□ Hotel Mate – Booking Reservation Tutorial

Once you've successfully logged into **Hotel Mate** and reached the **Dashboard**, follow these steps to create a reservation.

Step 1 – Navigate to the Front Desk

1. From the **left sidebar menu**, click on **Reservation**.
2. Under Reservation, click on **Front Desk**.

Step 2 – Open Quick Reservation

1. On the **top right corner** of the Front Desk screen, click **Quick Reservation**.
2. A **Quick Reservation drawer** will slide in from the right.

Step 3 – Fill in Reservation Details

The Quick Reservation form allows you to capture all booking information:

Basic Information

- **Travel Agent** – Select an existing travel agent or add a new one (+ button).
- **Booking Ref.** – Enter a booking reference ID for internal or travel agent tracking.
- **Check-in / Check-out** – Choose the dates for the guest's stay.
- **Nights** – Automatically calculated when you select dates (or can be adjusted).
- **Status** – Select booking status (e.g., Confirm).
- **Rate Plan** – Choose rate type (e.g., Standard Rate, Discounted).
- **Currency** – choose currency type.
- **Meal Plan** – Select (e.g., Bed & Breakfast, Half Board, Full Board).

Room Details

- **Room Type** – Select the desired room category (e.g., Family Room, Deluxe Room).
- **Room No** – Pick the specific room number if required.
- **Adults / Children** – Enter the number of guests.
- **Rate** – Set the room rate (per night).
- **FOC (Free of Charge)** – Check this box if the booking is complimentary.
- You can click **Add Room** to include multiple rooms in the same reservation.

Guest Information

- **Title** – Mr/Ms/Dr, etc.
- **Guest Name** – Full name of the primary guest.
- **Mobile** – Contact phone number.
- **Email** – Guest's email for communication.
- **Country** – Select the guest's country.

Additional Details

- **Additional Notes** – Add remarks (e.g., "Vegetarian meals only").
- **Tour No** – Enter tour ID if part of a travel group.
- **Group Name** – Name of the group if booking is part of a group.
- **Check-in (optional)** – If the booking is for the same day, you can mark it as checked-in immediately.

Step 4 – Save the Reservation

- Once all details are filled, click the **Reserve** button at the bottom.

Step 5 – View Reservation on Front Desk Layout

- After saving, the reservation will appear on the **Front Desk grid** under the assigned **room and date range**.
- The booking block will display the **guest's name** and room details, making it easy to track occupancy.

□ Hotel Mate – Editing a Reservation

Once a reservation is created and appears on the **Front Desk grid**, you can edit it or perform other management actions.

Step 1 – Select a Reservation from Front Desk

1. Go to **Reservation → Front Desk** from the left sidebar.
2. On the grid, click on an existing reservation (highlighted by guest name and room).
3. A **Reservation Drawer** opens on the right side.

At the top, you will see the **Guest Name** and the **reservation status** (e.g., *Confirmed Reservation*).

Step 2 – Open Reservation Actions

- In the **top-right corner** of the drawer, click the **Actions dropdown**.
- Available actions include:
    - **Edit** – Modify booking details.
    - **Check-in** – Mark guest as checked in.
    - **Cancel Booking** – Cancel the reservation.
    - **No Show** – Mark as a no-show.
    - **Extend** – Add more nights.
    - **Shorten** – Reduce number of nights.
    - **Post Charges** – Add extra charges.
    - **Post Credit/Discount** – Apply discounts or credits.
    - **Take Payments** – Record payment against the booking.

Step 3 – Edit a Reservation

1. From the **Actions dropdown**, select **Edit**.
2. A new drawer called **Edit Booking Details** will appear.

3. This editor has **4 tabs**:
    - **Overview**
    - **Financials**
    - **Guests**
    - **Attachments**

Tab 1 – Overview

Here you can update:

- **Room Details** – Change room type, room number, or occupancy.
- **Reservation Details** – Adjust travel agent, booking reference, check-in/out dates.
- **Currency** – Change currency for rates if needed.
- **Booker Details** – Edit name, phone, email.

