

# Helen Pastras Product Process

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Sample of managing the project, tickets, and the process from inception to product delivery.

## Goals

- Simplify user experience for viewing information on an existing reservation.
- Simplify user experience in editing all or some information in an existing reservation.





## Background and strategic fit

This feature is part of a larger project to improve usability throughout the system to increase retention and drive new sales. The reservations module is specifically important because it is the most widely used section within the product.

## Assumptions

- Primary features of this screen must be responsive for all devices.
- User has entitlements for Reservations View and Update.

## Requirements

#	Title	User Story	Importance	Notes
1	Opening an Existing reservation  NG-195 TO DO	User can open an existing reservation from the below: <ul style="list-style-type: none"><li>• Tape Chart</li><li>• Reservation List</li></ul>	Must Have	Today reservation list also includes list of reservations in Guest history, accounts and groups. Page used for this is the advanced search page with the account associated.
2	View existing Reservation  NG-196 DONE	User should be able to view the below reservations details: <ul style="list-style-type: none"><li>• Guest Name ( prefix. First Name, last name)</li><li>• Contact number</li><li>• Reservation status.</li><li>• Reservation#</li><li>• Primary Action Button with Drop for status change</li></ul>	Must have	
3	Existing Reservation Summary/Quick Actions  NG-220 TO DO  NG-229 - Status Change on Reservation Title Line TO DO	User should be able to see the following first on the reservation: <ul style="list-style-type: none"><li>• Guest name</li><li>• Res number</li><li>• Res status- editable</li><li>• Primary action button</li></ul>	Must have	



Confluence product project  
page for reservations

This is part of the confluence page

any actions.

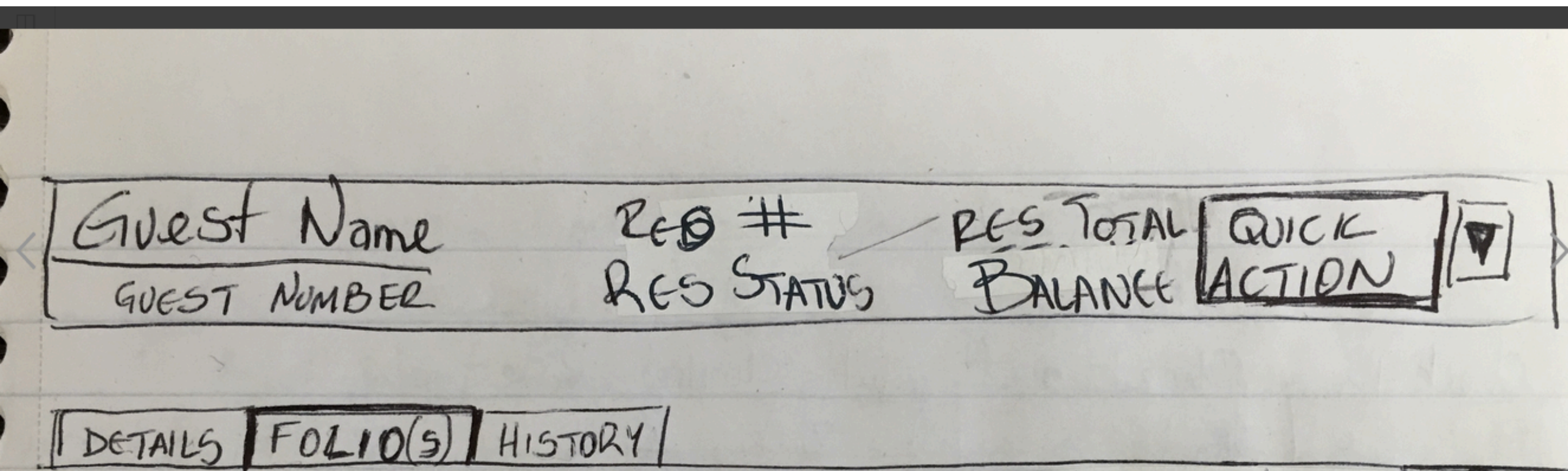
The information on this page should allow a user to view all information about the reservation. Editing each section will be covered in separate stories.

