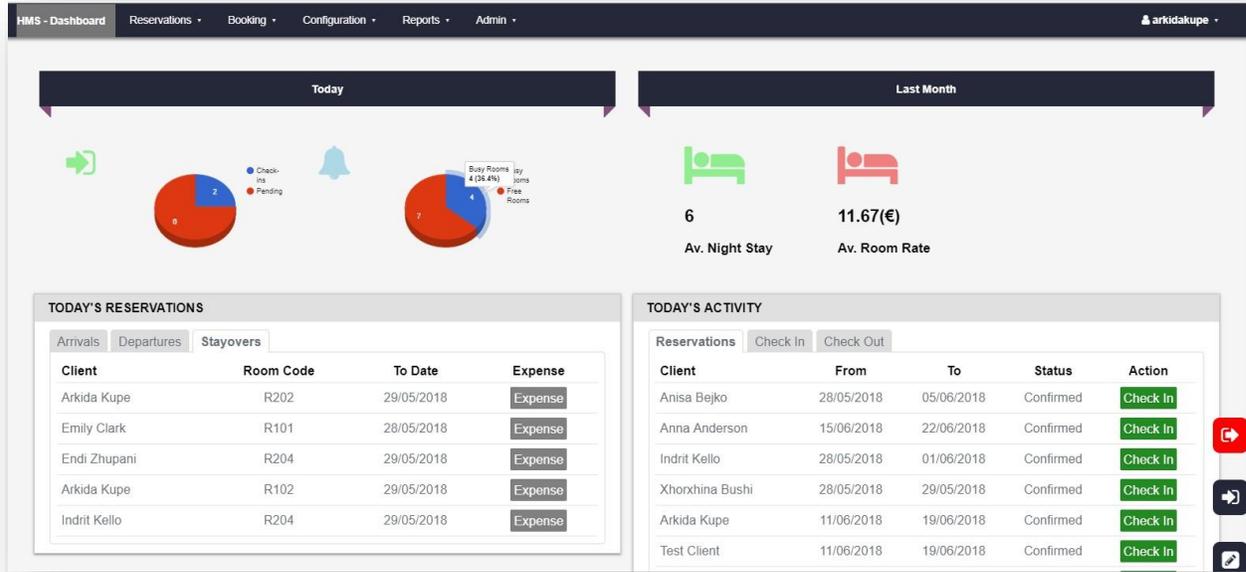


# PontusHMS - User Guide



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## Introduction

This guide aims informing users of the PontusHMS about its configuration and usage regarding the hotel staff's point of view.

It will help the users of the system to better manage all the hotel's reservations, booked rooms and the incomes in a more understandable and easy way.

Keep in mind the differences between reservations and booking terminologies – Reservation is everything related to the reservation process (registration, confirmation, cancellation, etc.) and Booking is everything related to room availability (check in/check out).

Reservations include the phases passed until the client approves the reservation, that's why a client can reserve but without being sure, can cancel it, can confirm reservation and can complete it when arriving to your hotel. In the moment the client comes to your hotel to check in, then the reservation is marked as completed, therefore your job will be concentrated to rooms being busy and bookings being checked in. This means that at first you will have to check if the room is available or not, if so then you can check in the client and mark the room as busy and the booking as Checked In. In the moment the client leaves the hotel, the room will be marked as free and the booking as Checked Out.

## Logging in

To access the system, at first you should access the system's link by clicking here:

<http://demo.pontushms.com/>

# PontusHMS

Please enter a username and password to log in

 Remember me?

As you can see, the page is asking you to put your username and password in the correspondent input fields. You can use these credentials:

Username: demo

Password: demo123

Then all you need to do is click on the green Log in button:

Notice that if you want the system to remember your credentials, then ticking on the "Remember me?" checkbox would be a good solution. This option will remember your credentials for 10 days:

 Remember me?

## Dashboard

The page you are watching is the dashboard and all its containers. The reports give you the basic statistics about how your hotel is doing until this moment:



You can take the first look over 4 first graphics about Today's check-ins, Booking Percentage and about last month's average night stay and room rate.

The first graphic is about Today's check-ins and it tells you how many people have checked in today from all the reservations that were being planned to confirm/check-in.

The second graphic shows Booking Percentage, meaning the report between the number of free rooms (those which are not booked yet) in the hotel today and busy rooms (those which are already checked in).

Last month's first graphic is about Average night stay, which tells how many nights people have stayed in the hotel in average, when they have checked in according to last 30 days.

The graphic of Average Room Rate shows the average price of rooms per day according to last 30 days.

Then you can check today's reservations and activity to get yourself prepared about the clients that are about to check-in or check-out today and what has happened so far in this day.