> Note: The **Booker** is not always the **Guest**. For example, a travel agent or company may book on behalf of a guest.

Tab 2 – Financials

Here you manage the financial side of the reservation:

- **Rates** – Adjust daily room rates, discounts, child rates, extra bed, supplements.
- **Folio Detail** – Invoice records once posted.
- **Deposits** – Track advance payments, method, amount, and date.

Tab 3 – Guests

This section stores **actual guest details** (different from the booker):

- Guest Name
- NIC/Passport
- Gender
- Nationality

- Phone No
- Repeat guest indicator
- VIP status

□ Guest records usually appear after **Check-in** when actual stay details are confirmed.

Tab 4 – Attachments

Here you can upload supporting documents:

- **Document Type:** Passport/NIC, Booking Voucher, Payment Slip, Visa Document, Other.
- **Upload File:** Attach and save documents for compliance or verification.

Step 4 – Save Changes

After making edits in any tab, click **Save**.

- Updates reflect instantly in the **reservation detail drawer**.

□ Hotel Mate – Check-In Process

Step 1 – Open the Reservation

1. From the sidebar, go to **Reservation → Front Desk**.
2. On the calendar grid, click on the reservation you want to check in.
3. The **Reservation Drawer** will open on the right side, showing details such as:

- Room type & number
- Reservation number & booking reference
- Source (e.g., Travel Agent)
- Booker details (who made the booking)
- Current status (e.g., **Confirmed Reservation**)

Step 2 – Select Check-In Action

1. In the **Reservation Drawer**, click on the **Actions dropdown** (top right).
2. Choose **Check-In** from the list.
3. A **Check-In Drawer** will appear.

Step 3 – Enter Guest Check-In Details

Fill in the required information about the guest(s) staying in the room:

- **Title & Guest Name** – The actual guest's details.
- **Date of Birth** – Enter DOB for identity tracking.
- **Country** – Guest's nationality.
- **Email & Phone** – Contact details for communication.
- **ID Type** – Passport, Driver's License, or NIC.
- **ID Number** – Identification number from the chosen ID.
- **Upload ID** – Upload a scanned copy/photo of the ID (passport, license, etc.).
- **Repeat Guest** – Mark if the guest has stayed before.
- **Special Requests** – Record any guest-specific requests (e.g., vegetarian meals, late checkout).

 Tip: Click **Show Additional Fields** if more guest data is required.

Step 4 – Complete Check-In

1. Once all details are filled, click **Complete Check-In**.
2. The Check-In drawer will close automatically.
3. The reservation status will update to **Checked-in** (shown with a green label).

Step 5 – Guest Details Confirmation

1. Open the **Guests tab** in the reservation drawer.
2. The checked-in guest's information will now appear here.
    - Guest Name
    - NIC/Passport
    - Gender
    - Nationality
    - Phone No
    - Repeat guest flag
    - VIP status

 This confirms that the **Guest** (staying) and the **Booker** (who reserved) can be different people, and both sets of details are stored separately.

Hotel Mate – Check-Out Process

The **Check-Out** function finalizes a guest's stay, generates their invoice/receipt, and updates the reservation status to **Checked-out**.

Step 1 – Open the Reservation

1. From the sidebar, go to **Reservation → Front Desk**.
2. Select the **checked-in reservation** (highlighted with a green "Checked-in" status).
3. The **Reservation Drawer** opens on the right side.

Step 2 – Select Check-Out Action

1. In the reservation drawer, click the **Actions dropdown** (top right).
2. Choose **Check-Out**.
3. A **Check-Out Form drawer** will appear.

 Note: Once a guest is checked in, extra options become available in the action dropdown such as:

- **Take Payments**
- **Cash Payout**
- **Rollback**

Step 3 – Review the Check-Out Form

The **Check-Out Form** has **two tabs**:

1) Invoice Tab

- Shows **Folio Details**: invoice type, document number, POS center, payment method, credit, debit, and total amount.
- Options available:
    - **Print** the invoice.
    - **Download** as PDF.
    - **Email** directly to the guest.

