

Gold KeySolutions



CA Web

User Manual

Created: Thursday, July 22, 2010

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CA Web

Online Help



Installation



Introduction



Logbook Usage



Contact Usage



Reminders



Messages



Profiles



Basic Administration



PCI Best Practices



Videos



Keyboard Shortcuts



FAQ

Welcome

Welcome to the CA Web online help system. Browse through the help pages by clicking on the links above or selecting pages in the table of contents. To quickly find specific product information, enter search criteria in the search box above and click the search button.

Ask Someone

If you're unable to find what you're looking for in this help system, try these alternative [resources](#), or contact our [customer support department](#).

Most popular pages

- [Welcome](#)
- [Installation](#)
- [Logbook Usage](#)
- [Logbook Screen](#)
- [System Requirements](#)
- [Logbook Reminders](#)
- [Adding a Logbook Entry](#)
- [Videos](#)
- [Basic Administration](#)
- [Searching Logbook Entries](#)

Home > Welcome > Ask

Get help from Customer Support or other resources

Ask Someone

Post a question or search for an answer in our online [user forum](#).



If you're unable to find what you're looking for in this help system, try these alternative resources:

- [User Forum](#)
- [Knowledgebase](#)
- [FAQ](#)

Contact our support department:

Email:
support@goldkeysolutions.com
Phone: (818) 865-0006

Knowledgebase

Search the [knowledgebase](#) for common bugs, tips & tricks, and compatibility issues with other software.

Customer Support

Contact our customer support department by email at support@goldkeysolutions.com or by phone at (818) 865-0006

Home > Installation

Articles in this section



[System Requirements](#)



[Internet Explorer Configuration](#)

See also

[Welcome](#)
[Introduction](#)
[Logbook Usage](#)
[Contact Usage](#)
[Reminders](#)
[Messages](#)
[Profiles](#)
[Basic Administration](#)
[PCI Best Practices](#)
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Home > Installation > System Requirements

System Requirements

To access the application all is needed is a connection to the Internet and a modern browser such as Internet Explorer version 6 or higher, Firefox, Safari, Google Chrome, etc. Your email system must be MAPI compliant to take advantage of the software's ability to email itineraries and confirmations. You must have Adobe Reader installed in your computer to take advantage of the printing features.

1. W3C Compliant Browser.
2. MAPI Compliant Email Client.
3. [Adobe Reader](#).

See also

[Internet Explorer Configuration](#)

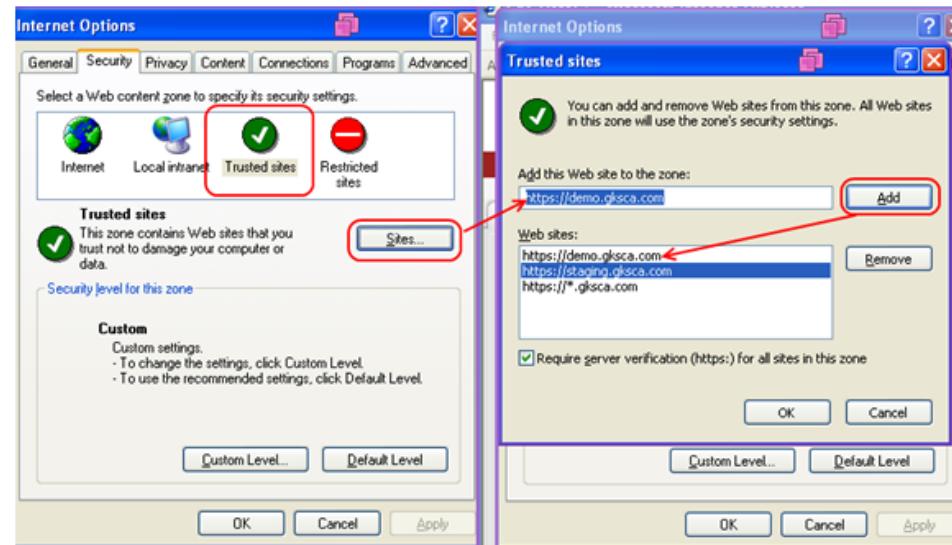
Home > Installation > Internet Explorer Configuration

