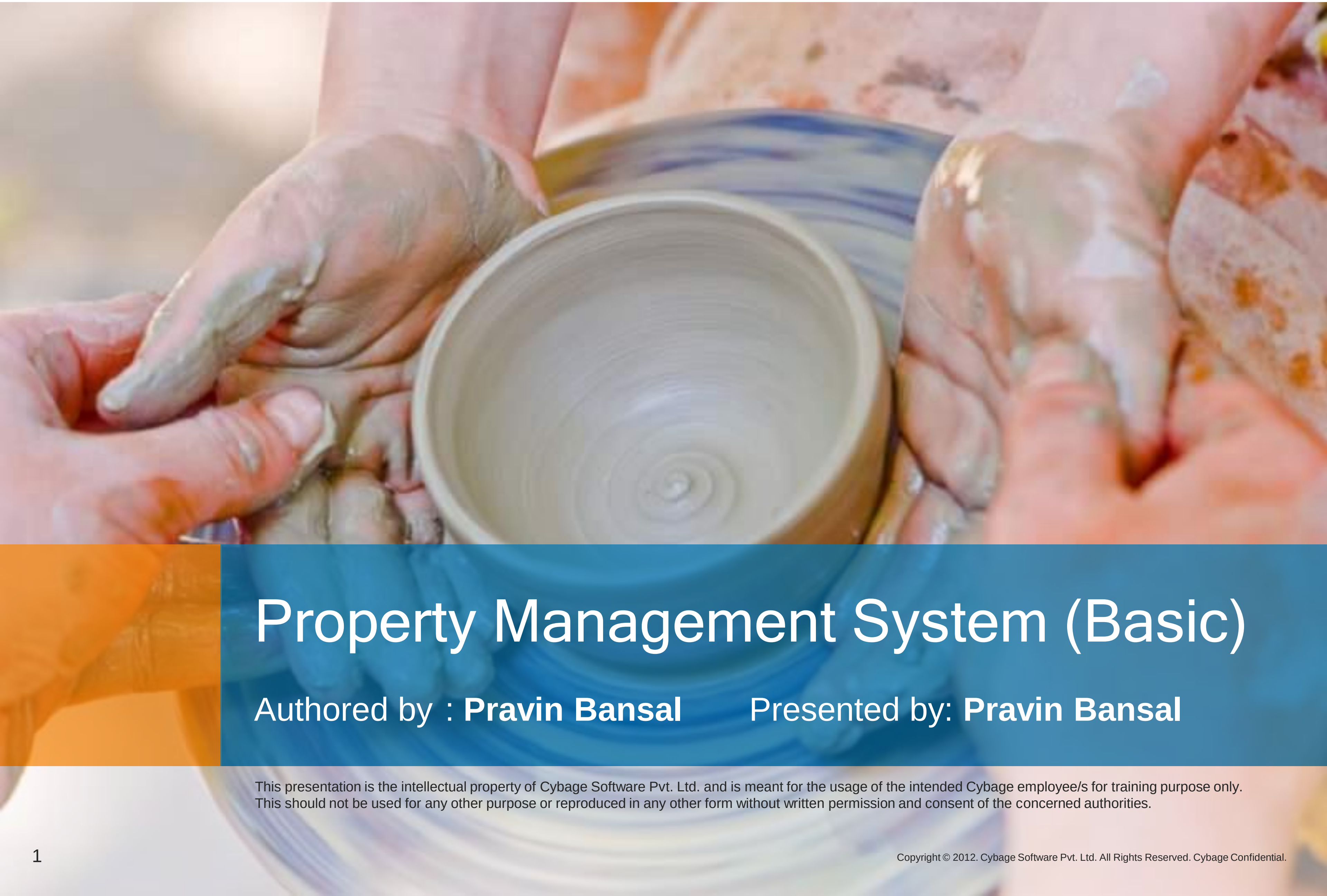

Property Management System (Basic)

Authored by : **Pravin Bansal** Presented by: **Pravin Bansal**

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Learning Objectives

This training provide an overview of PMS and various operational areas it covers.

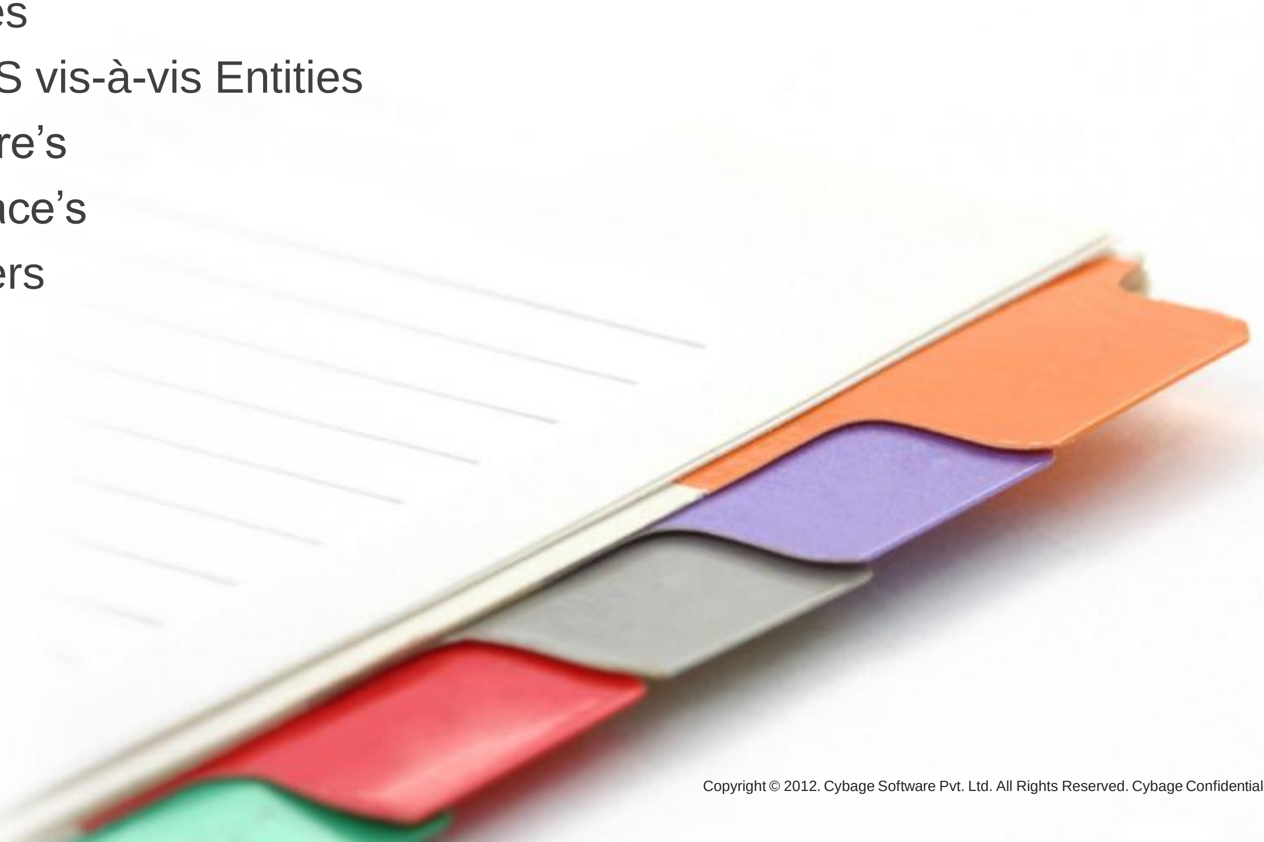
This is a basic program targeted primarily for those who are new to Hospitality.

Course Structure

Target audience	People new to Hospitality Domain and/or want to become CCHP
Level	All
Pre-requisites	Knowledge of English & Hindi
Training methods	Class room
Evaluation	Test

Agenda

- What’s PMS
- PMS Entities
- Role of PMS vis-à-vis Entities
- PMS Feature’s
- PMS Interface’s
- Major Players
- Questions

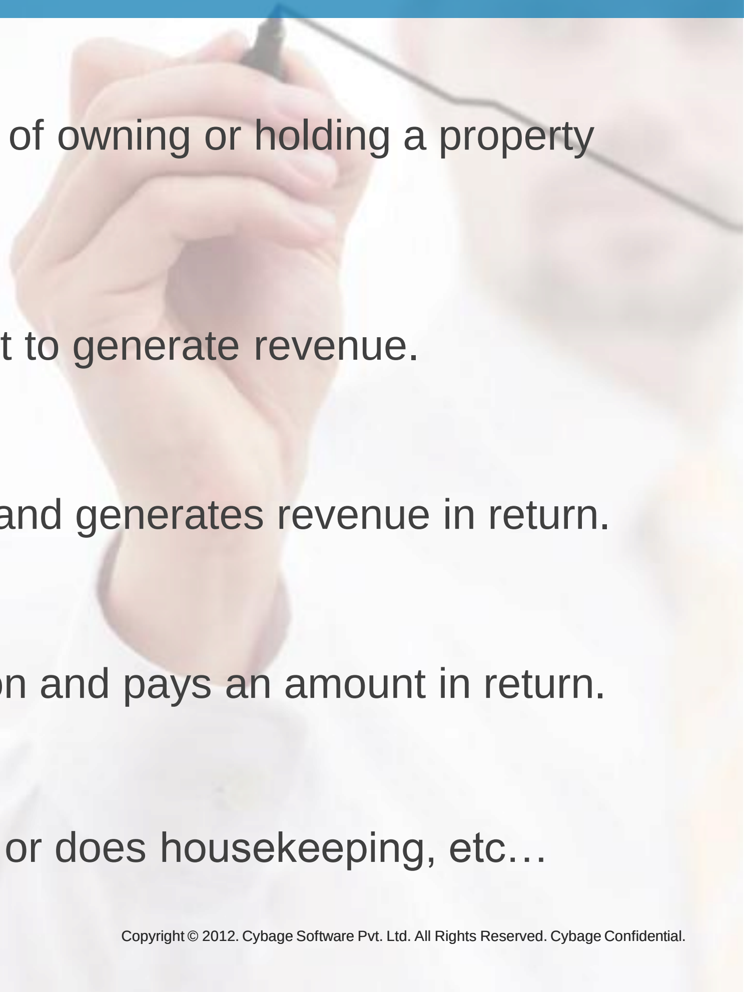


What’s PMS

PMS stands for Property Management System. It’s the system that manages every aspect of guest’s visit for Hotels, Motels, Resorts, Villas and Apartments. Property managers use this application to optimize the efficiency of their operations, speeding the process of filling and turning over rooms.

Hospitality industry heavily relies on PMS for every level of service.

