



The Concierge Assistant Software

User Manual

1st Edition
Agoura Hills, California 2004

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Introduction

The Concierge Assistant has been in use for many years at high-end Hotels, Clubs and Apartment Buildings. They use it on their daily operation.

The software has been developed with members and officers of the Les Clefs d'Or organization. In addition to the Concierge profession, our product can be and is used by guest services staffs, VIP departments and personal or vacation planners.

Our product is a software solution that enhances the level of service and improves operating efficiencies. The Concierge Assistant enables you to spend more time interacting with your customers and focus less on the time-consuming paperwork. You are able to better anticipate the needs of your customers by having information that is easily accessible and well organized.

Here are just some of the wonderful features:

- A database with a powerful search engine for all contacts, events and log book entries
- Customized confirmations, itineraries and authorization forms for all your customers.
- Personalized list of current events, shopping, restaurants and city activities that you can present to the guests
- Digital logbook for all interaction with your customers with a color-coded alarm.
- Notification of pending items for further action
- Tracking of rented or loaned items.

Features and Functions

Contacts

- Robust search engine to add or locate all vendors and contacts quickly by name, address or keyword then sort by proximity, rank, rating or keyword
- Save linked documents or the website address on every data entry panel to eliminate notebooks full of information
- Lists of guests' most requested items (church schedules, restaurants, kids activities) available for print and/or email

Events

- Keep event information in a database that all concierge can access
- Link website address for easy access and up-to-the-minute information on the event
- Print event listings for the week, or personalized for the specific dates when the guest will be in the hotel
- Print event schedules to fax or email to a guest prior to arrival, or have on hand and available to all guests

Logbook

- Email capabilities for itineraries, confirmations and miscellaneous charge forms and with the option to include an attachable "Guest List" or two
- Provide personalized and professional customized confirmations and itineraries that can be presented to your guest in up to 6 different languages
- Access all guest information by entering just a few letters
- Color coding feature for incomplete items to avoid anything "falling through the cracks"
- Archive all past requests/reservations for very easy accessibility on returning guests
- Management reports and graphs
- Ability to convert all logbook and contact information into a Word document to personalize for the guests

Messaging Center

- Improve communication between shifts, concierge, and departments
- Added benefits of a personal diary for each staff member to save important messages until no longer needed
- Trace file for all logbook, event and contact entries to ensure accountability
- Ability to "Forward" messages
- "Pass On" messaging

Other

- Track revenue and items that are rented or loaned to your guests
- Hyperlinks to all of your dynamic information
- Every entry is date, time and initial stamped by the person who has performed the task
- Profile repeat guests to anticipate their needs
- Extract and Export information for marketing and management strategies e.g. future events for your property

Administration

- Full control of your database, keywords, events, logbook categories, fonts, margins, etc to suit your specific needs
- Various levels of individual access and functionality determined by the administrator
- Excellent service and support
- Exports to Word and Excel and interfaces with MapPoint
- On-line tutorial

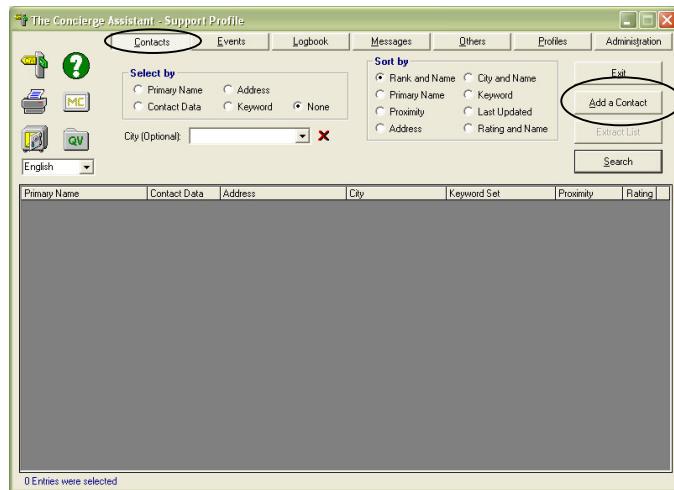
Contacts

Creating your database and customizing a Contact

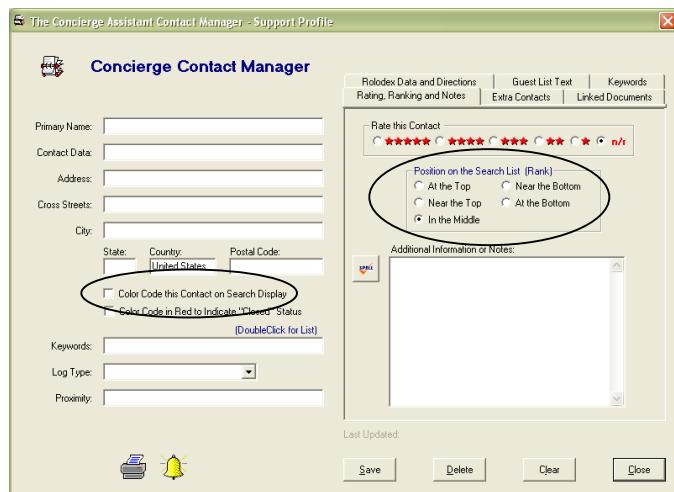
You can customize your favorite Contacts to display in a different color and different order in your searches as well as to print in your guest lists. To do so, follow these steps:

Step 1

From your “Contacts” screen select the “Add a Contact”.

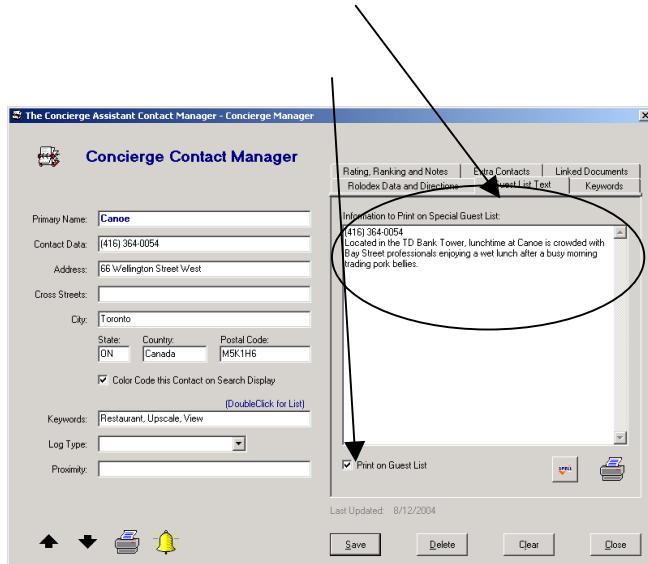


You will see the screen below, fill out the details for the contact (“Contact Data” is the phone number). Select “Color Code this Contact on Search Display” and the position on the search list “at the top” if this is a frequent contact.



Step 2

Select the “Guest List Text” tab and type the information you would like to print for the guest and check mark “Print on Guest List”



Step 3

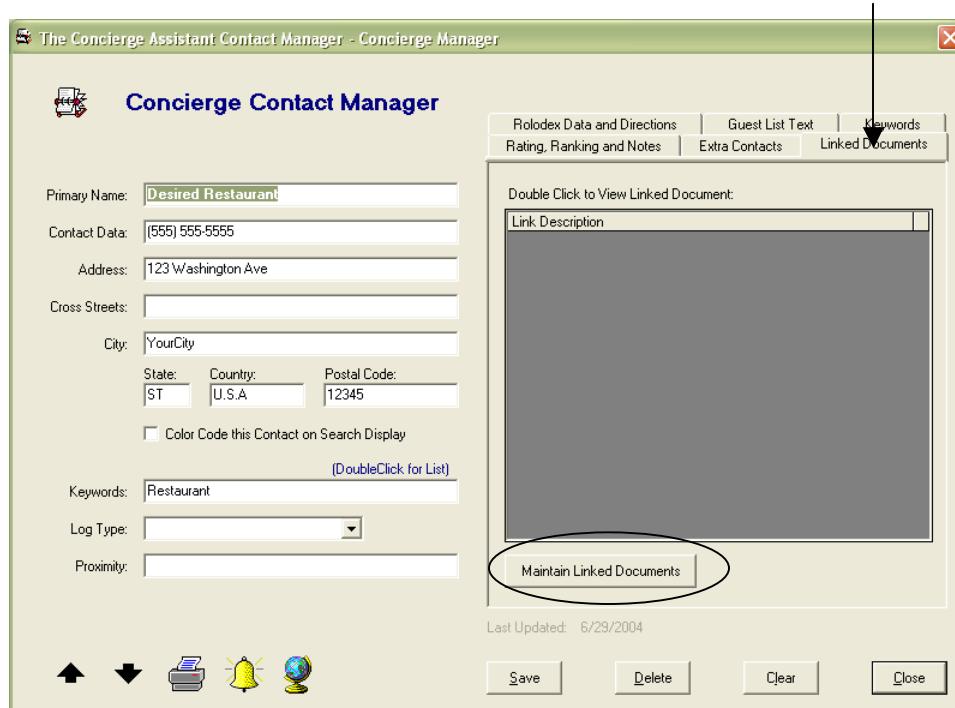
Select the “Keywords” tab and click in the desired keywords you would like group this contact by clicking you will see a check mark next to the keyword.



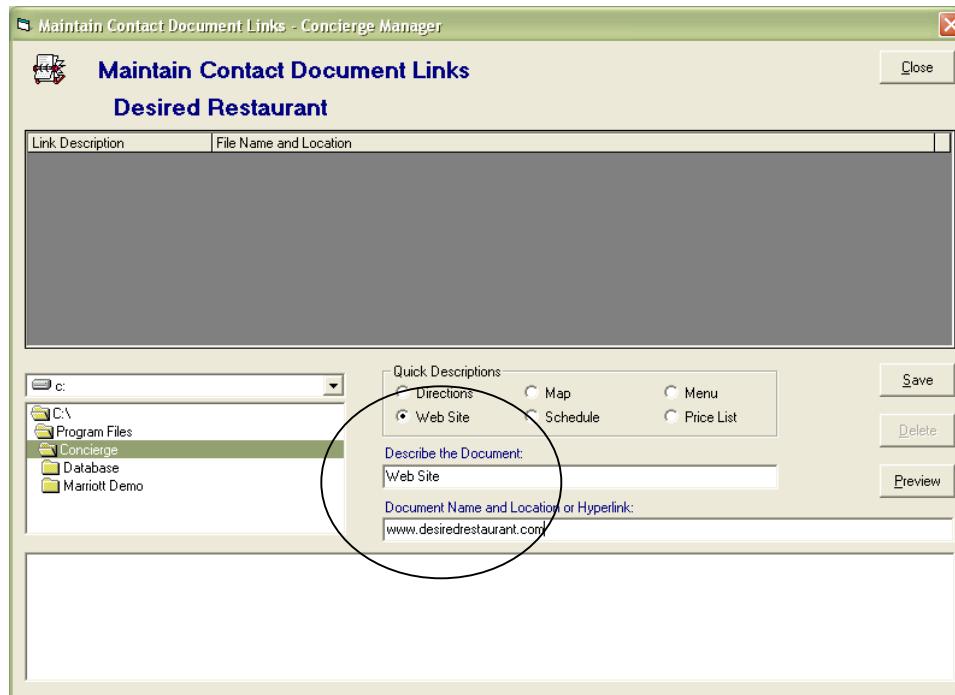
Click Save and Close. You are now ready to look up the information you typed.

Linking Websites and Documents to a Contact

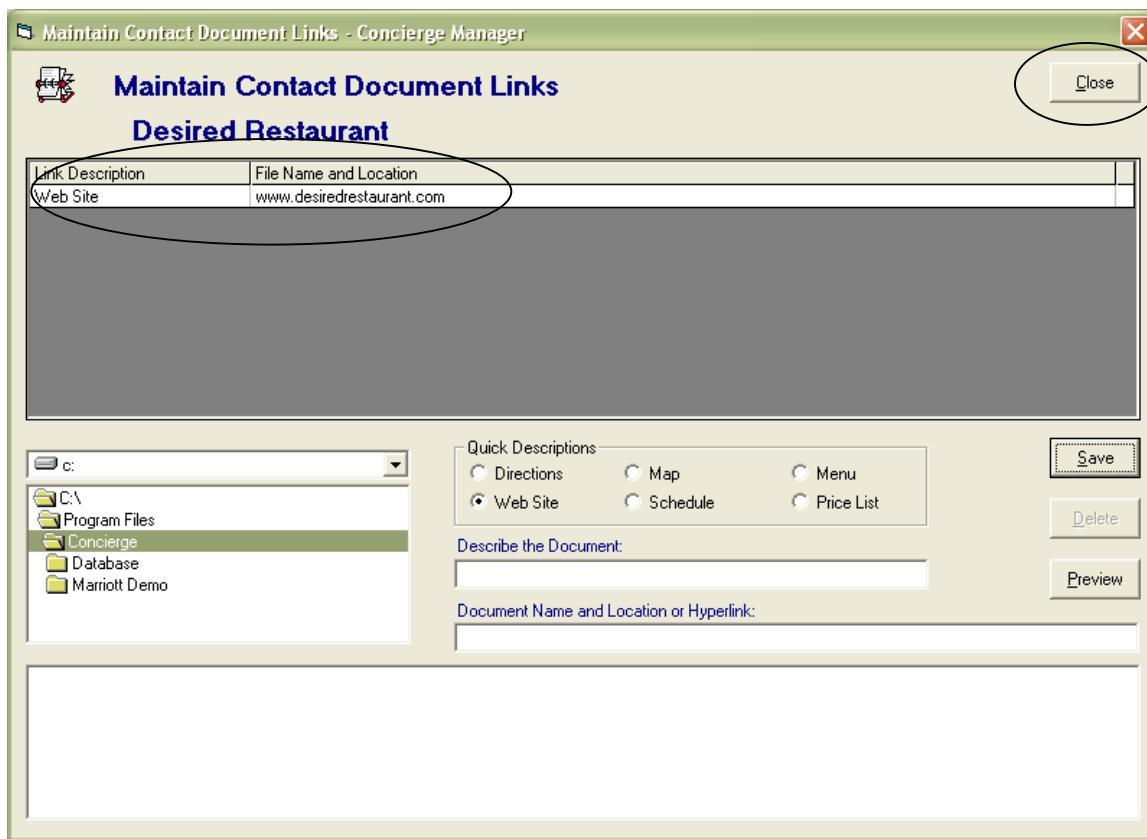
Open the desired Contact and click on the “Linked Documents” tab on the right, select “Maintain linked documents”



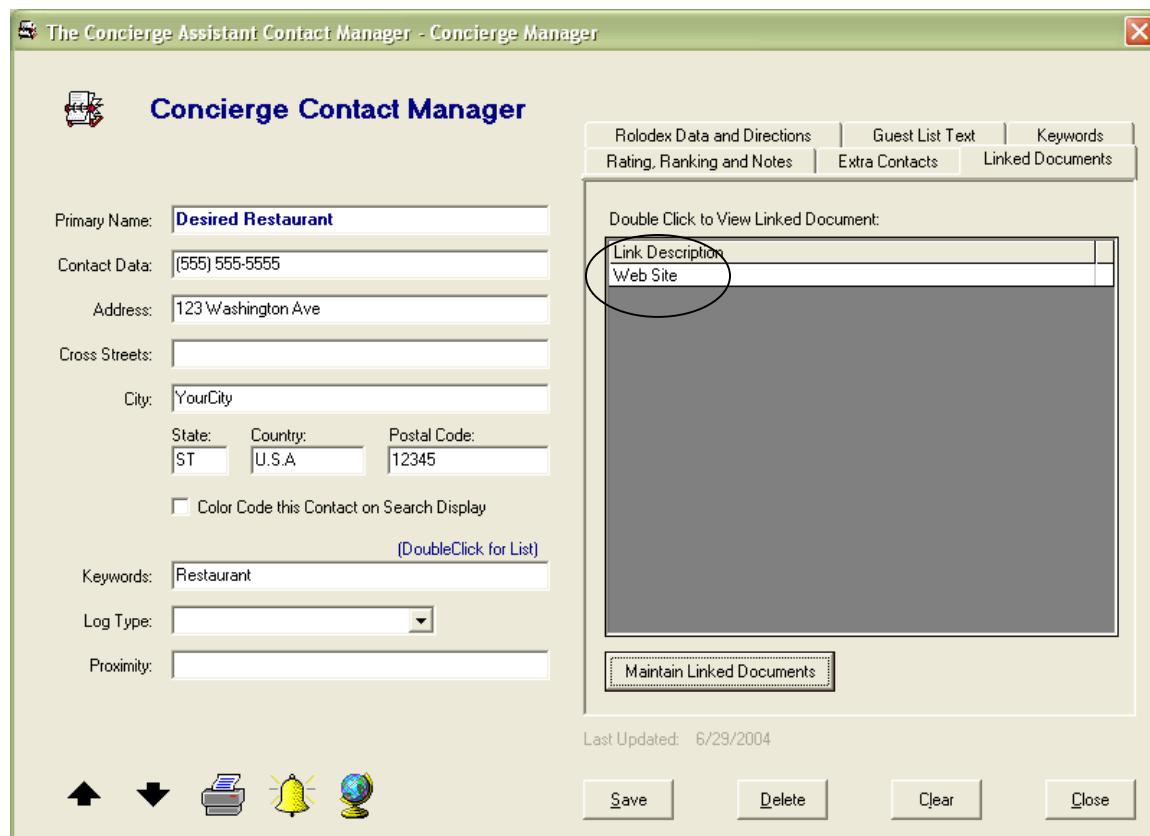
You will see the below screen, select the type of information you want to link and the location.



Click Save and you will see the link description on the screen, link as many documents or websites as needed, when finish click “close”



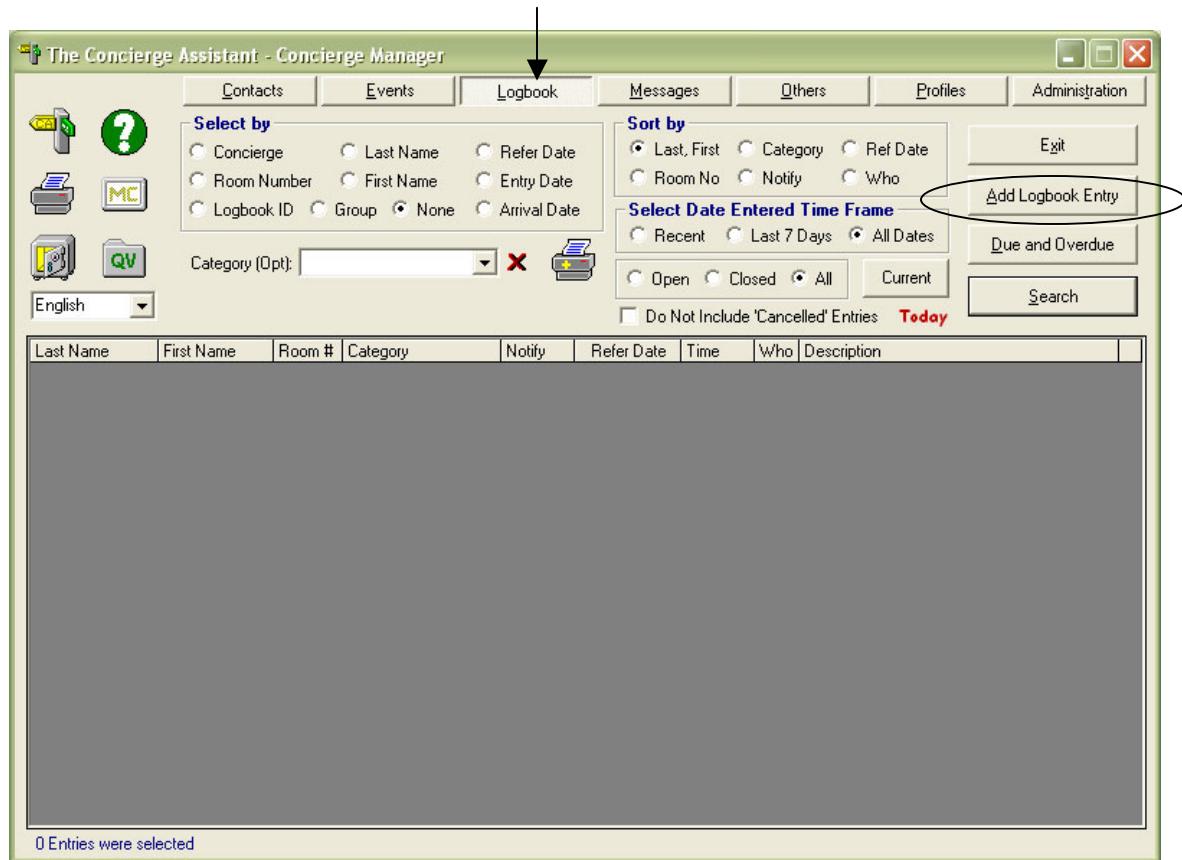
To go to the linked documents just simply double click on the link.



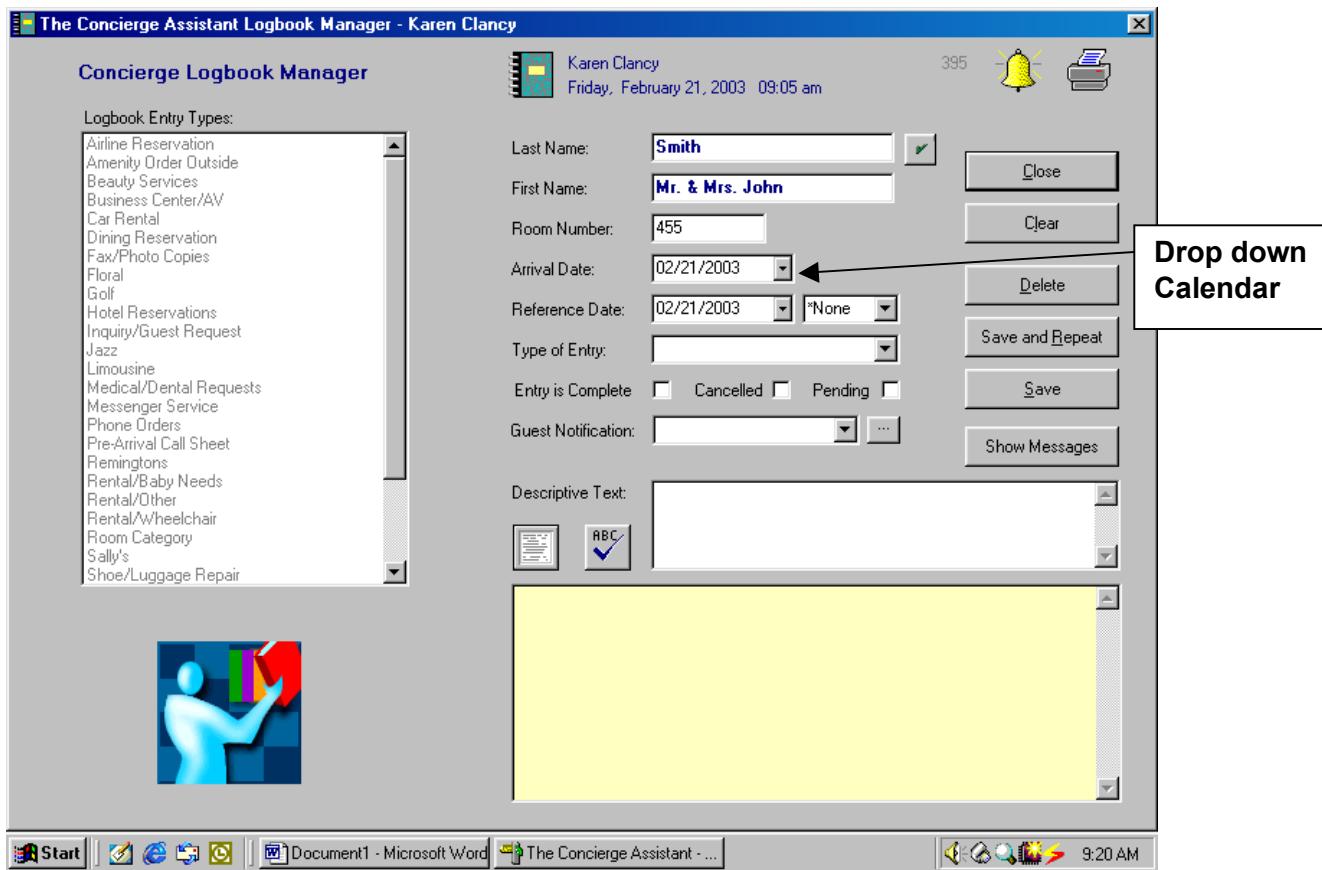
Logbook

Adding a Logbook Entry

From the Logbook screen click on “Add Logbook Entry”



Fill out fields as Shown



“Arrival Date” is the date the guest will be arriving in the hotel. Please use the drop down calendar to eliminate any errors.

“Reference Date” is the date the guest wants the reservation for. Please use the drop down calendar to eliminate any errors.

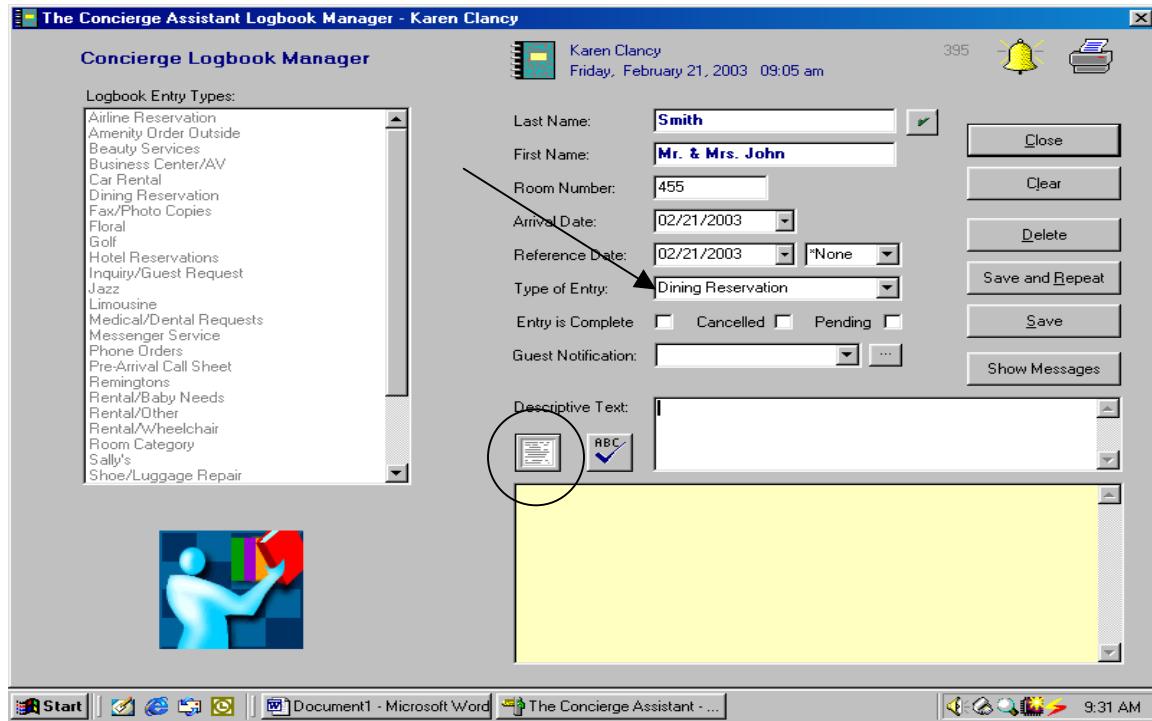
The *none box is only used for sequencing itinerary items please see page () for explanation.

The best way to navigate through the system is to use the tab key, if you use the enter key it is going to take you back to the beginning of the entry. But, you can always use your mouse also.

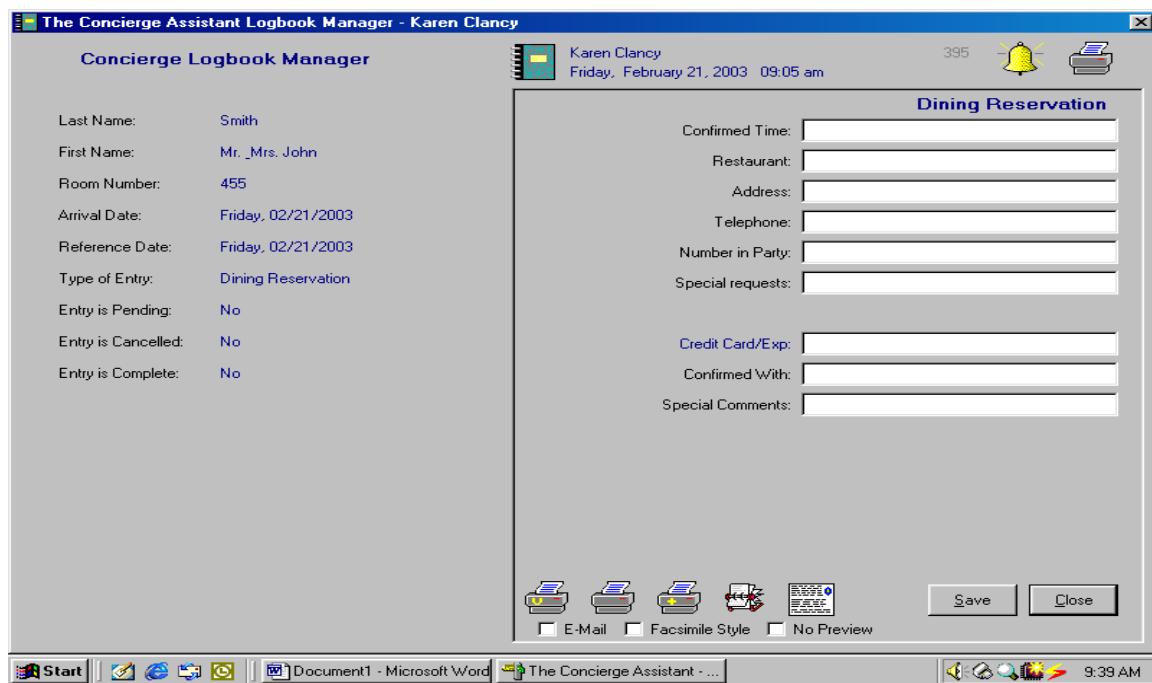
Type of Entry is going to tell the computer which kind of reservation you are going to be making for the guest, i.e. Dining Reservation.

There are 3 ways to obtain Logbook entry types 1. Start typing and the computer will automatically recognize the entry. 2. Use your drop down menu and click on to the type of entry. 3. In the large box to the right double click on the appropriate entry and it will shoot over to the right.

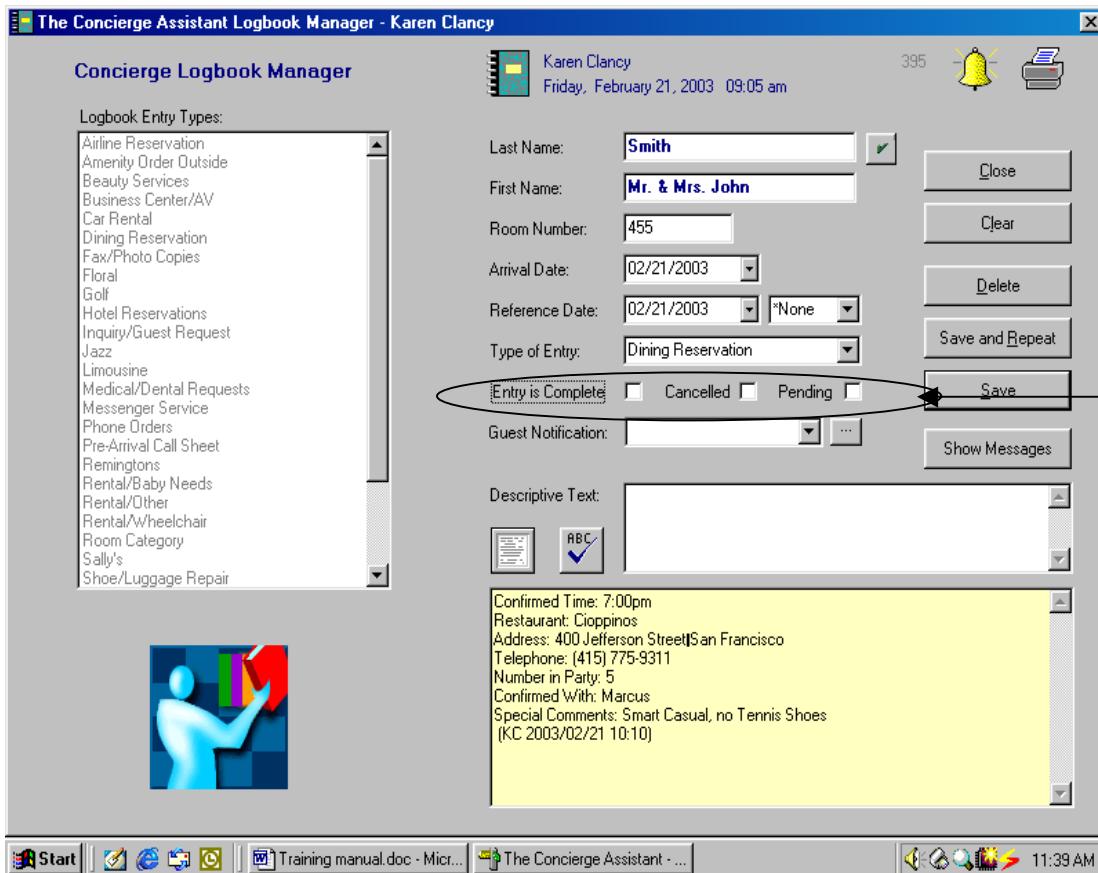
In the Logbook entry, from the “Type of Entry” field tab four Times or single click in the form icon to bring up the next window (data entry panel).