Acceptance Criteria:

1. Create the reservation view screen as seen in the following prototype (<https://invis.io/8Y4X9TT4J>), which includes several sections as listed below.
2. Reservation Summary Title Line:
  - Guest name
  - Phone Number
  - Reservation Number
  - Reservation Status
  - Reservation Balance
  - Primary Action Button (Check in/out)
3. Notes Banner:
  - If any of the tasks in the reservations are due or overdue, they will appear here for the user to notice them and take action.  
This will be completed in  NG-221 
4. Stay Info: Displays the following stay details for the reservation
  - Property name
  - Arrive
  - Depart
  - Nights
  - Adults and children
  - Room class (with Split indicator)
  - Room #
  - Rate plan and promo code
5. Add-Ons & Incidentals: Displays the add-ons and incidentals that have been added to the reservation including the following fields:
  - Date
  - Category
  - Description
  - Amount
  - Tax
  - Total = Amount + Tax
  - TOTAL = sum that shows totals for amount, tax and total.

## Jira ticket for reservations

Portion of ticket for view of existing reservations with all the required info to be displayed.



Initial draft of visualization  
of new reservations page

This was followed by several white board  
sessions and more sketches before we  
got to wire framing, prototyping and style  
guides.



User: [helen](#)
[Home](#)
[Logout](#)

[Reservations](#)
[Tape Chart](#)
[New Quote](#)
[Guest History](#)
[Groups](#)

[Admin](#)

# Reservation Detail

[Print](#)
[Email](#)
[Help](#)

Summary
Guest Info
Folio

Reservation #: 6627737

Stay Info

Guest Name: helen test
Account:
Arrive: Sat, 04-Jun-2016 - 1 Night(s)
Depart: Sun, 05-Jun-2016 [+](#)
Adults: 1
Children: 0

Reservation Status: Reserved
Group: ☐
Property: InnroadTest2
Room(s): [Link](#) [More](#) Double Bed Room : VRC 1
Folio Balance: \$ 10.63 (Total: \$10.63)

## Folio Summary:

	Room Charges	Incidentals	Taxes & Service Charges	Total Charges	Payments	Balance
Entire Stay	\$ 10.00	\$ 0.00	\$ 0.63	\$ 10.63	\$ 0.00	\$ 10.63
Daily	\$ 10.00	\$ 0.00	\$ 0.63	\$ 10.63		

## Marketing Information:

Rate Plan: Rack Rate
Market Segment:
Travel Agent:
Source: innCenter

Promo Code:
Referral: Walk In
Ext Res #:
Sub-Source:

## Contact Information:

Contact Name: helen test
Phone: ext:
Alternate Phone: ext:

Account:
Fax: ext:
Email:

Old reservations view

This is the original system as it was when I started and still in use by several clients.

## Style Guide

## In product

**innRoad** Frontdesk Guest Service... Setup Night Audit Reports Accounts Inventory Admin innRoad

Quick Cancel Quick No Show Generate Keys Tax1 Tax2 Tax3 Take Payment Folio Payment Export & Print Email

Mr. David DeAngelo  
RESERVED - 4932437  
631-458-020  
david.deangelo@innroad.com

RES TOTAL \$5059.00  
BALANCE \$100.00  
CHECK IN

Notes Banner Text Comes Here.

Enter a cc in the payment method.

COPY MARKUP

Details Follow History

COPY MARKUP

**STAY INFO**

Wed, 03 Oct 2015 → Wed, 08 Oct 2015  
Lakewood Inn Double City View View  
3 Adults, 0 Child, 5 Nights  
RATE PLAN: Manual Override ROOM: 123

Check-in: [calendar icon] [input field]  
Check-out: [calendar icon] [input field]  
Adults: 1 Children: 1 Rate Plan / Promo: [dropdown]  
FIND ROOM

SPLIT ROOMS + No rate Change Change only for added/removed dates Recalculate rate

**RESERVATION SUMMARY**

Room	\$0.00
Add Ons	\$140.00
Taxes and Services Fee	\$0.00
Discount	\$0.00
Trip Total	\$0.00
Total	\$0.00

APPLY DISCOUNT  
TAKE PAYMENT  
GENERATE KEYS

**RAVE RATE**

RAVE RATE	AVAILABLE	TOTAL	ROOM NUMBER
Double City View \$300 per night	2 rooms left	\$900	1
Double City View \$300 per night	8 rooms left	\$700	1
Double City View \$300 per night 4 night minimum stay	0 rooms left	\$500	1

SELECT  
SELECT  
SELECT

**ADD-ONS & INCIDENTALS**

DATE	CATEGORY	DESCRIPTION	AMOUNT	TAX	TOTAL AMOUNT
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**innRoad** Reservations Accounts Guest Services Inventory Setup Admin Night Audit Reports innRoad

Reservations Tape Chart New Quote Guest History Groups John Smith

Mr. John Smith  
Res No 5537308  
Status In-House  
Res Total \$46.00  
Balance \$4.00  
CHECK IN

Enter a cc in the payment method.