PMS Entities



- **Hotel/Resort:**
  A company or an organization which is in the business of owning or holding a property and generating revenue by renting it.
- **Owner:**
  A person who owns the property and rents to the resort to generate revenue.
- **Distribution Channel:**
  Travel Agents that helps to increase the sale of resort and generates revenue in return.
- **Customer:**
  The actual entity who uses the physical accommodation and pays an amount in return.
- **Employees:**
  The entity who makes the booking of accommodation, or does housekeeping, etc…

Role of PMS vis-à-vis Entities

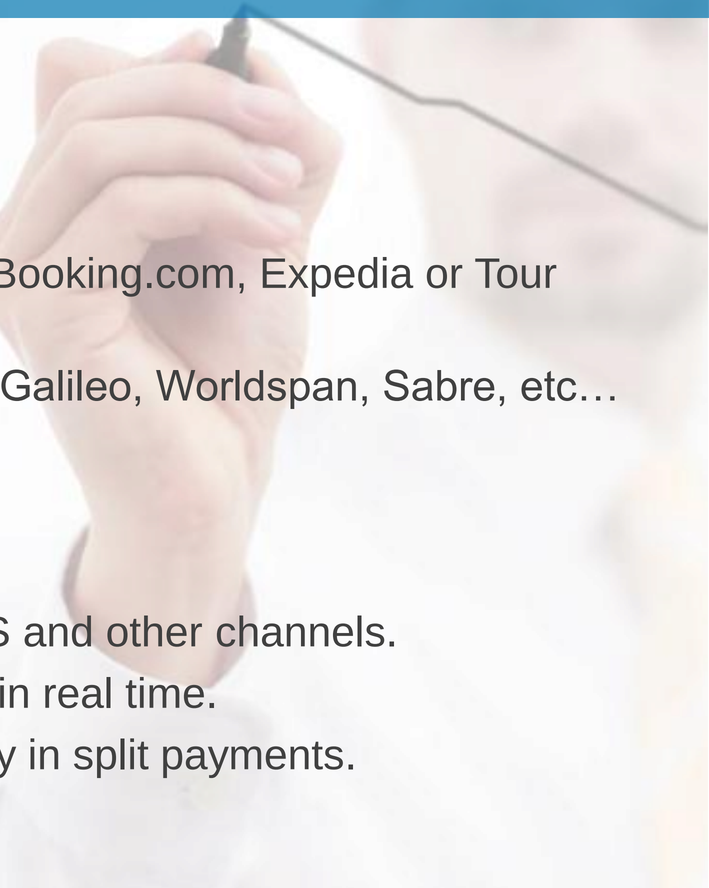
Hotel/Resort:

A property can be classified into different ways. It would depend on number of people it can occupy and the facilities provided. For e.g. Hotels would have Single room, Double Room, Suites, etc…

Properties can be independent (individually owned/operated) or be a part of a chain and/or have a parent company associated with it. For e.g. Accor is Parent company and Ibis is a Brand.

PMS helps in configuring such properties & their resources and help in reserving those accordingly.

Role of PMS vis-à-vis Entities



Distribution Channel:

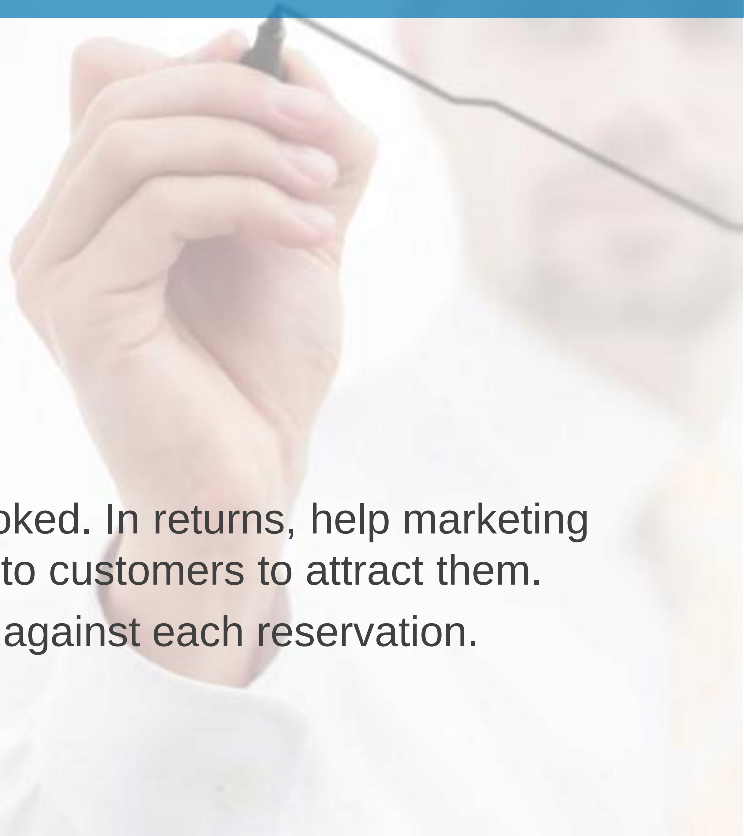
Types of DC

- Direct DC – Call Center, Internet, Chain CRS
- Indirect DC- Online Travel agents like Travelocity, Booking.com, Expedia or Tour operators like Thomas Cook, C&K, etc…
- GDS – Global Distribution Systems like Amadeus, Galileo, Worldspan, Sabre, etc…

PMS helps in following ways:

- Configuring different DC and there commission rates.
- Inventory: Updates inventory in real time to all CRS/GDS and other channels.
- Bookings: Accepting bookings made through CRS/GDS in real time.
- Calculating commission and sharing revenue accordingly in split payments.
- Configuring Payment Terms and using them.

Role of PMS vis-à-vis Entities



Customer:

Types of Customers

- Corporate Customer
- Leisure Customer

PMS helps in following ways -

- Configuring different types of customer.
- Maintain history of each reservation and resources booked. In returns, help marketing team to prepare loyalty programs and send brochures to customers to attract them.
- Maintain the payment received and made to customer against each reservation.
- Manage customer loyalty programs.

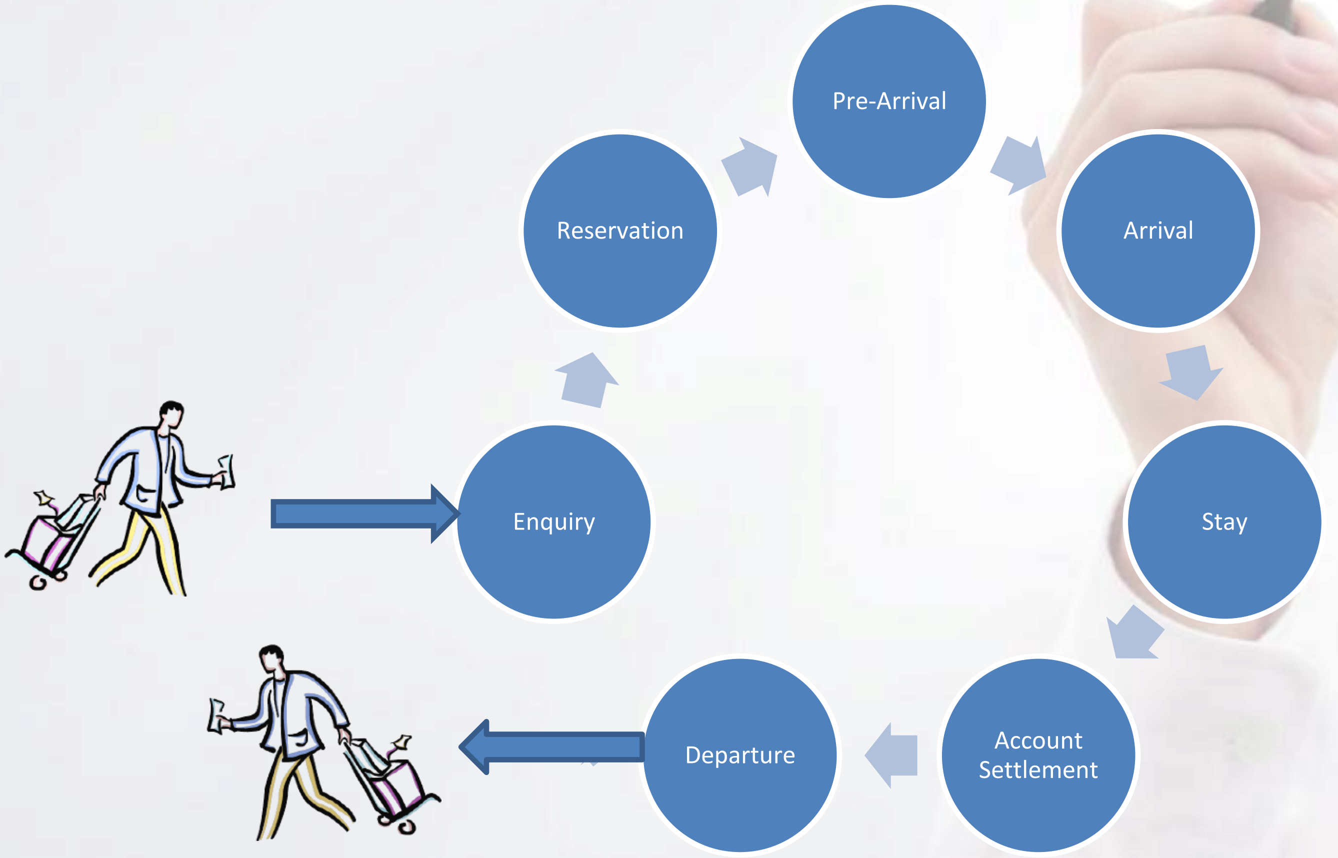
Role of PMS vis-à-vis Entities

Employees:

PMS helps to do the following:

- Create employees and teams.
- Configure contracts and use the employee accordingly.
- Configure Skills and use the employee accordingly.

Guest Life Cycle (in context of Hotel Industry)