Fill out the entry panel information in the “Data entry panel”. Click Save and Close



Status of the Entry:



If none of the three boxes are checked the entry will appear in **Red**

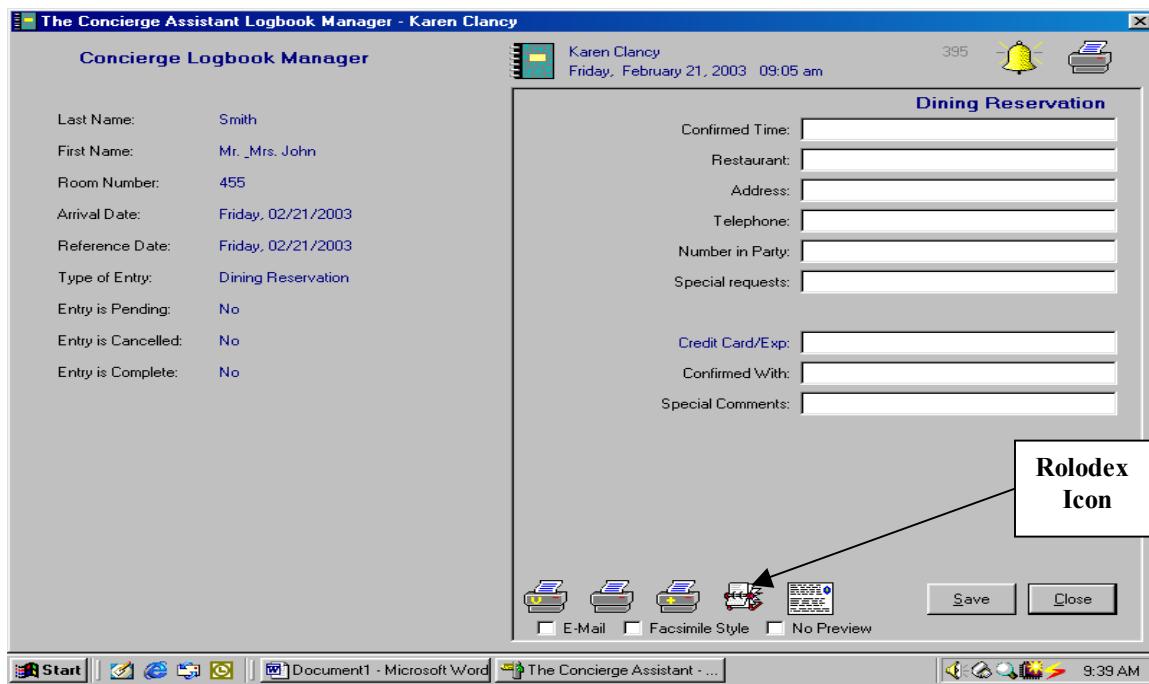
If the Entry is Complete box is checked the entry will appear in **Black**

If the entry is marked Canceled the entry will appear in **Grey** with a CXL by the guest's last name.

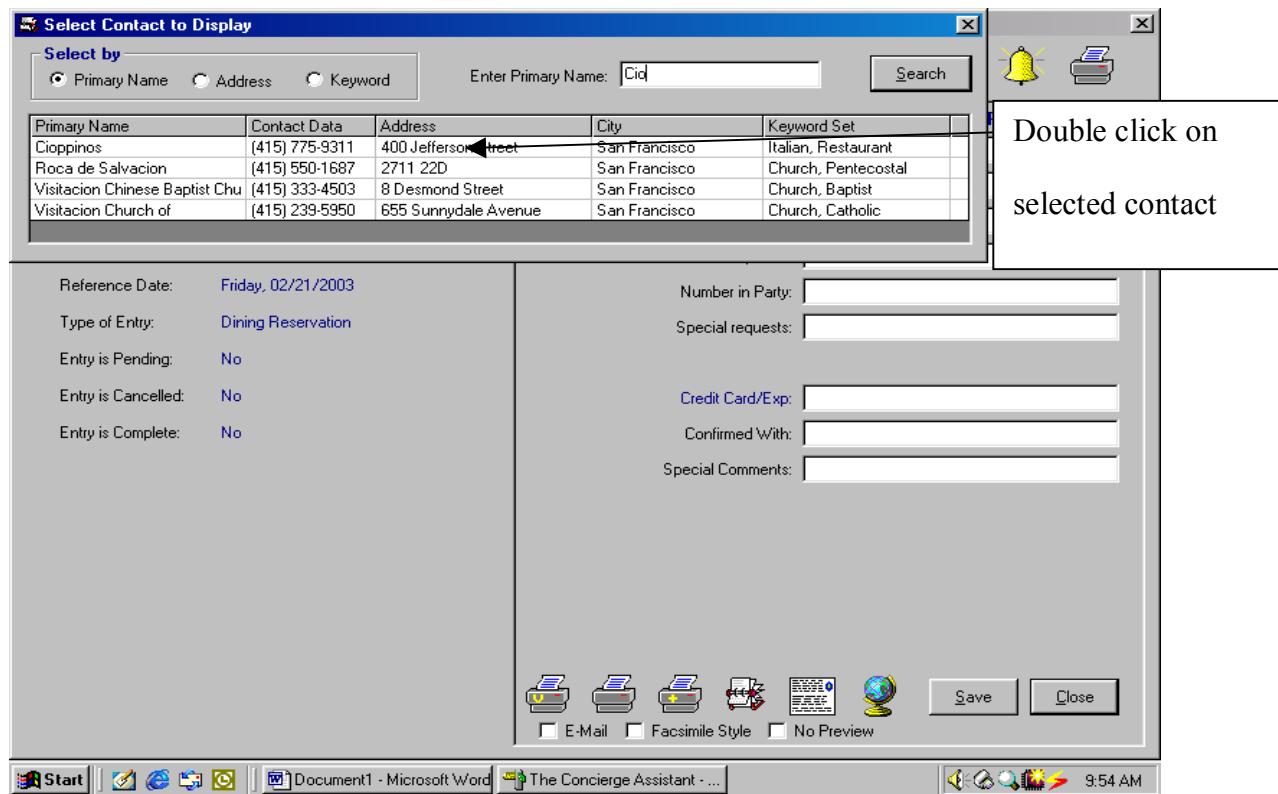
If the entry is marked Pending the entry will appear in **Blue/Green** (depending on your properties preference) Please notice all four colors for the status on the reservation.

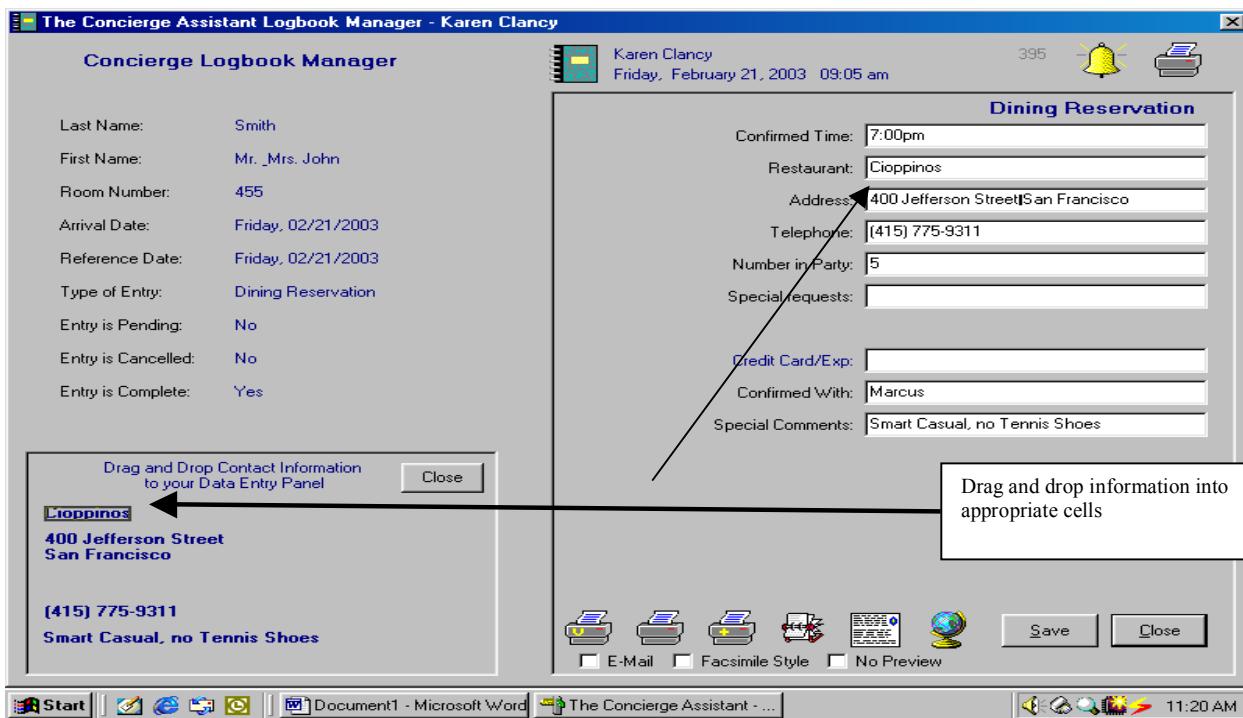
Click save and close.

Finding Contacts from a Logbook Entry



Rolodex to use the rolodex to look up a contact double click on the rolodex icon.





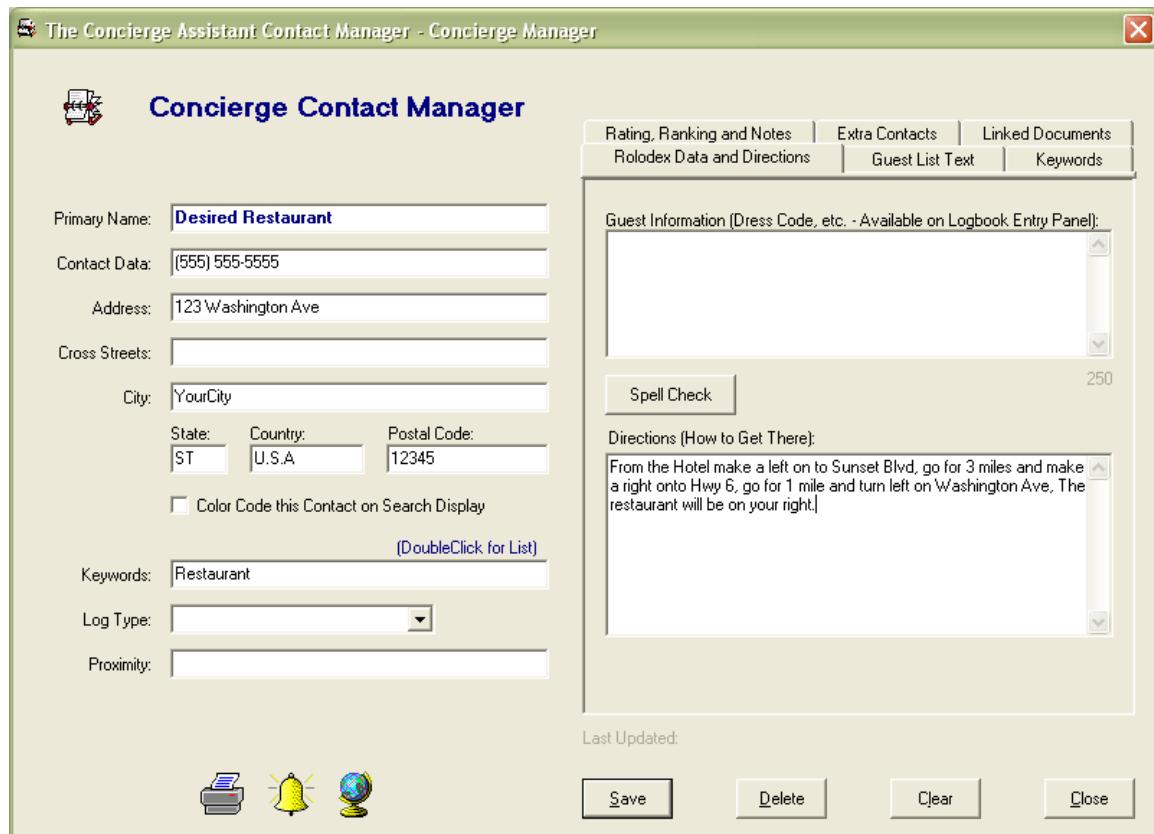
- **Drag and Drop** Name of restaurant, address, phone number and any other pertinent information. (*This can be done by clicking on the restaurant name, holding the button down and dragging the mouse over to the desired area and releasing the mouse button*)
- **Automatic Populated fields** There is an automatic option to self-populate desired fields (See Linking Elements from Contacts to Logbook)
- **Click save** and it will bring you back to the main screen where you first entered the guest's first and last name.

| Last Name | First Name | Room Number | Category | Notify | Refer Date | Who | Description |
|-------------|-----------------|-------------|--------------------|--------|------------|-----|---|
| Smith | Mr. & Mrs. John | 455 | Dining Reservation | | 02/22/2003 | KC | Confirmed Time: 8:00pm Restaurant: Paradise F |
| Smith | Mr. & Mrs. John | 455 | Dining Reservation | | 02/21/2003 | KC | Confirmed Time: 7:00pm Restaurant: Cioppinos |
| Smith | Mr. & Mrs. John | 455 | Limousine | | 02/24/2003 | KC | Time: 4:00pm Type of vehicle/No of people: Sedan |
| Smith (CXL) | Mr. & Mrs. John | 455 | Dining Reservation | | 02/23/2003 | KC | Confirmed Time: 8:00pm Restaurant: Maggie's E |

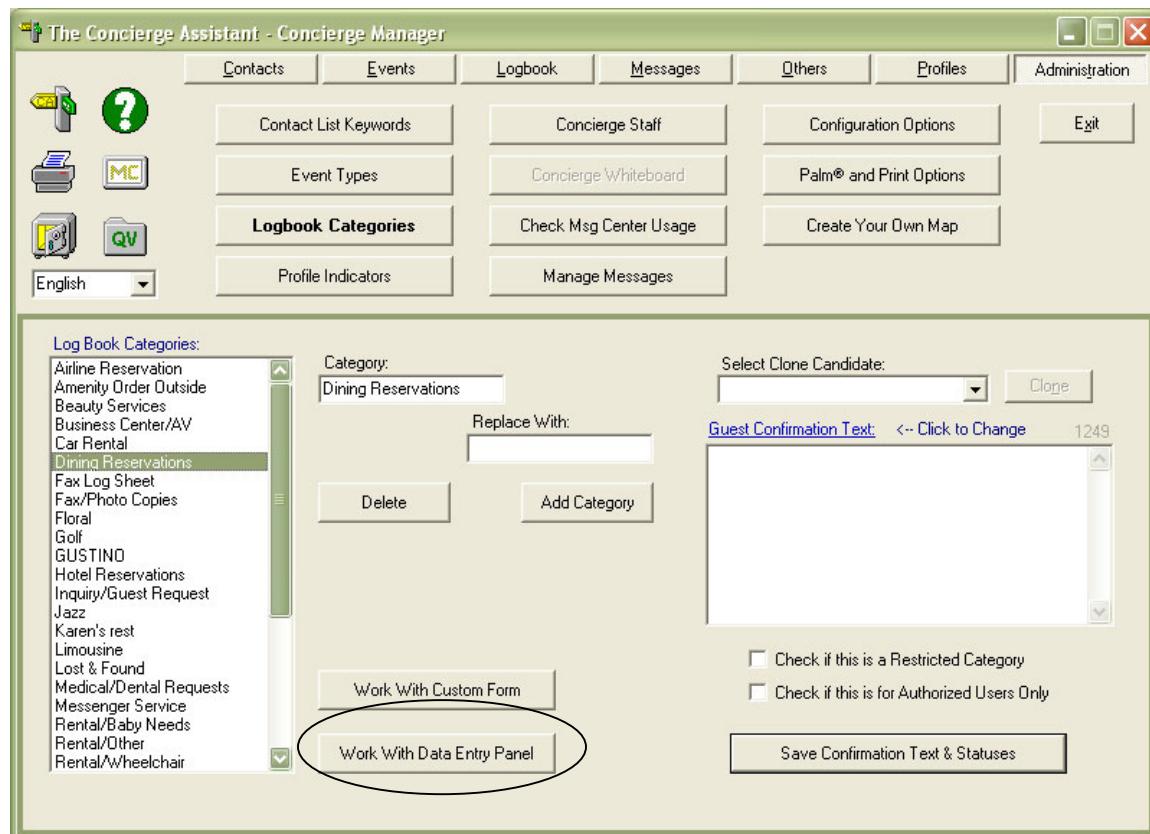
4 Entries were selected

Linking Elements from Contacts to Logbook

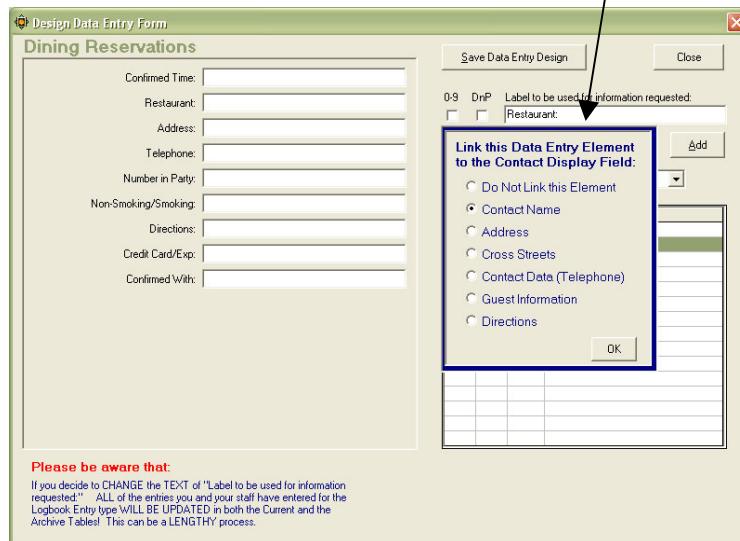
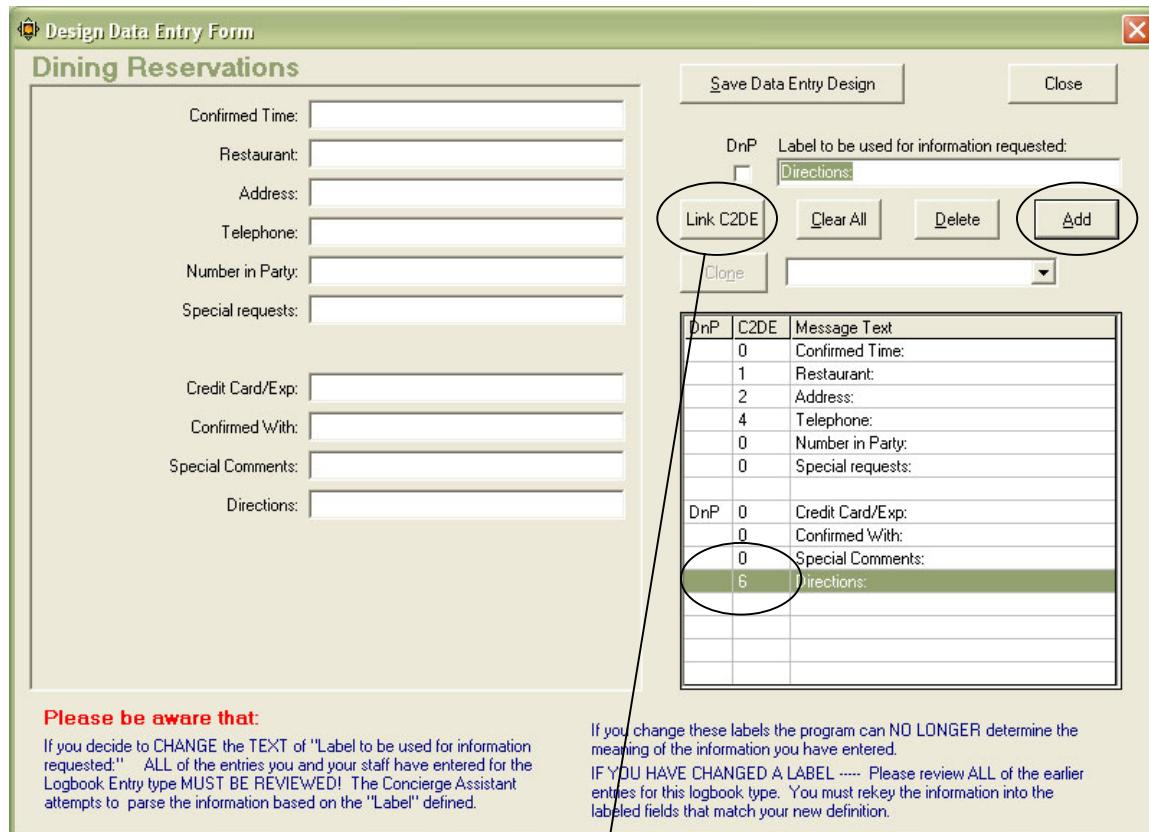
From the “Contacts” screen, select the desired Contact and open it, click on the “Rolodex Data and Directions” tab, type the directions and the guest information and click save and then close.



In the Administration Screen go to “Logbook Categories” and select the category to be linked, and the click “work with data entry panel”

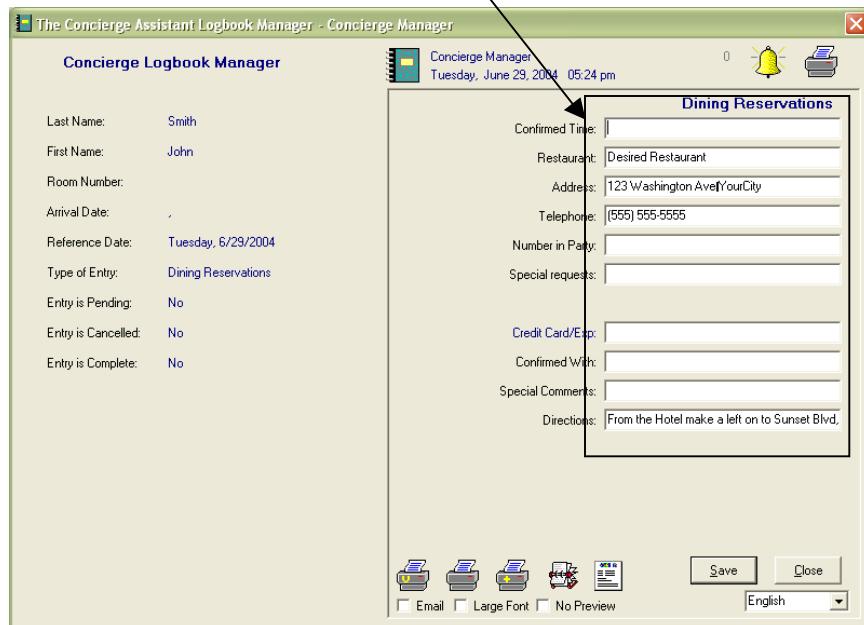
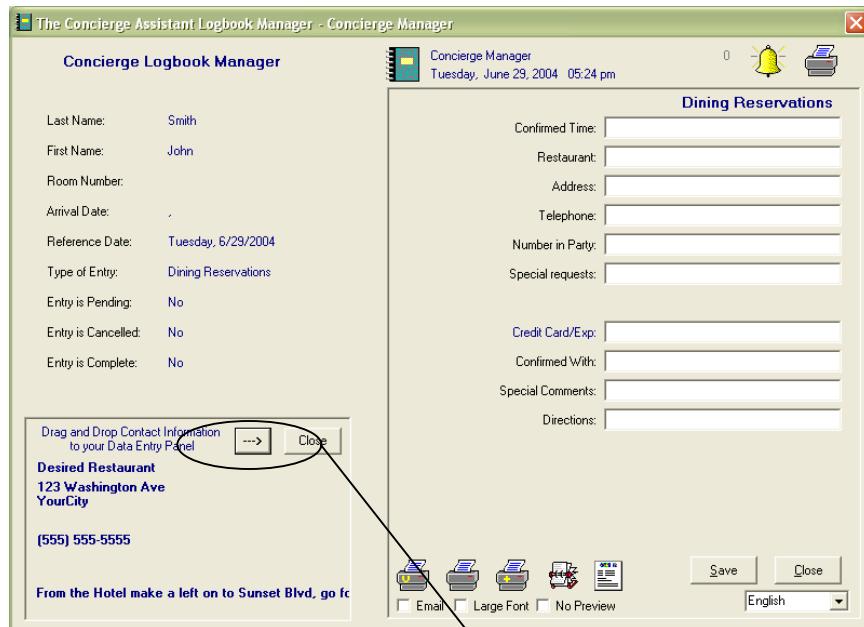


Select the desired field and click “Link C2DE” button,



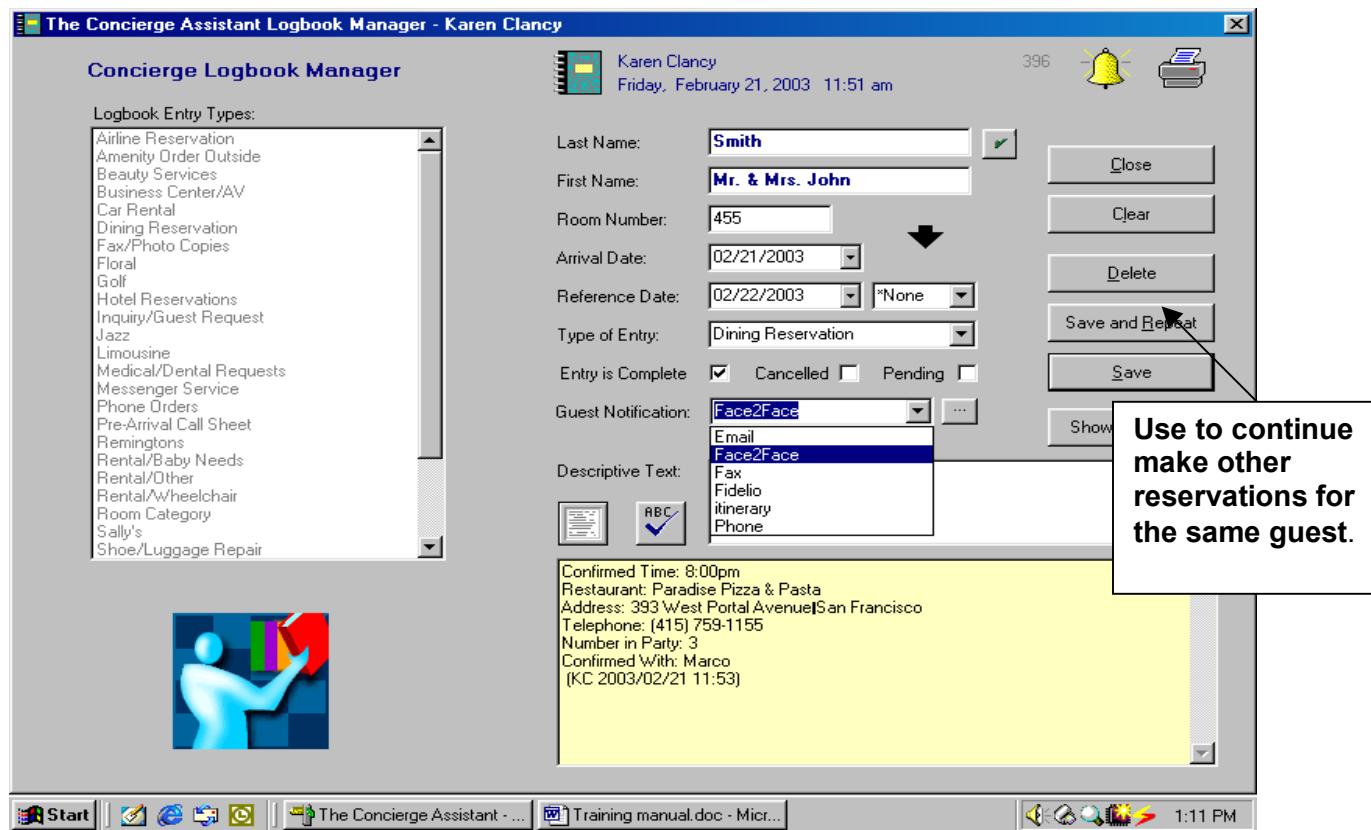
Select the elements to be linked, hit “OK” and then click “add” (you will see a number on the left of the linked field), click “Save data entry design”

In the “Logbook Screen” select “Add Logbook Entry”, select the linked category and use the Rolodex from the “Data entry form” (See Finding Contacts from a Logbook Entry) , find the contact that you added directions and guest information. Double click it, it will come down to your lower left on the screen, click the arrow and the linked elements will self populate. Once you have them there you can print confirmations, itineraries, vendor forms and miscellaneous forms with the linked elements.



Guest Notification

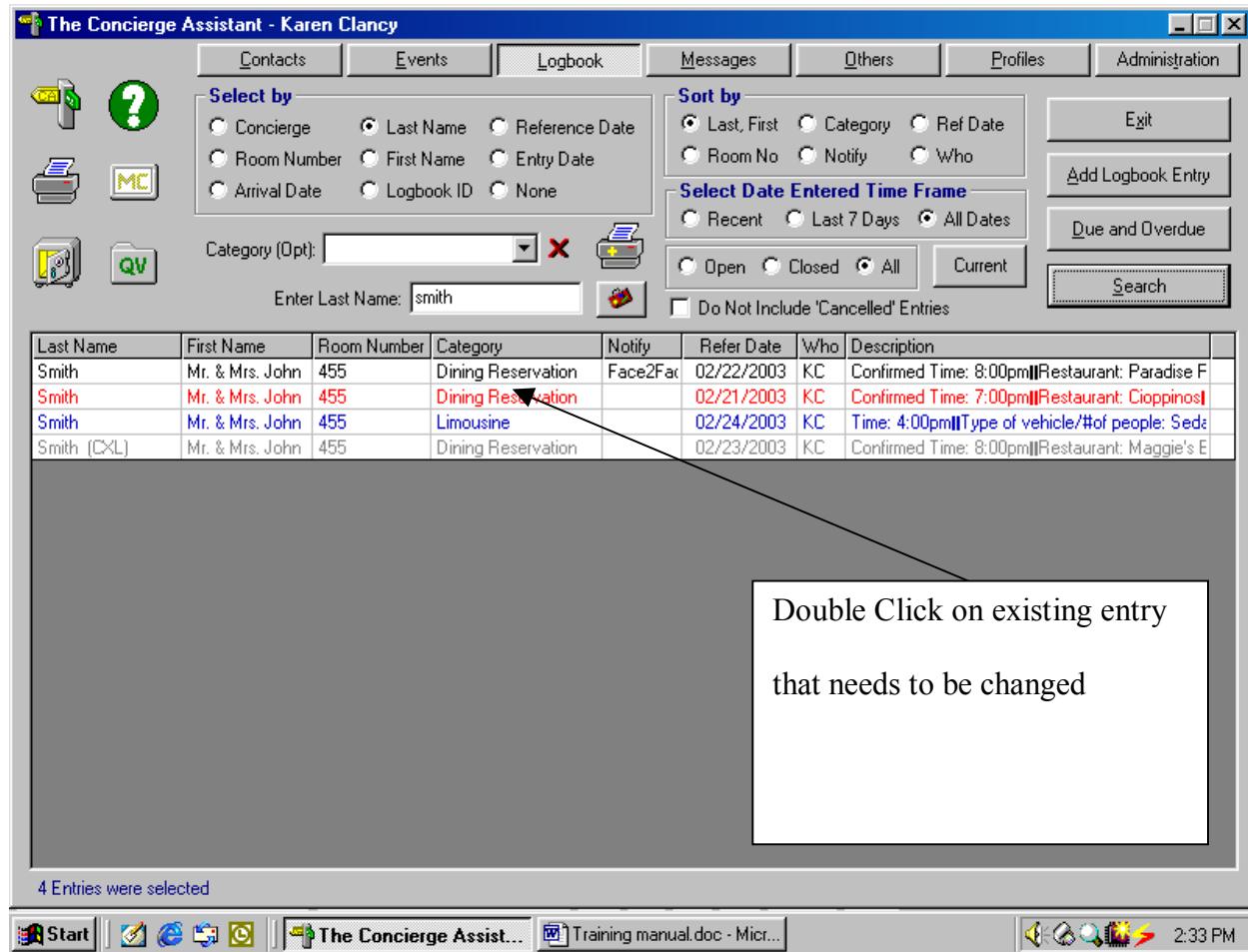
This box is to let your teammates know if the guest has been informed or not. You can use the drop down box or simply type in a date or the appropriate response.



