and checked back in with the new rate type.
2. To transfer a balance from one rate type to the other, pay the balance off as a cash payment and complete the check out procedure. When you check the person back in at the new rate type, add the same balance in as a negative payment.

NOTE: This will have no net effect on your cash intake.

MY MODEM WILL DIAL BUT NOT CONNECT. WHY?

If the modem is having trouble connecting to your credit card processor, you may need to try changing your “Initialization” options.

1. Press “**8**” or click on the **Change Settings** button.
2. Press “**5**” or click on the **Credit Cards & Phone Limit** button.
3. Press **F3** or click on the **Card Processing Setup** button in the lower left corner.
4. Click the down arrow next to “Initialization”, and select an option.
5. Try processing another credit card transaction.
6. If you are still having trouble connecting, repeat the above procedure using the next option in the initialization list.

If the steps above do not solve your issue, please contact Innsoft, Inc. technical support.

I AM HAVING TROUBLE SUBMITTING A CREDIT CARD BATCH. WHY?

With a batch issue, you have to answer a few questions before starting the trouble shooting process.

1. Have you ever been able to submit a successful batch before?
2. Are you able to get credit card authorizations?
3. Did you receive a batch error?

If you answered **Yes** to question one, something has changed in the computer to affect you ability to submit batches. You will want to check the following:

1. Check the connection from the modem to the wall jack.
2. Check for a dial tone on the phone line.
3. Check the Credit Card Processor and Account numbers to verify they are correct.

If you answered **Yes** to question two, you may have a transaction in the batch that is causing it to fail. You want to check for the following:

1. Refunds
2. Payments for Accounts Receivable entries
3. \$0 charges
4. Expired Cards
5. Odd number or dates
6. Did you receive a batch error? Batch entries are sent two at a time. For example, if the batch error is 6 you may have a damaged entry at either entry 6 or 7. Try deleting the two entries and resubmitting the batch. If the batch is sent successful re-enter the two entries you deleted and send them with the next batch.

If the steps above do not solve your issue, please contact Innsoft, Inc. technical support.

BASIC COMPUTER TERMS

1. Mouse- The mouse allows you to move the cursor on the screen without using the keyboard. It has a ball and two or three buttons. The “tail” (the wire coming from the mouse) should be away from you.
2. Cursor- The arrow or the blinking line that appears on the screen.
3. Click- Push the left button on the mouse while the cursor is over the button you wish to select.
4. Double Click- Click the left mouse button two times quickly while the cursor is over the area you wish to double click.
5. Function Keys- The buttons along the top or side of the keyboard with the letter F and a number on them, such as F3.
6. Port- An outlet on your computer that an additional device plugs into. (i.e.: Printer Port)
7. Icon- A small picture on the Windows desktop that allows you to start programs loaded on your computer.
8. Start Bar- The bar along the bottom of the Windows desktop with a button labeled “Start”, a clock, and all windows currently open.
9. Drop Down Box- Displays a list of options you may select by using the arrow keys or clicking the down arrow and selecting the correct entry. Some Drop Down Boxes will allow you to type a new entry if the one you are looking for is not listed.
10. Message Box- A message that is shown on top of the current screen, usually a list of choices requires a response from you.
11. Pop-Up Menu- A menu that is shown on top of your current screen when a button is pressed.
12. Hint Box- A message that is displayed when you hold the cursor over an item with a hint.

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