#### TODAY'S RESERVATIONS

Arrivals | Departures | Stayovers

Client	Room Code	To Date	Expense
Arkida Kupe	R202	11/05/2018	<a href="#">Expense</a>
Emily Clark	R101	10/05/2018	<a href="#">Expense</a>
Endi Zhupani	R204	11/05/2018	<a href="#">Expense</a>
Arkida Kupe	R102	11/05/2018	<a href="#">Expense</a>
Indrit Kello	R204	11/05/2018	<a href="#">Expense</a>

#### TODAY'S ACTIVITY

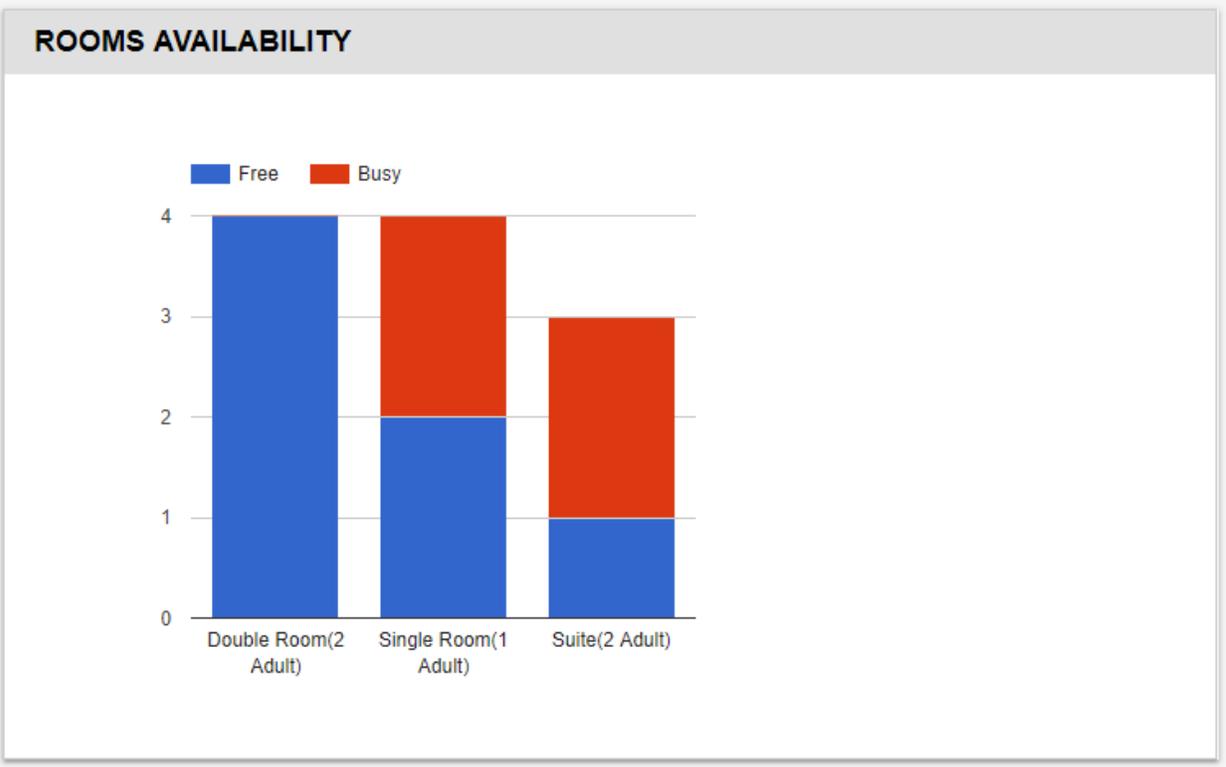
Reservations | Check In | Check Out

Client	From	To	Status	Action
Anisa Bejko	10/05/2018	18/05/2018	Confirmed	<a href="#">Check In</a>
Anna Anderson	28/05/2018	04/06/2018	Confirmed	<a href="#">Check In</a>
Indrit Kello	10/05/2018	14/05/2018	Confirmed	<a href="#">Check In</a>
Xhorxhina Bushi	10/05/2018	11/05/2018	Confirmed	<a href="#">Check In</a>
Arkida Kupe	24/05/2018	01/06/2018	Confirmed	<a href="#">Check In</a>
Test Client	24/05/2018	01/06/2018	Confirmed	<a href="#">Check In</a>
Emily Clark	27/05/2018	07/06/2018	Confirmed	<a href="#">Check In</a>

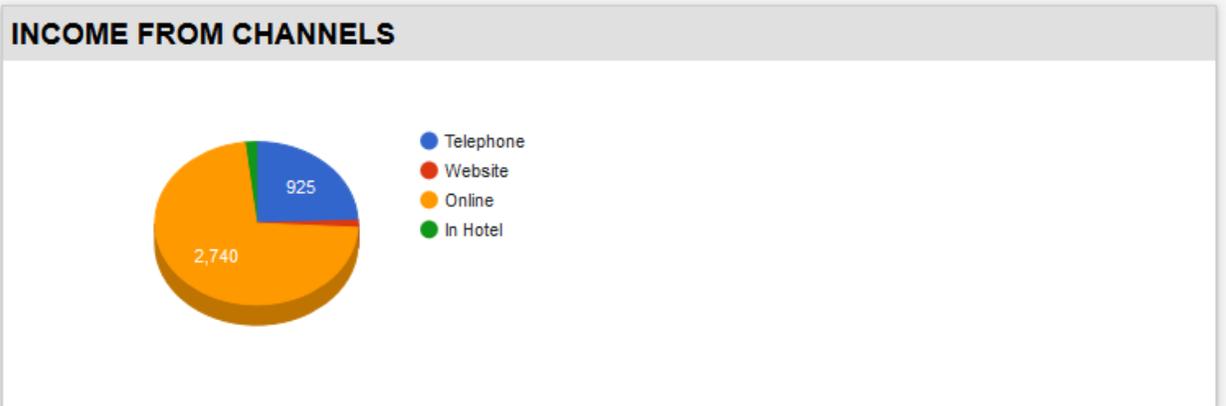
Left tab shows us Arrivals, which means clients that have reserved days ago and are going to check in the hotel today, meanwhile departures are the opposite, they show some of the clients that are supposed to check out today. Stayovers, as shown in the picture, show us some of the clients who are staying in the hotel and here you have the opportunity to quickly add expenses to their booking in this section of the dashboard.