Notes Banner Text Comes Here.

Details Follow History

**STAY INFO**

Wed, 03 Oct 2015 → Wed, 08 Oct 2015  
Lakewood Inn Double City View View  
3 Adults, 0 Child, 5 Nights  
RATE PLAN: Manual Override ROOM: 123

Check-in: [calendar icon] [input field]  
Check-out: [calendar icon] [input field]  
Adults: 1 Children: 1 Rate Plan / Promo: [dropdown]  
FIND ROOM

SPLIT ROOMS + No rate Change Change only for added/removed dates Recalculate rate

**RAVE RATE**

RAVE RATE	AVAILABLE	TOTAL	ROOM NUMBER
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Double City View \$300 per night 4 night minimum stay	0 rooms left	\$500	1

SELECT  
SELECT  
SELECT

**GUEST INFO**

Mr. David DeAngelo  
david.deangelo@innroad.com  
PHONE: 631-458-020 FAX: 631-458-060  
361 West 25th Street 12th Floor  
New York, NY 10001

**ADDITIONAL GUEST**

Mr. David DeAngelo david.deangelo@innroad.com PHONE: 631-458-020  
Mr. David DeAngelo david.deangelo@innroad.com PHONE: 631-458-020

Use Updated status header UI

Use same padding and icon like in style guide

use same edit icon

adult-child icon missing

use same plus icon

icons and label are not aligned properly

calendar icon vertical alignment missing

use same close icon

use same plus icon and alignment

Select button height should be work with out image also

This section will come after add-ons & Incidentals

Working with front end engineer

In-ticket work with designer and front end engineer during development to get the product ready for QA, UAT and then delivery.

Reservations
Tape Chart
Guest History
Groups
John Doe x
Vania Viegas x
Helen Pastras x
David DeAngelo x
Mohan Naik x

David DeAngelo  
631-458-0201

Res No  
4932437

Status  
Reserved

Res Total  
\$1051.00

Balance  
\$100.00

CHECK IN

Notes Banners Text Comes Here

Details
Folio(s)
History

STAY INFO

Wed, 06 Oct'2015 → Wed, 07 Oct'2015

2 Adult(s), 1 Child, 1 Nights,

Lakewood Inn Double City View,  
RATE PLAN: Manual Override ROOM: 123

ADD-ONS & INCIDENTALS

DATE	CATEGORY	DESCRIPTION	AMOUNT	TAX	TOTAL AMOUNT	
Thu, 06 Oct'2015	Package	Say Cheese (8)	\$80.00	\$3.00	\$83.00	✗
Fri, 07 Oct'2015	Bar	Unwind (2)	\$60.00	\$8.00	\$68.00	✗
<div>ADD-ONS +</div> <div>INCIDENTALS +</div>			Total	\$11.00	\$151.00	

GUEST INFO

Mr. David DeAngelo  
david.deangelo@innroad.com  
PHONE 631-458-020 FAX 631-458-060

261 West 35th Street 12th Floor  
New York, NY 10001

ADDITIONAL GUESTS

Mrs. Helen Pastras  
<helen.pastras@innroad.com>

PHONE 631-458-040

Ms. Vania Viegas  
<vania.viegas@innroad.com>

PHONE 631-458-040

RESERVATION SUMMARY

Room  
Add Ons

\$900.00  
\$140.00

+ Taxes and service fee  
- Discounts

\$11.00  
\$100.00

Trip Total  
Due Now

\$1051.00  
\$100.00

APPLY DISCOUNT

TAKE PAYMENT

# New Reservations

This is the finalized version, part of it is completed, while some features, like discounts and other tabs within the reservations are currently in development with sample data.