2) Receipt Tab

- Shows a detailed **receipt summary** including:
    - Payment Date & Method
    - Room Charges
    - Additional Charges (e.g., mini-bar, late checkout fees)
    - Taxes
    - Grand Total
- Options available:
    - **Print** the receipt.
    - **Download** as PDF.
    - **Email** directly to the guest.

Step 4 – Complete the Check-Out

1. After reviewing the invoice/receipt, click **Complete Check-out**.
2. The drawer will close automatically.
3. The reservation status updates to **Checked-out** (displayed in red).

Step 5 – Post Check-Out Actions

After check-out, the reservation's **Actions dropdown** is reduced to a single option:

- **Recall** → used if the check-out was done by mistake and needs to be reversed.

□ Hotel Mate – Cancel a Reservation

Sometimes a reservation may need to be cancelled before the guest checks in. The system allows you to record a cancellation reason for proper tracking.

Step 1 – Open the Reservation

1. From the sidebar, go to **Reservation → Front Desk**.
2. Select a reservation with status **Confirmed Reservation** or **Tentative**.
3. The **Reservation Drawer** will open on the right side.

Step 2 – Choose Cancel Booking Action

1. In the reservation drawer, click the **Actions dropdown** (top right).
2. Select **Cancel Booking**.
3. A new **Cancel Booking drawer** will appear.

Step 3 – Provide Cancellation Reason

- The system asks: *“Are you sure you want to cancel this booking?”*
- Select a reason from the dropdown list. Available options may include:
    - Entry error
    - On Guest Request
    - Visa or Travel Restrictions
    - Change in Travel Plans
    - Weather Concerns
    - Date Change
    - Unavailability
    - Over Booked

Step 4 – Confirm Cancellation

1. After selecting a reason, click **Confirm**.
2. The drawer will close automatically.
3. The reservation status will update to **Cancelled** (shown with a grey “Cancelled” tag).

Important Notes

- **Cancellation is only possible before Check-in.**
- Once cancelled, the booking is closed, and no further actions (like Check-in or Check-out) can be performed.

□ Hotel Mate – Extend a Reservation

Sometimes guests request to stay longer than originally planned. The **Extend Stay** feature allows front desk staff to quickly update the check-out date and apply the additional charges.

Step 1 – Open the Reservation

1. From the sidebar, go to **Reservation → Front Desk**.
2. Locate and select the **Checked-in reservation** you wish to extend.
   - Only reservations with status **Checked-in** can be extended.
3. The **Reservation Drawer** opens on the right side.

Step 2 – Choose Extend Stay Action

1. In the reservation drawer, click the **Actions dropdown** (top right).
2. Select **Extend Stay**.
3. A new **Extend Stay drawer** will appear.

Step 3 – Enter Extension Details

The drawer requires the following inputs:

- **Extend Till (Date)** → choose the new check-out date using the calendar picker.
- **Room Charge (Per Day – Including Taxes)** → enter the daily charge for the extended stay.
  - You can also change the currency if required.

Step 4 – Confirm Extension

1. Once details are filled, click **Extend Stay**.
2. The drawer will close automatically.
3. The reservation's **check-out date is updated** in the system.
4. The additional nights and charges will reflect in the guest's financials.

Important Notes

- Extensions can only be processed for **Checked-in reservations**.

□ Hotel Mate – Shorten a Reservation

In some cases, a guest may decide to leave earlier than originally planned. The **Shorten Stay** feature allows front desk staff to adjust the check-out date and update the booking accordingly.

Step 1 – Open the Reservation

1. From the sidebar, go to **Reservation → Front Desk**.
2. Locate and select the **Checked-in reservation** that needs to be shortened.
   - Only reservations with status **Checked-in** can be shortened.
3. The **Reservation Drawer** will open on the right side, showing booking details.

Step 2 – Choose Shorten Stay Action

1. In the reservation drawer, click the **Actions dropdown** (top right).
2. Select **Shorten**.
3. A new **Shorten Stay drawer** will appear.