Right tab is all about what has happened today, including Reservations Check In-s and Check Out-s that are made in a day until the time we are using the system.

Moving further, you have available statistics in a column chart about today's free and busy rooms regarding their type, where you can check which rooms have larger availability. For example, if you would like to know which kind of rooms are available and which of them are larger in number than others, then you can check the Blue part of the chart and you could suggest those room type more easily to the client. In case you would like to know which kind of rooms are more required by the clients, you can check the Red part of the chart per room.



Next to this chart, you can check the Revenue pie chart according to the channel from which these revenues came from:



And finally you can check all notes in the Notes section to remind yourself or to be informed in different occasions by other users.

NOTES		
Note	From	Date
Added demo data.	arkidakupe	09/05/2018 00:00:00
Breakfast in bed at room 302 in 8:20 AM!	indritkello	10/05/2018 00:00:00
Clean room 201! Must be ready before 10 am!	indritkello	10/05/2018 00:00:00
Wake up room 201 at 7 am.	indritkello	10/05/2018 00:00:00
Wake up room 301 at 8 AM!	indritkello	10/05/2018 00:00:00

## Configuration

To start working with your hotel system, firstly you should configure your hotel including all the rooms in it. To configure them, go to [Configuration section](#) in menu and you can see the dropdown menu as follows:



We suggest you to start with Room Categories and Room Capacities, since creating a new Room Type requires you to have configured those two first and then to create a new Room requires Room Types to already be configured.

1- So, first step leads us to [Configuration -> Room Capacities -> Click Create green button](#)

A green rectangular button with a white plus sign and the word "Create" in white text.

Go ahead and type one room capacity in the lightened box as shown below. Room capacity means how many people a room can take and what age interval should they be included to. You can type for example 1 Adult or 2 Adults or 2 Adults + 1 child (0-4 y.o.), etc. After that, you should click the [Create button](#) to save your configuration, otherwise click [Back button](#) to discard your entries.

## Create a Room Capacity

**\*Please fill in the room capacity's data and then submit the form.**

**Create** **Back**

Name

Note that you are just configuring the types of capacities of your hotel, not the rooms. This means that if you have already created a room capacity 1 Adult, you don't have to create another one with the same capacity even though you have 2 or more rooms with same capacity in your hotel.

- 2- Next step, we will configure Room Categories in [Configuration -> Room Categories -> Click Create green button](#)

## Create a Room Category

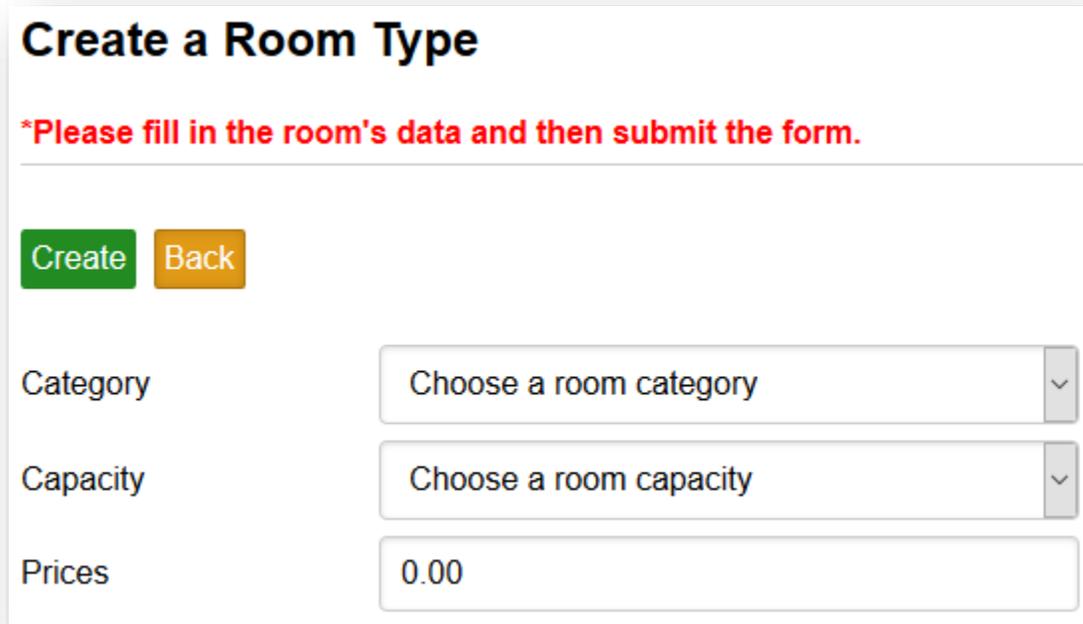
**\*Please fill in the room category's data and then submit the form.**

**Create** **Back**

Name

Fill in the box with a Room Category name meaning that you can define a room regarding the group of people that will book it, for example you can define Standard Room for one person, or Suite for a couple, or Family Room for a family, etc. Then click Create button to save the category or "Back" to discard.