Internet Explorer Configuration

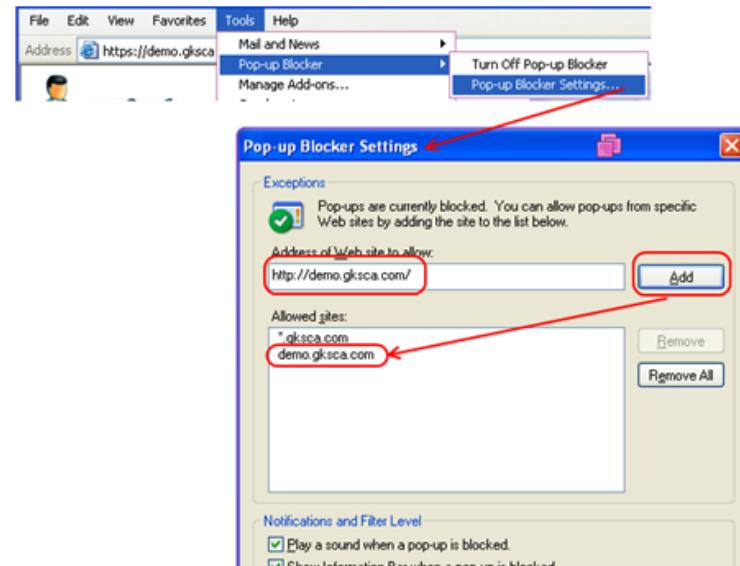
In this example we will use the site "Demo" as the site to be configured. The URL for the site "Demo" is https://demo.gksca.com

Site https://demo.gksca.com should be included in

- Internet Options>Security>Trusted Sites

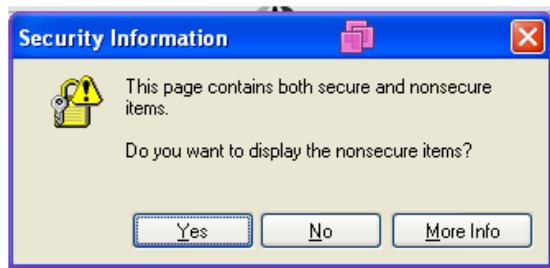


- Tools>Pop-up Blocker>Pop-up Blocker Settings

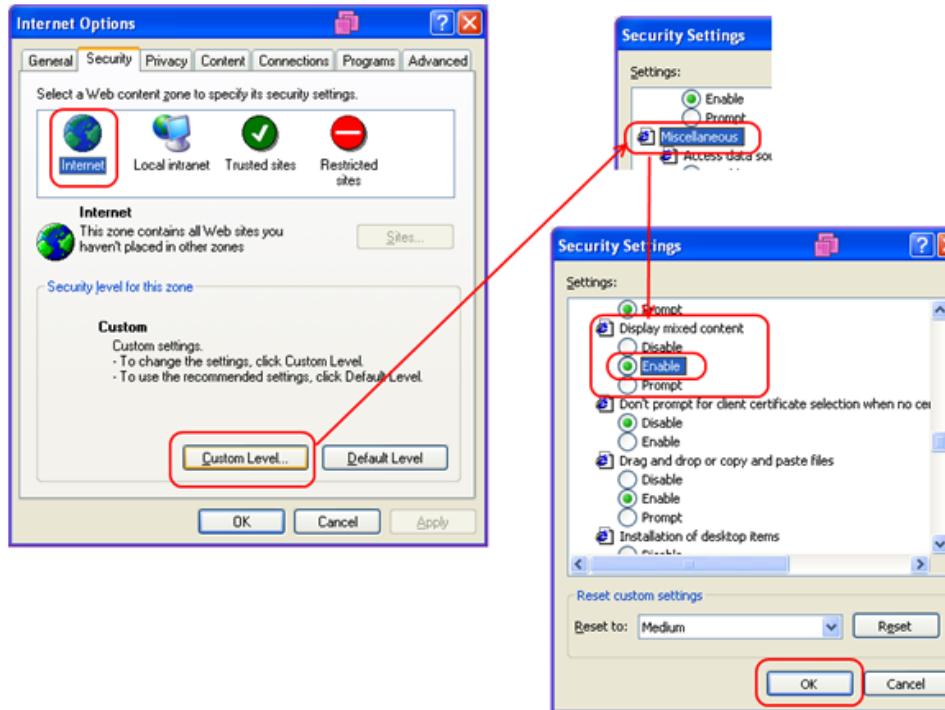


Optional Internet Security Settings

When login in the site https://demo.gksca.com I get the pop-up message below:



I can simply click "Yes" (twice) and I will not see the message again until the site is reloaded or I login again. If I decide that I don't want to see the message at all. I can configure the way "mixed content" is displayed by adjusting my internet security settings at Internet Options>Security>Internet>Custom Level>Miscellaneous>Display mixed content>Enable:



Printing Plug-in (Adobe Reader)

In order to be able to print any collateral it is necessary to have Adobe Reader installed in the client. If Adobe Reader is not installed in the client CA Web will provide you with a link to download the latest version of adobe reader when trying to print.

See also

[System Requirements](#)

[Home](#) > [Introduction](#)

Articles in this section



[Screen Overview](#)



[Logon Page](#)

See also

[Welcome](#)
[Installation](#)
[Logbook Usage](#)
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[PCI Best Practices](#)
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[FAQ](#)

Home > Introduction > Screen Overview

Screen Overview

Under Construction....

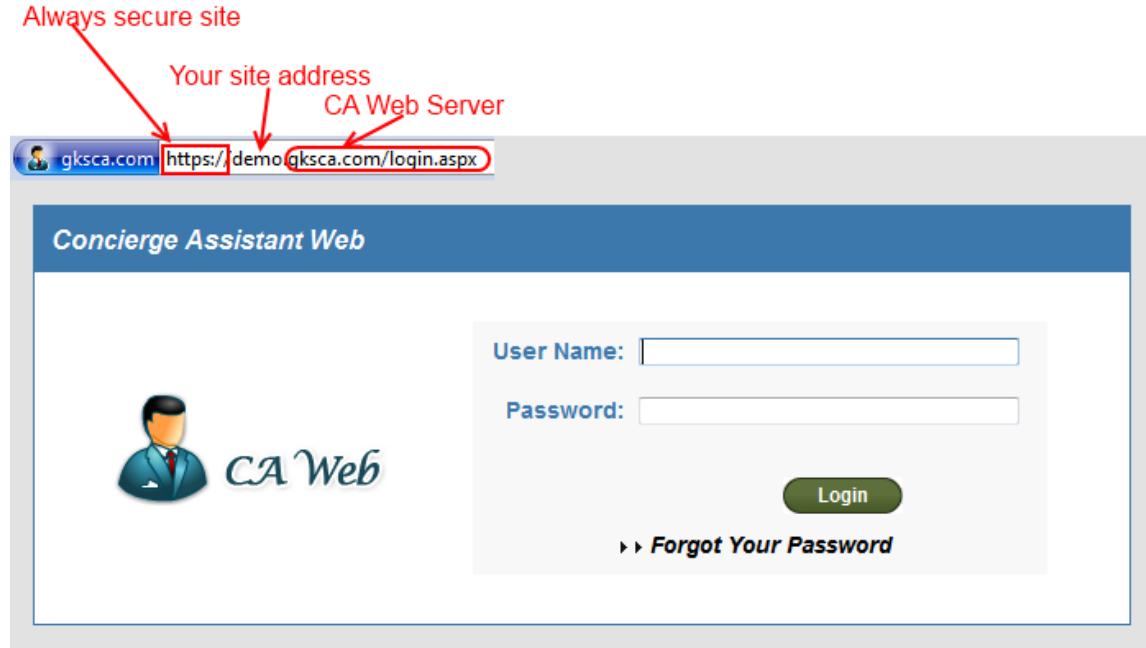
See also

[Logon Page](#)

Home > Introduction > Logon Page

Logon Page

Under Construction...