Enquiry

Reservation

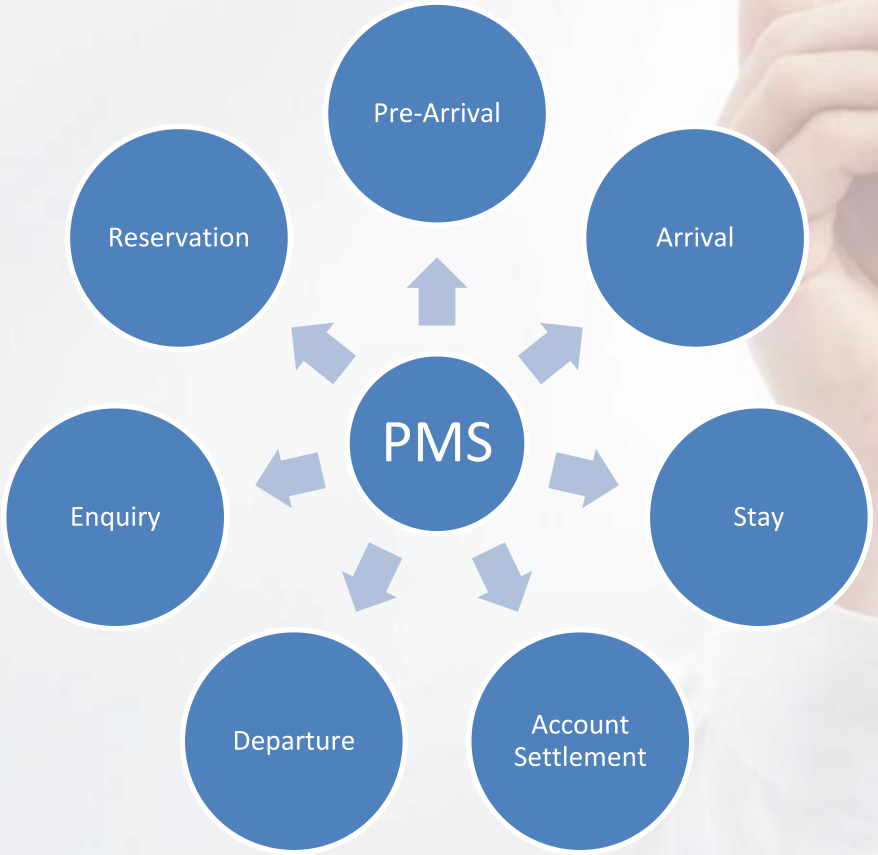
Pre-Arrival

Arrival

Stay

Account Settlement

Departure



Pre-Arrival

Reservation

Arrival

PMS

Enquiry

Stay

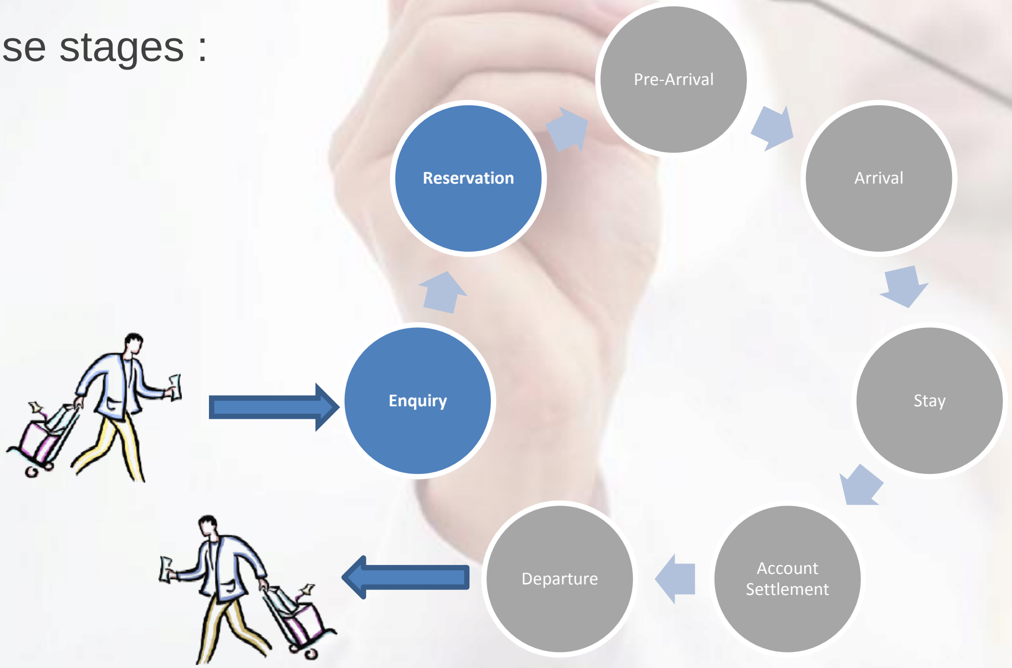
Departure

Account Settlement

PMS Features vis-à-vis Guest Life Cycle

Following PMS features facilitates these stages :

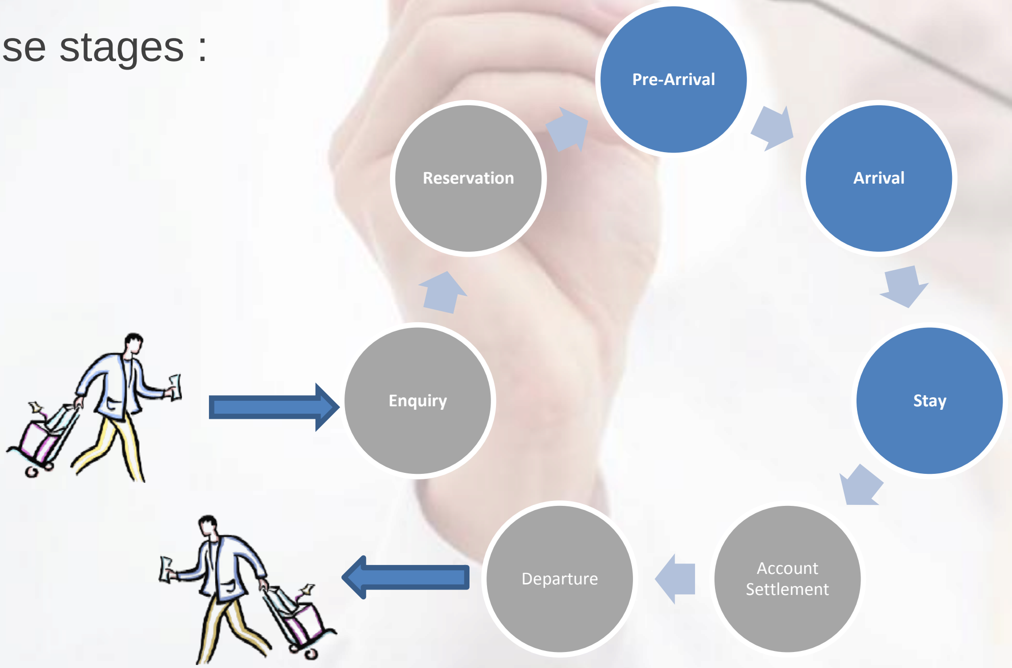
- Room/Inventory Management
- Rate Management
- Package Management
- Distribution
- Commission Handling
- Reservations
- Front Desk


Pre-Arrival
Reservation
Arrival
Enquiry
Stay
Departure
Account Settlement

PMS Features vis-à-vis Guest Life Cycle

Following PMS features facilitates these stages :

- Employee Management
- Front Desk
- Cashiering
- House Keeping
- End Of Day
- Reports



Enquiry

Reservation

Pre-Arrival

Arrival

Stay

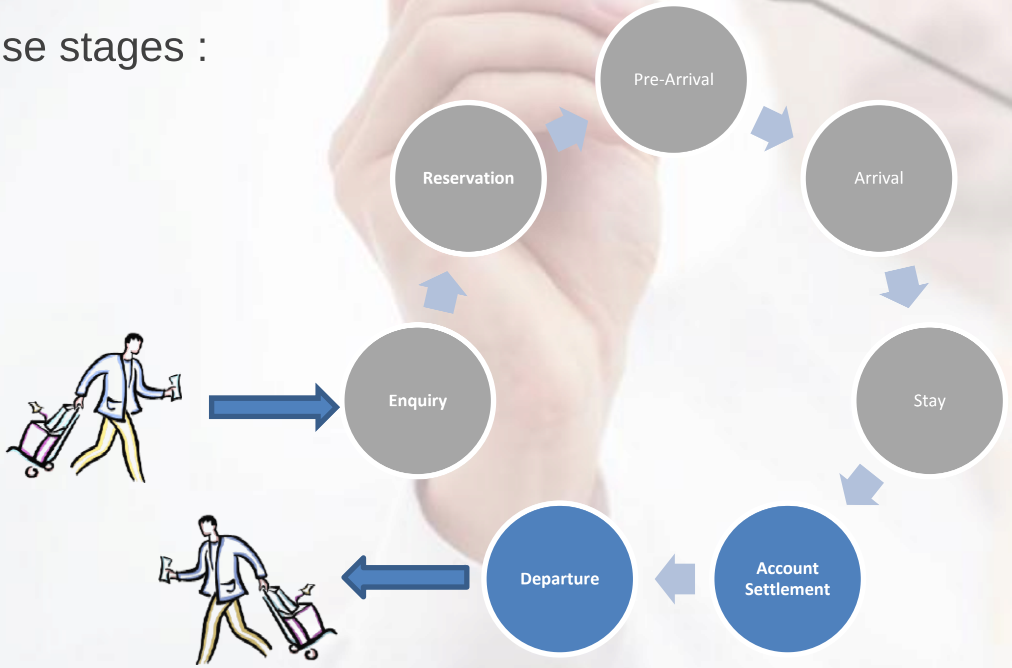
Account Settlement

Departure

PMS Features vis-à-vis Guest Life Cycle

Following PMS features facilitates these stages :

- Front Desk
- Cashiering
- Account Receivables / Payables
- Reports
- Marketing & Sales



Enquiry

Reservation

Pre-Arrival

Arrival

Stay

Account Settlement

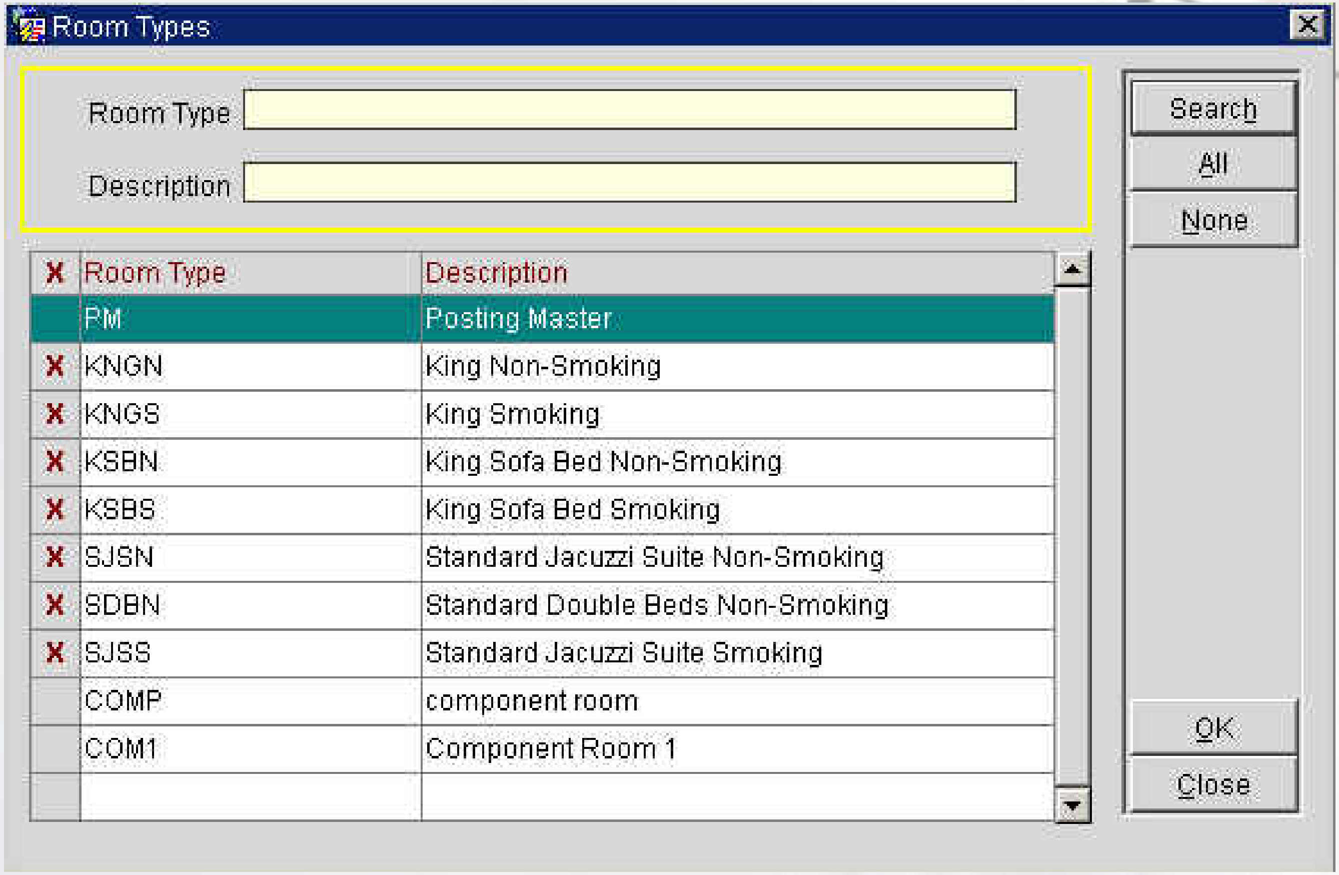
Departure

PMS - Room Management

PMS helps in following ways:

- Create Rooms
- Define Room Types
  - Standard Single
  - Standard Double
  - Deluxe
  - Cottage
- Room Details
  - Amenities included
  - Views
- Mark rooms as out of order / out of service