- 3- Let's now create Room Types by going to Configuration -> Room Types -> Click Create green button



**Create a Room Type**

**\*Please fill in the room's data and then submit the form.**

**Create** **Back**

Category

Capacity

Prices

A room type is a specific categorization of a room, based on price and number of persons it can contain. As you can see from the picture above, now you can freely choose the room category and capacity from the drop-down menus according to configurations you already made in the first and second step above. Then, for this room type you can enter the price, which will be the default price. Click Create button to save the selections.

- 4- Finally, we can configure each room by going to Configuration -> Rooms -> Click Create green button

## Create a Room

**\*Please fill in the room's data and then submit the form.**

Code

Description

Floor

Room Type

You should enter a Room Code to uniquely identify the room, a short description of the room, the floor in which the room resides and then select from the drop-down menu one of the Room types you have already configured in the third step above. Click [Create button](#) to configure the room.

- 5- Services are facilities that the hotel provides for the client to have a better accommodation during his stay in the hotel. Therefore, if your hotel provides services , then to make one you should go to [Configuration -> Services -> Click Create green button under Room Services label](#)

## Create Service

**\*Please fill in the service's data and then submit the form.**

Room Service

Price

Here, you just have to put the name of the Room Service for example Spa & Sauna, the price for the current service and then click [Create button](#).

- 6- Packages are a way to select a room or a group of rooms for a specific time period and special occasions, with a preferable price and with specific services included. If you want to create packages as seasonal or special offers, you should go to [Configuration -> Packages -> Click Create green button under All Packages](#)

## Create a Package

**\*Please Fill all fields**

Create Back

Package

Price

0.00

From

mm / dd / yyyy

To

mm / dd / yyyy

Inside the first box enter the name of the package and then fill other fields with the price you want to add and the dates when this package will be active.

Next to them, you can view all the services that you have already configured in step 5. To include one of the services in the package, you have to click on the *Tick green box* in the right side of the Service name in the *Services table*.

Spa & Saunaa



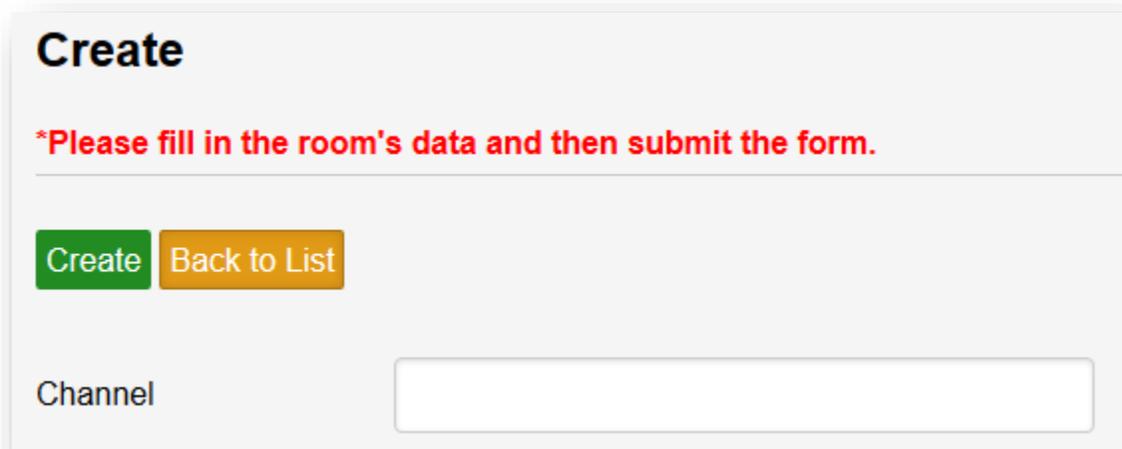
As you can see, the selected service now appears to the Selected Services table as below:



To deselect this service, you just have to click over the “red cross” sign to its right side.

After you have finished with all the features you want to include to your Package, click Create button to finally create the package.

- 7- When you create a reservation, you can also add the channel from which that reservation comes from and you can do this by firstly configuring channels in Configuration -> Channels -> Click Create green button.



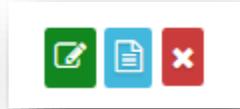
**Create**

**\*Please fill in the room's data and then submit the form.**

Channel

Channels help you keep track of the way reservations follow before they are checked in your hotel, therefore they can be considered as channels, such as telephone, social media or website, etc. In the box near to the Channel label you can enter the name of the channel, for example Telephone if the client has made the reservation through phone or Direct if the client has come right to your hotel to book or Website if the client has booked in your Website, etc. Click Create button to save the type.

Note that for each configuration, you can see in their respective lists that in the right side there are some actions you can take, such as [Edit button](#) that will help you edit a configuration, [Details button](#) that will show you the current details about a configuration and [Delete button](#) that will help you delete a configuration.