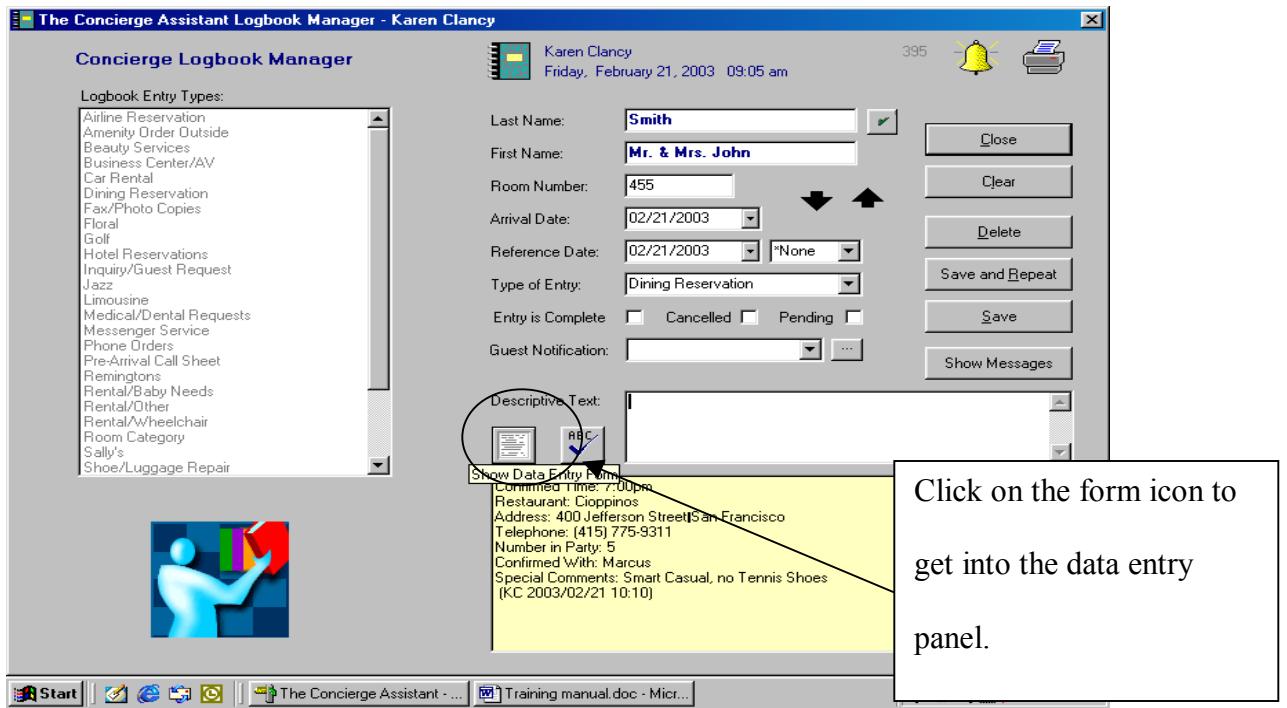
- **Save and Repeat** – This function is ideal for making another reservation for the same guest. This way you do not have to re-enter most of the data i.e., Last Name, First Name, Room Number, Arrival Date. **You MUST change the reference date** and Type of Entry, and then tab 4 times to go to the data entry panel.

Changing a Logbook Entry

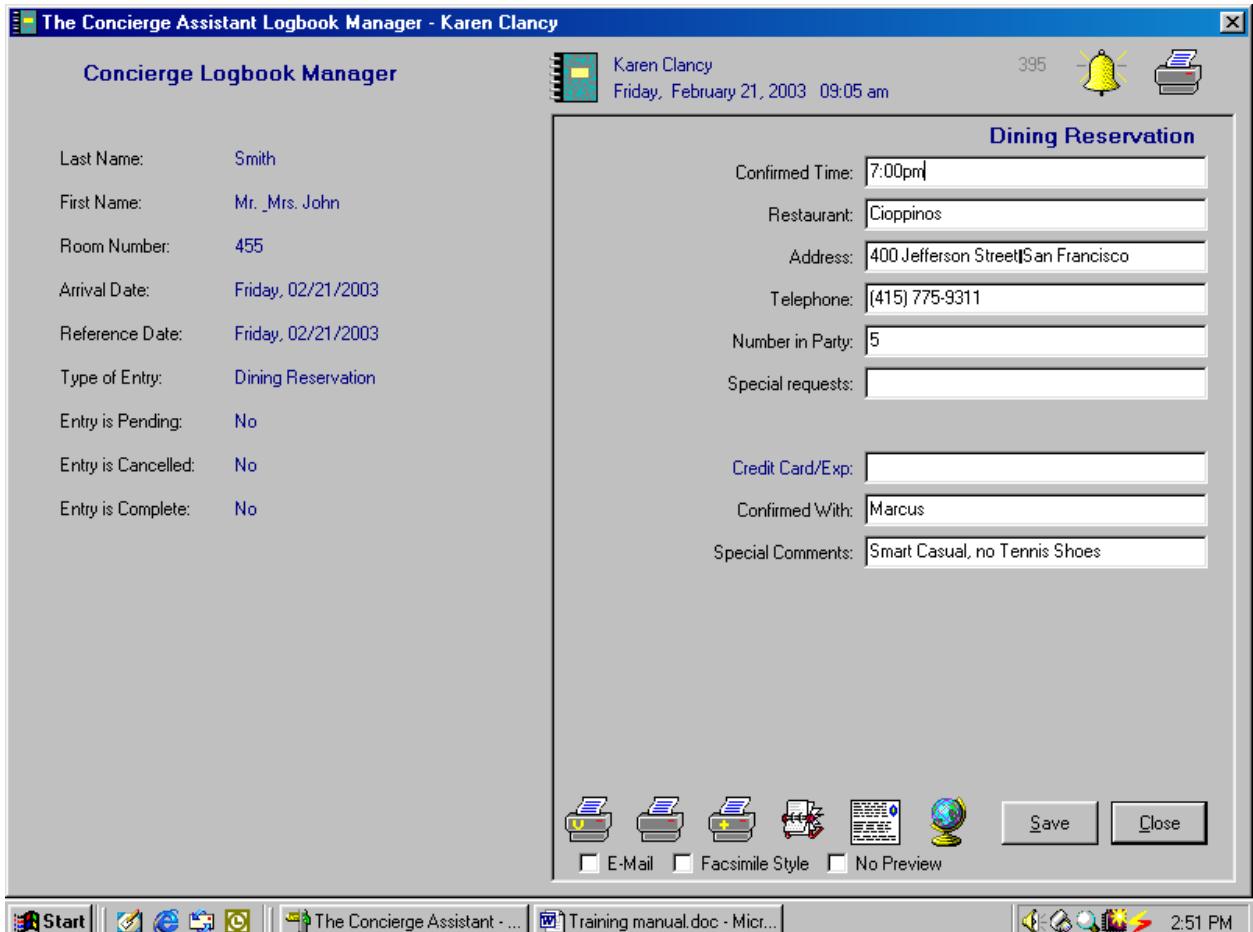
To change an existing entry in the logbook screen double click on the entry that you would like to change.



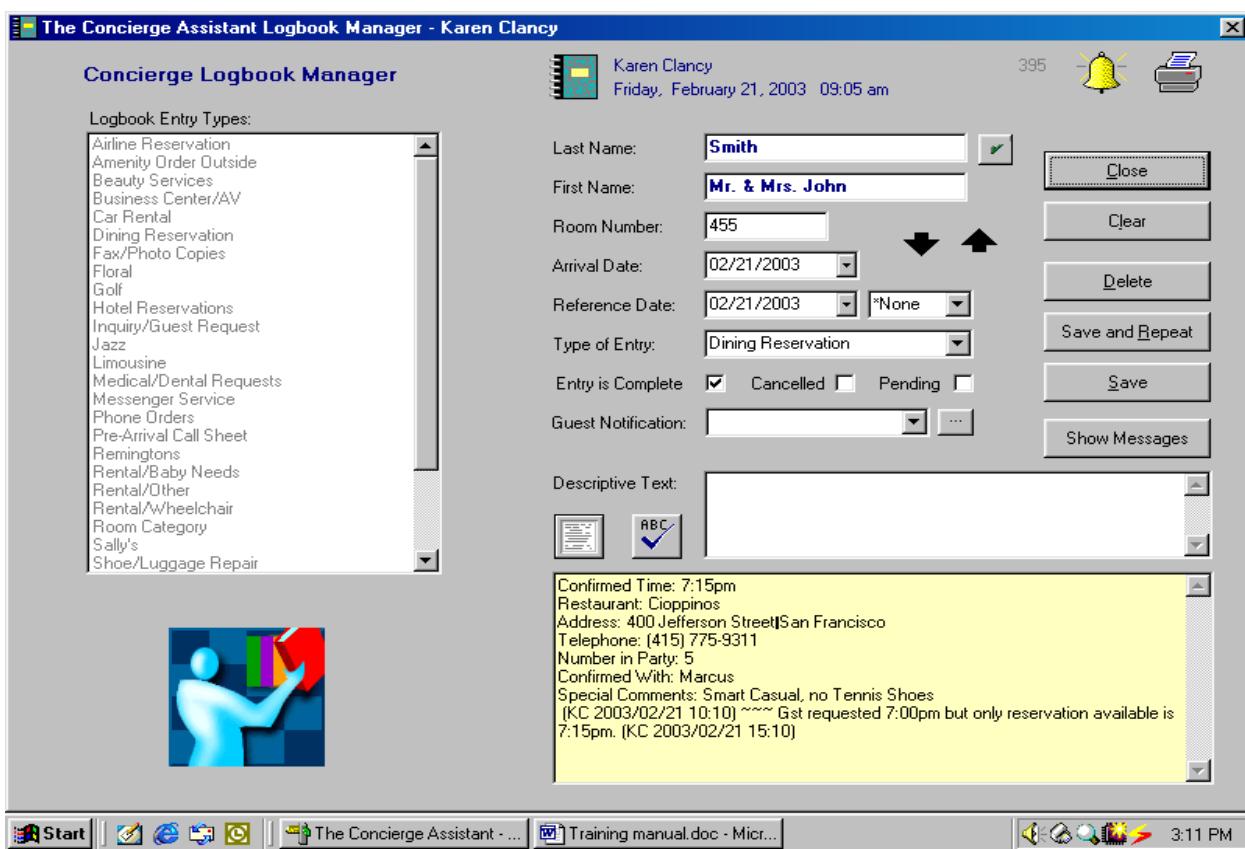
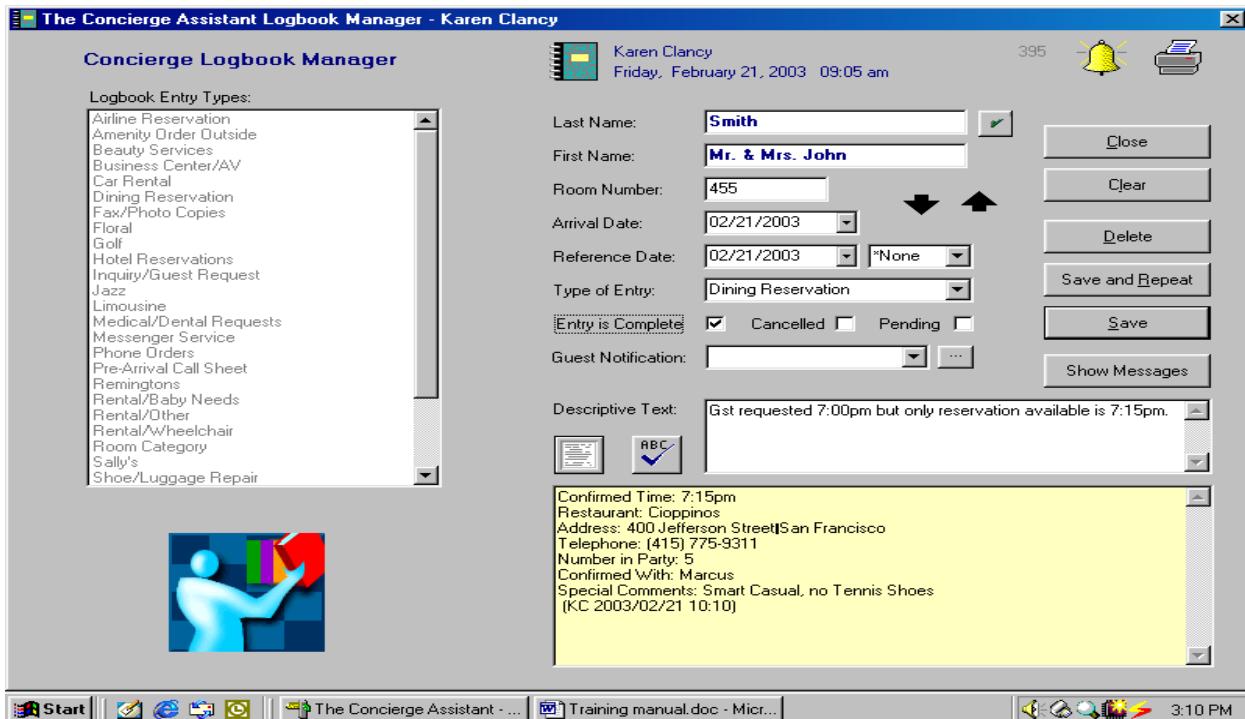
- If the entry name is longer than the field you need to triple click (the first click opens the name and then double click to get into the entry).



- Once you double click the piece of paper it will bring you back to the following screen.



- At this point you can change anything in that data entry panel, i.e., lets say it gets changed from 7:00pm to 7:15pm you would make the change in the Confirmed Time Cell. You can change any cells that are appropriate.
- **SAVE** and that will bring you back to the reservation screen.
- If there has been a change other than exactly what the guest has requested you should make a notation in the white descriptive text box.



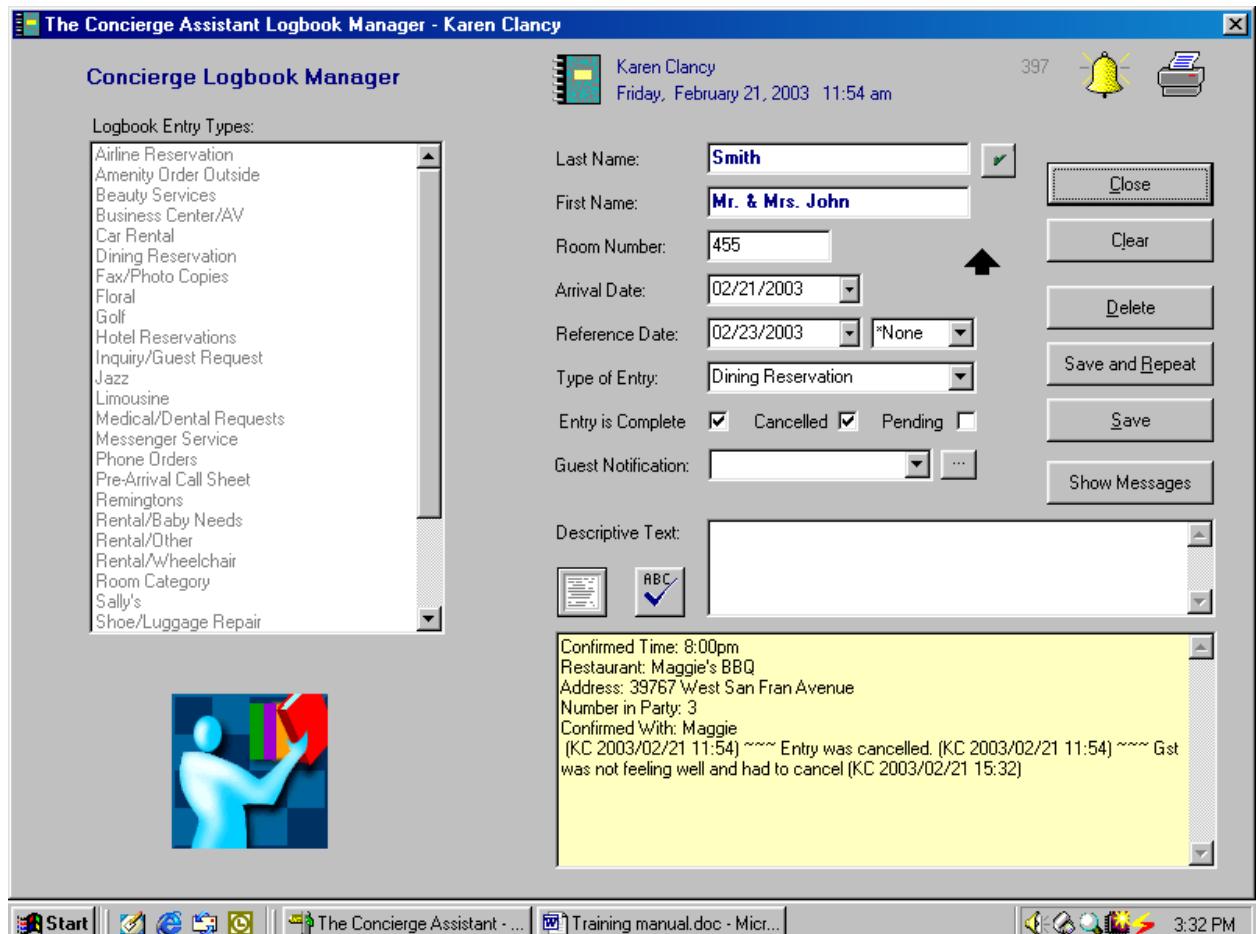
- Once you have either clicked save or hit your enter key it will drop down into the yellow text box after ~~~ (3 tildes) **ANYTHING after a tilde will NOT be**

printed for the guest, this is used for “notes” for the staff on any and all reservations. Everything is always date time and initial stamp by the concierge that made the change to the reservation.

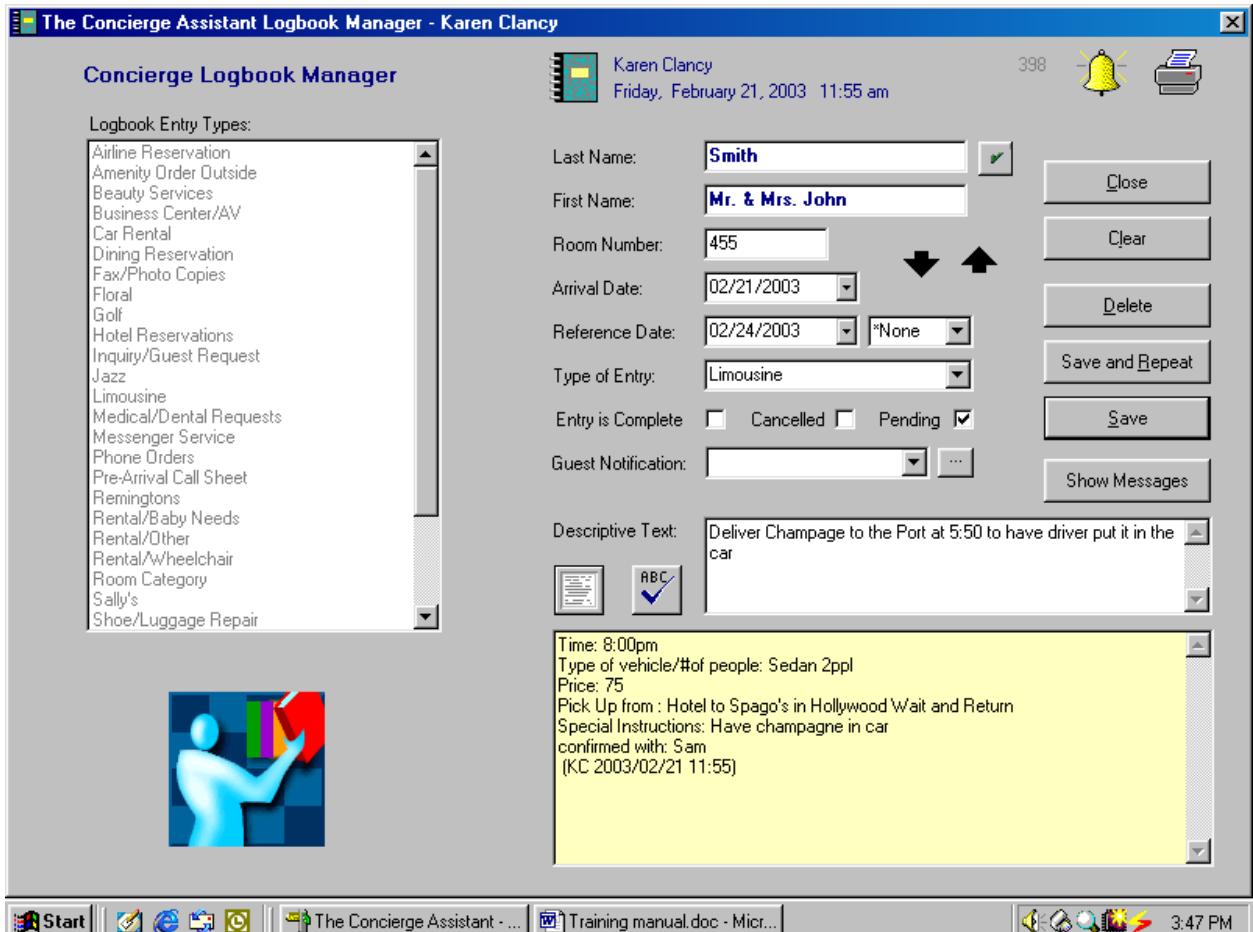
- **Mark the Status** of the reservation and **SAVE, Close**.
- **Spell Check** if you are using spell check the reservation information **must be in the White Descriptive Text Box**.
- Once you hit the close button it will take you back to the main logbook screen.

Canceling a Logbook Entry

- Bring the entry up exactly like changing an entry.
- Change Status of the reservation by clicking the cancelled box, please note that the complete box will also stay checked that is so the computer knows to change the color of the reservation.
- Just like in changing the reservation always make note of who cancelled the reservation and why as shown in the following.



- As with most changes it will always be date, time and initial stamped.
- To Change Status to Pending
- Bring the reservation up exactly like changing the reservation.
- Change Status of the reservation by clicking the Pending box, pending is when something still needs to be done with the reservation. See the following:



- Once you have saved the information it will then again drop down to the yellow descriptive text box and be date, time and initial stamped.
- The best practice is then to send yourself or your team members a message in regards to this logbook entry and that is covered on page () further in this document, also, always make sure you tell your teammates why it is pending by making a note in the white descriptive text box.

Printed Forms

Single Item Confirmations,

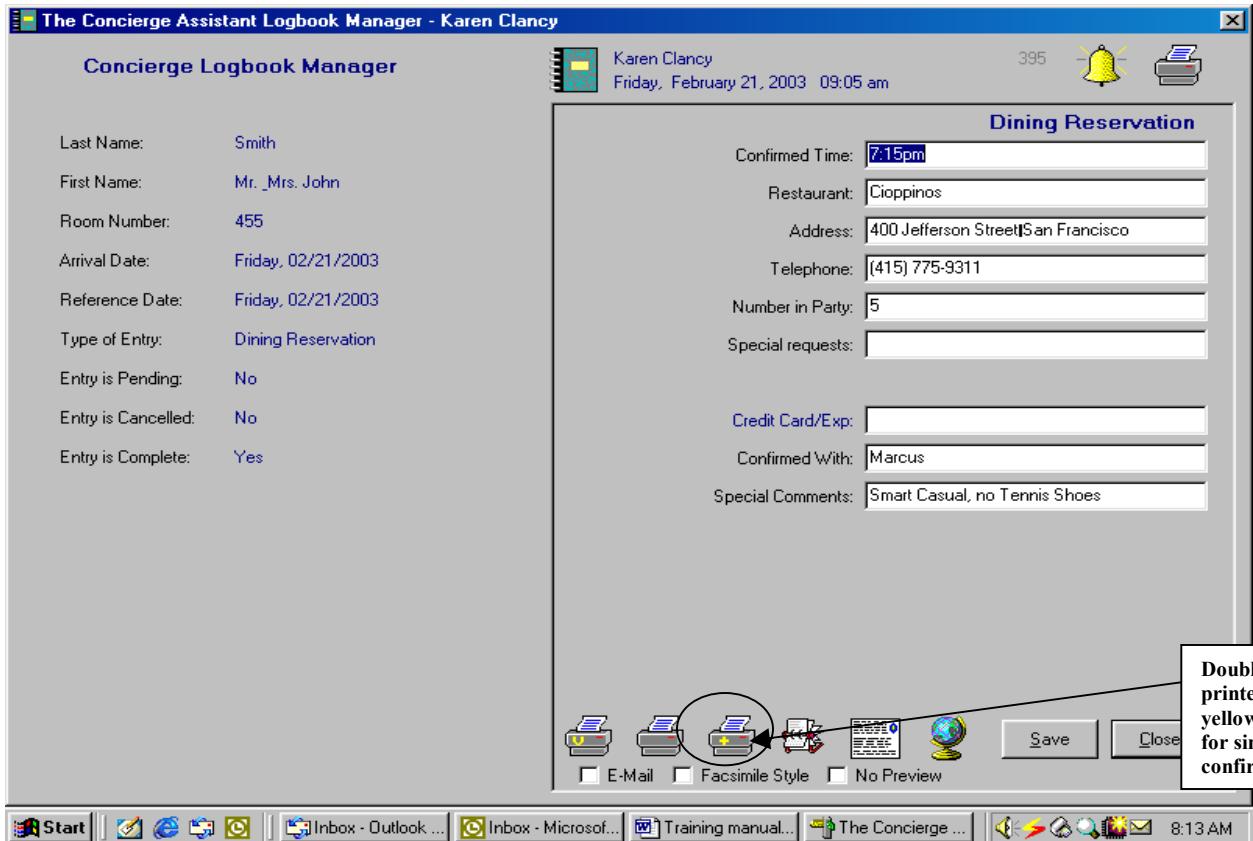
To print out a single item confirmation double click on the entry that you would like to print up.

The screenshot shows the 'The Concierge Assistant - Karen Clancy' application window. The 'Logbook' tab is selected. In the center, there is a grid of logbook entries:

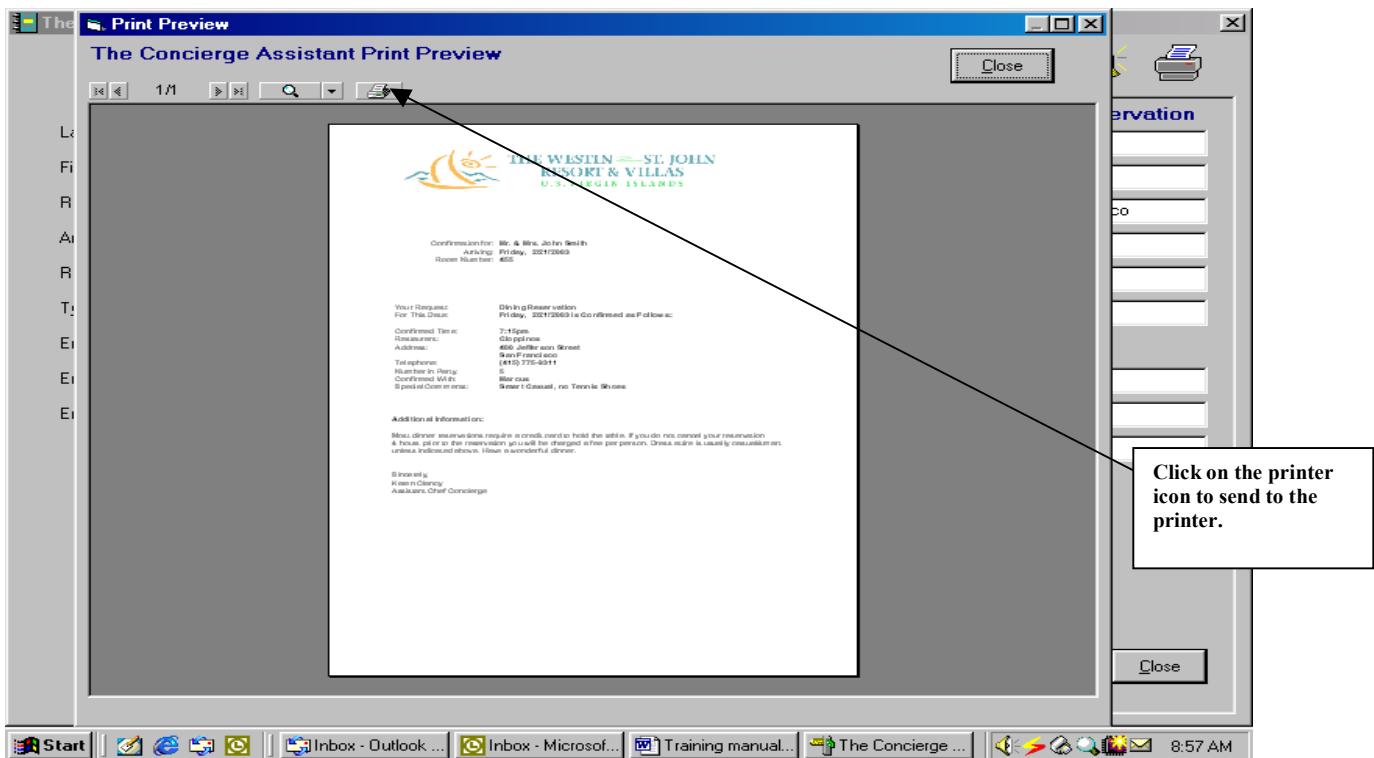
| Last Name | First Name | Room Number | Category | Notify | Refer Date | Who | Description |
|-------------|-----------------|-------------|--------------------|-----------|------------|-----|---|
| Smith | Mr. & Mrs. John | 455 | Dining Reservation | Face2Face | 02/22/2003 | KC | Confirmed Time: 8:00pm Restaurant: Paradise F... |
| Smith | Mr. & Mrs. John | 455 | Dining Reservation | | 02/21/2003 | KC | Confirmed Time: 7:15pm Restaurant: Cioppin... |
| Smith | Mr. & Mrs. John | 455 | Limousine | | 02/24/2003 | KC | Time: 8:00pm Type of vehicle/#of people: S... |
| Smith (CKL) | Mr. & Mrs. John | 455 | Dining Reservation | | 02/23/2003 | KC | Confirmed Time: 8:00pm Restaurant: Maggie... |

A red arrow points to the second entry ('Mr. & Mrs. John, 455'). A callout box with the text 'Double-click on the entry that you want a confirmation for.' is positioned over the grid. At the bottom left of the grid, it says '4 Entries were selected.'

- That will bring you into the logbook entry
- Double-click on the “piece of paper” to take you into the Data Entry Panel.



- Double-click the printer with the yellow plus sign to bring up a print preview of the **Single Item Confirmation**.