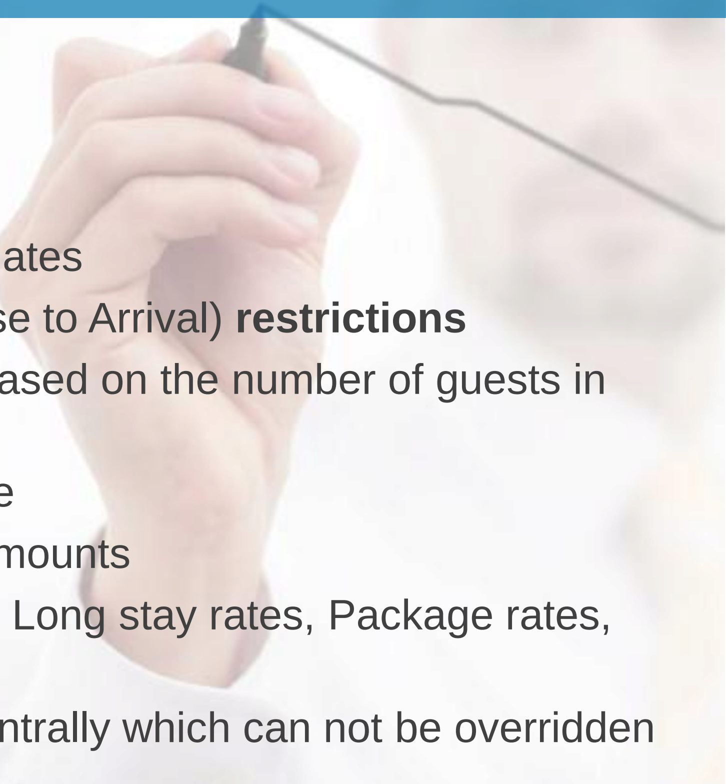
PMS - Room Management



Room Type	
Description	

✗	Room Type	Description
	PM	Posting Master
✗	KNGN	King Non-Smoking
✗	KNGS	King Smoking
✗	KSBN	King Sofa Bed Non-Smoking
✗	KSBS	King Sofa Bed Smoking
✗	SJSN	Standard Jacuzzi Suite Non-Smoking
✗	SDBN	Standard Double Beds Non-Smoking
✗	SJSS	Standard Jacuzzi Suite Smoking
	COMP	component room
	COM1	Component Room 1

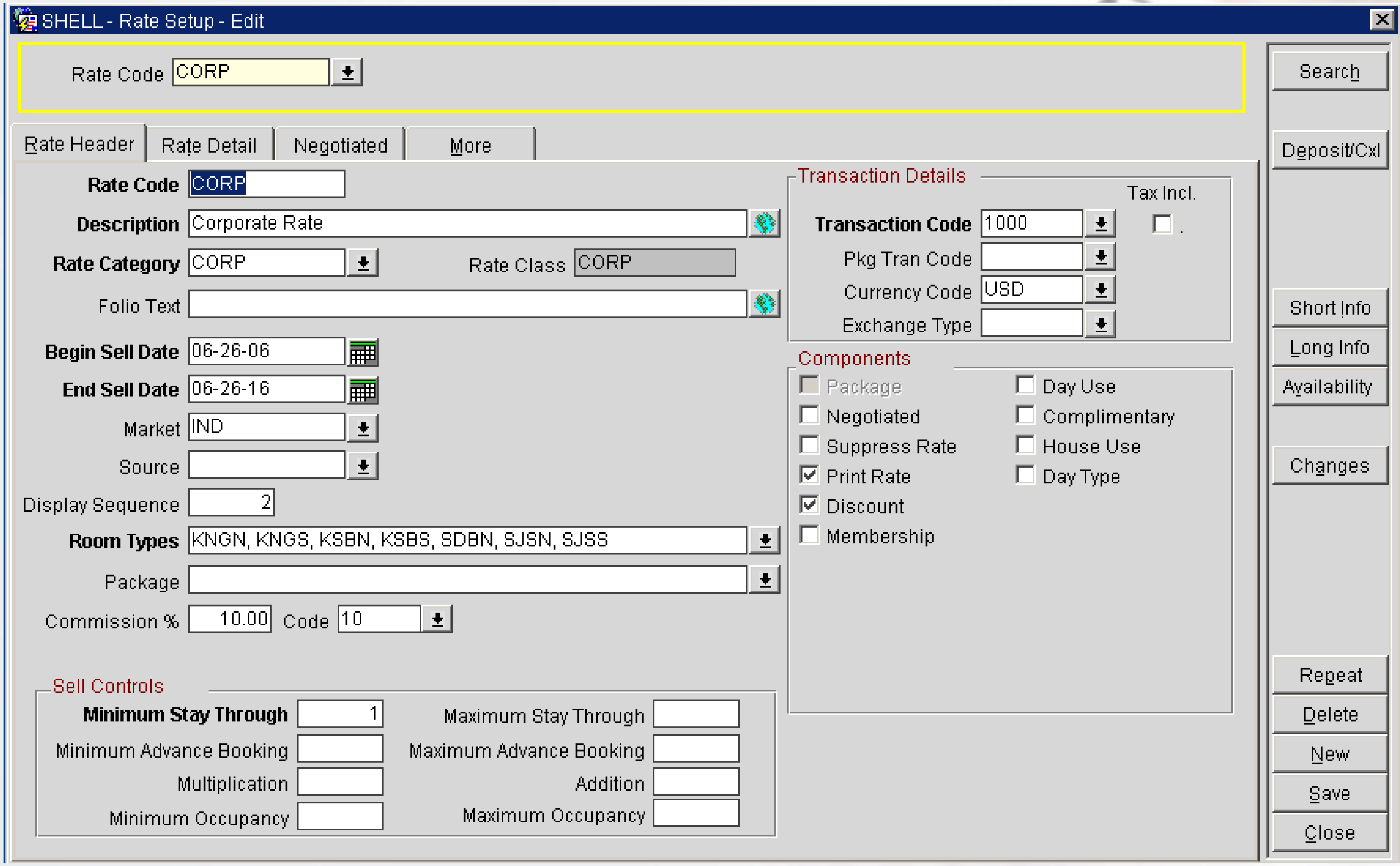
PMS - Rate Management



Following are the areas covered under this –

1. Create an unlimited number of **Rates** and applicable dates
2. Allow to manually set LOS (Length of Stay), CTA (Close to Arrival) **restrictions**
3. Allow **discounts** based on the rate for one guest, or based on the number of guests in the room
4. Designate certain rates where discounts are applicable
5. Create discounts as either percentages or flat dollar amounts
6. Ability to define Best available rates, Negotiated rates, Long stay rates, Package rates, etc…
7. Interfacing with RM system to get the rates defined centrally which can not be overridden
8. **Cancellation** policy

PMS - Rate Management



Rate Header
Rate Detail
Negotiated
More
Search
Deposit/Cxl
Short Info
Long Info
Availability
Changes
Repeat
Delete
New
Save
Close

SHELL - Rate Setup - Edit

Rate Code CORP

Rate Code CORP

Description Corporate Rate

Rate Category CORP

Rate Class CORP

Folio Text

Begin Sell Date 06-26-06

End Sell Date 06-26-16

Market IND

Source

Display Sequence 2

Room Types KNGN, KNGS, KSBN, KSBS, SDBN, SJSN, SJSS

Package

Commission % 10.00

Code 10

Transaction Details

Tax Incl. ☐

Transaction Code 1000

Pkg Tran Code

Currency Code USD

Exchange Type

Components

☐ Package

☐ Negotiated

☐ Suppress Rate

☑ Print Rate

☑ Discount

☐ Membership

☐ Day Use

☐ Complimentary

☐ House Use

☐ Day Type

Sell Controls

Minimum Stay Through 1

Maximum Stay Through

Minimum Advance Booking

Maximum Advance Booking

Multiplication

Addition

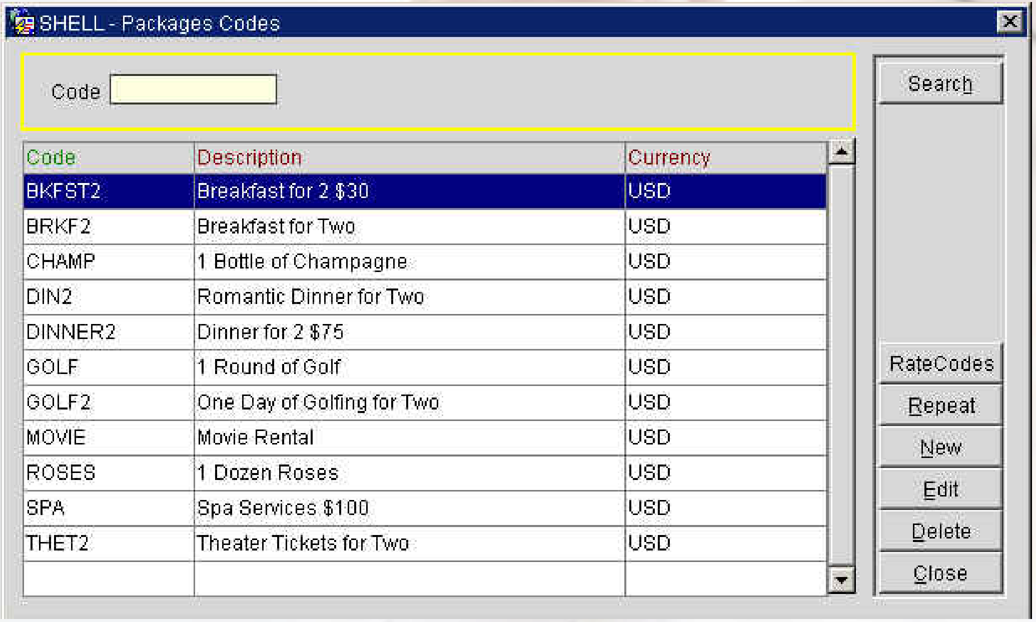
Minimum Occupancy

Maximum Occupancy

PMS - Package Management

PMS helps in following ways:

- Creating packages
- Assigning Rate codes



SHELL - Packages Codes

Code

Code	Description	Currency
BKFST2	Breakfast for 2 $30	USD
BRKF2	Breakfast for Two	USD
CHAMP	1 Bottle of Champagne	USD
DIN2	Romantic Dinner for Two	USD
DINNER2	Dinner for 2 $75	USD
GOLF	1 Round of Golf	USD
GOLF2	One Day of Golfing for Two	USD
MOVIE	Movie Rental	USD
ROSES	1 Dozen Roses	USD
SPA	Spa Services $100	USD
THET2	Theater Tickets for Two	USD

PMS - Distribution

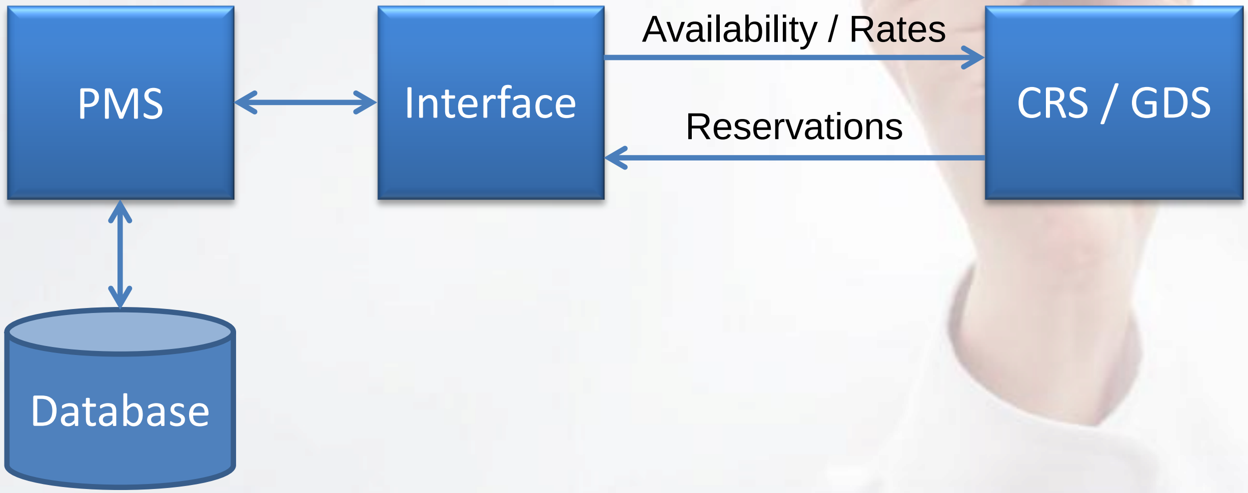
2 ways:

- Direct – Call Center (hotel or chain), Internet
- Indirect - Online Travel Agents (OTA) like Travelocity, Booking.com, Expedia or Tour operators like Thomas Cook, C&K, etc…

PMS helps in following ways:

- Providing interface with various CRS/GDS
- Rates & Availability: Updating inventory & rates in real time to all CRS/GDS and other channels
- Bookings: Accepting bookings made through CRS/GDS in real time
- Configuring different Distribution Channels and there commission rates

PMS - Distribution

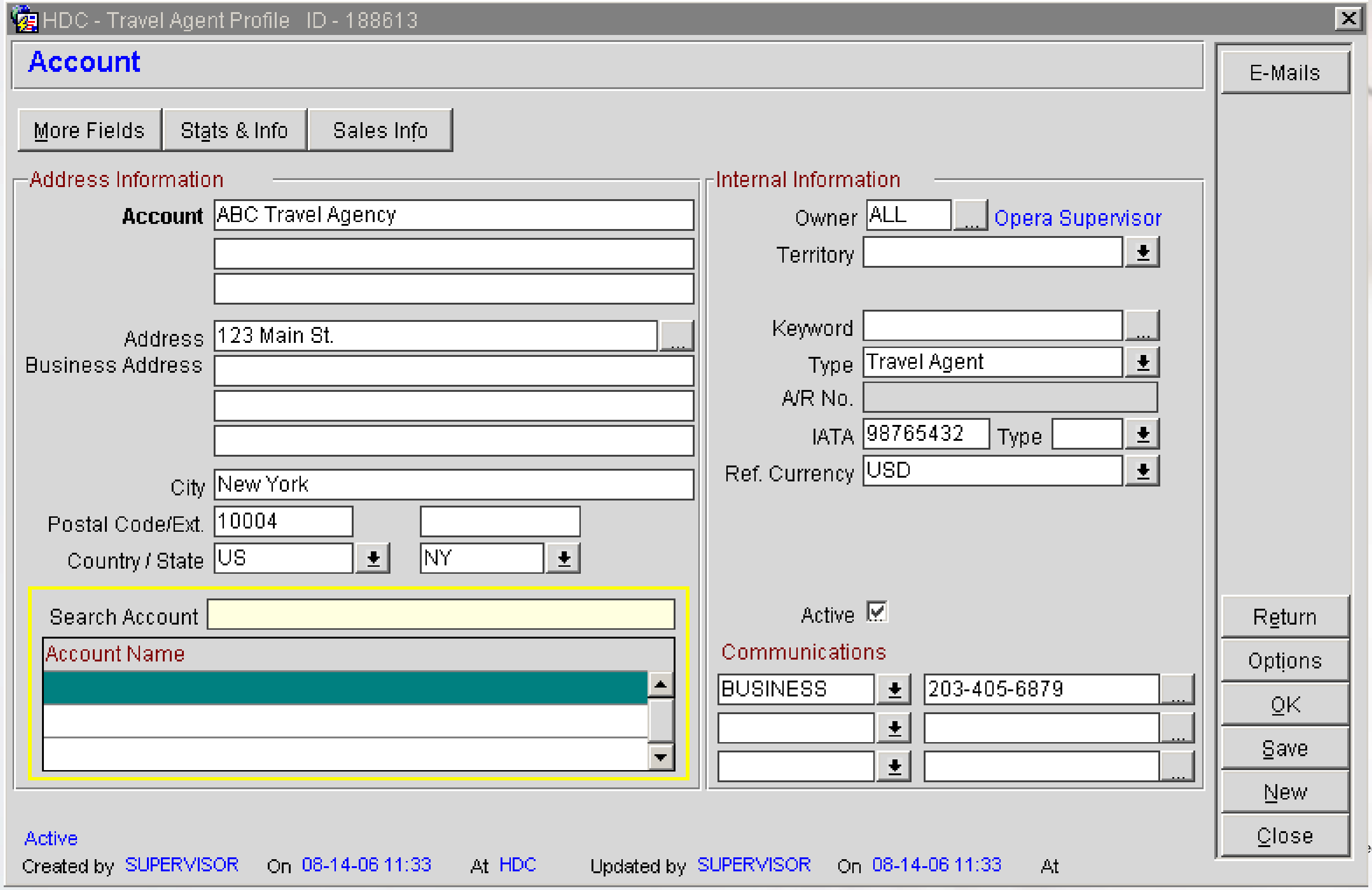

PMS
Interface
Availability / Rates
CRS / GDS
Reservations
Database

PMS - Commission Handling

PMS helps in following ways:

- Travel Agent profile setup
- Rate code setup
- Calculating commission and sharing revenue accordingly
- Payment processing
    - Check Run process
    - Via File Export
    - Pay Centrally
- Configuring Payment Terms and using them

PMS - Commission Handling



HDC - Travel Agent Profile ID - 188613

Account

Address Information

Account ABC Travel Agency

Address 123 Main St.

Business Address

City New York

Postal Code/Ext. 10004

Country / State US NY

Search Account

Account Name

Internal Information

Owner ALL Opera Supervisor

Territory

Keyword

Type Travel Agent

A/R No.

IATA 98765432 Type

Ref. Currency USD

Active ☑

Communications

BUSINESS 203-405-6879

Active

Created by SUPERVISOR On 08-14-06 11:33 At HDC Updated by SUPERVISOR On 08-14-06 11:33 At

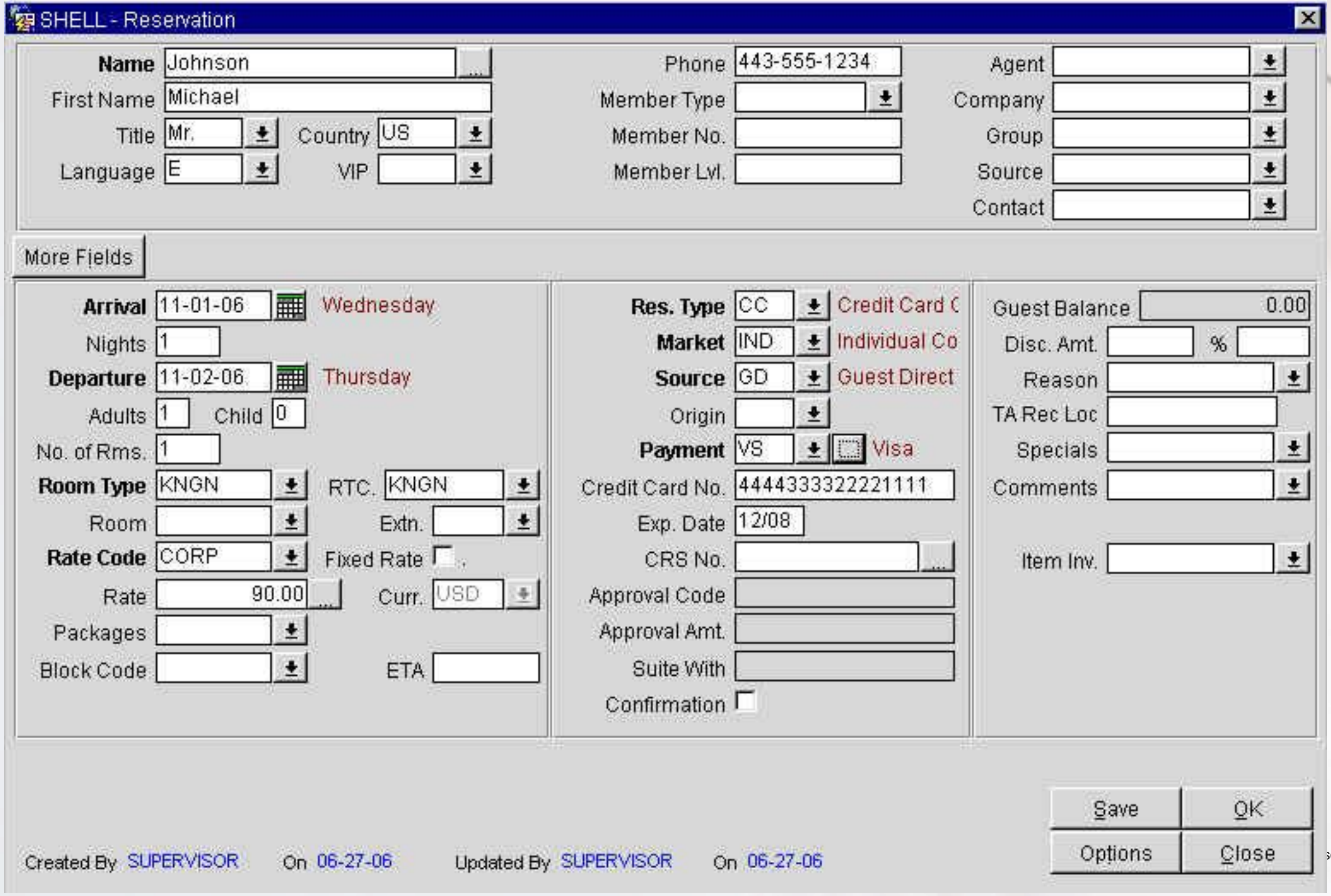
More Fields
Stats & Info
Sales Info
E-Mails
Return
Options
OK
Save
New
Close

PMS - Reservations

Following are some of the functions available –

1. Taking bookings for individuals or Groups
2. Performing Rates & Availability check
3. Blocking specific rooms for guests (VIP, Special Request, etc…)
4. Managing Group bookings
5. Sending confirmations by fax, email or mail
6. Allow setting of single or multiple folios for any quests
7. View Floor and Room plan

PMS - Reservations



SHELL - Reservation

Name Johnson
First Name Michael
Title Mr. Country US
Language E VIP
Phone 443-555-1234
Member Type
Member No.
Member Lvl.
Agent
Company
Group
Source
Contact

More Fields

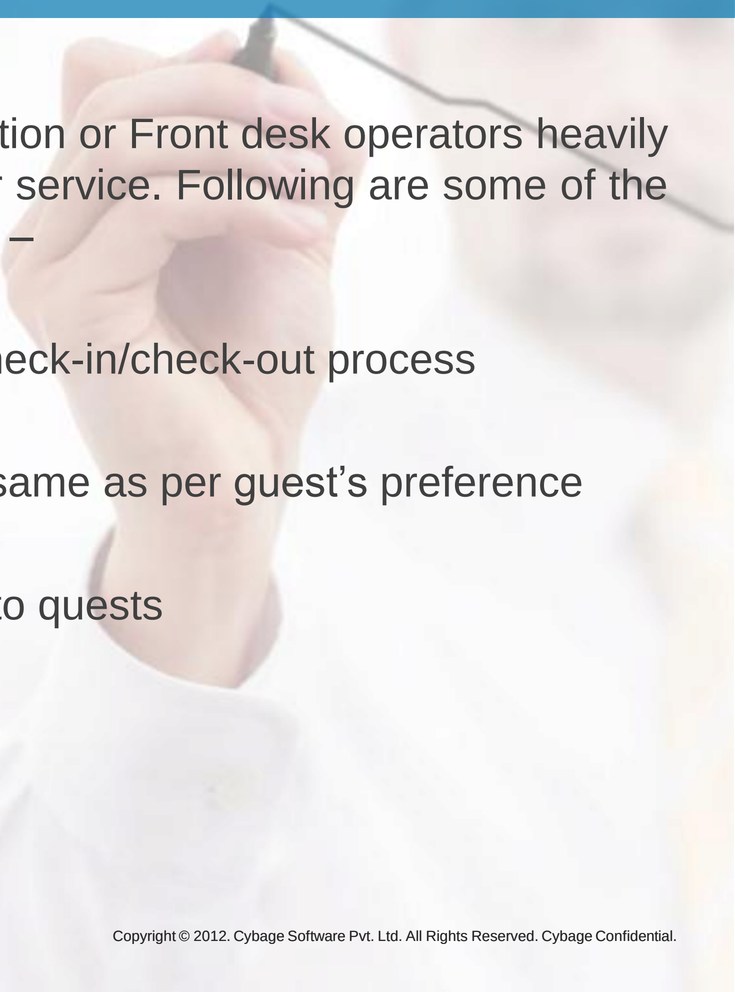
Arrival 11-01-06 Wednesday
Nights 1
Departure 11-02-06 Thursday
Adults 1 Child 0
No. of Rms. 1
Room Type KNGN RTC. KNGN
Room Extn.
Rate Code CORP Fixed Rate ☐
Rate 90.00 Curr. USD
Packages
Block Code ETA

Res. Type CC Credit Card (
Market IND Individual Co
Source GD Guest Direct
Origin
Payment VS Visa
Credit Card No. 4444333322221111
Exp. Date 12/08
CRS No.
Approval Code
Approval Amt.
Suite With
Confirmation ☐

Guest Balance 0.00
Disc. Amt. %
Reason
TA Rec Loc
Specials
Comments
Item Inv.