Also, notice that [Room Types list](#) has also the [Prices button](#) in the Actions column. Clicking that button will provide you with the possibility to change the price according to a specific period of time, for example for a Room Type of Matrimonial category you can decide the price to be 70\$ in Spring, 50\$ in Winter and 40\$ in Autumn.

When you register a new reservation or perform a check-in, the system will automatically use the right price. If there's a price set for that room type in the specific period, it will use that price; otherwise it will use the default price for that room type. In any case, a manager can override the suggested price and manually enter a different price, if necessary.

There is also a [Room button in Packages list](#) that will help you to add another room type for a specific Package. All you need to do is to click the [Room button](#), that will lead you to a page where you can check the actual room types and in case you don't see the room type you want, then you can click the green [Create button under All Packages label](#). Make your choices and then click [Create button](#) to add the Room type in the package.

## Reservation Statuses and Registration

To register a new reservation, you have at first to understand Reservation's statuses, which are as follows:

- 1- Pending – when the reservation is not confirmed yet, it is supposed to happen in the future
- 2- Confirmed – when the client has notified you that he confirms the reservation
- 3- Completed – when all the reservations from one client are confirmed and have checked in the hotel
- 4- Canceled - when the reservation is canceled before arriving to check

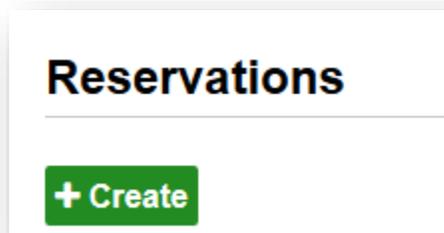
Therefore, in the moment you are going to make a reservation, you have to understand in what phase your reservation starts and then you can go to the menu section in Reservations and select one of the reservation's type.

The process we follow to pass from one status to another is as below and not backward:

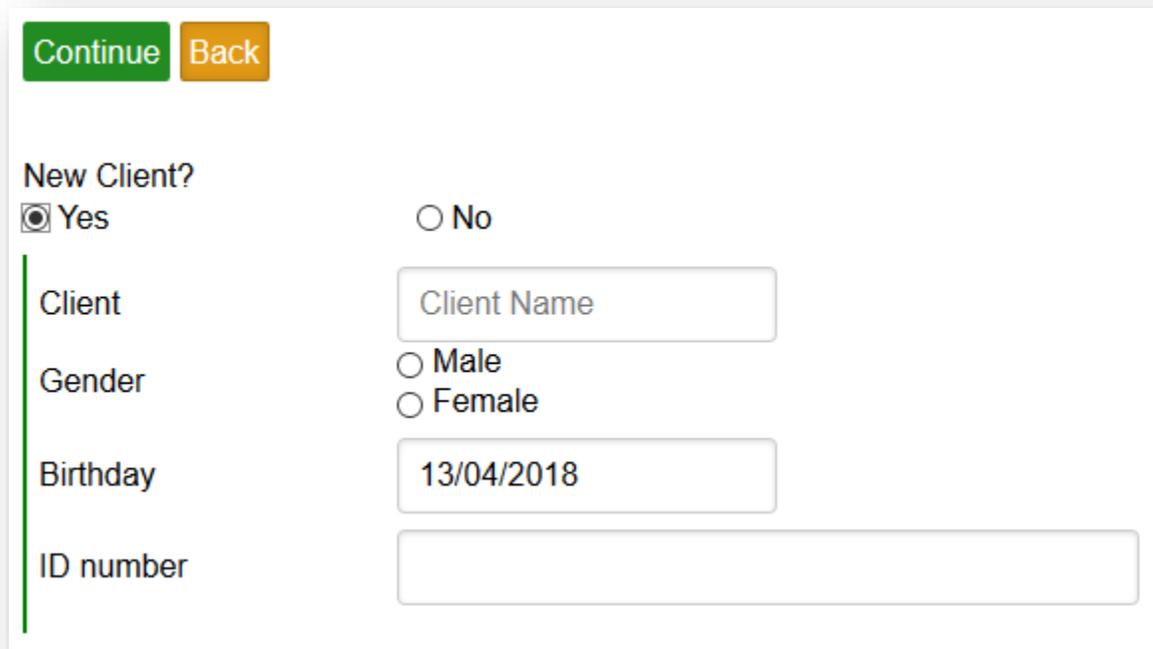
Pending -> Confirmed -> Completed

For example, if a client has phoned you about a reservation but he has not yet confirmed about it, then it means that this reservation is going to be added in Reservations -> Pending list.

When you click the Pending button, it shows you the list of all the pending reservations and at the head of the list you have to click the Create button in order to create a new one:



After you have clicked it, the opened page asks you if the client is "New" meaning the visitor is for the first time coming to your hotel, therefore you have to register his/her information in the system's database.



Continue Back

New Client?  
 Yes  No

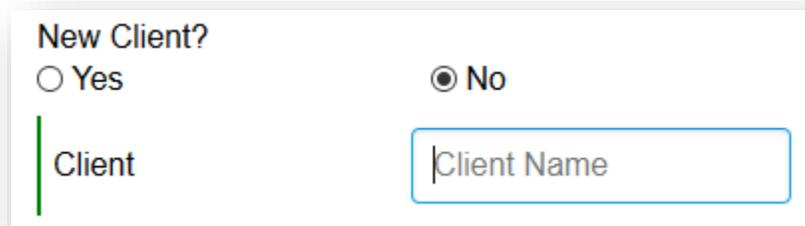
Client

Gender  Male  Female

Birthday

ID number

Otherwise, if the visitor has already visited your hotel, then you just have to filter his/her name without the need to fill his/her information all over again.