Shortcut From the “Main Logbook Screen”

- Right mouse-click on the logbook entry that you would like a confirmation for. Release the right mouse button
- Pull the mouse down till the shortcut is highlighted in dark blue
- Left mouse click. Please note that there will be no print preview and it will go directly to the printer.

The Concierge Assistant - Karen Clancy

Contacts Events Logbook Messages Others Profiles Administration

Select by: Last Name Reference Date
 Room Number First Name Entry Date
 Arrival Date Logbook ID None

Sort by: Last, First Category Ref Date
 Room No Notify Who

Select Date Entered Time Frame: Recent Last 7 Days All Dates
 Open Closed All Current
 Do Not Include 'Cancelled' Entries

Category (Opt):

Enter Last Name:

Last Name **First Name** **Room Number** **Category** **Notify** **Refer Date** **Who** **Description**

| | | | | | | | |
|-------------|---------------------------|-----|--------------------|-----------|------------|----|---|
| Smith | Mr. & Mrs. John | 455 | Dining Reservation | Face2Face | 02/22/2003 | KC | Confirmed Time: 8:00pm Restaurant: Paradise F |
| Smith | Mr. & Mrs. John | 455 | Dining Reservation | Face2Face | 02/21/2003 | KC | Confirmed Time: 7:15pm Restaurant: Cioppinos |
| Smith | Print Confirmation | 455 | Limousine | Face2Face | 02/24/2003 | KC | Time: 8:00pm Type of vehicle/#of people: Sedan/2 |
| Smith (CKL) | Mr. & Mrs. John | 455 | Dining Reservation | Face2Face | 02/23/2003 | KC | Confirmed Time: 8:00pm Restaurant: Maggie's E |

4 Entries were selected



Itineraries

- To print a multi item itinerary in the main Logbook Screen. Select by Last Name

The Concierge Assistant - Karen Clancy

Select by

Concierge Last Name Reference Date
 Room Number First Name Entry Date
 Arrival Date Logbook ID None

Sort by

Last, First Category Ref Date
 Room No Notify Who

Select Date Entered Time Frame

Recent Last 7 Days All Dates

Category (Opt):

Enter Last Name:

Do Not Include 'Cancelled' Entries

Search

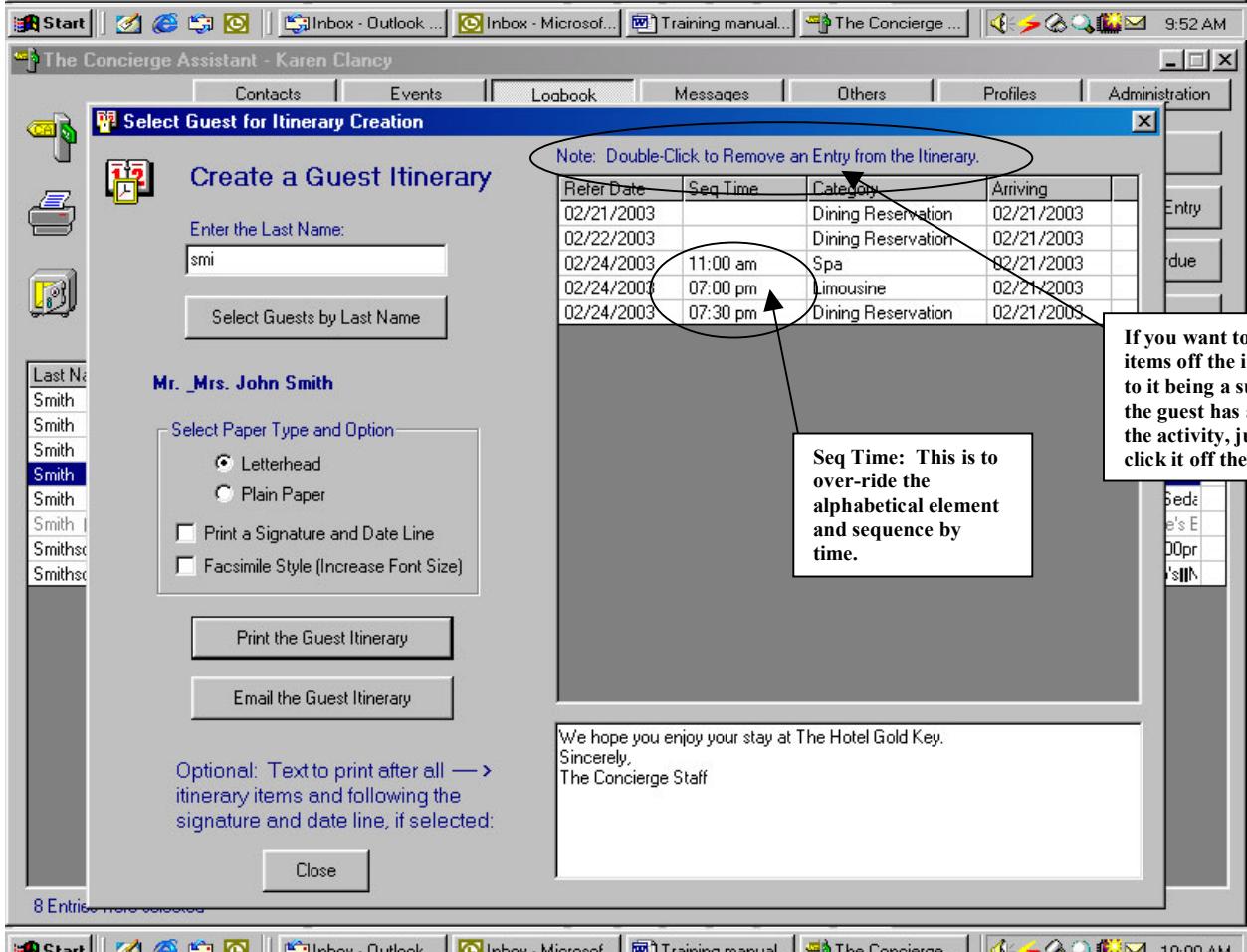
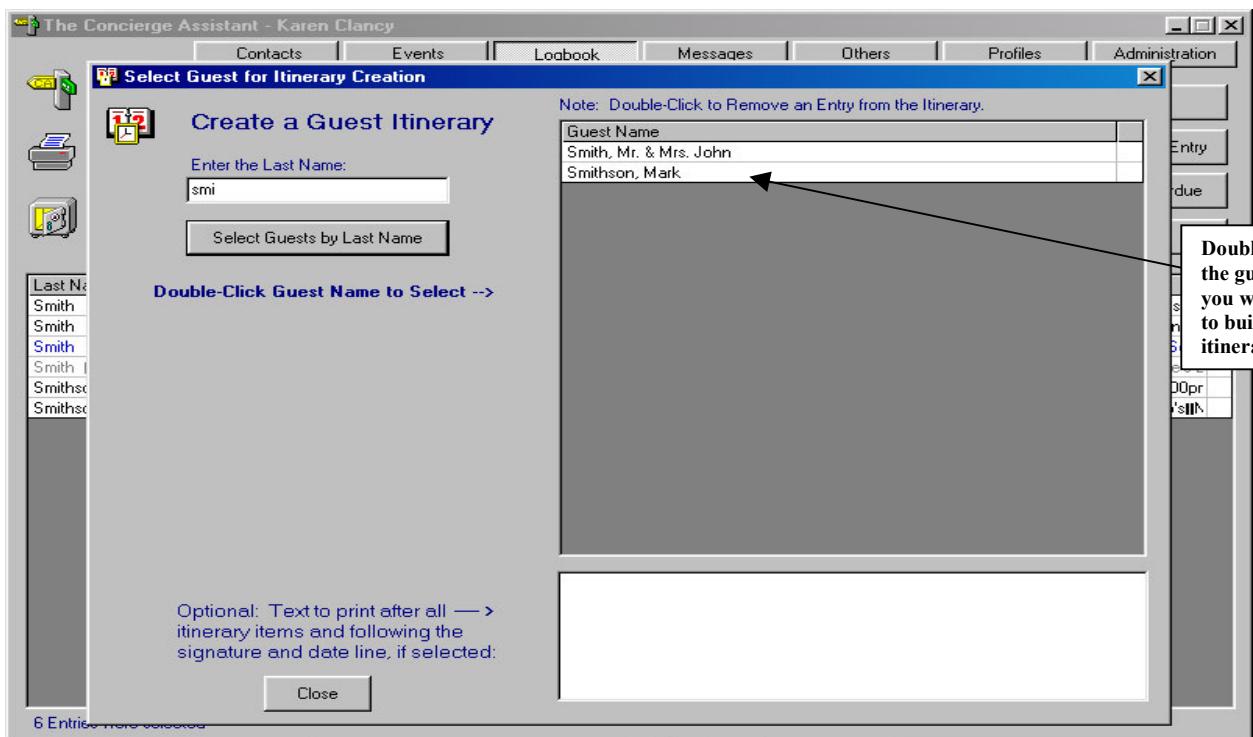
Itineraries can ONLY be done by Selecting by Last Name

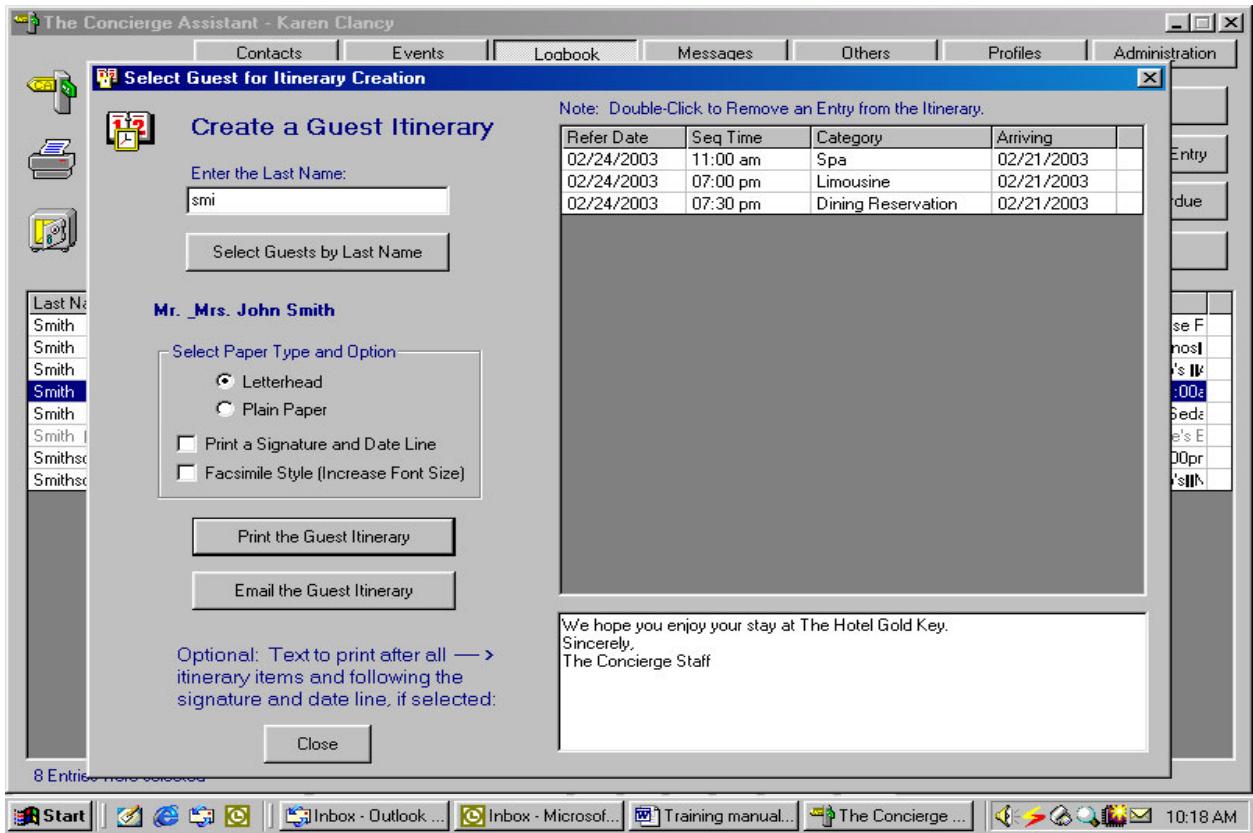
| Last Name | First Name | Room Number | Category | Launch Itinerary | Print Panel | Date | Who | Description |
|----------------|-----------------|-------------|--------------------|------------------|-------------|------------|-----|---|
| Smith | Mr. & Mrs. John | 455 | Dining Reservation | Face2Face | Print Panel | 02/22/2003 | KC | Confirmed Time: 8:00pm Restaurant: Paradise |
| Smith | Mr. & Mrs. John | 455 | Dining Reservation | Face2Face | Print Panel | 02/21/2003 | KC | Confirmed Time: 7:15pm Restaurant: Cioppino |
| Smith | Mr. & Mrs. John | 455 | Limousine | Face2Face | Print Panel | 02/24/2003 | KC | Time: 8:00pm Type of vehicle/#of people: S |
| Smithson (CKL) | Mr. & Mrs. John | 455 | Dining Reservation | Face2Face | Print Panel | 02/23/2003 | KC | Confirmed Time: 8:00pm Restaurant: Maggie's |
| Smithson | Mark | 788 | Spa | Face2Face | Print Panel | 02/24/2003 | KC | Spa/Location: The Spa Confirmed Time: 4:00pm |
| Smithson | Mark | 788 | Dining Reservation | Face2Face | Print Panel | 02/24/2003 | KC | Confirmed Time: 7:00pm Restaurant: Spago's |

6 Entries were selected

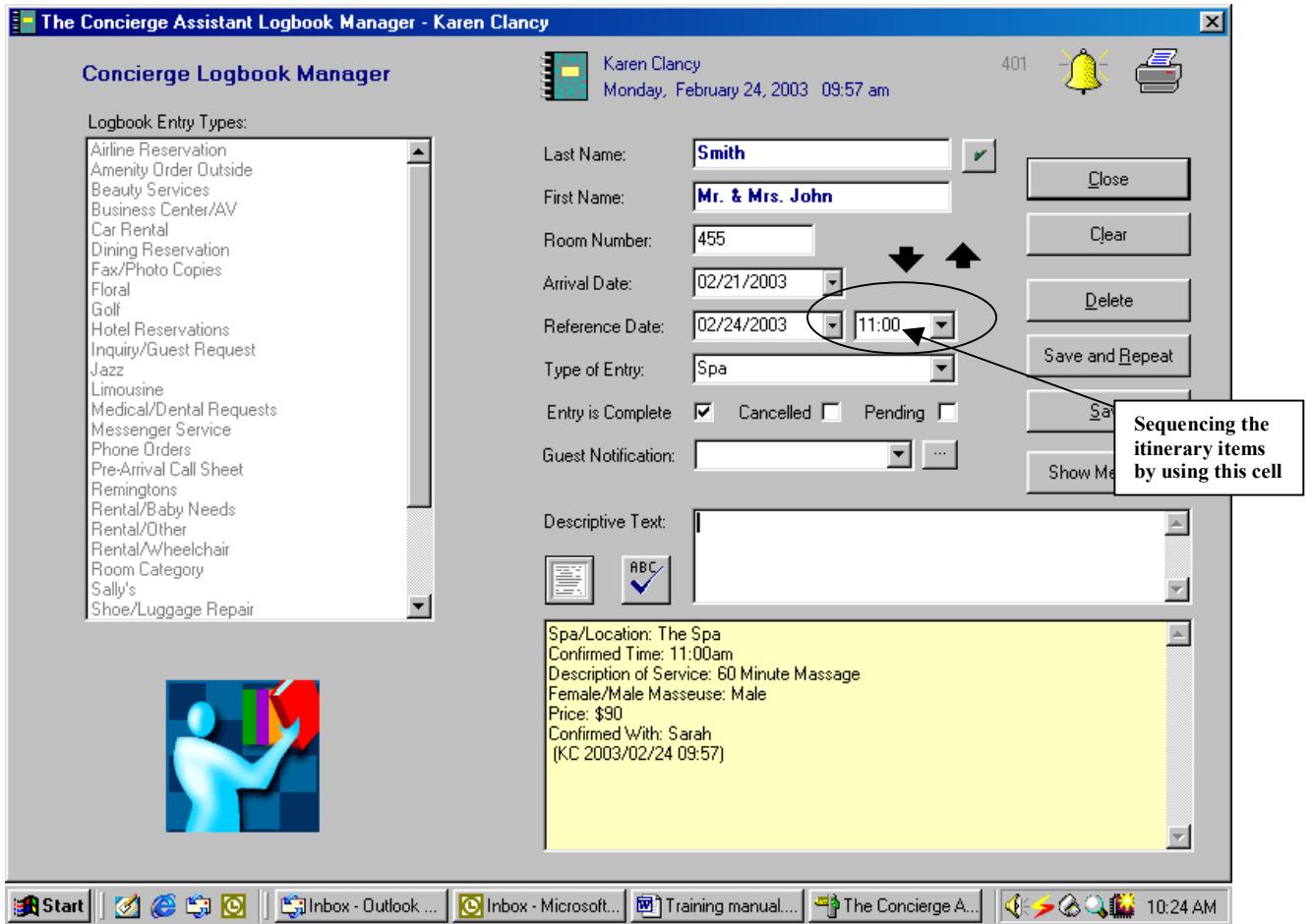
Single-click on the suitcase (itinerary icon) to build an itinerary.

- The next screen you must click on the guest that you would like to build an itinerary for.
- Double-click on the guest name in the box on the right-hand side.

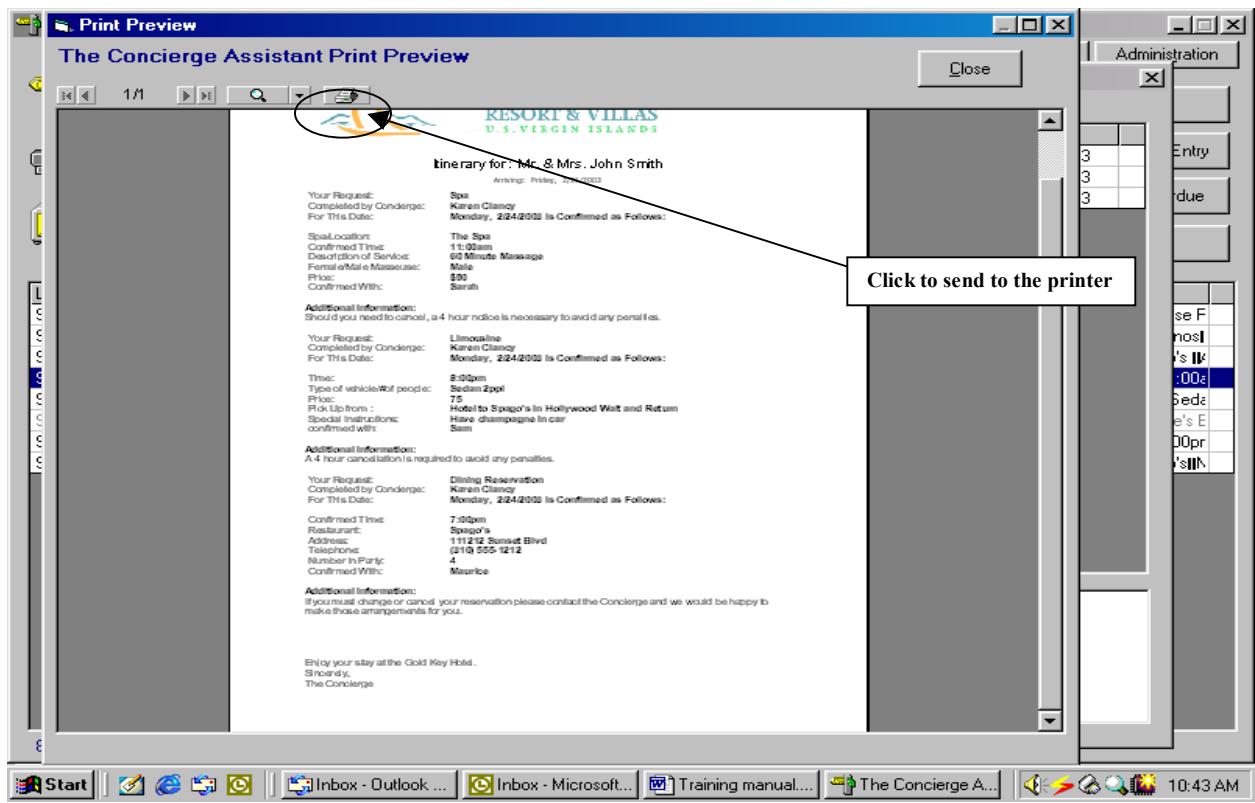




- **Sequencing Items** the program automatically sorts by day first, then alphabetically. If you want to over-ride the alphabetical sequence and sort by time you must use the sequencing element in the reservation panel on each entry.



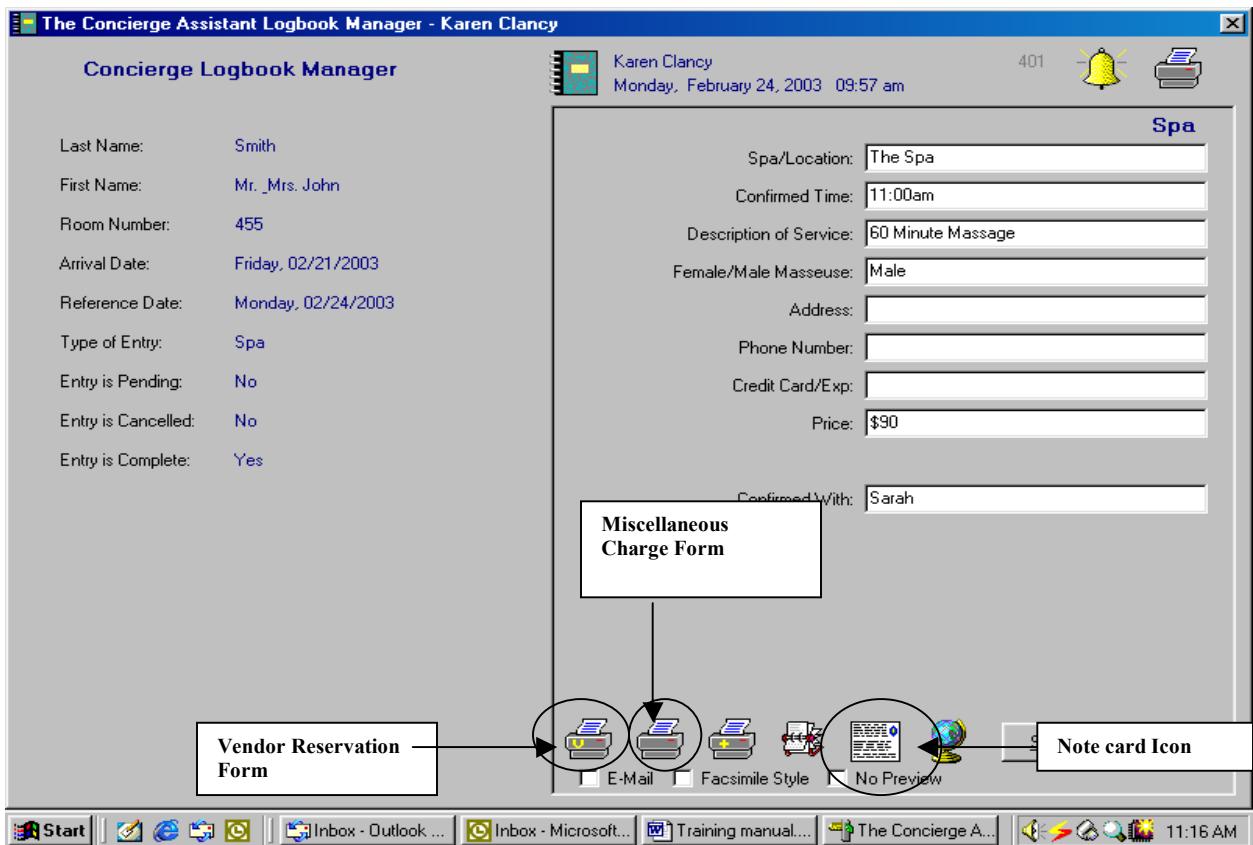
- Please note that this sequencing element will NEVER print out for the guest.
- When double-clicking of any element from the itinerary, if you make a mistake just click on the button called “Select Guests by Last Name” and it will take you back to the original screen where you select the guest and it will take you back to the beginning.
- The large white box at the bottom of the Create a Guest Itinerary screen is to personalize the itinerary for the guest. It will print up at the bottom of the Itinerary.
- Then select either Print the Guest Itinerary or Email Guest Itinerary (If you have Outlook).
- Again, the program will always do a print preview prior to printing up the screen.
- Once you have reviewed the itinerary then go to the printer icon and click and send to the printer.
- There are also two options for your logo through the Administration Tab in The Concierge Assistant. You may use your properties letterhead or have the logo automatically printed out on all Printed items for the your guests.
- Please see the next screen to see the print preview screen.
- In the itinerary screen you also have the option to select paper type and to print a signature line and to increase the font (for older fax machines).



Note cards, Miscellaneous Forms and Vendor Sheet

Must be set up by your administrator, here is one example.

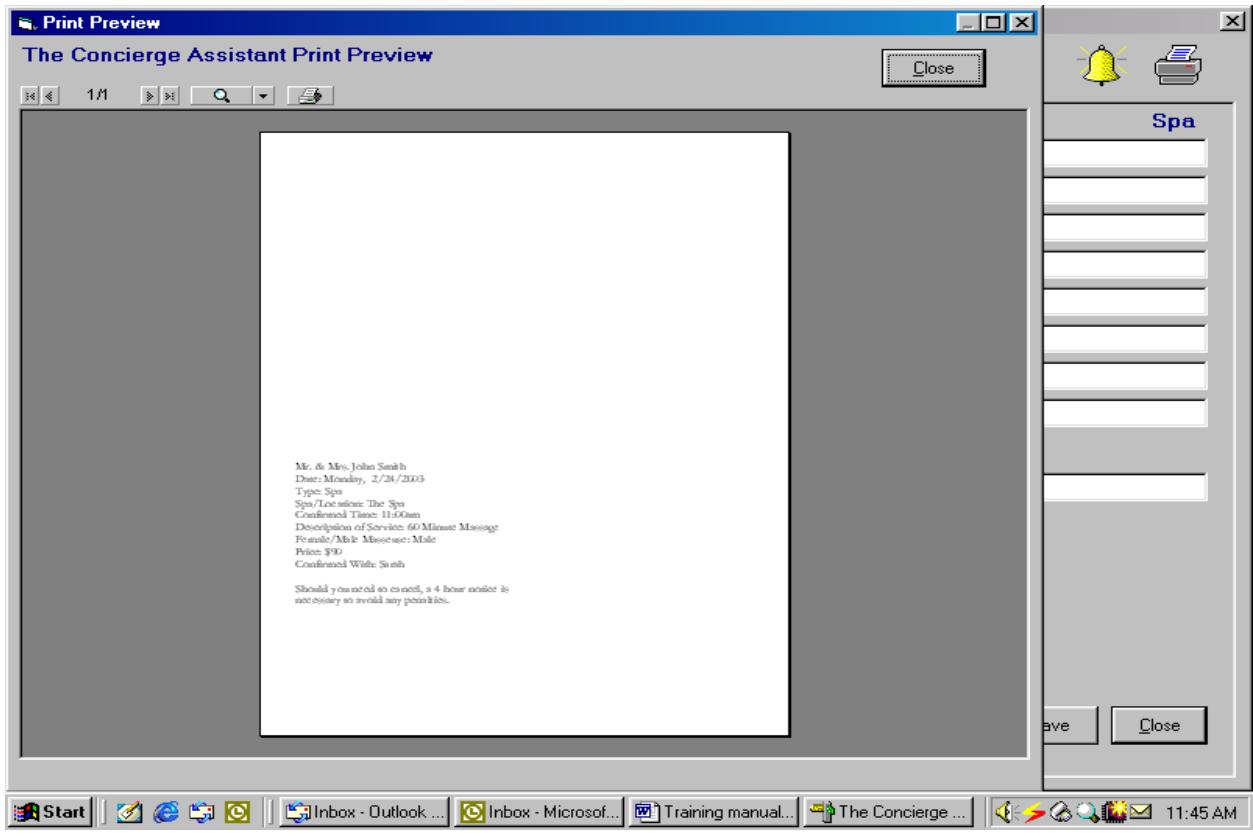
- To print up a confirmation card, proceed just as if you are going to print up a “**Single Item Confirmation**”
- Double-click on the **Note card Icon**.



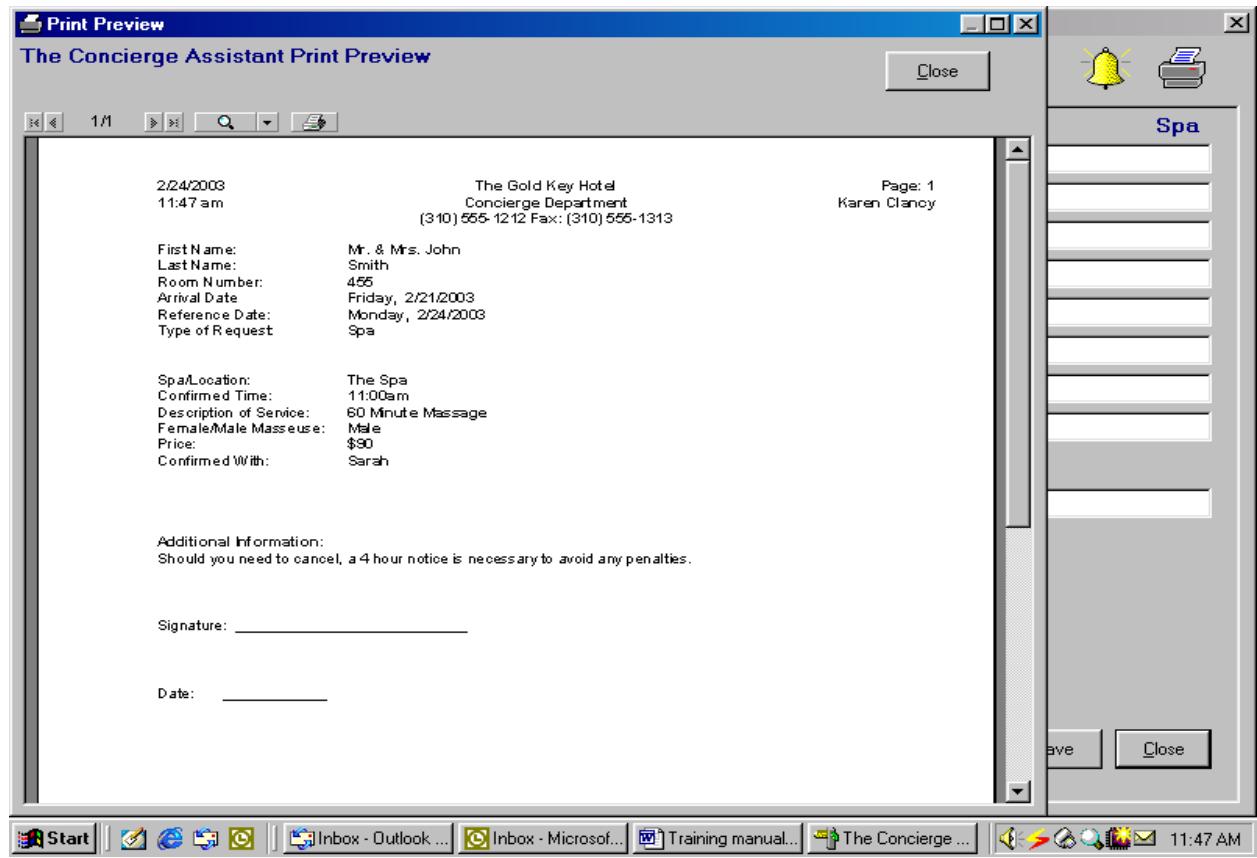
- As in most of the printed material in The Concierge Assistant you will be shown a Print preview and then you will have to go to the Printer Icon to print the **Note Card**
- The Printer with the “Yellow V” is for **Vendor Reservation Sheet**. The difference in the Vendor Reservation Sheet is that the Credit Card information will print out for the Vendor but will not print out for the guest (these are any of the data entry elements that are in Dark Blue, i.e., Credit Card, Broker Information ect).
- **Miscellaneous Charge Forms** are used to have a place for a signature of the guest, to be able to charge anything to the guest and to have written confirmation with their signature.