Created By SUPERVISOR On 06-27-06 Updated By SUPERVISOR On 06-27-06

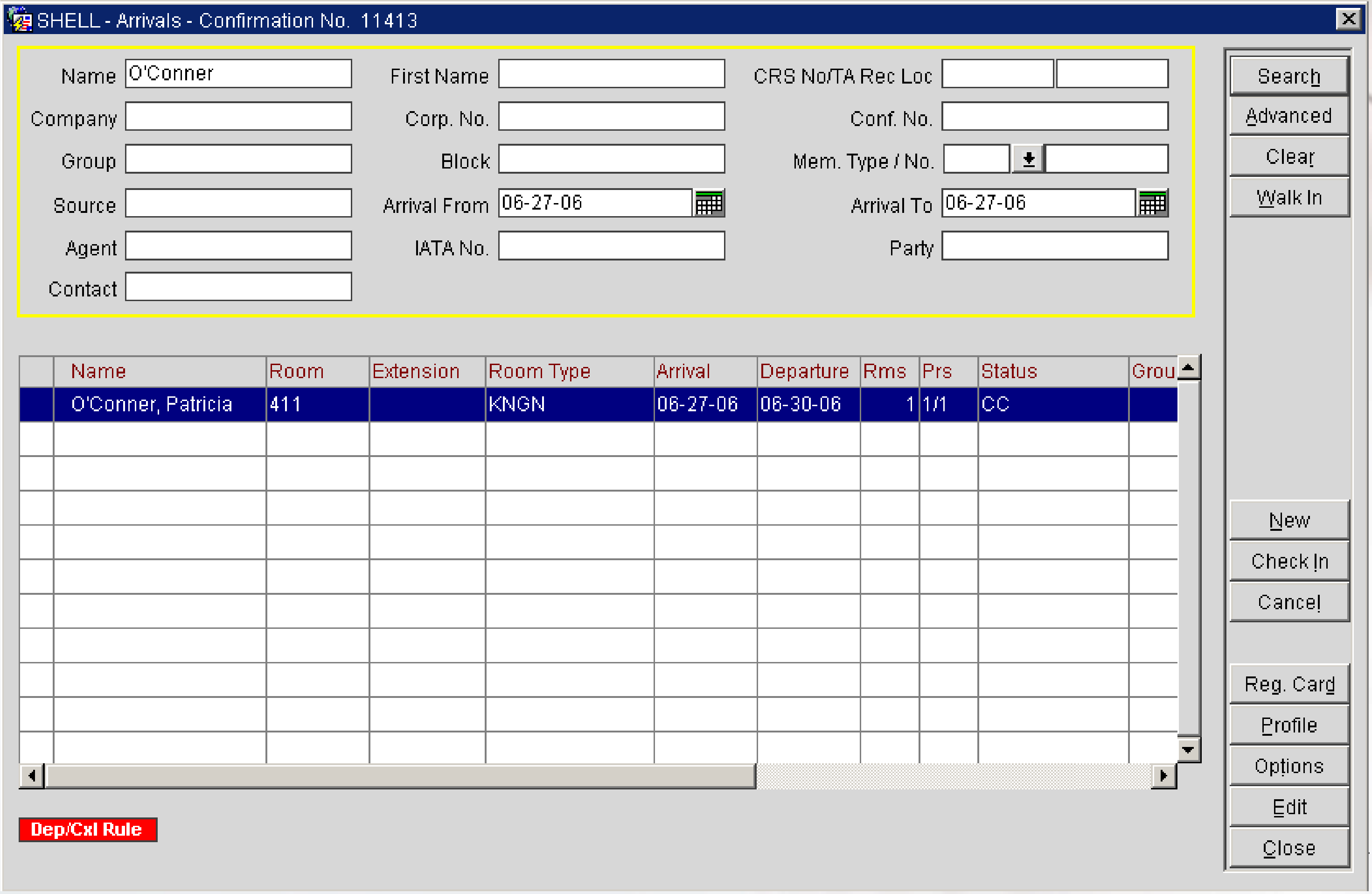
PMS - Front Desk



It’s the center of daily operations of any property. Reception or Front desk operators heavily depend on the system for prompt and efficient customer service. Following are some of the features available to them during Check-In & Check-Out –

1. Quick retrieval of guest records enabling quick check-in/check-out process
2. Checking in a Walk-in guest
3. Checking for room availability and allocating the same as per guest’s preference
4. Showing room pictures without leaving desks
5. Direct email of reservation and hotel information to quests
6. Printing of area attraction maps for guests
7. Billing and payment processing

PMS - Front Desk


Company
Group
Source
Agent
Contact
First Name
Corp. No.
Block
IATA No.
CRS No/TA Rec Loc
Conf. No.
Mem. Type / No.
Party
Search
Advanced
Clear
Walk In
New
Check In
Cancel
Reg. Card
Profile
Options
Edit
Close
Dep/Cxl Rule

SHELL - Arrivals - Confirmation No. 11413

Name: O'Conner
Arrival From: 06-27-06
Arrival To: 06-27-06

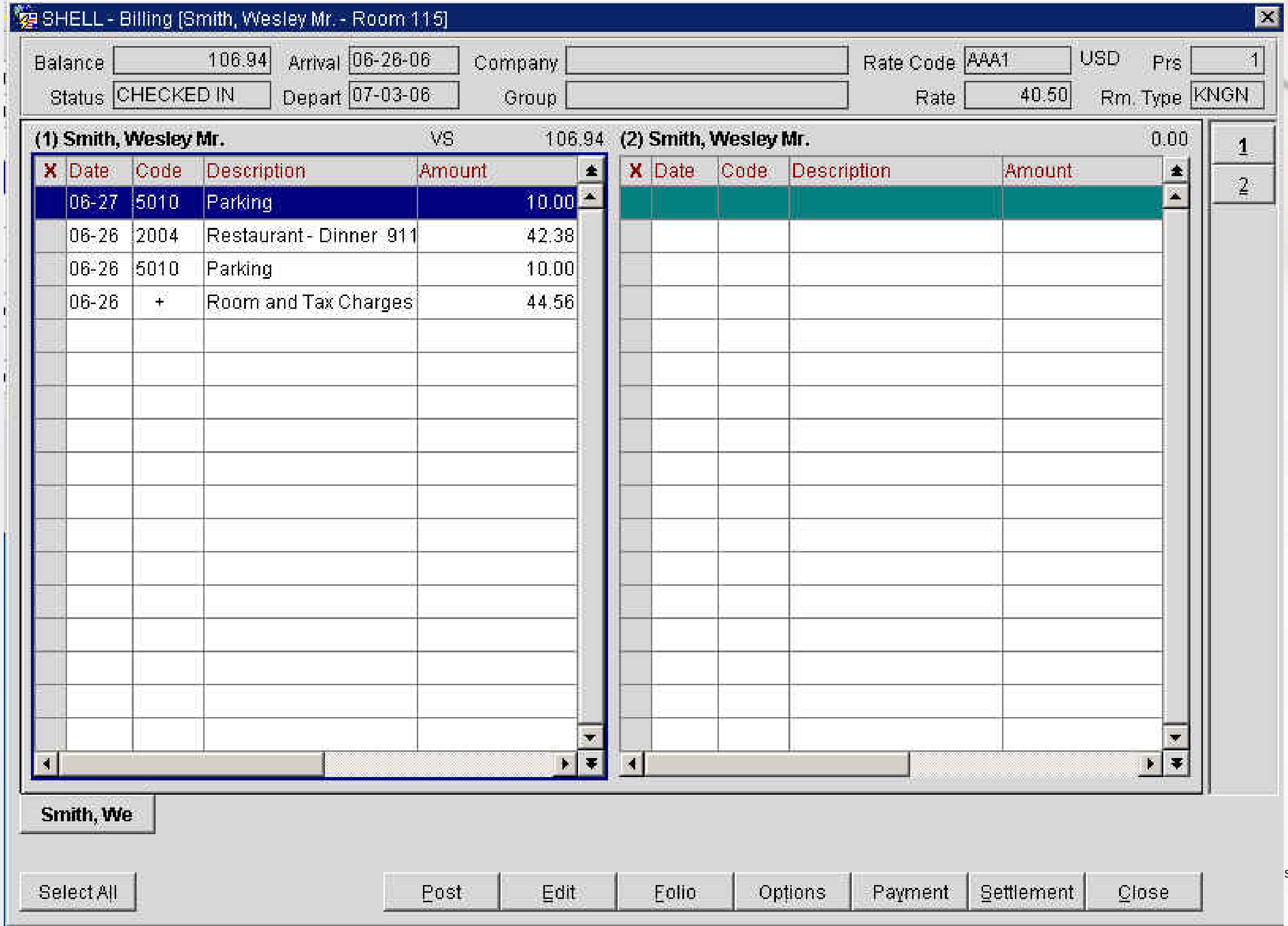
Name	Room	Extension	Room Type	Arrival	Departure	Rms	Prs	Status	Grou
O'Conner, Patricia	411		KNGN	06-27-06	06-30-06	1	1/1	CC	

PMS - Cashiering

Basic functionality of Cashiering is to deal with Debits and Credits to Guest folios. Following are some of the features available:

1. Quick retrieval of guest folio
2. Posting charges for multiple departments directly to guest folio
3. Transferring charges from one folio to another
4. Track credit limits for each guest and report when a limit is exceeded
5. Posting payments against the balance in the folio
6. Splitting charges
7. Printing folio
8. Processing guest refunds

PMS - Cashiering



SHELL - Billing [Smith, Wesley Mr. - Room 115]

Balance	106.94	Arrival	06-26-06	Company		Rate Code	AAA1	USD Prs	1
Status	CHECKED IN	Depart	07-03-06	Group		Rate	40.50	Rm. Type	KNGN