New Client?  
 Yes  No

Client

After you have made your choice and filled the information, you should click the Continue button to finish the registration or you can go back and discard it by clicking in Back button.

In our case, we would like to finish the registration of client's information and go forward to create the reservation. The page that appears to you has the following view:

## Create a Reservation

From

To

Is Confirmed?

Notes

With package instead

Room Type

Reservation Type

Quantity

Price per room

As you can guess, the first 2 boxes require you the date of when this reservation is thought to be happening. Just after that, there's a quick checkbox that asks you if the reservation is confirmed or not. This will help you in case the person makes up his mind in the moment he/she is talking to you and decides to come, therefore you should tick the checkbox, so the reservation can pass to Confirmed status. You can also add some notes to this reservation.

Moving forward, you need to ask the visitor if the reservation is going to be with a specified room type or instead it will stick to a package regarding the packages you have already configured in the [Configuration -> Packages](#) menu. After that, you can properly choose from the drop down menus the reservation type, package/room type and quantity. Notice that the price per room that appears in this reservation is the price you have already configured, but you can change it manually by adding a new one.

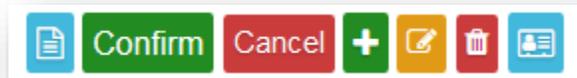
Click Create button to create the reservation, otherwise click Back button. In the moment you click Create button, it will send you to the list of reservations in which the created one belongs to, meaning that if you clicked Is Confirmed checkbox before, then the Create button will send you to the list of Confirmed Reservations, otherwise it will send you to the Pending Reservations list.

You should follow the same steps for every reservation you want to create, you just have to decide in which status your reservation is, go to the proper status in the menu, select it and then click Create button.

## Reservation Actions

Before we pass our reservation from one status to another, we have to know the Action buttons in Reservation list of each status.

### In Pending list you can see:



The first action is to show reservation details, the second one is the action that passes the reservation from Pending status to Confirmed status and in that moment the reservation will show up only in the Confirmed list. The Cancel button is for cancellation and passes the reservation to Canceled list.

Note that you can only choose one between 2 buttons, either Confirm or Cancel, because each of them will send you to different status (or list).

Moving forward, you have the possibility to add item to your reservation, which means you can create another room type or package to the reservation, in the same way you have created before.

## Create Reservation Item

**\*Please fill in the reservation's data and then submit the form.**

Create Back

With package instead

Room Type Double Room(2 Adult)

Quantity 0

Price per room 0.00

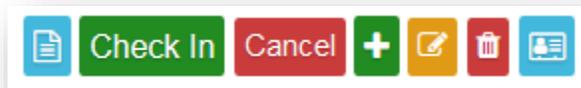
Notes

Then, you have the Edit button, which will help you to make changes to the reservation. Next to it, there's the Delete button that will totally delete the reservation.

Note that Cancel button will not delete the reservation, it will only send it to Canceled list, because maybe the person is not ready to confirm now, but it can happen after a period of time. Therefore, if you delete the reservation's information it will be gone, but if you cancel the information it will still stay in the system.

The last button is the one for Rooms, which shows you, in a popup window, current rooms in the reservation.

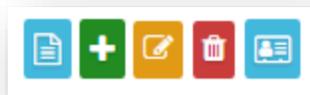
**In Confirmed list you can see:**



You see that there are similar buttons with those in *Pending list* and they actually have the same functionality. The only distinct button is the *Check In button*, which will pass the reservation to a Check In process which we will explain later.

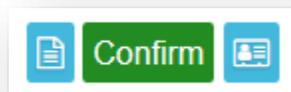
After this process is finished, you assure that the reservation has passed in the *Completed list* and at the same time a Booking has been created. Booking will keep track of the rooms and payments until the visitor does the Check Out.

**In Completed list you can see:**



As you have seen it before, there are same buttons here and as you can guess they all do the same functionality as in the lists above, starting from *Details button* which shows details and ending with *Rooms button* that will show you the rooms taken from that reservation.

**In Canceled list you can see:**



Here you can see details of the reservation, the rooms that were added for that reservation and you can distinguish the *Confirm button* in the middle, which will provide you with the ability to activate the reservation from a Client who has canceled it before, but finally decides to come to your hotel. Therefore you can click Confirm and proceed with the Confirmation process as we have already explained above.

## Bookings

In the moment a client comes to your hotel, you have to make a check in for that client and in the moment the client leaves the hotel you have to register a check out.

The system provides you with 2 ways to make the Check In and Check Out processes:

- 1- **Quick way** – When someone comes directly to your hotel without reservation, this can be the fastest way for you to check in a client.  
You can find 2 buttons right side of every page you visit in the system:  
The Grey button – is for Checking In the client  
The Red button – is for Checking Out the client
- 2- **Standard way** – You have to enter the system and go to Confirmed Reservations to make a Check In while to make a Check Out you have to go to the Checked In bookings list.