Examples of all Three

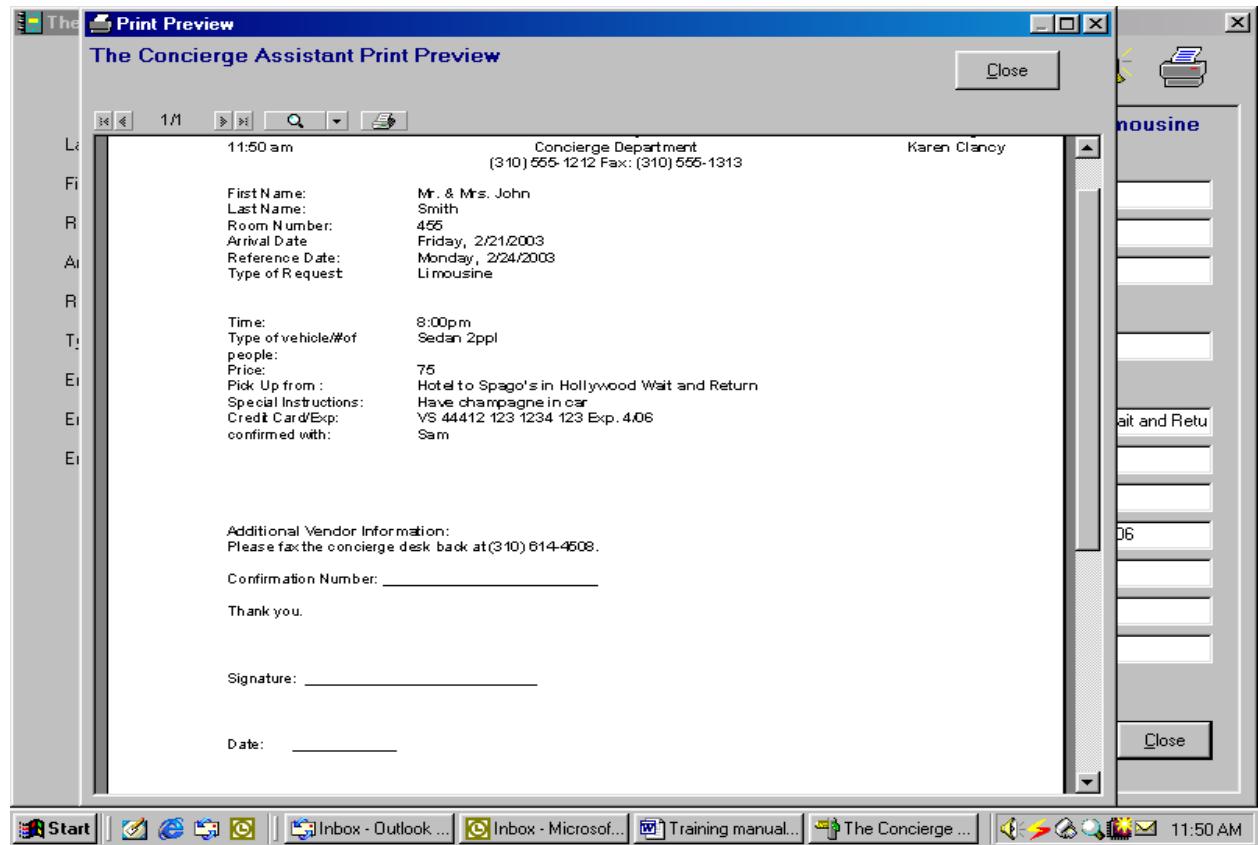
Note Card



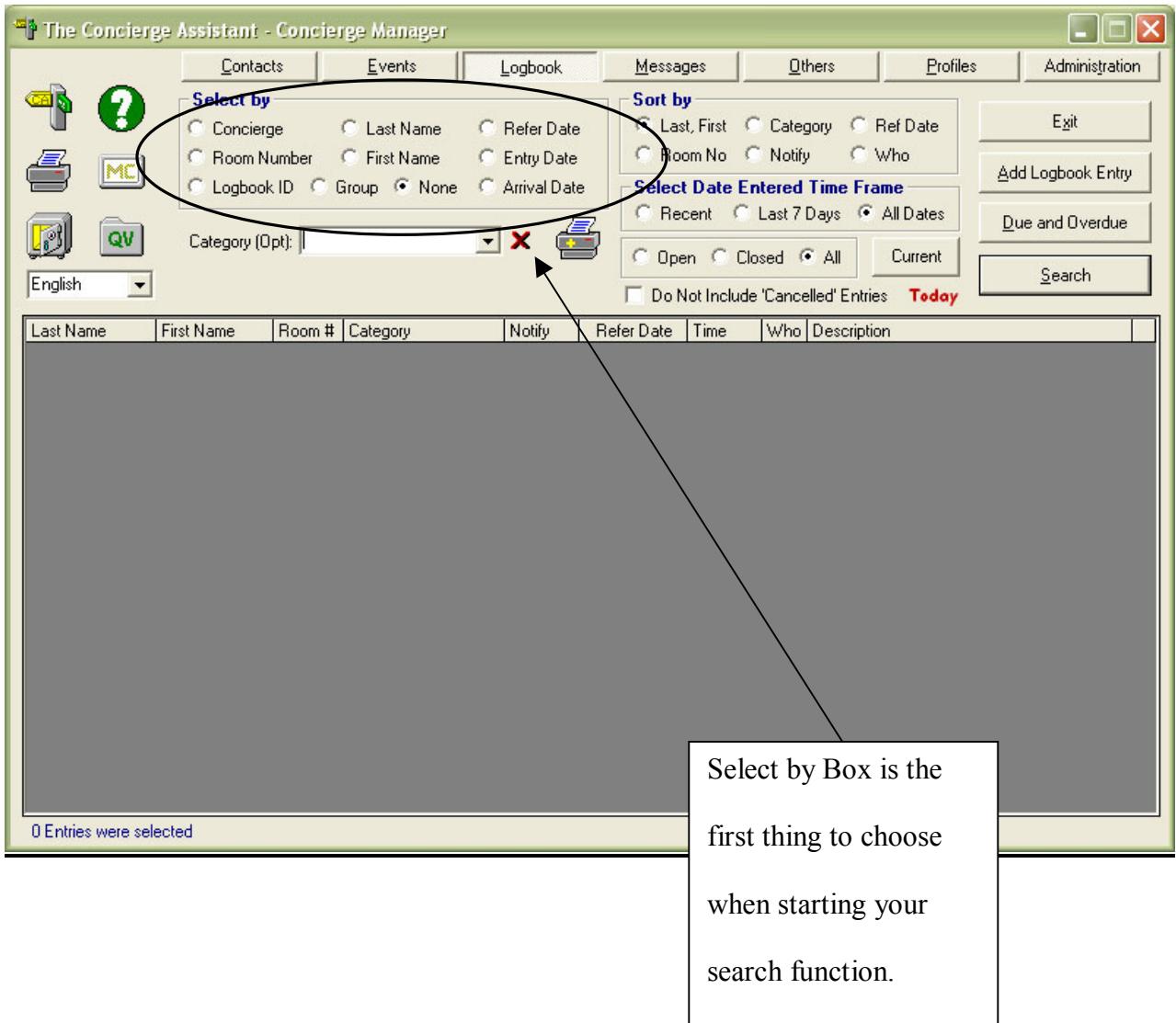
Miscellaneous Charge Form



Vendor Reservation Sheet



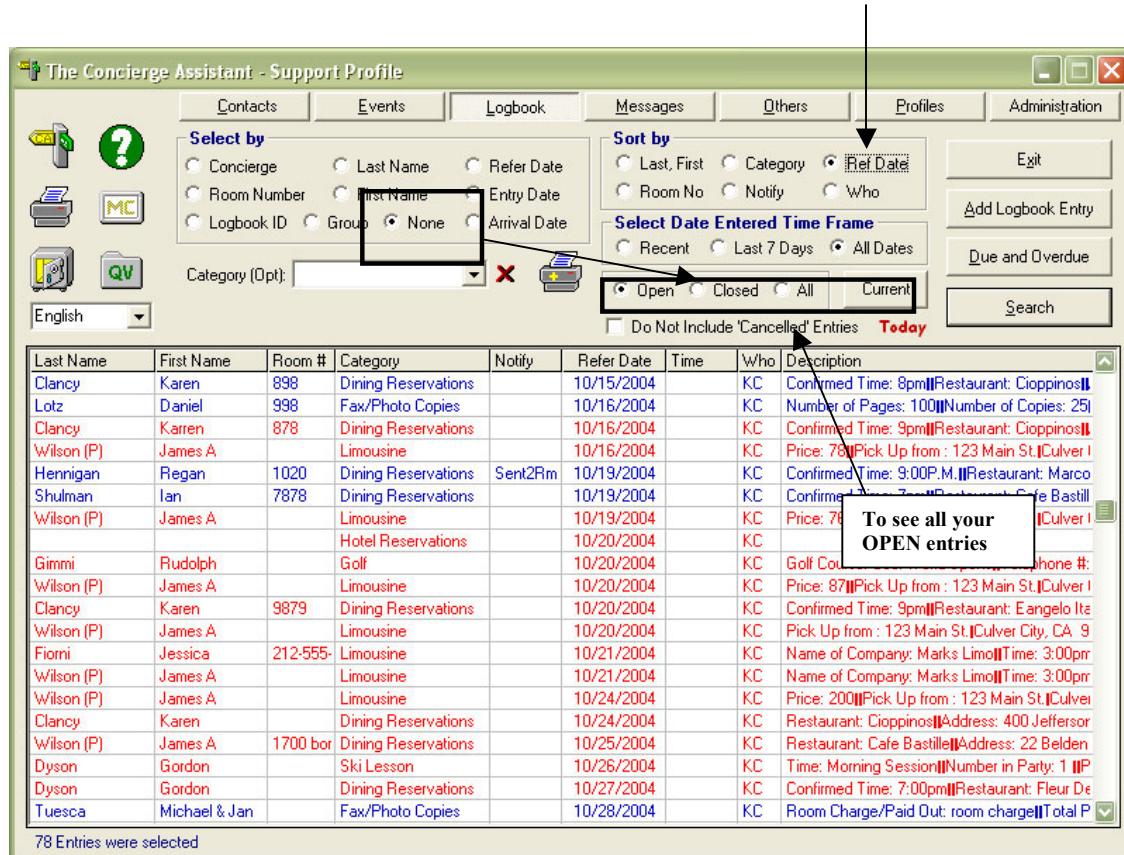
Explanation of the Logbook Screen



Select By

- When you are beginning your search for entries you must always select by first.
 - **Concierge** it will automatically bring up the name of the concierge that is logged on to the program. By either using the drop down arrow or by beginning to type you are able to select any concierge that has a log on in the system.
 - **Room Number** will bring up a cell that you will then type the guest's room number in and any guest that has been in that room since you have archived will come up.
 - **Arrival Date** when putting arrival dates into the field in the guest reservation it will bring up every guest that has that corresponding arrival. This is great if you are printing up itineraries for incoming guests.
 - **Last Name** when the guest approaches the desk you can bring it up by the last name of the guest. A best practice is to only put a few letters of the last name of the guest to try to avoid misspelling of the guest's last name.
 - **First Name** if you know the guest's first name to try to recall what the guest has done during their stay.
 - **Logbook ID** every single logbook entry has a unique identifier number located at the top right-hand side of the logbook entry (by the bell and the printer in grey), this number can be used to give to either guests who are insistant on having a confirmation number or to be used as a voucher number.
 - **Reference Date** is the way most properties run the application from day to day. When you bring it up by reference date for today's date it will bring everything up that is happening that day.
 - **Entry Date** is the date that the entry has been made by the Concierge. That Date Appears at the top of the data entry page.
 - **None** using the **None box** is a best practice for finding out what is still open in the system. Click on **None** and to the lower right next to your Search key there are three buttons Open, Closed All. If you select on the **Open** button it will bring everything up in the system. As Shown:

- To find out everything that is Open in your system, Select by **None** and sort by Reference Date. At the lower right there are Three buttons Open, Closed and All, Select the open button and everything Open or Pending ONLY will appear.



Today Button

- Is like Selecting By Reference Date (put in today's date), Sort by either Last Name, First Name or by Category. This will show you what is going on for today this is like having your logbook open to today.

Example:

The Concierge Assistant - Support Profile

Logbook

Select by:

- Concierge
- Last Name
- Refer Date
- Room Number
- First Name
- Entry Date
- Logbook ID
- Group
- None
- Arrival Date

Sort by:

- Last, First
- Category
- Ref Date
- Room No
- Notify
- Who

Category (Opt):

Select Refer Date: 10/4/2004 Thru 10/4/2004

Do Not Include 'Cancelled' Entries Today

| Last Name | First Name | Room # | Category | Notify | Refer Date | Time | Who | Description |
|------------|------------|--------|---------------------|--------|------------|------|-----|---|
| Campbell | Colleen | | Dining Reservations | | 10/4/2004 | | KC | Confirmed Time: 7pm Restaurant: Cafe Bastille |
| Miller | Mr. Evan | 3000 | Dining Reservations | | 10/4/2004 | | KC | Confirmed Time: 8pm Restaurant: Cafe Bastille |
| Wilson (P) | James A | | Limousine | | 10/4/2004 | | KC | Price: 75 Pick Up from: 123 Main St Culver City |

3 Entries were selected

- Make sure that everything is completed for the day.
- You can also put in a Category in the cell right above the reference date in order to limit the search to just that category.

Today's Active Logbook

Today's Activities -> Monday, October 4, 2004

Do Not Include "Complete" Entries

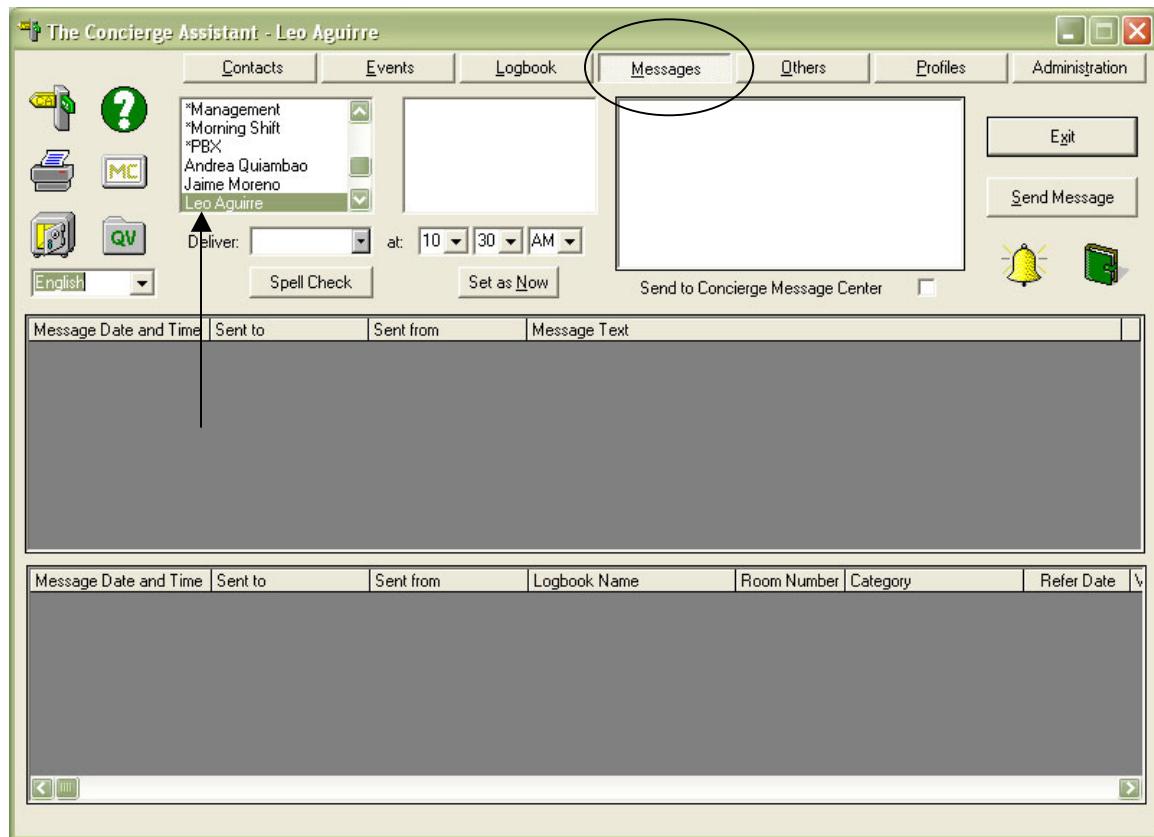
| Time | Last Name | First Name | Room # | Category | Notify | Who | Description |
|------|------------|------------|--------|---------------------|--------|-----|---|
| | Miller | Mr. Evan | 3000 | Dining Reservations | | KC | Confirmed Time: 8pm Restaurant: Cafe Bastille |
| | Campbell | Colleen | | Dining Reservations | | KC | Confirmed Time: 7pm Restaurant: Cafe Bastille |
| | Wilson (P) | James A | | Limousine | | KC | Price: 75 Pick Up from: 123 Main St Culver City |

You can select to see only the open entries.

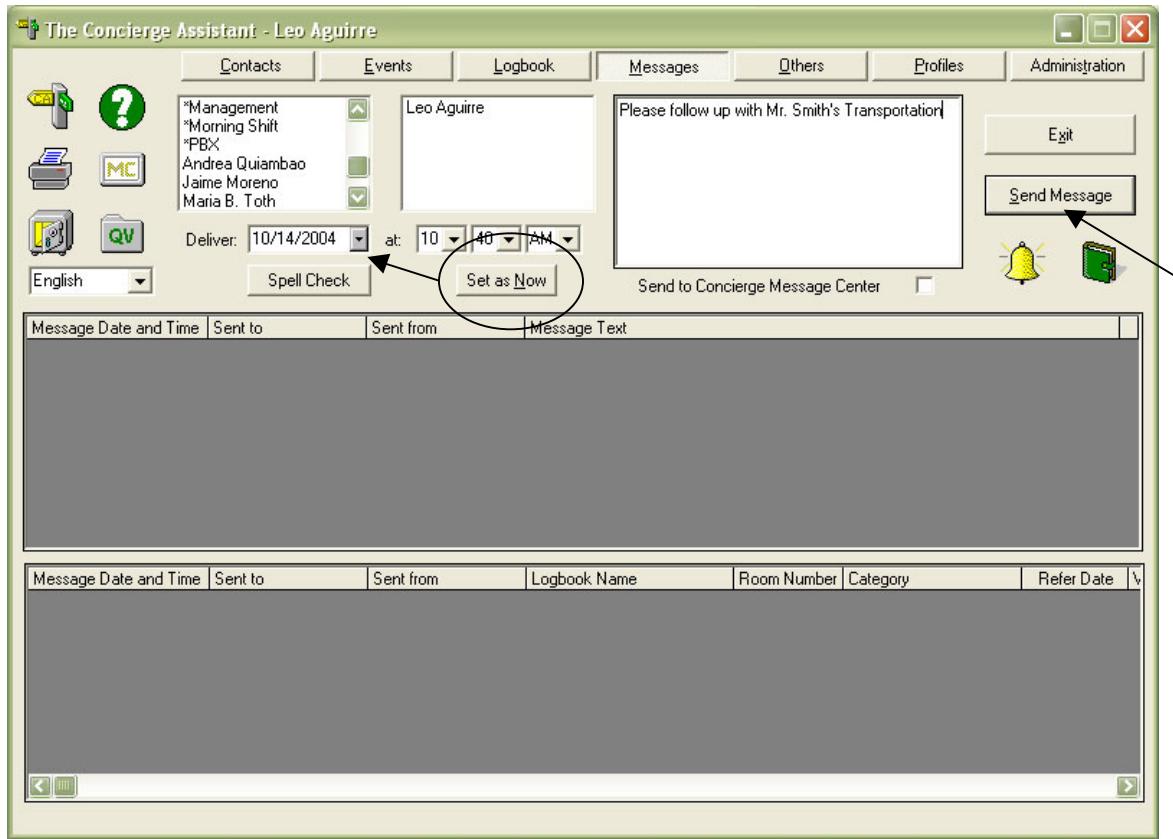
Messages

There are four sources of messages in the Concierge Assistant: Contacts, Events, Logbook, and Text Messages.

The Message Manager is where you can view the messages that you have received during your current session. This is also where you can create free form text messages.



To create a free form text message simply double click from the window in the left the name, names or group you wish to send the message



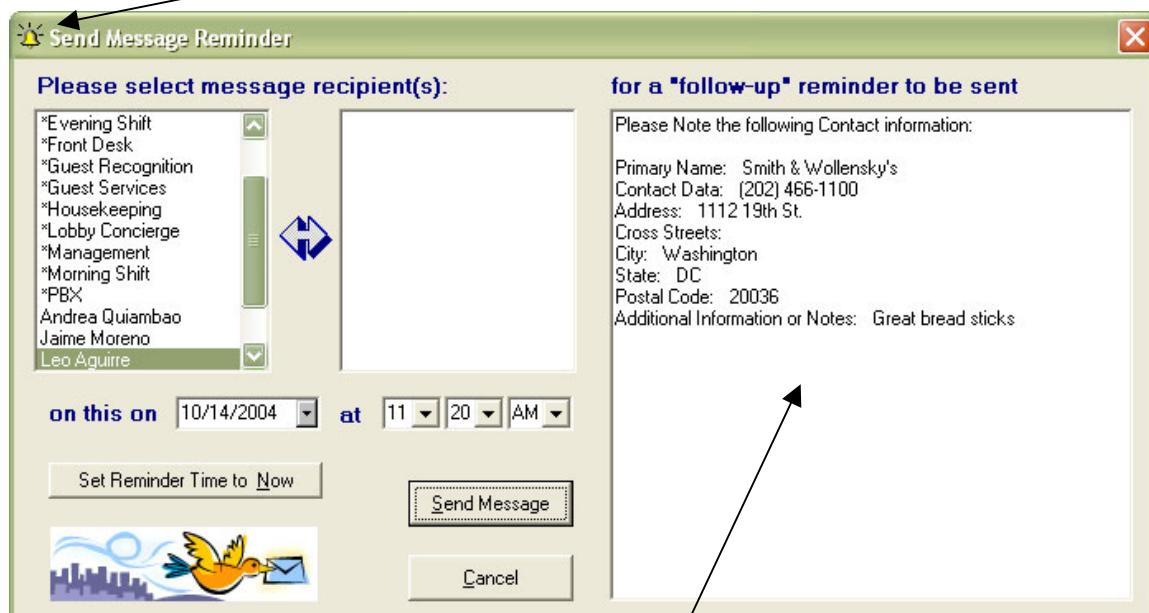
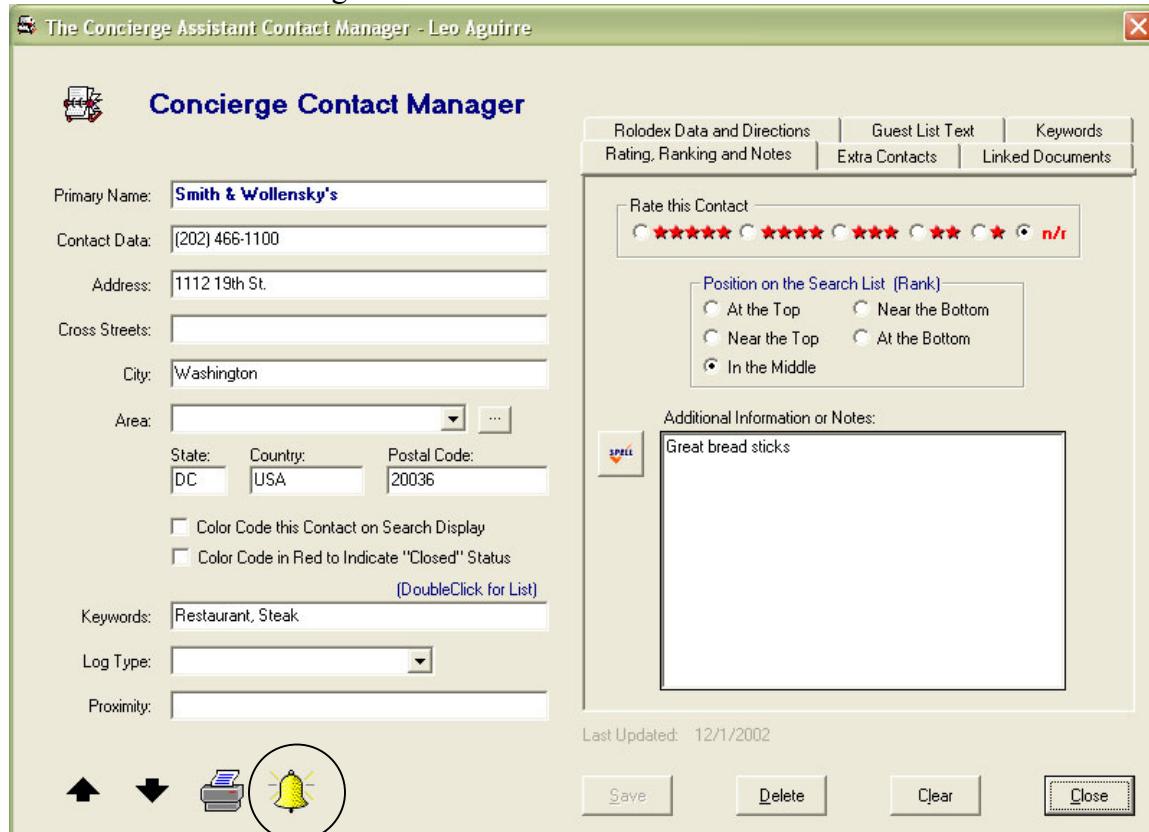
The names that you double click will move the middle window, there are the recipients of the message, The window in the right is where you type the message.

Once you have typed the message you will determine when the message needs to be delivered. A better option is to select the “Set as Now” button. This will default the message to today’s day and time.

To send the message just click in the button on the right “Send Message”

Contact Messages

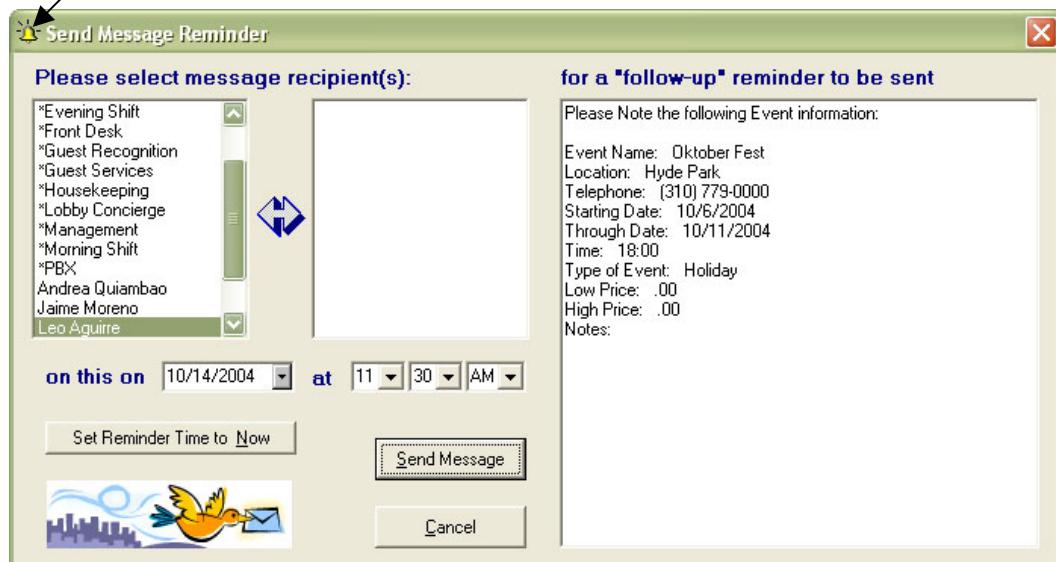
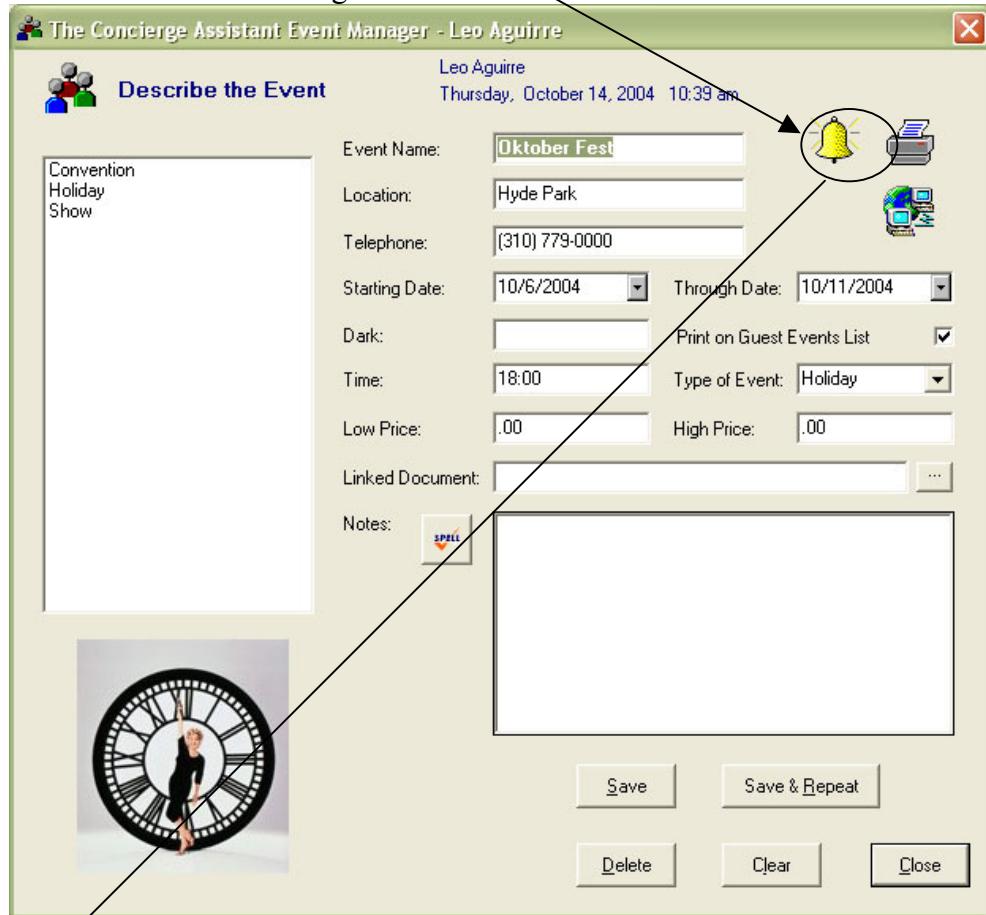
This feature gives you all of the details of a contact plus any additional message the sender may have added. To send a message from contacts, open the desired contact and double click in the message icon:



You can add additional information in the message

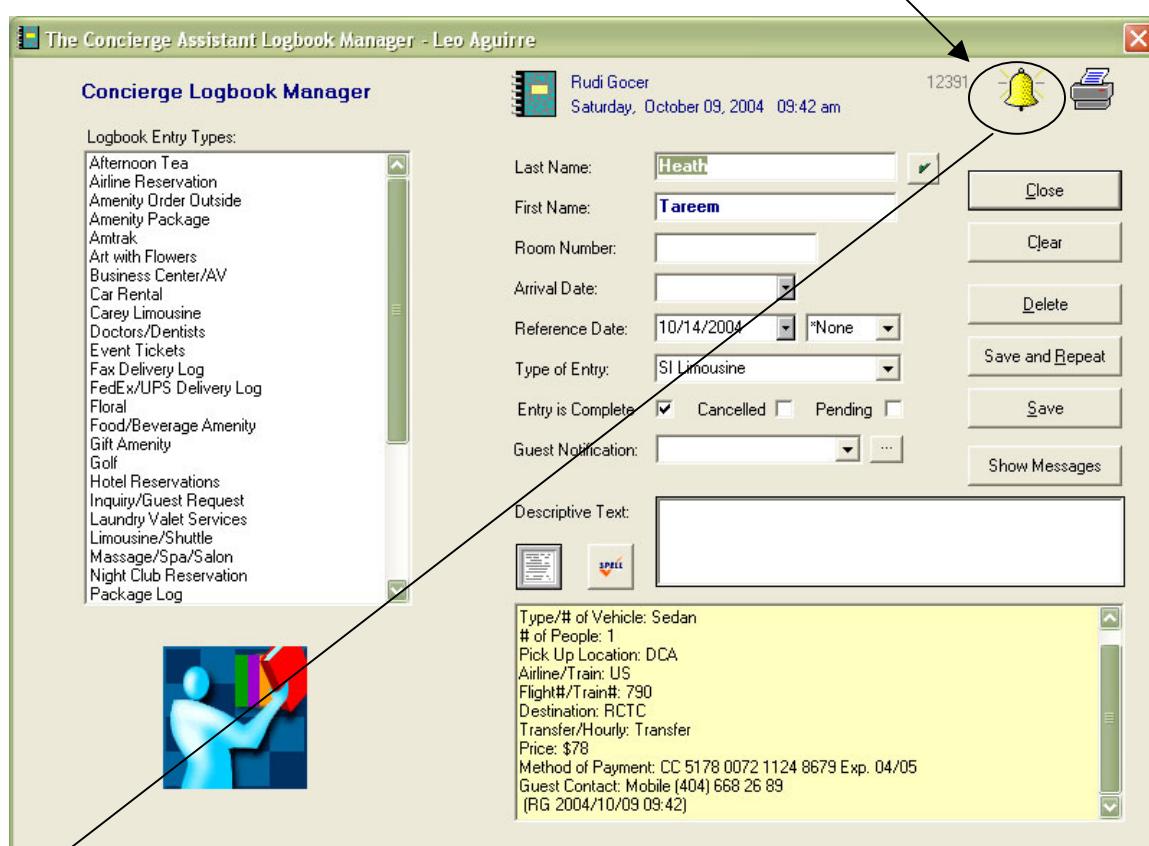
Event Messages

This feature gives you all of the details of the event plus any additional message the sender may have added. To send a message from events, open the desired event and double click in the message icon:



Logbook Messages

This kind of message gives you all of the details of the logbook entry. To send a message from a logbook entry, open the logbook entry and double click the message icon.