(1) Smith, Wesley Mr. VS 106.94

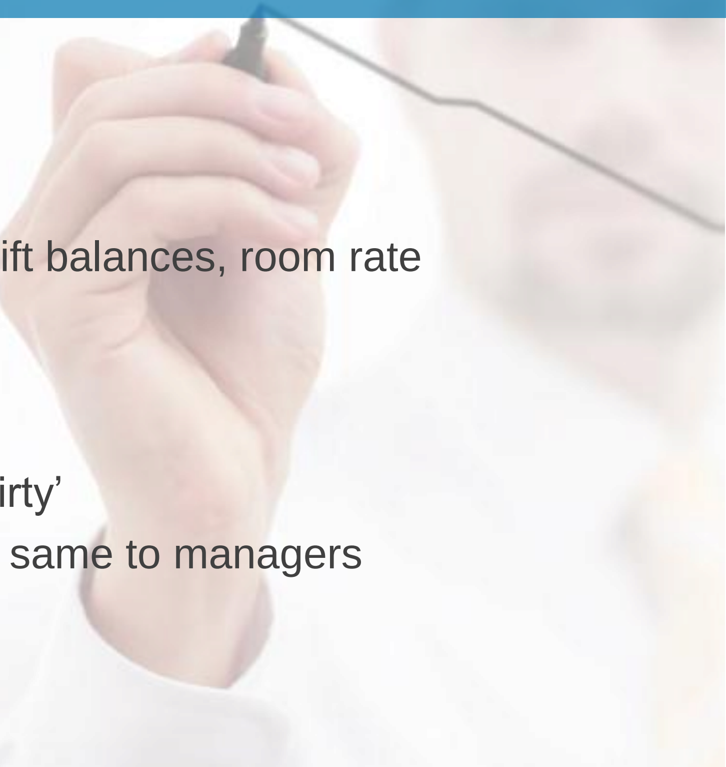
X	Date	Code	Description	Amount
	06-27	5010	Parking	10.00
	06-26	2004	Restaurant - Dinner 911	42.38
	06-26	5010	Parking	10.00
	06-26	+	Room and Tax Charges	44.56

(2) Smith, Wesley Mr. 0.00

X	Date	Code	Description	Amount

1
2
Smith, We
Select All
Post
Edit
Folio
Options
Payment
Settlement
Close

PMS - End of Day



Following are some of the EOD activities –

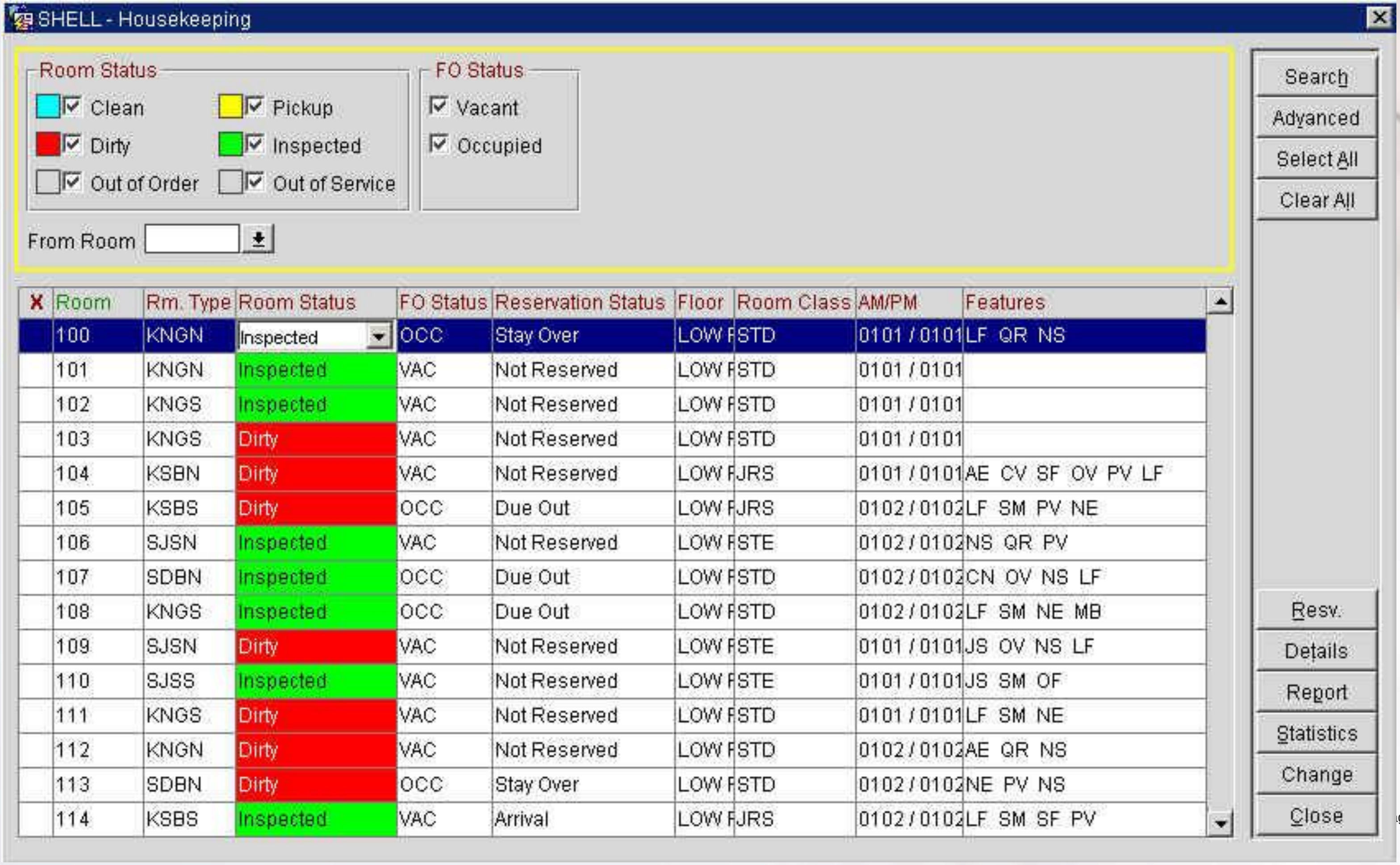
1. Perform shift close and generate reports highlighting shift balances, room rate discrepancies from Rack rate, etc…
2. Full data backup for days operations
3. Change of Business date in the system
4. Setting all occupied rooms to housekeeping status of ‘dirty’
5. Generate various operational reports and delivering the same to managers

PMS - House Keeping

Following are the areas covered under this –

1. Maintaining an employee database for house keeping activities
2. Scheduling house keeping staff based on projected occupancy
3. Creating multiple house keeping zones
4. Generating job assignment report based on job type or zone wise
5. Manual or Automated updates of Room status after cleaning
6. Viewing maintenance issues according to room number or date
7. Notifying staff of urgent issues needing urgent attention through integrated messaging system

PMS - House Keeping



SHELL - Housekeeping

Room Status
- 🟦 ☑ Clean
- 🟨 ☑ Pickup
- 🟥 ☑ Dirty
- 🟩 ☑ Inspected
- ☐ ☑ Out of Order
- ☐ ☑ Out of Service

FO Status
- ☑ Vacant
- ☑ Occupied

From Room

X	Room	Rm. Type	Room Status	FO Status	Reservation Status	Floor	Room Class	AM/PM	Features
	100	KNGN	Inspected	OCC	Stay Over	LOW F	STD	0101 / 0101	LF QR NS
	101	KNGN	Inspected	VAC	Not Reserved	LOW F	STD	0101 / 0101	
	102	KNGS	Inspected	VAC	Not Reserved	LOW F	STD	0101 / 0101	
	103	KNGS	Dirty	VAC	Not Reserved	LOW F	STD	0101 / 0101	
	104	KSBN	Dirty	VAC	Not Reserved	LOW F	JRS	0101 / 0101	AE CV SF OV PV LF
	105	KSBS	Dirty	OCC	Due Out	LOW F	JRS	0102 / 0102	LF SM PV NE
	106	SJSN	Inspected	VAC	Not Reserved	LOW F	STE	0102 / 0102	NS QR PV
	107	SDBN	Inspected	OCC	Due Out	LOW F	STD	0102 / 0102	CN OV NS LF
	108	KNGS	Inspected	OCC	Due Out	LOW F	STD	0102 / 0102	LF SM NE MB
	109	SJSN	Dirty	VAC	Not Reserved	LOW F	STE	0101 / 0101	JS OV NS LF
	110	SJSS	Inspected	VAC	Not Reserved	LOW F	STE	0101 / 0101	JS SM OF
	111	KNGS	Dirty	VAC	Not Reserved	LOW F	STD	0101 / 0101	LF SM NE
	112	KNGN	Dirty	VAC	Not Reserved	LOW F	STD	0102 / 0102	AE QR NS
	113	SDBN	Dirty	OCC	Stay Over	LOW F	STD	0102 / 0102	NE PV NS
	114	KSBS	Inspected	VAC	Arrival	LOW F	JRS	0102 / 0102	LF SM SF PV

PMS - Account Receivables/Payables

PMS helps in following ways:

- Accounts Receivable
  - Creating/Modifying AR accounts
  - Creating/Modifying AR Invoice
  - Apply Payment & Close Invoices

- Accounts Payables
  - Create & maintain vendor records
  - Schedule recurring payables
  - Produce Cash flow projections

PMS - Employee Management

PMS helps in following ways:

- Add/Edit users
- Assign Roles & Rights

PMS - Reports

PMS helps in following ways:

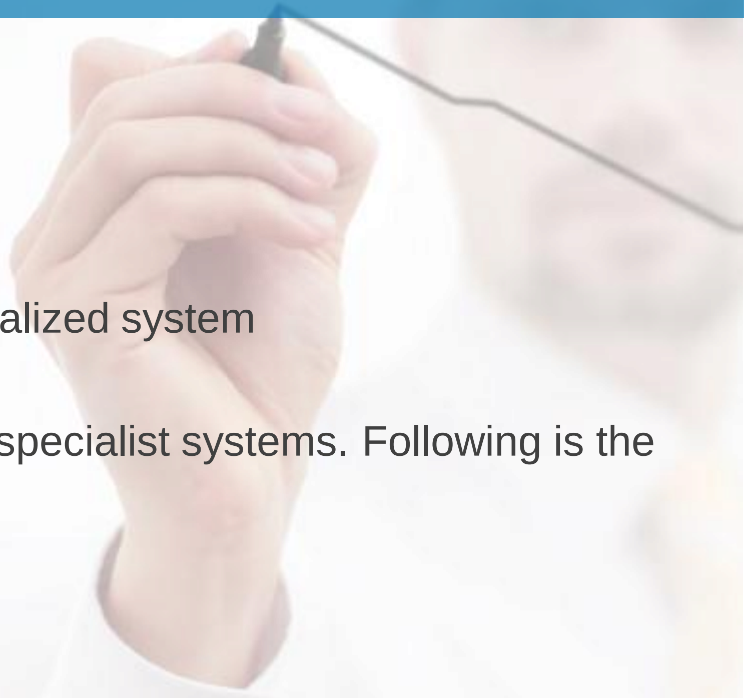
- Daily revenue reports
- Guest list by Name/Room Number
- Direct bill customer statement
- Housekeeping list & Work orders
- Occupancy sales forecast
- Month end report
- Arrival/Departure reports
- Travel agent statement
- Room occupancy report
- And many more

PMS - Marketing & Sales

PMS helps in following ways:

- Guest profiling
- Market code, source of business, reason for stay & tracking of guest reservations
- Sales and occupancy forecast information for viewing and printing
- Geographical source monitoring of guests
- Unlimited creation and tracking of package promotions
- Contacting customer via integrated email system for reservation confirmation, Campaign and Promotional offers as well as ad hoc requests for property information or online brochures links

PMS Interface’s



Why you need one ?