Step 3 – Enter Shortened Stay Details

The drawer requires the following input:

- **Shorten Till (Date)** → choose the new earlier check-out date.
  - The date must be between the **check-in date** and the **current check-out date**.

Step 4 – Confirm Shortened Stay

1. Once the new date is selected, click **Shorten Stay**.
2. The drawer will close automatically.
3. The reservation's **check-out date is updated** in the system.
4. Financial charges will be recalculated based on the shortened duration.

□ Hotel Mate – Room Change in a Reservation

Sometimes guests may need or request to be moved to a different room during their stay. The **Room Change** feature allows staff to reassign a room while keeping the booking details intact.

Step 1 – Open the Reservation

1. From the sidebar, go to **Reservation → Front Desk**.
2. Locate and select the **Checked-in reservation** that requires a room change.
3. The **Reservation Drawer** will open on the right, showing guest details and current room assignment.

Step 2 – Choose Room Change Action

1. In the reservation drawer, click the **Actions dropdown** (top right).
2. Select **Room Change**.
3. A new **Room Change drawer** will appear.

Step 3 – Enter Room Change Details

The drawer requires two selections:

- **New Room Number** → select the new available room from the dropdown list.
- **Reason for Room Change** → choose from the list of common reasons, such as:
    - On Guest Request
    - Maintenance Issues
    - Cleanliness Concerns
    - Noise Disturbance

- Room Size or Layout
- Room View Preference
- Safety Concerns
- Allergies or Health Concerns
- Upgrade Offers
- Other

Step 4 – Confirm Room Change

1. After selecting the new room and reason, click **Confirm**.
2. The drawer will close automatically.
3. The reservation will now be updated to reflect the **new room assignment**.

Step 5 – Verify in Front Desk Layout

- On the **Front Desk Grid**, the guest’s stay will now display in the updated room line.
- A connector (arrow/line) visually indicates the room shift from the old room to the new one.

□ Hotel Mate – Adding Post Charges to a Reservation

Hotels often need to add extra charges to a guest’s account during their stay. These may include meals, spa services, late check-out fees, or other services. The **Post Charges** feature lets staff add such charges directly to the reservation.

Step 1 – Open the Reservation

1. Go to **Reservation → Front Desk** in the sidebar.
2. Click on the reservation of a **Checked-in guest** (only available once the guest is checked in).
3. The **Reservation Drawer** will appear on the right side.

Step 2 – Select Post Charges

1. In the reservation drawer, open the **Actions dropdown** (top right).
2. Select **Post Charges**.
3. A new **Post Charges drawer** will open.

Step 3 – Fill in Post Charge Details

The Post Charges drawer contains:

- **Guest Name** → pre-filled with the guest's name.
- **Room Number** → pre-filled with the assigned room.
- **Transaction Type** → select from available charge categories, such as:
    - Late Check-out Fee
    - Early Check-in Fee
    - Airport Pick-up / Drop / Round Trip
    - Spa Charges
    - Laundry Charges
    - Excursion Charges
    - Meals (Dinner, Lunch, Breakfast)
    - Location Charges
    - Room Charges
    - No-Show Charges
- **Amount** → enter the charge value.
- **Apply Service Charge & Taxes** (checkbox) → if enabled, the system automatically applies relevant service charges and taxes to the total.

A live **Total Summary** will show:

- Base Amount
- Service Charge / Tax
- **Final Total**

Step 4 – Post the Charges

1. Review the entered details.
2. Click **Post Charges**.
3. The drawer will close automatically, and the charges will be added to the guest's reservation financials.

Step 5 – Verify Charges

- Go back to the reservation's **Financials tab**.
- You will see the new post charges reflected in the folio/transaction history.

□ Hotel Mate – Adding Post Credit / Discount in a Reservation

Sometimes, adjustments are required to a guest's folio — for example, applying discounts, issuing credits, or correcting overcharges. The **Post Credit / Discount** option allows you to manage these adjustments seamlessly.

□ Step 1: Open the Reservation

1. From the **Front Desk layout**, click on the guest reservation you want to adjust.
2. The **Reservation Drawer** will open, displaying the booking details and action options.