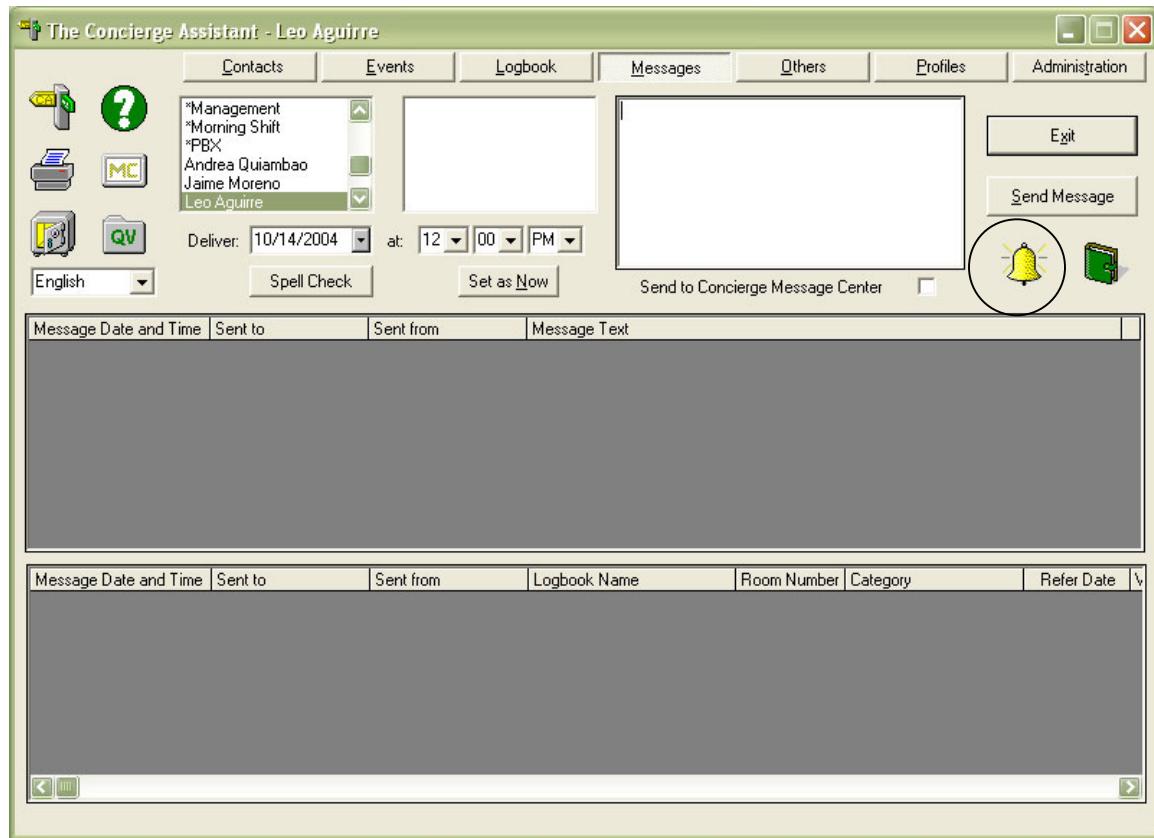


View Messages.

The Concierge Assistant checks for new messages every ten minutes. If you have more than 1 message the system will ask you if you wish to read your messages now, otherwise the message will pop up on the screen.

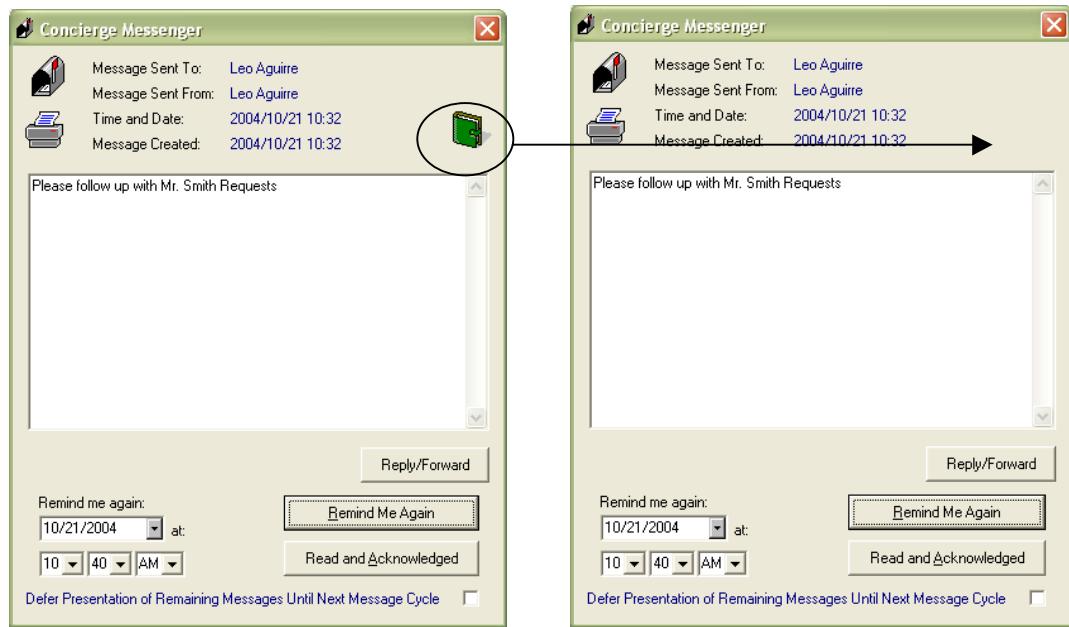


To review your messages select “Yes” on this screen or go to your message manager screen and double click the message icon.



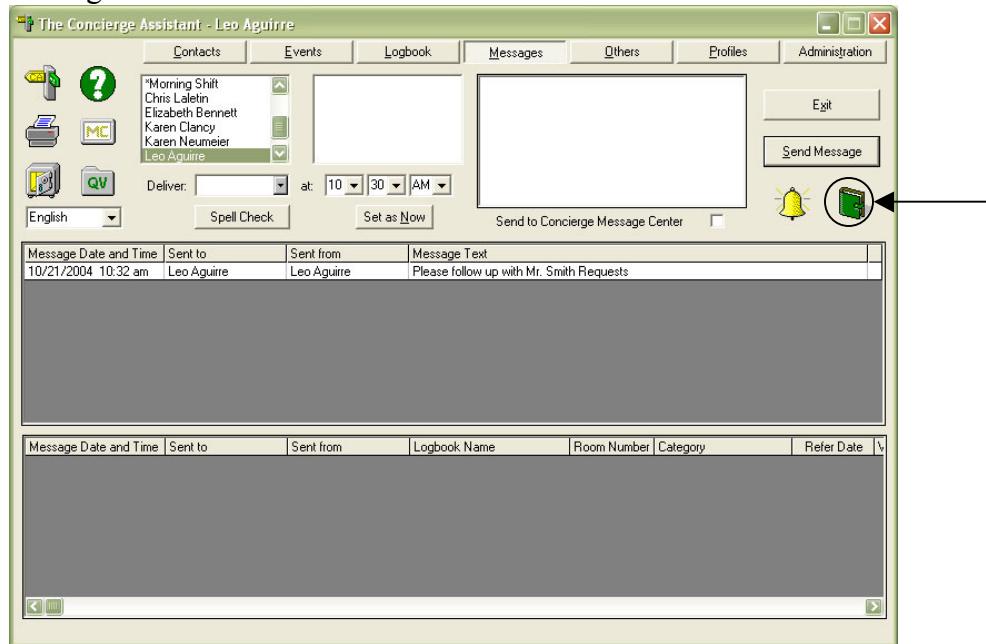
Saving Your Messages in the Message Center

When you receive a message, you will keep that message for the duration of your session, the minute you log off, the message will be erased. If you want to keep a copy of any particular message, double click on the green book icon located in the upper right corner:



The green book icon will disappear.

If you want to retrieve your message simply double click the green book icon on the messages screen:



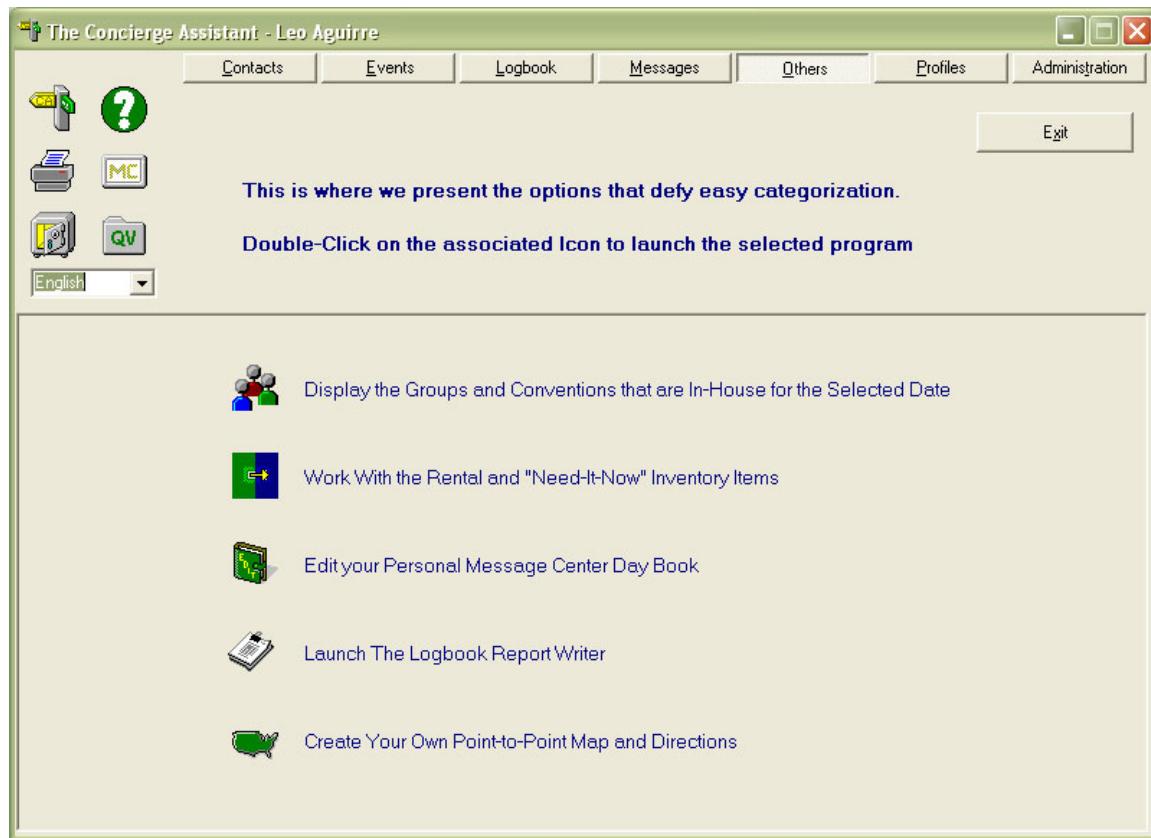
This is how the message center looks like:

The screenshot shows a Microsoft Internet Explorer window titled "Gold Key Solutions Message Center - Microsoft Internet Explorer provided by Compaq". The menu bar includes File, Edit, View, Favorites, Tools, and Help. The title bar also features the Windows logo. On the left, there is a logo for "Gold Key Solutions" with a stylized fleur-de-lis icon above the text. The main content area is titled "Personal Message Center for Leo Aguirre". Below this, there is a list of messages:

| Date | From | Message Content |
|---------------------|--------------|---|
| 2004/10/21 10:32 | Leo Aguirre | Please follow up with Mr. Smith Requests |
| 2003/10/30 08:53 | Leo Aguirre | Please Note the following Contact information: Primary Name: Cioppinos Contact Data: (415) 775-9311 Address: 400 Jefferson Street Cross Streets: City: San Francisco State: CA Postal Code: 94109 Additional Information or Notes: Maitre'd is David Luntz Service is very good, food has been inconsistent Hours of Operation: 5:00pm - Midnight Monday - Saturday Closed on Sundays Closed for renovations til October 30th Contact Information: Business Second Telephone = (414) 786-8897 Fax Second Number = (415) 666-7878 |
| 2003/10/29 08:23 | Quick Viewer | Please check the Task List in Your Quick Viewer. You have tasks assigned to you for today. |

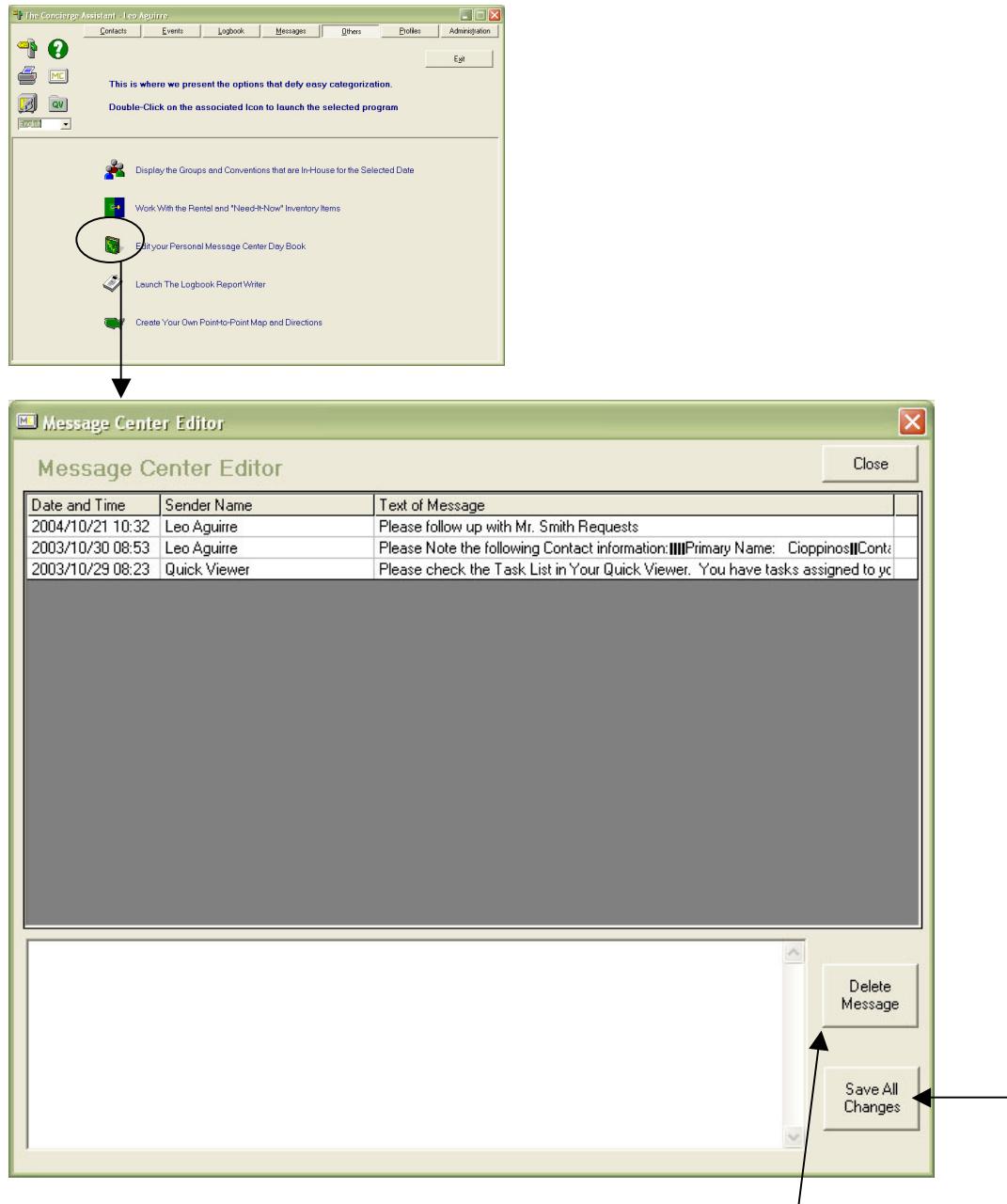
To edit your personal message center see “Others; edit your message center”

Other Screen



Edit your Personal Message Center Day Book

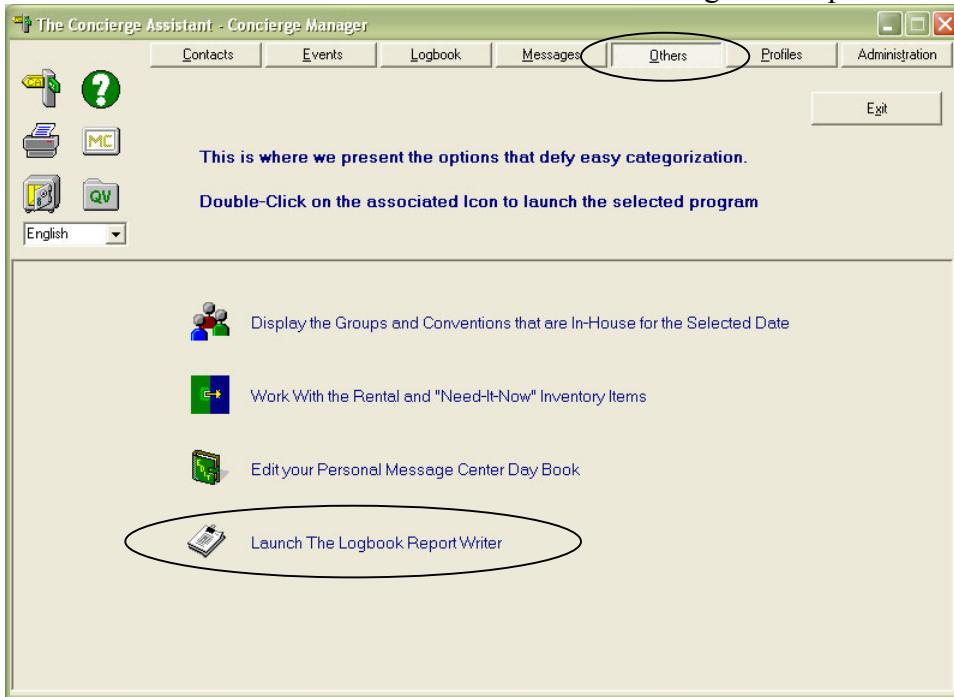
Simply double click on the green book icon:



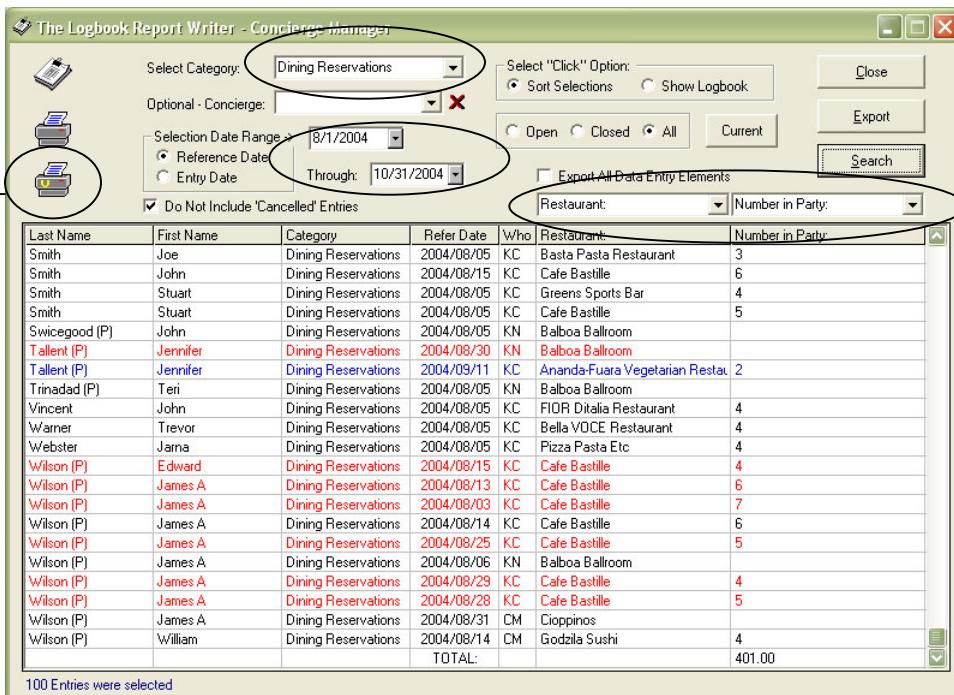
Double click on the messages you want to delete and click “Delete Messages” and “Save All Changes”

Vendor Report

In the “Others” screen double click on “Launch the Logbook Report Writer”

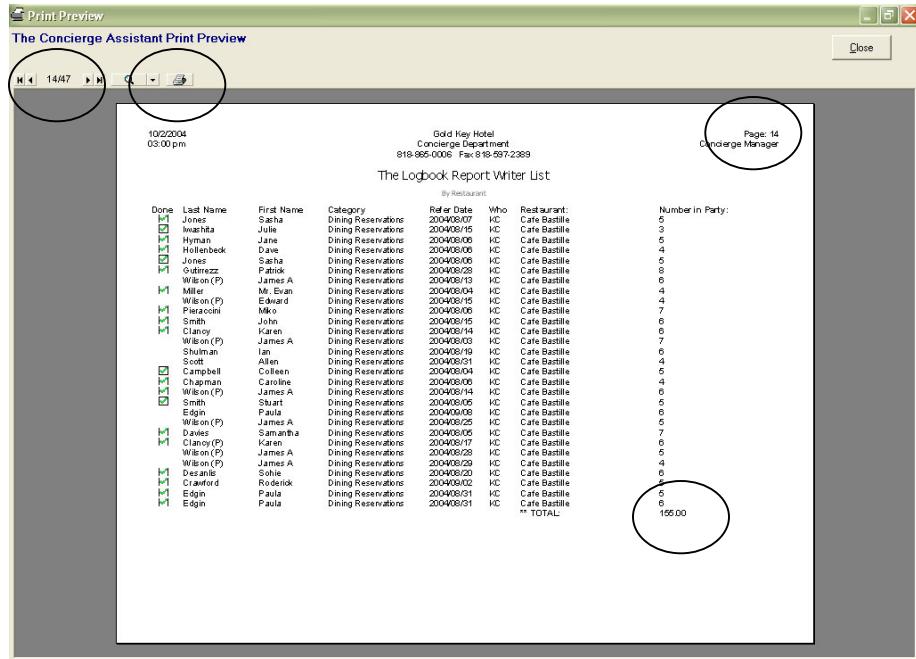


In “The Logbook Report Writer” Screen, select the category, the date range and the fields to print (Restaurant and Number in Party)



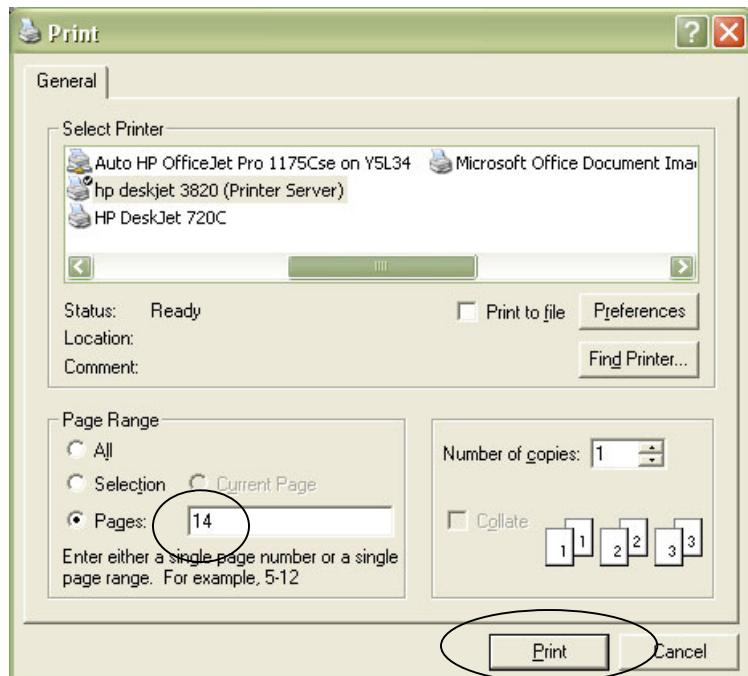
Double Click the vendor printer icon

Browse in the pages to find the desired restaurant, note the page number
And click the printer icon.



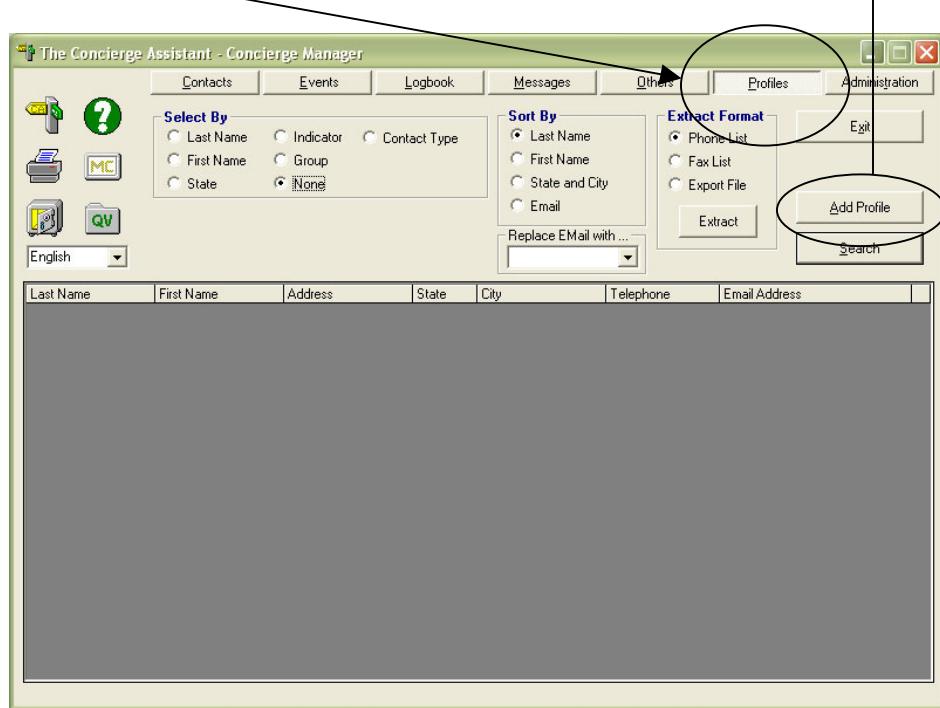
The program automatically count the numeric fields if there is not any alfa-character
(letter or symbols)

Select only the desired page and click print.