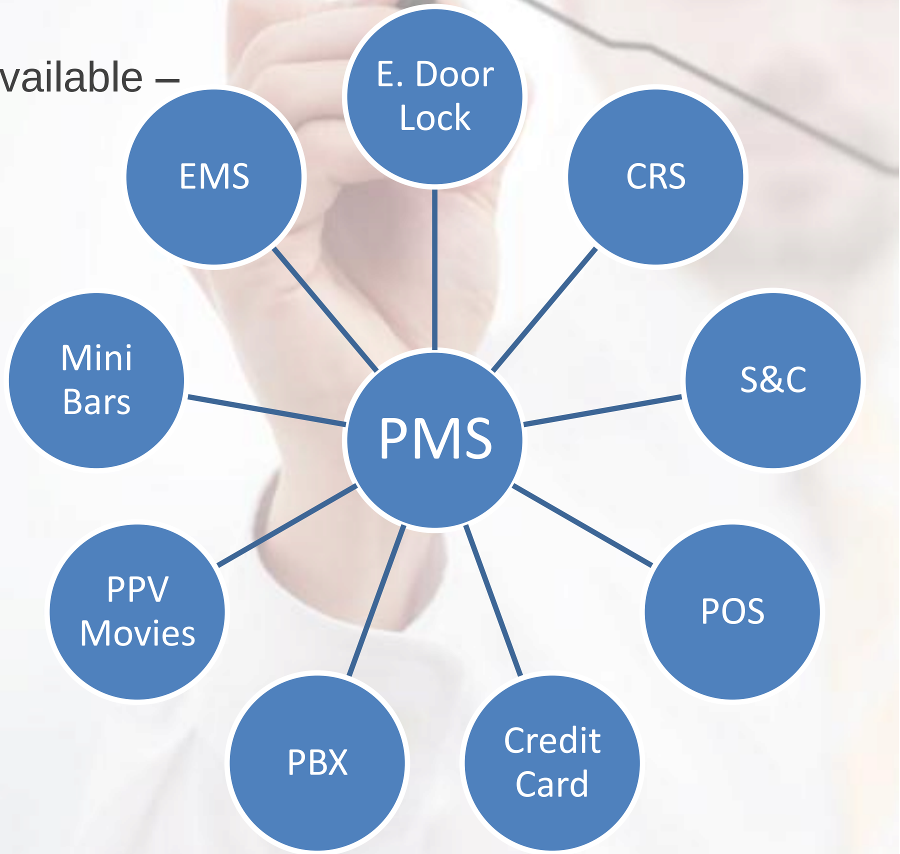
- No one system is likely to cover all areas
- Based on hotels and their operational focus need specialized system

PMS supports a range of interfaces with other 3rd party specialist systems. Following is the most common interfaces available –

PMS Interface’s

Following is the list of most common interfaces available –

- Central Reservation System (CRS)
- Sales & Catering (S&C)
- Point of Sale (POS)
- Credit Card (Payment Gateways)
- Call Accounting (PBX)
- PPV Movies
- Mini-Bar
- Energy Management System (EMS)
- Electronic Door Locks


E. Door Lock
EMS
CRS
Mini Bars
PMS
S&C
PPV Movies
POS
PBX
Credit Card

PMS Interface

Central Reservation System (CRS)

CRS is by far one of the most important interface of PMS. This allows real time exchange of information about Reservations, Availability, Rates & Inventory updates.

PMS may interface with one or more CRS's to tap potential of various distribution channels thereby trying to achieve near 100% occupancy rate.

Example: Sabre, Amadeus, Tourico, Expedia, Innlink, and many more…

PMS Interface

Sales & Catering (S&C)

S&C systems primarily deals with Group bookings for functions like Meeting, Wedding that involves not only Guest Rooms but functional rooms like hall, lawn, pool, etc… too.

PMS interface passes information about guest room availability to sales manager to give complete picture of property availability including functional rooms. At the same time it can also receive information about group blocks made in S&C system to establish a group master and folio in PMS.

PMS Interface

Point of Sale (POS)

POS is the place where a transaction occurs in exchange for goods or services. For e.g. Restaurant, Spa, Reception, etc…

PMS provides interface where it can receive and respond to requests from POS systems like –

1. Name of the guest registered in a specific Guest Room
2. Accepting POS charges against a Guest folio
3. Alerting POS cashier about any message in PMS for the guest
4. Letting guest check out from the hotel from POS terminal itself

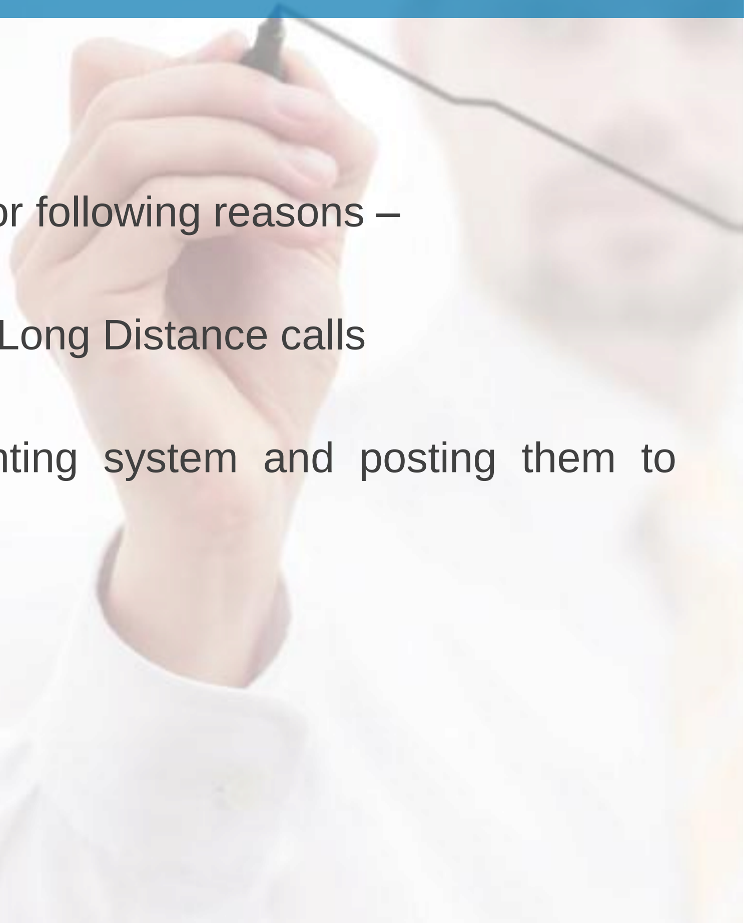
PMS Interface

Credit Card

Billing & Charging guests for various services provided is handled by PMS. For this PMS interface's with 3rd party payment gateways. Following is the list of tasks performed by PMS –

1. At check-in automatically dial to payment gateways to authorize appropriate funds for Guest's stay
2. During Guest's stay, if PMS credit limit is exceeded, it will automatically dial to increase the authorized amount
3. At check-out, PMS dials out to collect the funds due

PMS Interface



PBX & Call Accounting

PMS interfaces with PBX & Call Accounting systems for following reasons –

1. Unblocking guest room phone during Check-in for Long Distance calls
2. Blocking guest room phone during Check-out
3. Receiving phone call charges from Call accounting system and posting them to Guest’s folio

PMS Interface

PPV Movies

1. Receive charges from PPV movie management system to post to the guests folio
2. Receives & Responds to requests from PPV system to display guest’s folio on the guest room TV
3. Perform guest check-out actions entered into the PPV system by guest. This way guest don’t have to spend time at reception for completing check-out process.

PMS Interface

Mini-Bar

Most hotels use mini-bar systems in a stand alone mode, operated on the honor system and with guest usage monitored on daily basis by the staff. However, there are specialist providing mini-bars in connected mode where items removed by the guest from the bar is automatically and immediately charged to the guest folio through a PMS interface.

Following are typical information exchanged between PMS and Mini-bar systems –

1. During check-in so that mini-bar gets unlocked
2. During check-out so that mini-bar gets locked
3. Items removed from the bar and associated charge
4. List of items consumed during stay period

PMS Interface

Energy Management System (EMS)

This system helps hotel save energy and at the same time save money and be environment friendly. EMS systems use thermostats and Occupancy sensor to control the heating and cooling of the rooms and also turning lights off/on.

The change in settings is triggered by PMS sending a message to EMS when guests check-in so that EMS can activate various electrical devices in the guest room. Similarly, when check-out happens, PMS informs EMS about the same.

PMS Interface

Electronic Door Locks

Most of the hotels have replaced manual guest room locks with Electronic ones. This enables hotel to control the same from central location. Electronic Door lock system also has a key generator integrated with PMS.

At check-in PMS sends the room number and number of keys required to the lock key generator. Additionally, check-in & check-out time is also passed so that the keys generated are programmed to open the door between specified times.

Major Players

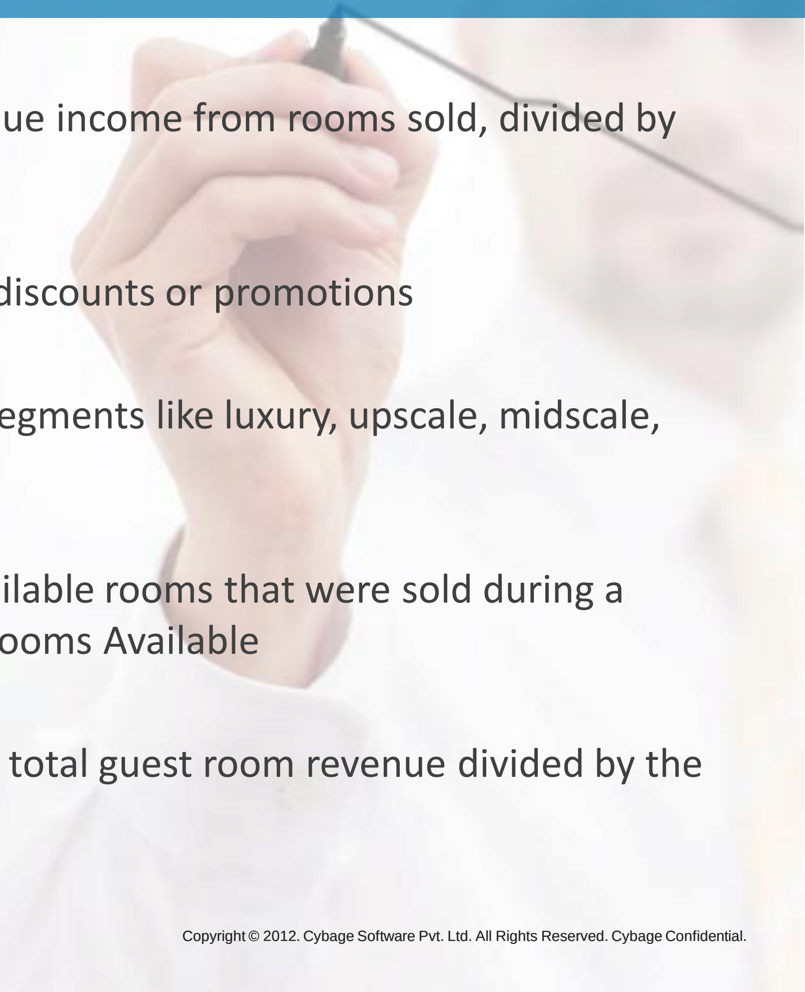
Desktop PMS

1. Opera – A desktop based Enterprise solution for any size hotels & chains from Micros.
2. Opera Express – A scaled down version targeted for small hotels.
3. Lodging Management System by Agilysys – enterprise solution for large hotels
4. WinPM & NiteVision – Targeted for small & mid-size properties from MSI
5. ResortSuite – Oracle based PMS that also provide add-ons like Spa, F&B, Golf, Concierge & Others.

Online PMS

1. WebRezPro – Cloud based PMS
2. Hotelogix – Another cloud based PMS whose primary market is budget & mid-size hotels.
3. Buildium – This is an online property management system managing over lakhs of properties

Key Terminologies



- **Average Daily Rate (ADR)** - The ADR is the total revenue income from rooms sold, divided by the number of rooms
- **Rack Rate** – The list price of a hotel room before any discounts or promotions
- **Market Segment** - Hotels targeting different market segments like luxury, upscale, midscale, economy & independent
- **Occupancy Rate** - Occupancy is the percentage of available rooms that were sold during a specified period of time. Occupancy = Rooms Sold / Rooms Available
- **RevPAR (revenue per available room)** - RevPAR is the total guest room revenue divided by the total number of available rooms

Questions

Thank you!