□ Step 2: Select Post Credit / Discount

1. In the **top-right corner**, open the **Actions dropdown**.
2. From the list of available actions, choose **Post Credit / Discount**.
3. A new drawer will open, titled **Post Credit / Discount**.

□ Step 3: Fill in Transaction Details

Inside the **Post Credit / Discount** drawer:

- **Guest Name** → pre-filled automatically.
- **Room Number** → pre-filled with the guest's assigned room.
- **Transaction Type** → Choose the type of credit/discount being applied.
- **Amount** → Enter the value of the credit or discount.

□ The system will auto-calculate **Service Charges** and **Taxes** (if enabled).

You can also check/uncheck **Apply Service Charge & Taxes** depending on your policy.

□ Step 4: Post the Credit / Discount

1. Review the **total calculation** (Amount + Service Charges + Taxes).
2. If correct, click the **Post Credit / Discount** button.
3. The drawer will close automatically, and the adjustment will be added to the reservation.

□ Step 5: Verify the Adjustment

- The applied credit/discount will now reflect under the **Financials Tab** of the reservation.
- This ensures the guest's folio is updated correctly before checkout.

□ Hotel Mate – Take Payments in a Reservation

The **Take Payments** feature allows you to collect payments from guests during their stay. This can include partial payments, deposits, or the full settlement of their balance.

□ Step 1: Open the Reservation

1. Go to the **Front Desk layout**.
2. Select the reservation for the guest you want to collect payment from.
3. The **Reservation Drawer** will open, showing booking details and available actions.

□ Step 2: Select Take Payments

1. In the **Actions dropdown** (top-right corner of the reservation drawer), select **Take Payments**.
2. A new drawer will open titled **Take Payment**.

□ Step 3: Enter Payment Details

Inside the **Take Payment** drawer, fill out the required fields:

- **Amount** → Enter the payment amount the guest is paying.
- **Payment Method** → Select the method of payment (e.g., *Credit Card, Cash, Bank Transfer, Online Payment*).
- **Currency** → Choose the correct currency (e.g., USD, LKR, EUR) for the transaction.
- **Account** → Select the account where this payment will be recorded (e.g., *Front Desk Cash, Bank Account*).

□ Step 4: Confirm the Payment

1. Double-check the payment details (amount, method, currency, account).
2. Click on **Confirm Payment**.
3. The drawer will close automatically, and the payment will be posted to the reservation.

□ Step 5: Verify the Payment

- The collected payment will now appear under the **Financials Tab** of the reservation.
- It will be deducted from the guest's outstanding balance.
- A receipt can be generated if required (based on your property's settings).

□ **Hotel Mate** – A Cash Payout in a Reservation

Sometimes hotels may need to return money to a guest — for example, refunds, reimbursements, or adjustments. The **Cash Payout** feature allows staff to record such payments against a guest's reservation.

□ Step 1: Open the Reservation

1. Go to **Reservation** → **Front Desk** in the sidebar.
2. Select the **Checked-in reservation** for the guest who requires a payout.
3. The **Reservation Drawer** will open, showing the booking details.

□ Step 2: Select Cash Payout

1. In the **Actions dropdown** (top right of the reservation drawer), select **Cash Payout**.
2. A new **Cash Payout drawer** will appear.

□ Step 3: Enter Payout Details

Inside the **Cash Payout drawer**:

- **Guest Name** → pre-filled with the guest's details.
- **Room Number** → pre-filled with the assigned room.
- **Account** → Select the payout source account (e.g., *Cash in Hand*, *Petty Cash*).
- **Amount** → Enter the payout amount in the selected currency.

□ Step 4: Process the Payout

1. Review the details carefully.

2. Click **Process Payout**.
3. The drawer will close automatically, and the payout will be recorded.

□ Step 5: Verify the Payout

1. Go to the **Financials Tab** of the reservation.
2. Under **Folio Detail**, you will see the new **Cash Payout entry** with the selected account and payout amount.
3. This confirms that the transaction has been applied correctly.