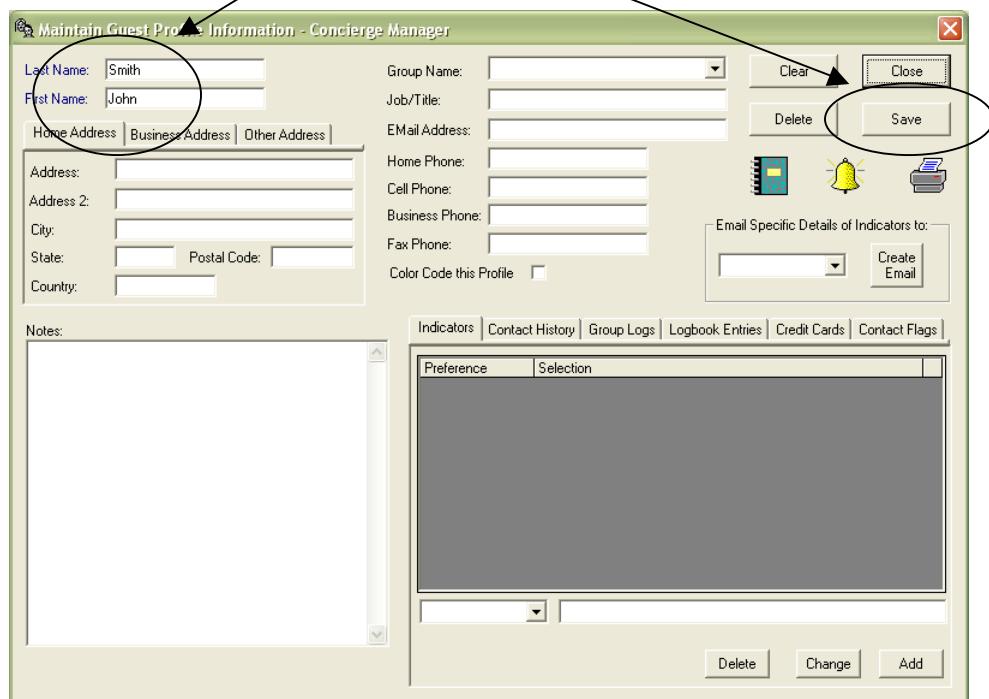


Profiles

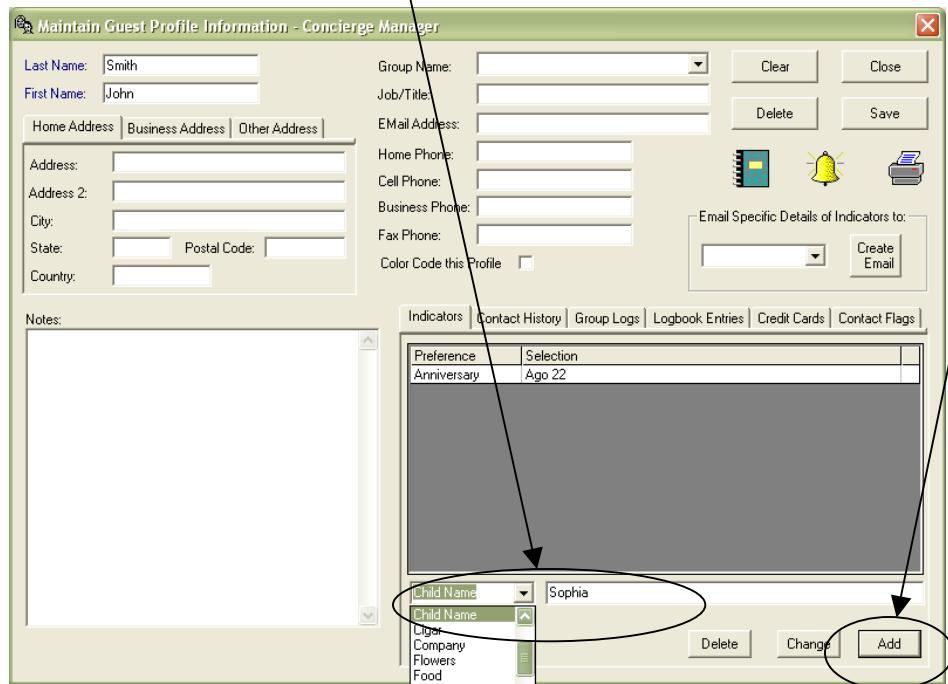
Click the profile tab and select add a profile



Fill out at least the guest name and click save



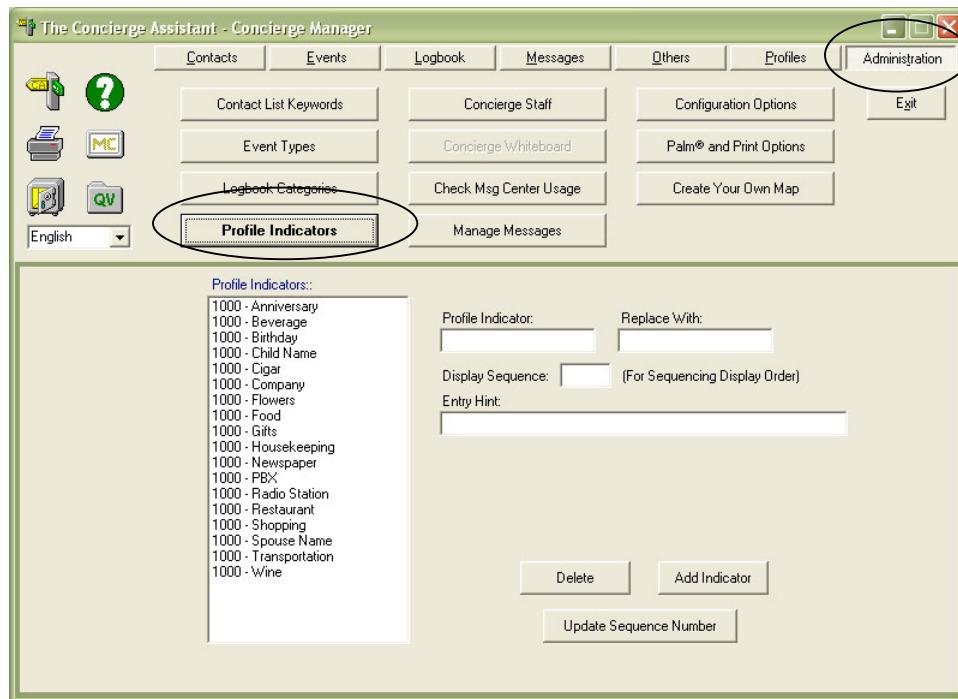
From the indicator drop down select the guest indicator (preference) and click add in as many as you know



You can type any notes about this guest as well

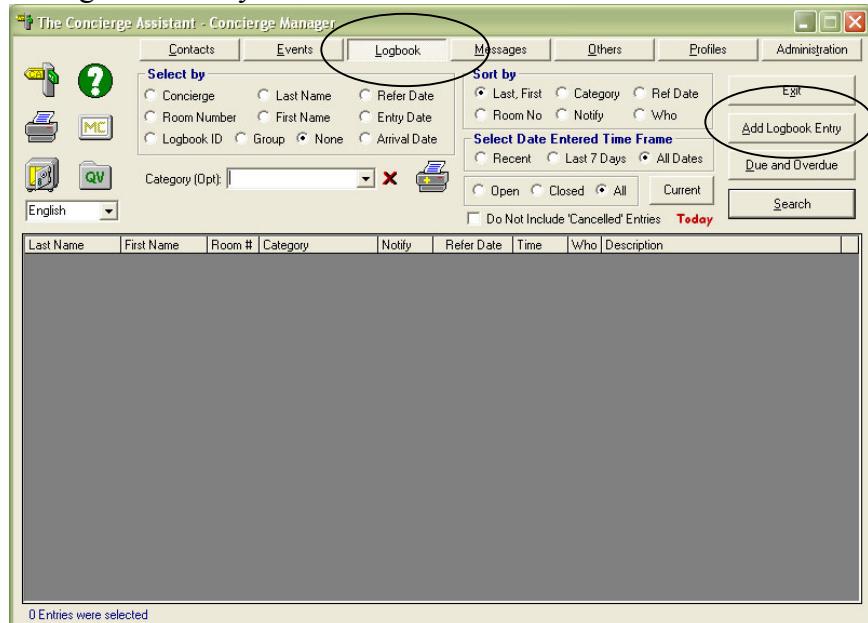
Profile Indicators

If you need to add indicator you may do it in the administration screen

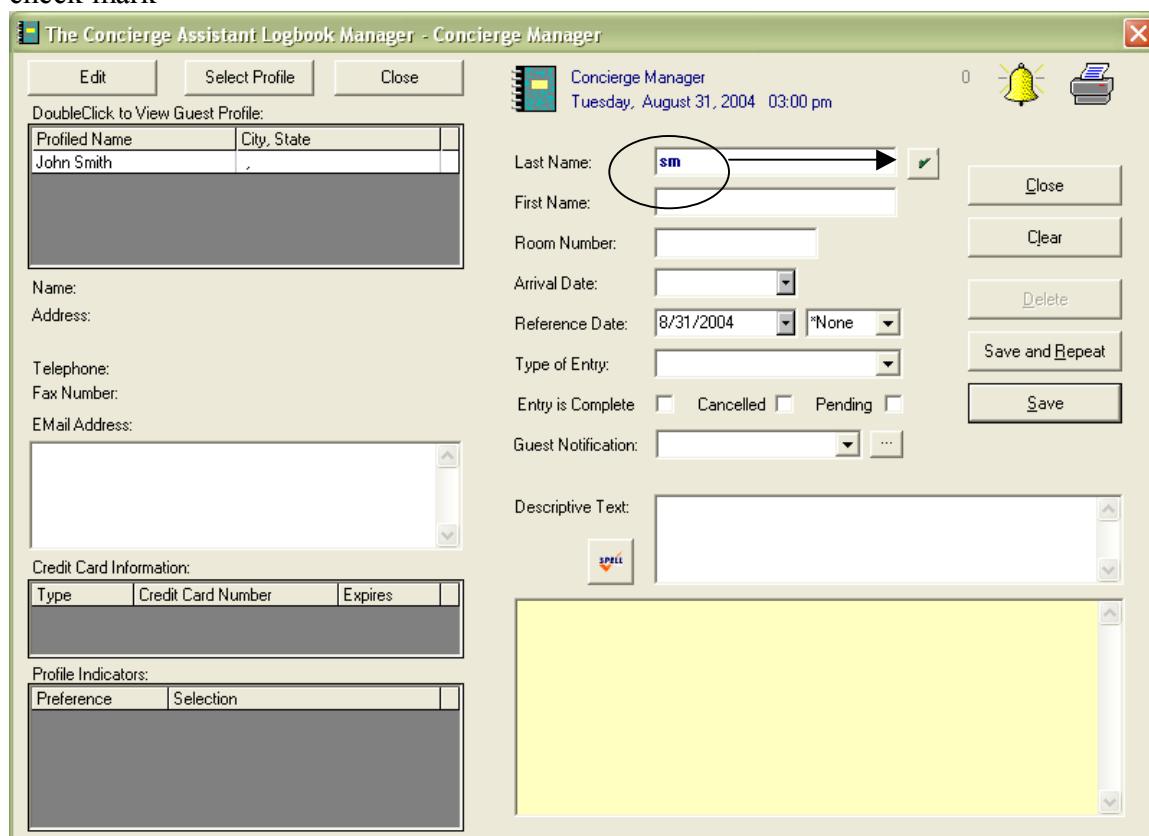


Profiles linked to a Logbook Entry

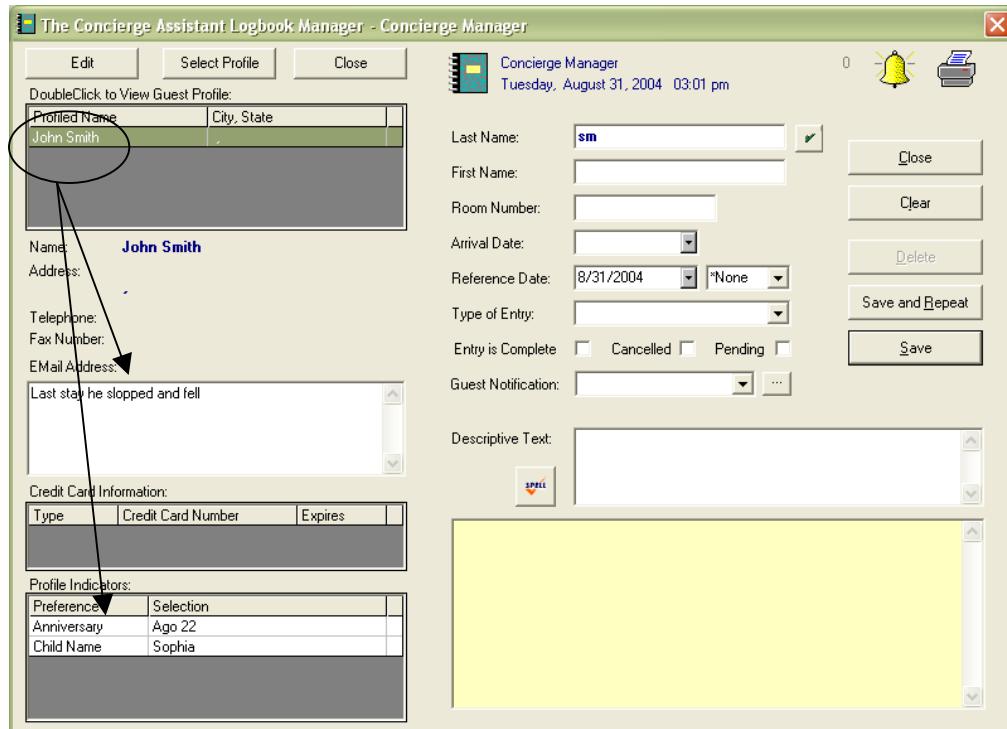
You can link the guest profiles to a logbook entry by going to the logbook screen and adding a new entry.



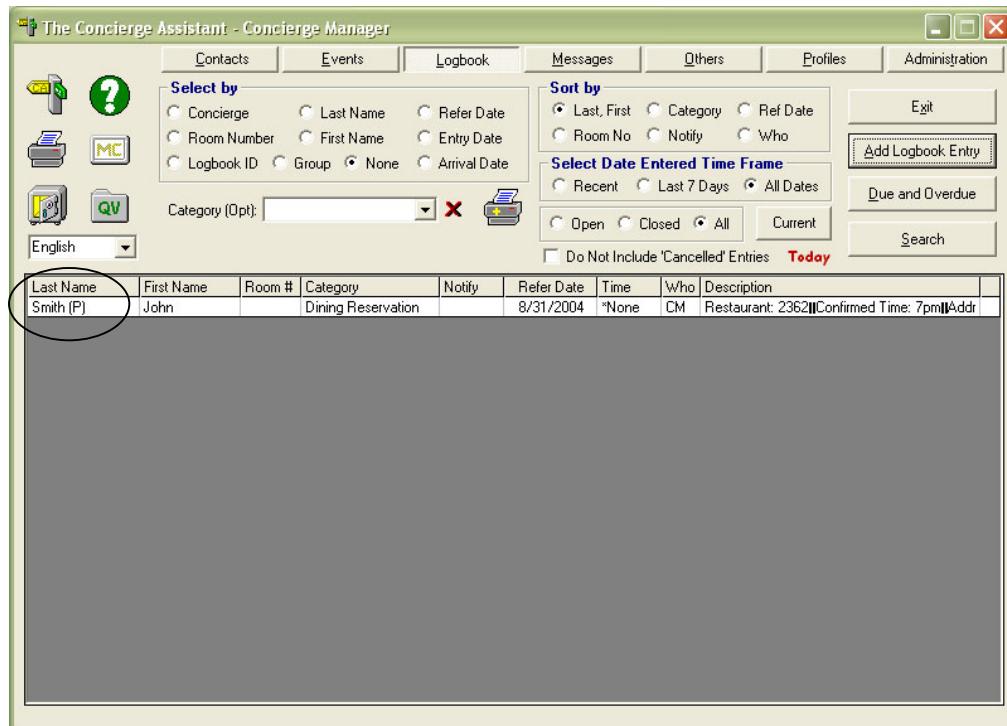
You will see the entry screen type the first 2 letters of the profile last name and click the check mark



You will see the profiles with this last name, double click the desired profiled and you will see the notes and the preferences.



Click select profile and you will see the note that this guest is profiled. When you saved the entry you will see a (P) next to the last name indicating that is a profiled guest.



Every entry you make using the profiles information will be attached to the profile screen.

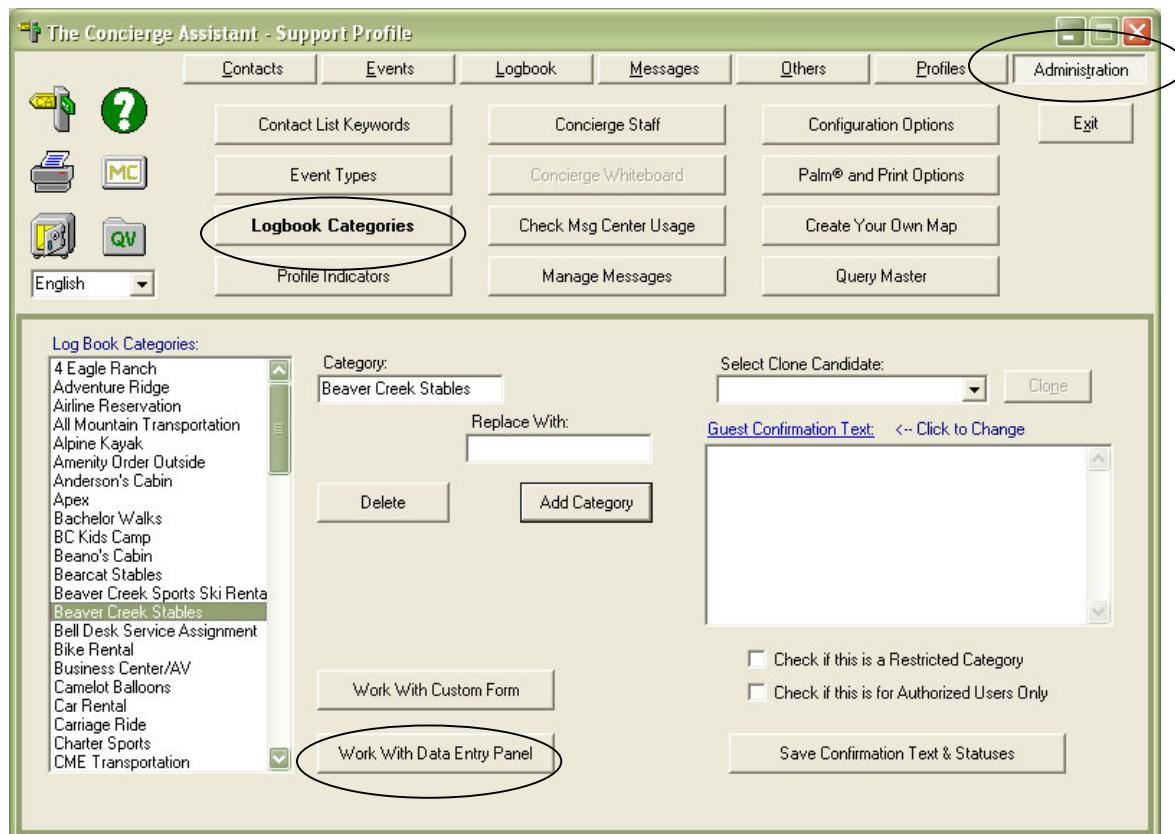
Maintain Guest Profile Information - Concierge Manager

| Last Name: <input type="text" value="Smith"/> | Group Name: <input type="text"/> | Clear | Close | | | | | | |
|---|--|---|--------------|------------|--------------|------------|-----------|--------------------|--|
| First Name: <input type="text" value="John"/> | Job/Title: <input type="text"/> | Delete | Save | | | | | | |
| Home Address Business Address Other Address | | | | | | | | | |
| Address: <input type="text"/> | Home Phone: <input type="text"/> | | | | | | | | |
| Address 2: <input type="text"/> | Cell Phone: <input type="text"/> | | | | | | | | |
| City: <input type="text"/> | Business Phone: <input type="text"/> | Email Specific Details of Indicators to:- | | | | | | | |
| State: <input type="text"/> | Fax Phone: <input type="text"/> | <input type="text"/> | Create Email | | | | | | |
| Postal Code: <input type="text"/> | Color Code this Profile <input type="checkbox"/> | | | | | | | | |
| Country: <input type="text"/> | | | | | | | | | |
| Notes: Last stay he stopped and fell | | | | | | | | | |
| Indicators Contact History Group Log Logbook Entries Credit Cards Contact Flags Refresh | | | | | | | | | |
| <table border="1"><thead><tr><th>Refer Date</th><th>Logbook Type</th><th>Group Name</th></tr></thead><tbody><tr><td>8/31/2004</td><td>Dining Reservation</td><td></td></tr></tbody></table> | | | | Refer Date | Logbook Type | Group Name | 8/31/2004 | Dining Reservation | |
| Refer Date | Logbook Type | Group Name | | | | | | | |
| 8/31/2004 | Dining Reservation | | | | | | | | |

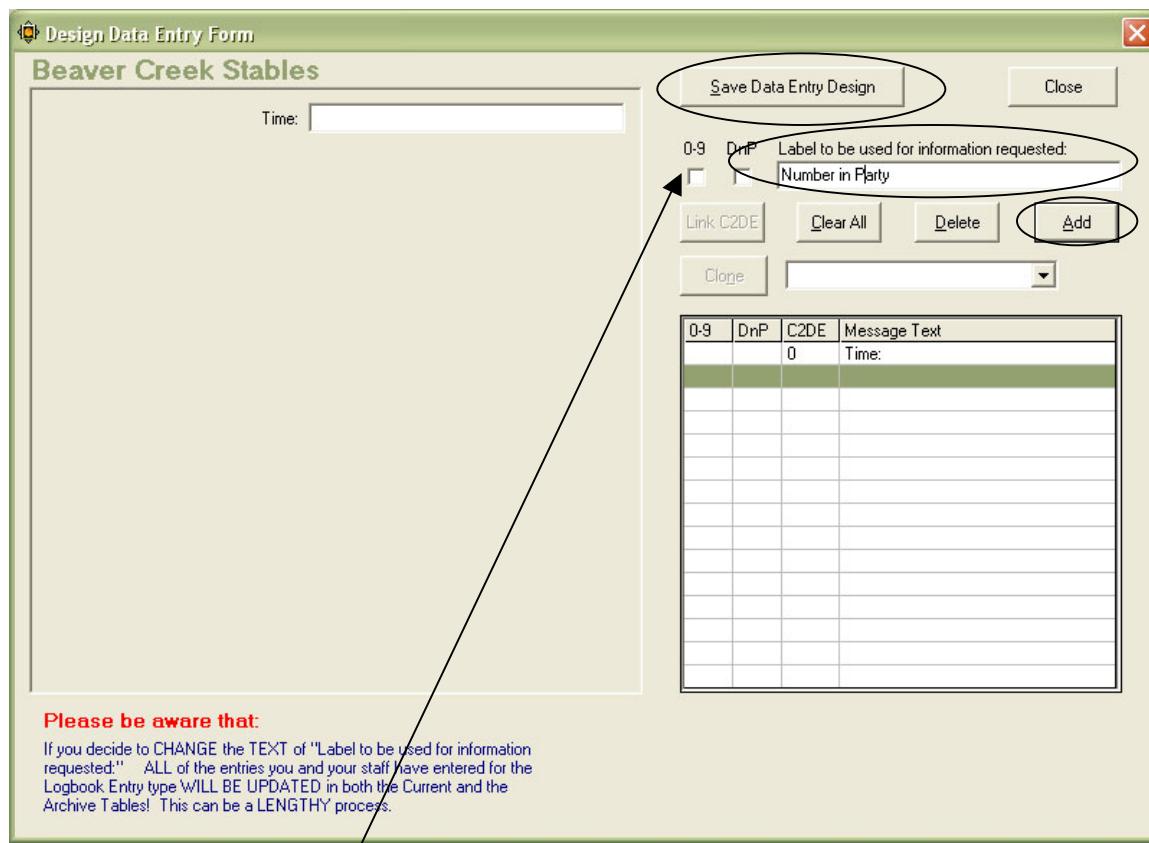
Administration

Creating Logbook Categories

From the administration screen select Logbook Categories. Click on the desired category and then click the “Work With Data Entry Panel”

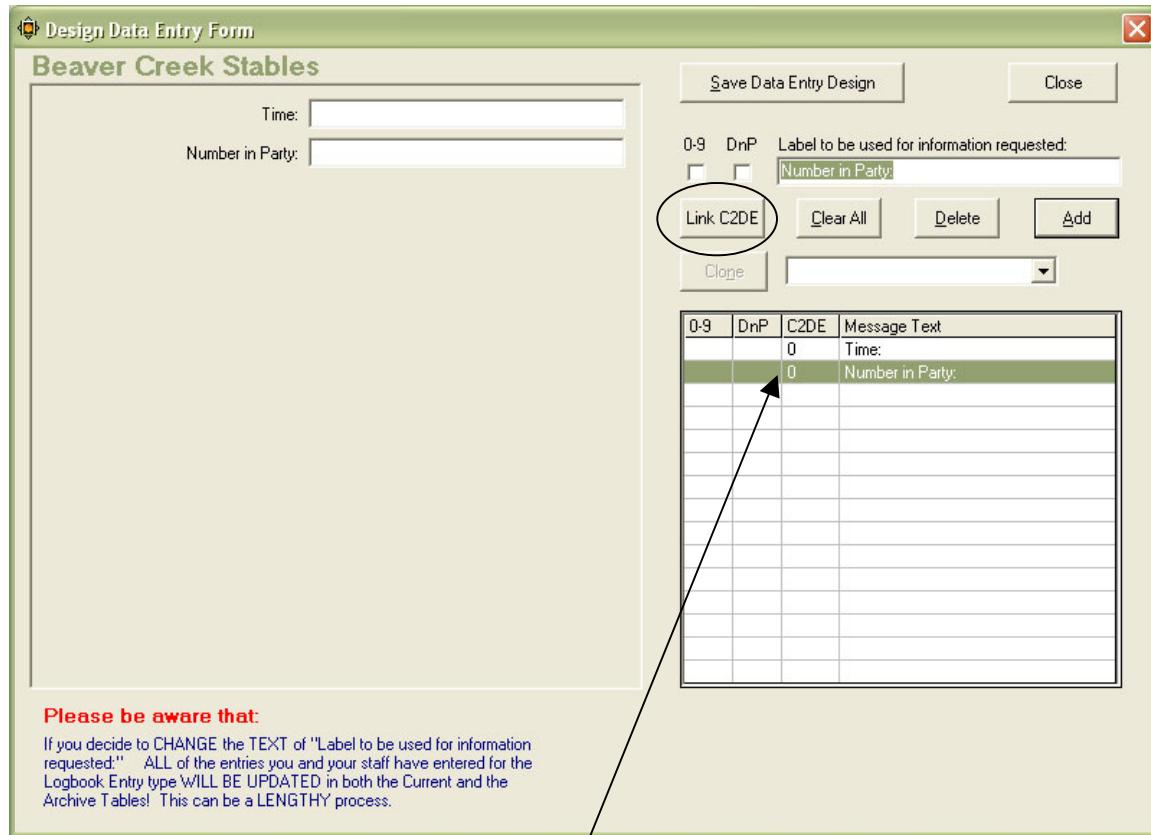


You will see the data entry panel. Create the desired fields by typing in the “Label to be used for information required”. After you type in the label click “Add”, when you finish typing your fields click “Save Data Entry Design”

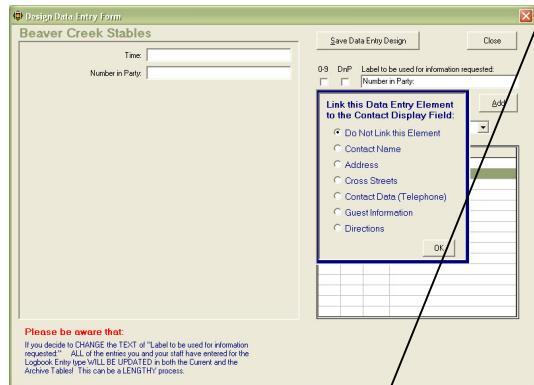


Note. You can make numeric field by selecting the check mark in 0-9 or do not print field by selecting the DnP check box

You can link elements from Contacts by clicking the “Links C2DE” button. (You only will see these button active after you have click the “Add” button)



You can link all these elements from Contacts:

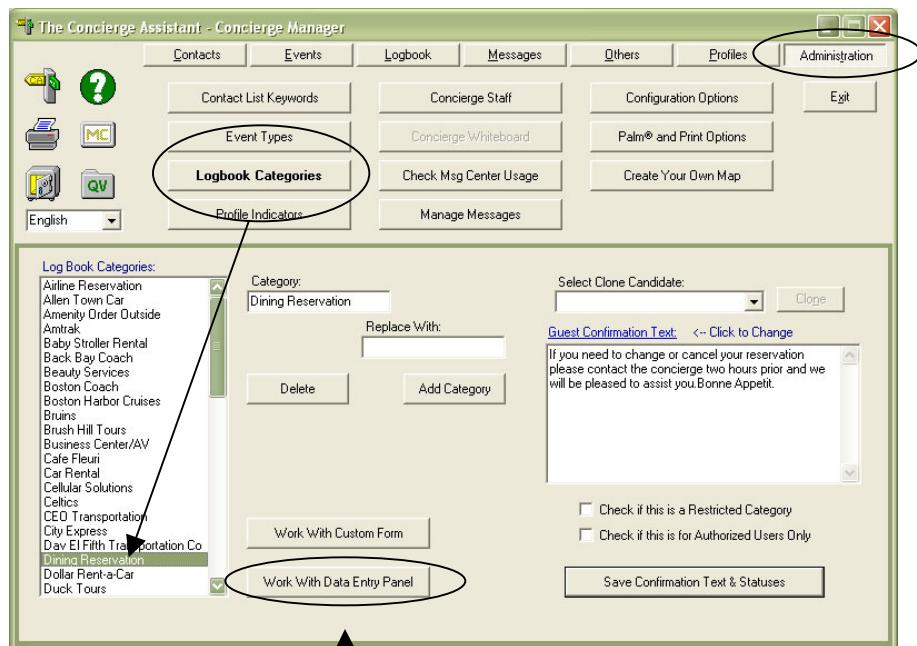


Please see the document “linking directions from Contacts” for more details about this feature.

After you have link the desired elements make sure you click “Add” you will see a number different than “0” in the “C2DE” column. Finally save the data entry and you are all set.

Do not print fields

From the administration tab select “logbook categories” and select the desired category



Click on the “work with data entry panel” button and select the field you do not want to print and click on the DNP check box and click add.

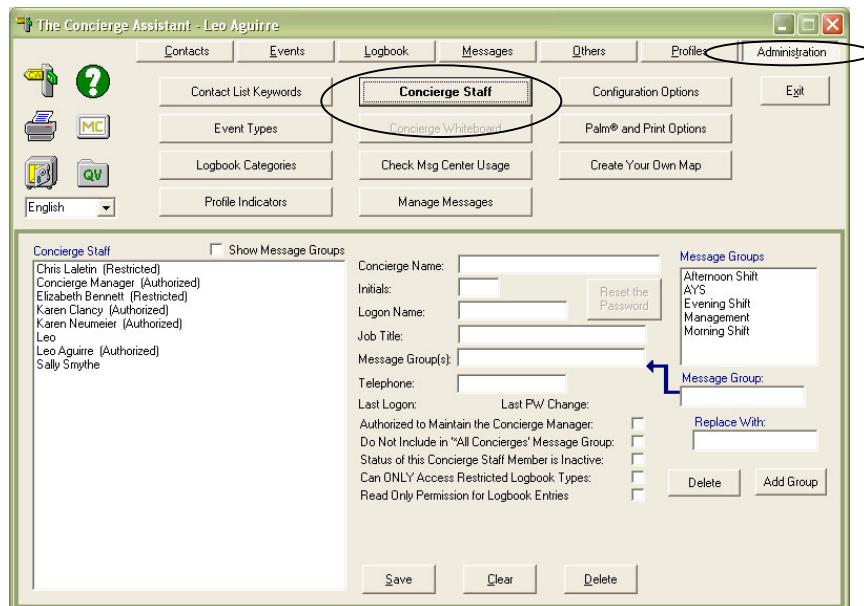
| C2DE | DnP | Message Text |
|------|-------------------------------------|-------------------|
| 0 | <input checked="" type="checkbox"/> | Restaurant: |
| 0 | <input checked="" type="checkbox"/> | Confirmed Time: |
| 0 | <input checked="" type="checkbox"/> | Address: |
| 0 | <input checked="" type="checkbox"/> | Telephone: |
| 0 | <input checked="" type="checkbox"/> | Number in Party: |
| 0 | <input checked="" type="checkbox"/> | Confirmed With: |
| 0 | <input checked="" type="checkbox"/> | Special Requests: |
| 0 | <input checked="" type="checkbox"/> | Notes: |

Please be aware that:
If you decide to CHANGE the TEXT of "Label to be used for information requested:" ALL of the entries you and your staff have entered for the Logbook Entry type WILL BE UPDATED in both the Current and the Archive Tables! This can be a LENGTHY process.

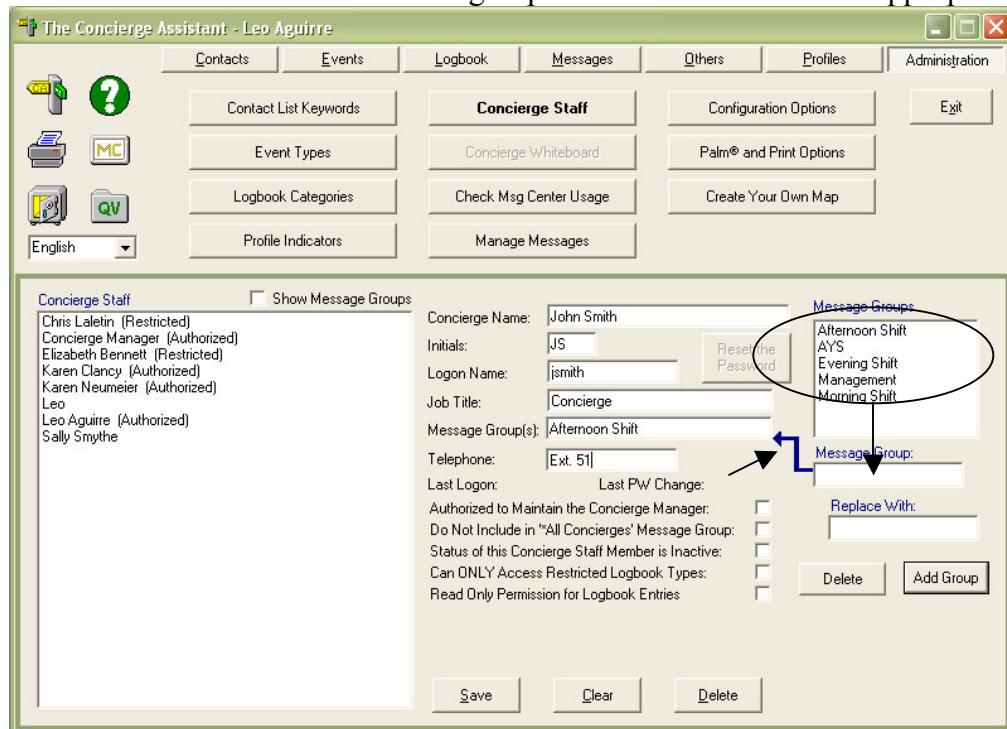
Click “save data entry design” and “close” this field will not print on the itinerary or the guest confirmation.