### First, let's follow the Check In process

Go to *Reservation -> Confirmed* list. There you should look for the reservation made from your client by searching at the box in top-right corner of the page or through paging, and then proceed with Check In button that we have mentioned before.

You will see a similar page as below:

Reservation Items for reservation No. 319 Anna Anderson

[Back](#)

Price Type	Price per room	Package	Quantity	From	To	
Standard	70.00	Weekend	2	23/04/2018	30/04/2018	<a href="#">Continue To Check In</a>  

Here, you can check current details for the reservation and make changes if you want by clicking the *Edit* orange button in the right or the *Delete* button to delete the current item. If everything is okay, then you can click the “*Continue to Check In*” button and in the page displayed after that, you will confirm the room and the visitor’s information. Then you can click the *Add* button at the top corner to finally Check In the visitor to your hotel:

## Check In - Select Room

[Add](#) [Back to Reservation List](#)

FromDate

21/04/2018

ToDate

23/04/2018

Select Room

Code: R101 Floor: 1

First name

Last name

Gender

Male  
 Female

Nationality

Birthday

25/04/2018

Upload Document

[Browse...](#) No file selected.

Now, we have checked in the client and his booking's information appears in the *Bookings->Checked In* bookings list. There are also some action buttons in this page as below:

[Persons](#)

[Expense](#)

[Check Out](#)

The *Persons* button will show you, in a popup window, the list of the persons included in the current booking.

Next, you have the *Expense* button where you can check all the expenses the client has already made during the booking, including services, and you can also add new ones by clicking the *Create* button at the top of the popup window.

### **Now, let's follow the Check Out process**

The last action button in "Checked In" booking list is the *Check Out* button. This button will check out the client and pass his booking from the Checked In list to Checked Out list, which you can also find in *Bookings* -> *Checked Out*.

Keep in mind that after confirming the Check Out, you don't have the possibility to return the booking to Check In list, the only way is to create a new Booking.

Actions in this list are the same as in the Checked In list, there are the Persons and Expense buttons, where you can view details about that booking.

## Reports

There is a Reports Section in the Menu, where you can find reports about Reservations, Bookings and Revenue respectively Reservations Report, Bookings Report, Analytic Report, Booking Rooms Progress and Outlook Report:

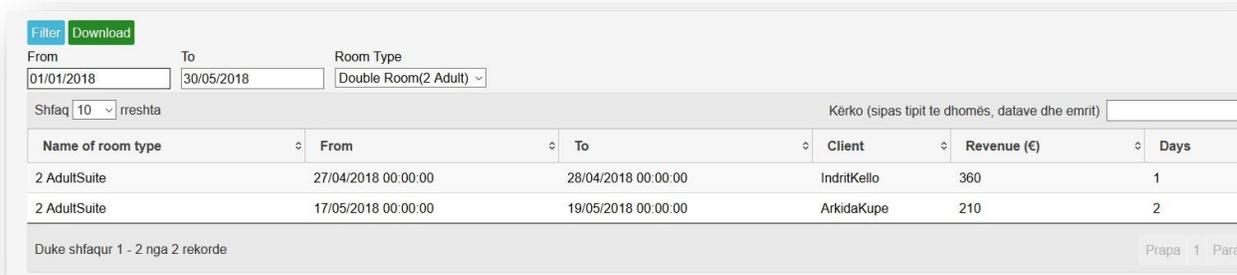


Reservations Report displays, by graphic and list, how pending and confirmed reservations are going until now regarding the room types. Bookings Report displays the progress of bookings

regarding room types. Analytic Report will serve the same purpose for the revenues progress. Booking Rooms Progress shows the progress of busy rooms regarding room types and Outlook Report present predictions about booked rooms and potential revenue of these booked rooms in the future.

Choose one of the reports from the menu above, for example Analytic Report, and see the reports presented visually in a block graphic. You can filter this report regarding room type and date. To do that, click the boxes below and choose the date range and then the Room type.

Finally, click the Filter Button to see the result. You can also see the report's list, where you can filter by Room Type, Date, Client, Revenue and days:



Filter Download

From: 01/01/2018 To: 30/05/2018 Room Type: Double Room(2 Adult)

Shfaq 10 rreshta

Kërko (sipas tipit të dhomës, datave dhe emrit)

Name of room type	From	To	Client	Revenue (€)	Days
2 AdultSuite	27/04/2018 00:00:00	28/04/2018 00:00:00	IndritKello	360	1
2 AdultSuite	17/05/2018 00:00:00	19/05/2018 00:00:00	ArkidaKupe	210	2

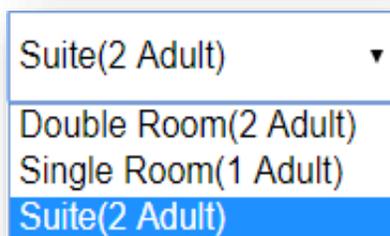
Duke shfaqur 1 - 2 nga 2 rekorde

Prapa 1 Para

If you would like to download this list in .xls format, click the Download button:



In the end of this list is a link 'Calendar', there you can see price of a room type for each day of the month. You can select the room type from the dropdown:



While you select the room type, the page will reload and display the prices. Above is an example of Calendar Prices of room type "Double Room (2 Adult).