Adding Concierge Staff

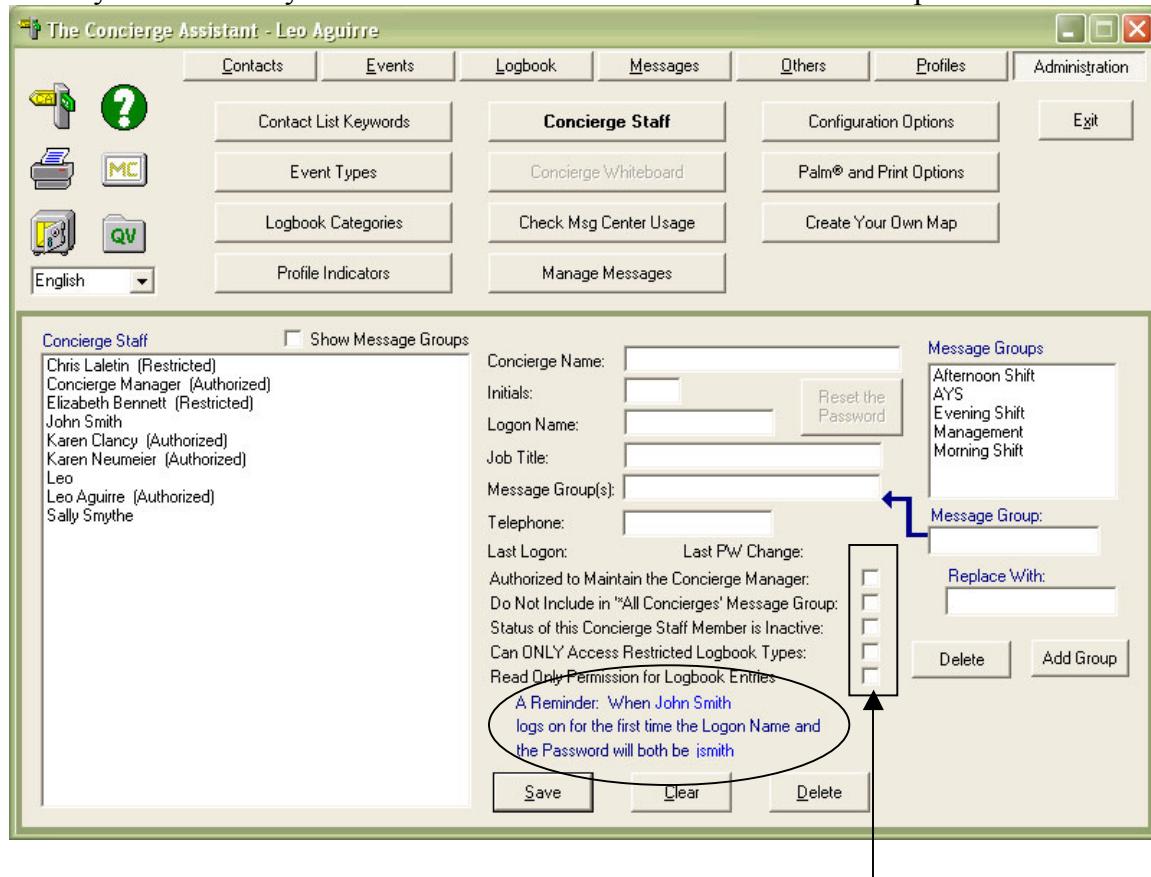
From the “Administration” tab select “Concierge Staff”



Fill out the Concierge information. To avoid mistyping in the message group double click in the selected group. When the desired group is in the “Message Group” field on the left, double click the blue arrow and the group will be transferred to the appropriate field.



When you click save you will see a reminder of the user name and the password



A regular Concierge should not have any of this check boxes selected.

A manager or supervisor should be “Authorized to Maintain the Concierge Manager”

You can select restricted users as well as read only attributes.

The Concierge Assistant Maintenance Program

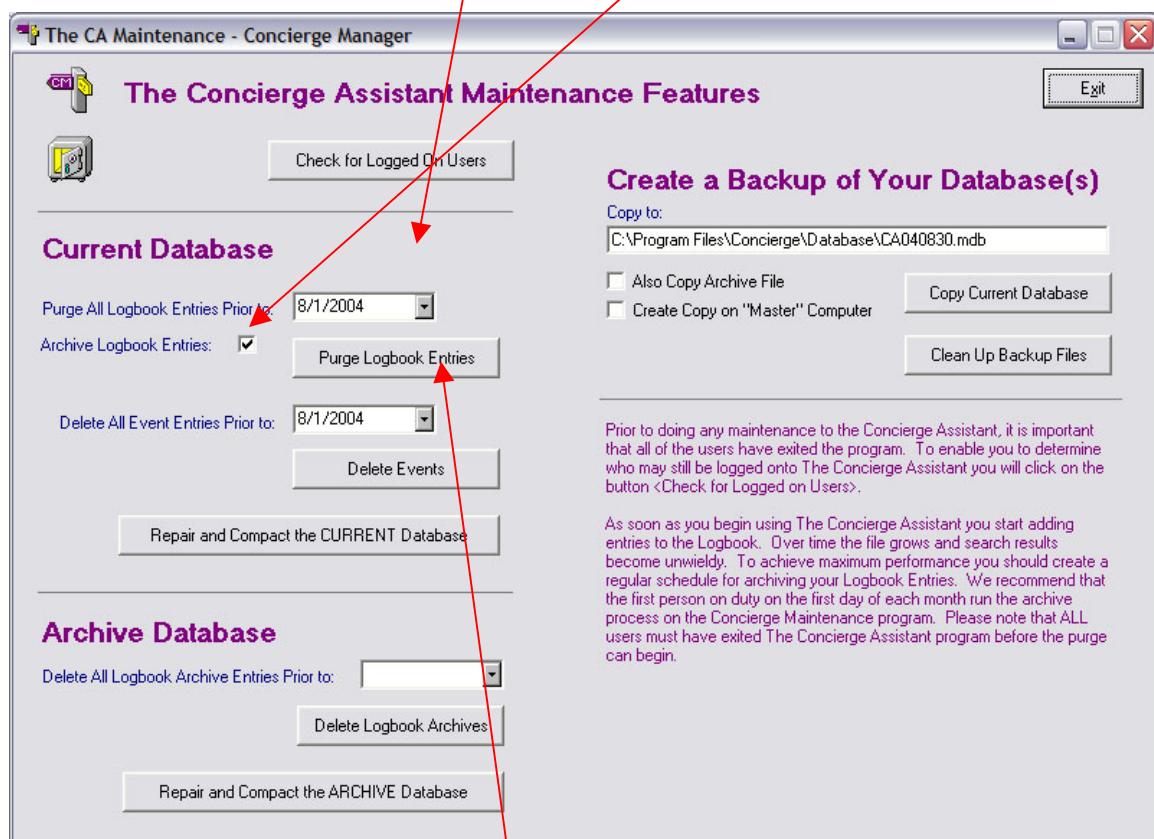
Archiving your Database

As soon as you begin using The Concierge Assistant you start adding entries to the Logbook. Over time the file grows and search results become unwieldy. **To achieve maximum performance you should create a regular schedule for archiving your Logbook Entries.** We recommend that the first person on duty on the first day of each month run the archive process on the Concierge Maintenance program. Please note that ALL users must have exited The Concierge Assistant program before the purge can begin. (Please refer to our Best Practices document - "Check for Logged On Users")

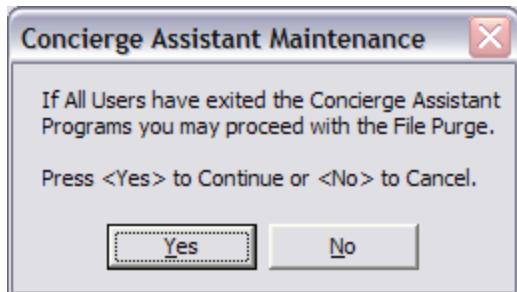
The "Current Database" section of the Concierge Maintenance program provides the features for archiving or purging the Current Database.

When you launch the Concierge Maintenance program the calendar combo-type box has a date equal to the first day of the current month.

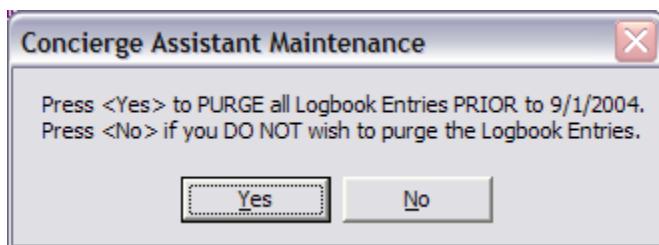
By default, the "Archive Logbook Entries" checkbox is checked. If this is NOT checked, the Logbook entries will be DELETED instead of Archived.



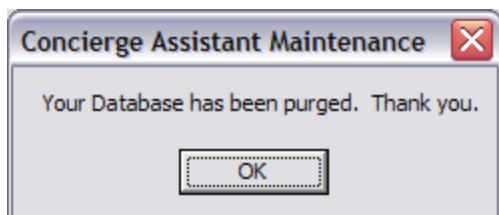
Press the "Purge Logbook Entries" button.



This screen will appear



Click on the "Yes" button after confirm that EVERYONE is exited out of The Concierge Assistant. After you click the "Yes" button, this screen will appear asking for a confirmation of the Archiving date.

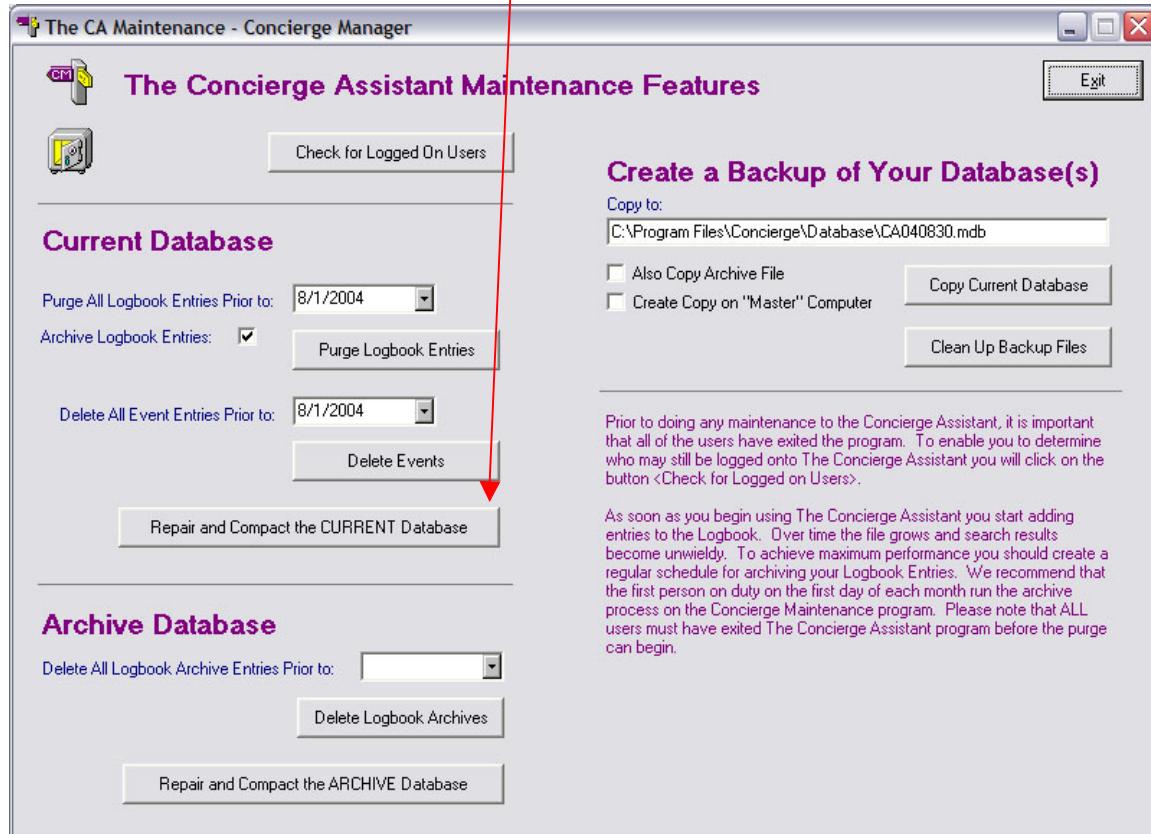


After the "Purge" has completed, you will see this message.

NOTE: This process can take a lot of time if there are an extensive number of Logbook entries to archive.

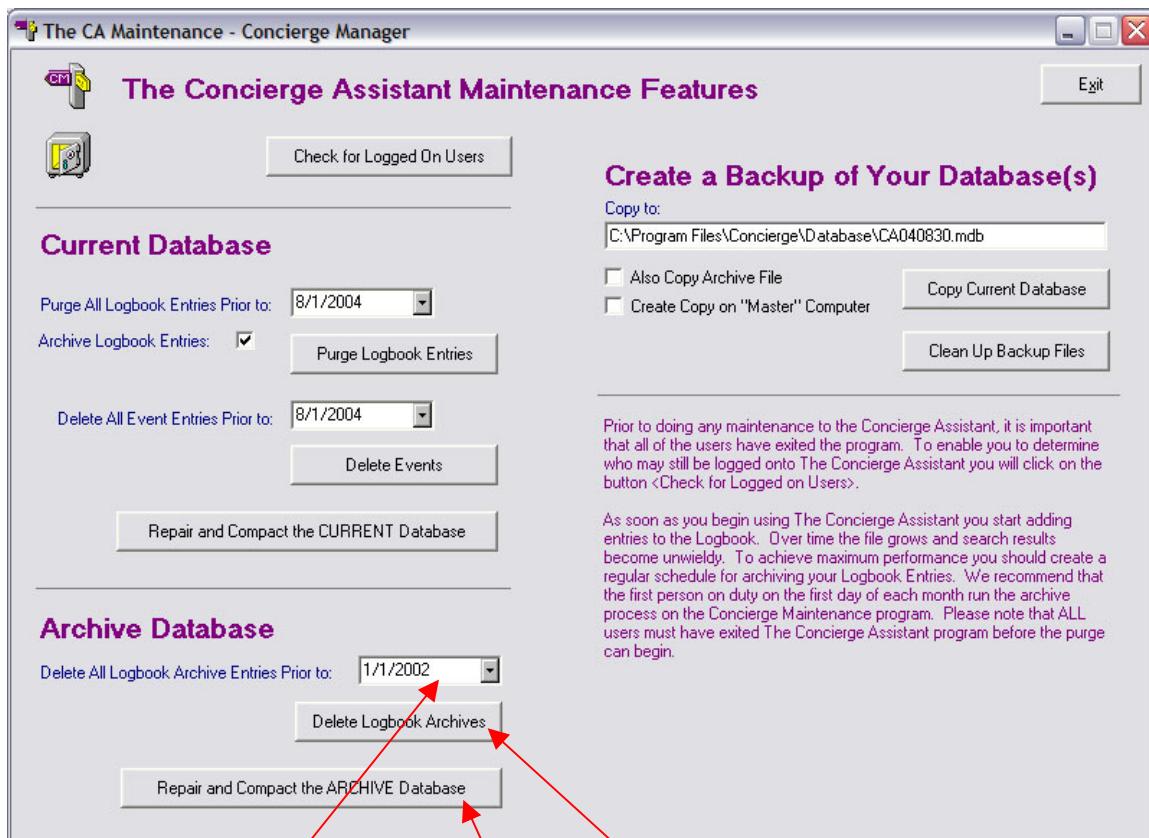
Click the "OK" button. The Archiving itself has been completed.

After the Purge has completed, be sure to press the “Repair and Compact the CURRENT Database” button to complete the process.



Logbook Entries that have been archived can be viewed at any time. None of the information is lost. The only change that can be made to an existing archived record is to append a text message to the entry. Even after a Logbook entry has been archived, it may be cloned for returning guests who wish to repeat past activities for their current trip.

Over time, your Archived Logbook entries may become too unwieldy to keep forever. Therefore, the Concierge Maintenance program provides the ability to delete unwanted logbook entries from the archived database.



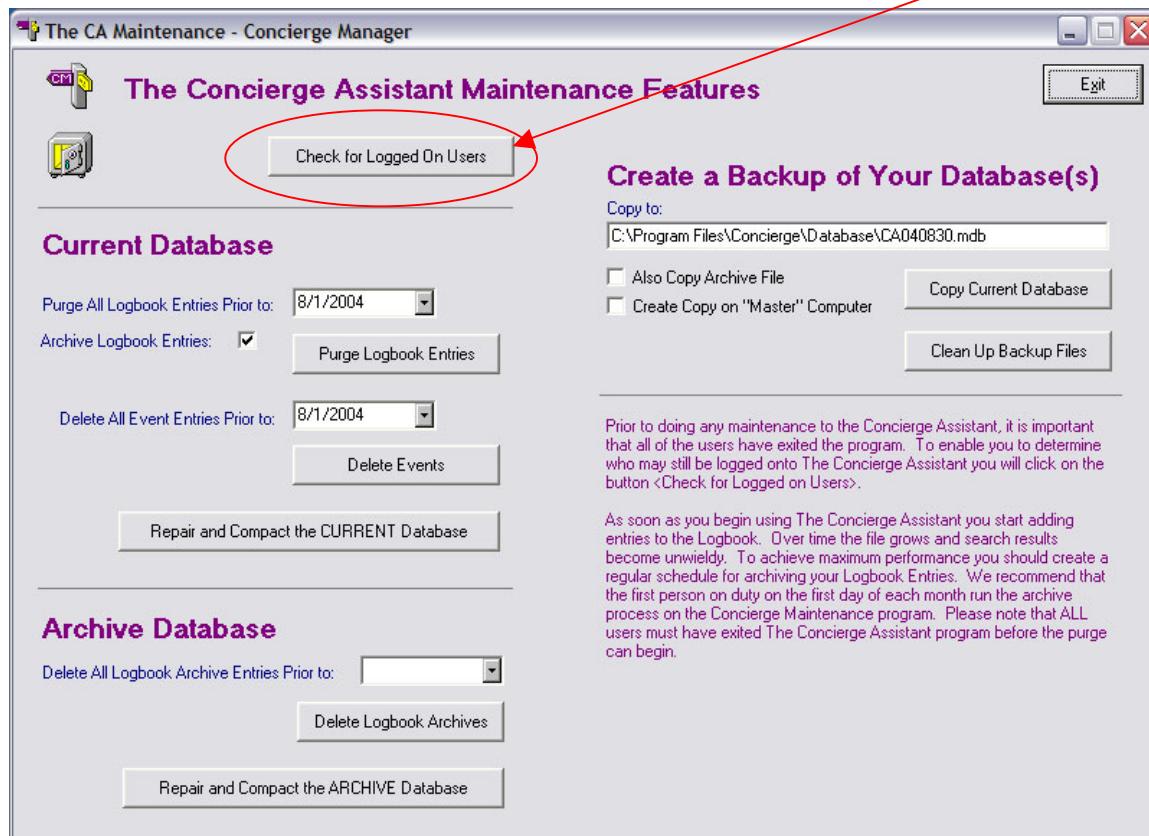
You will select the month, day and year that you want the entries deleted prior to from the calendar-combo box.

You will then click on the button labeled "Delete Logbook Entries".

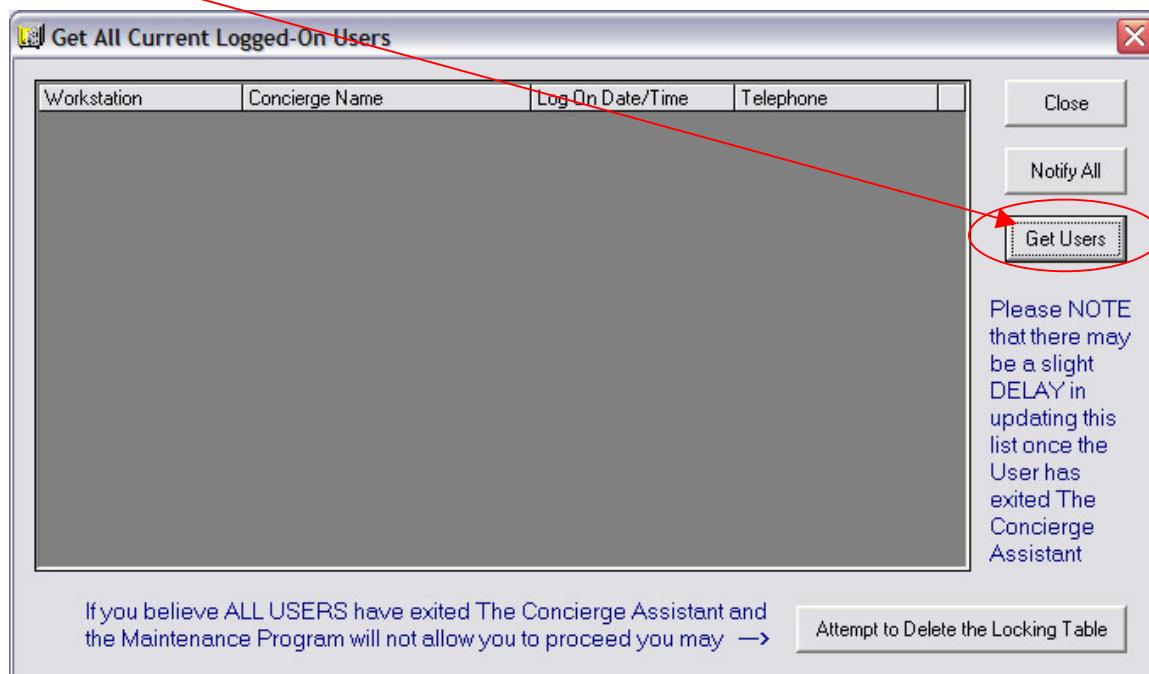
When the deletion has completed, be sure to click on the "Repair and Compact the ARCHIVE Database" button to complete this maintenance.

Check for Logged On Users

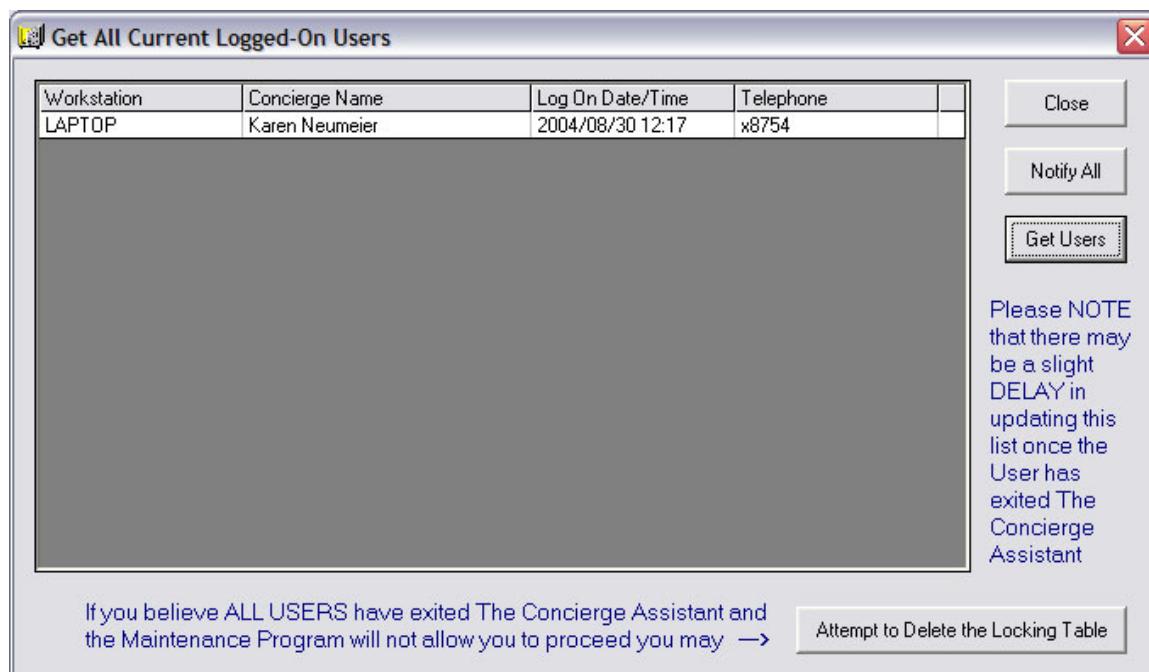
Prior to doing any maintenance to the Concierge Assistant, it is important that all of the users have exited the program. To enable you to determine who may still be logged onto The Concierge Assistant you will click on the button "Check for Logged on Users"



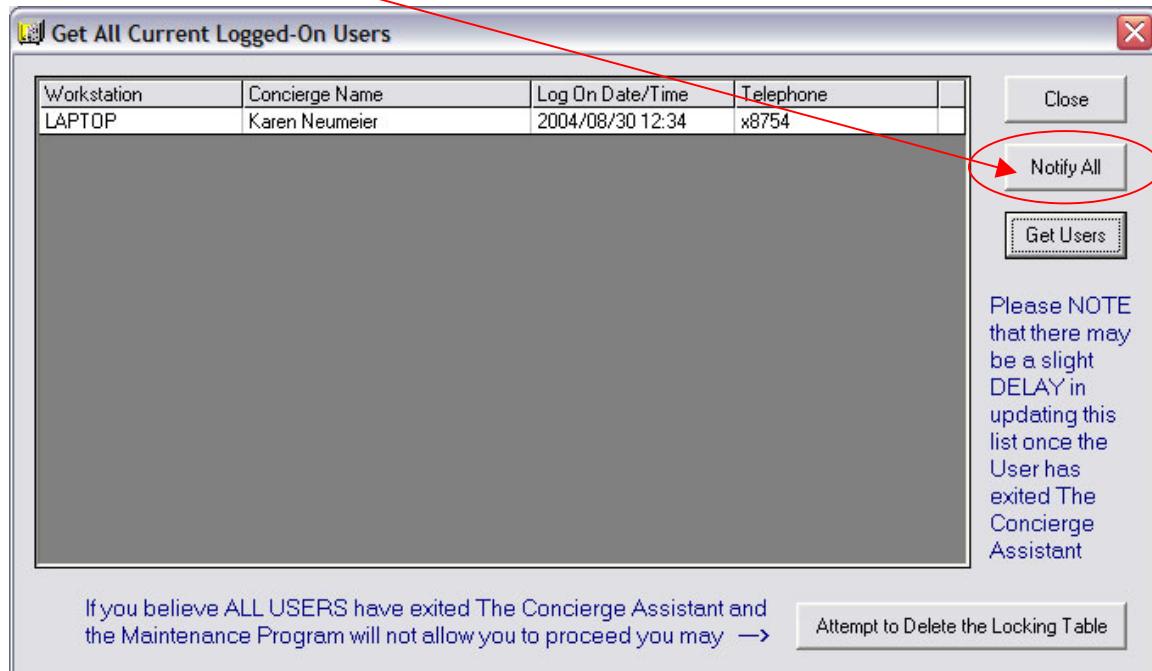
This will bring up a screen identical to the one below. You will then press on the button "Get Users"



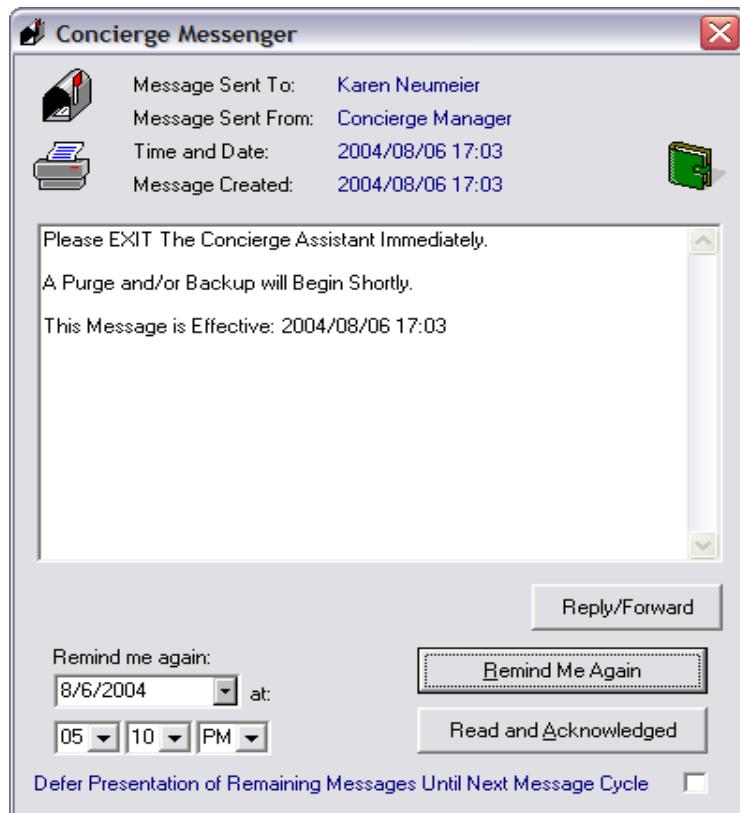
The Concierge Assistant will tell you the names of the users still signed on, as well as their computer name and telephone number (if provided with the staff member's name).



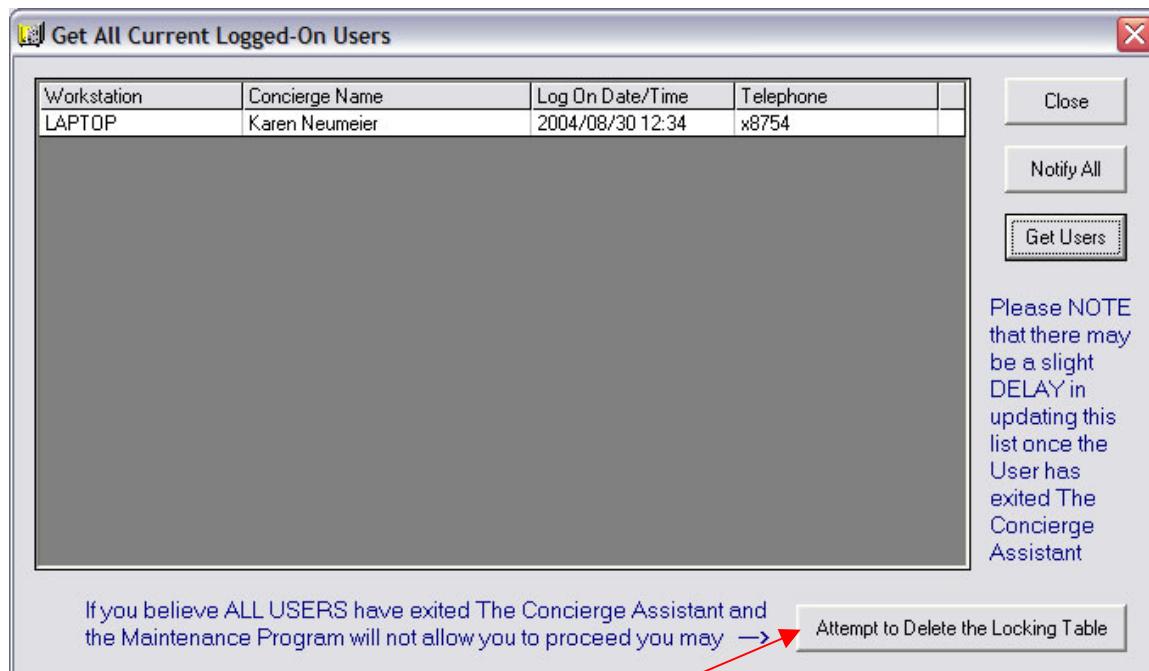
If there are still people logged onto the Concierge Assistant, you will then need to press the button "Notify All".



The system will generate a message to the user that looks like this:

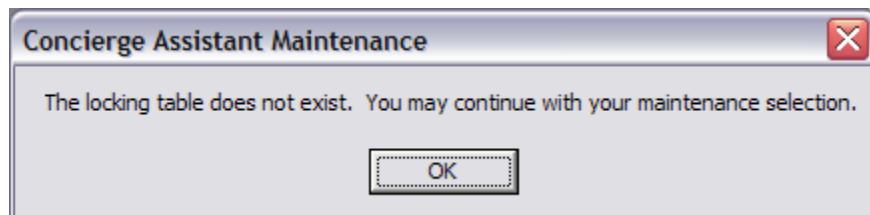


Please NOTE that there may a slight delay in updating this list once the User(s) has exited The Concierge Assistant. Give the system a few minutes before Checking for Logged On Users again to ensure that everyone has exited the system.



If you believe that ALL USERS have exited the Concierge Assistant program and the Maintenance Program will not allow you to proceed, you may now select the button labeled "Attempt to Delete the Locking Table".

If ALL USERS have indeed exited the system, the following screen will appear, telling you that you may proceed with your selected maintenance.



If ALL USERS have NOT exited, the following message will appear, denying you the ability to perform your selected maintenance.