PontusHMS   Rezervimet   Prenotimet   Konfigurimet   Raportet   Administrator   Gjuha   indritkello

Double Room(2 Adult) ▾  
 Double Room(2 Adult)  
 Single Room(1 Adult)  
 Suite(2 Adult)

**July 2018**   < > today

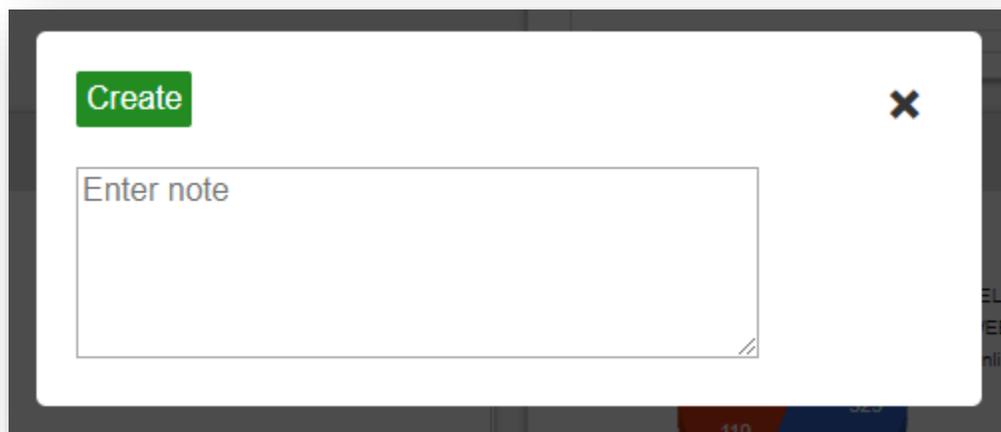
	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
Cmimi: 70						
8	9	10	11	12	13	14
Cmimi: 70						
15	16	17	18	19	20	
Cmimi: 70						
22	23	24	25	26	27	28
Cmimi: 70						

## Notes

As you can remember from the Dashboard section explained above, in the end of the page there was the Notes table where you could check your notes or other user's notes, but there was no indication about how to make one. That's because to make notes, you have to go to [Dashboard -> Quick Notes Button](#) and enter your notes inside the box:



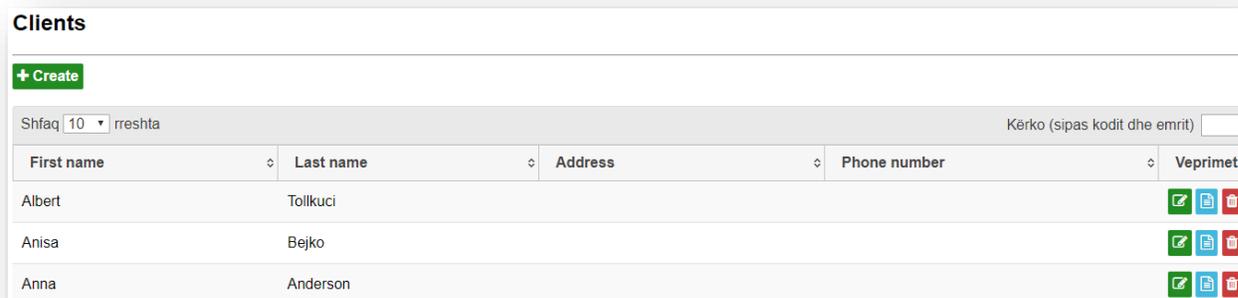
After you click it, there is a popup windows that appears to you to add notes:



Click Create button to save the notes.

## Clients

To view the list of all the clients that have already visited the hotel and have given their information to you, go to *Reservations* -> *Clients*. Here, you can create a new card for a new client with all his/her information by clicking the *Create* button.



First name	Last name	Address	Phone number	Veprimet
Albert	Tollkuci			  
Anisa	Bejko			  
Anna	Anderson			  

In the list, you can also see the actions you can take for a client, including editing, deleting and checking details clicking respectively *Edit*, *Delete* or *View Details* buttons to the right.

## Users and Roles

To add users that will use your hotel system, firstly you have to know the types of roles the users will have. To do this, go to *Admin -> Roles* and check the available types of roles. You will find 3 roles: Receptionist, Manager and Admin. Admin role is for the person who can have access over all the functionalities offered by the system. Manager role is for the person who can have the same access control as admin except control over the users, he cannot view, create, edit or delete users. A receptionist is the role who cannot access Configuration and Users sections, he can only make reservations, bookings and clients, without deleting them.

In case you want to add a new user to the system, go to *Admin -> Users -> Click Create button*.

### Create User

**\*Please fill in the users's data and then submit the form.**

Username

Password

Confirm Password

Profile Photo  No file chosen

Notes

Role

After you have completed the fields properly, save the password somewhere and then click *Create* button. The page will send you right back to the list of users, where you can check the new user you entered along with the information you put. You have the possibility to edit the user's information by clicking the *Edit* button and you can also delete the user by clicking the *Delete* button.

## Account Properties

You can check your account information by clicking your name in the top-right corner of the page and then the Account button. To change the password, click the Change password button in the same drop-down list.