See also

[Screen Overview](#)

[Home](#) > [Logbook Usage](#)

Articles in this section



Logbook Screen



Searching Logbook Entries



Search by Name



Advanced Searches



Accessing Logbook Information



Creating a New Logbook entry



Save and Repeat



Cloning a Logbook Entry and Recurrences



Printing Confirmations



Printing Itineraries

See also

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Home > Logbook Usage > Logbook Screen

Logbook Screen

The screenshot shows a web-based logbook application interface. At the top, there's a navigation bar with links for Contacts, Logbook, Messages, Profiles, Administration, Help, and a user greeting "Welcome, Karen". There are also links for "Get support live online" and "Quick Links". Below the navigation is a banner showing weather information: "Now: Fair, 61°F", "Mon: Partly Cloudy, 64°F", and "Tue: Mostly Cloudy, 60°F". The main content area is titled "Search Logbooks". It features a search form with fields for "Last Name" (Toubal), "Reference Date" (All Dates), "Status" (All), "Category" (All), and "My Searches" (Please select). Buttons include "Search", "Advanced Search", "Set as default search", "Run default search", "Clear", and a magnifying glass icon for "Search". Below the search form is a table listing logbook entries:

Last Name	First Name	Profiled	Room	Category	Notify	Reference Date	Who	Description	Operations
Toubal	Sophie	No		Problem Resolution		11/12/2009 09:00:00		Problem: rigatoni whale salad, steal cel. arug...	PrintConfirmation Edit
Toubal	Sophie	No	123-45...	Golf	Email	11/12/2009 07:00:00		Golf Course: Club Malibu # of Players: 4 Tele...	PrintConfirmation Edit
Toubal	Sophie	No		Problem Resolution		11/12/2009 00:00:00		Problem: rigatoni whale salad, steal cel. arug...	PrintConfirmation Edit
Toubal	Sophie	No		Dining Reservations		11/03/2009 21:00:00		Restaurant: Restaurant Gary Danko Address: ...	PrintConfirmation Edit
Toubal	Sophie	No		Dining Reservations		11/03/2009 21:00:00		Restaurant: Restaurant Gary Danko Address: ...	PrintConfirmation Edit
Toubal	Sophie	No		Golf		11/03/2009 20:00:00		Golf Course: Club Malibu # of Players: 4 Tele...	PrintConfirmation Edit

The Logbook display screen contains a Search tab, an Add tab and an Advanced Search tab. When looking up information the Search or Advanced Search tab will be used. When establishing a new Contact, the Add tab will be used.

The Logbook entries may be color coded to indicate their status of completion. Each property may determine the color selections for each status. The following are the color designations in this example:

- Blue – Pending Logbook Entry
- Red – Not completed Guest Request
- Black – Completed Guest Request
- Purple – On-hold Guest Request

See also

- [Searching Logbook Entries](#)
- [Search by Name](#)
- [Advanced Searches](#)
- [Accessing Logbook Information](#)
- [Creating a New Logbook entry](#)
- [Save and Repeat](#)
- [Cloning a Logbook Entry and Recurrences](#)
- [Printing Confirmations](#)
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Home > Logbook Usage > Searching Logbook Entries

Searching Logbook Entries

One of the fastest and easiest searches in Logbook is to click on the "Today" button located to the right of the main screen display. This will bring up the reservations that have a Reference Date of "today's date", the current date.

The button next to the Today button is "Updated Today". This button can be clicked for quick display of logbook entries that have been accessed and or changed today, the current date.

The "Due and Overdue" button is used for locating Logbook entries that have a status of incomplete or pending for the current date or prior. We highly recommend clicking this button daily to ensure that logbook entries made by the users have been completed by the time of the guest's expected appointment and or request.

NOTE: the "Today" search screen can be selected for each specific user ID as the opening display page after log in. This can be done by a Site Administrator under "User Management" or by each individual user under "My Profile".

The screenshot shows the CA Web Logbook Search interface. At the top, there are navigation links: Contacts, Logbook, Messages, Profiles, Administration, Help, and a weather forecast for Fair, 61°F. Below the header is a search bar with tabs for 'Search' and 'Advanced Search'. The search criteria include 'Last Name: Toubal', 'Reference Date: All Dates', 'Status: All', and 'Category: All'. There are three buttons at the top right: 'Today', 'Updated Today', and 'Due & Overdue'. A dropdown menu 'Searches:' is set to 'Please select'. Below the search bar is a table listing logbook entries:

Last Name	First Name	Profiled	Room	Category	Notify	Reference Date	Who	Description	Operations
Toubal	Sophie	No		Problem Resolution		11/12/2009 09:00:00		Problem: rigatoni wihde salad, steal cel. arug...	PrintConfirmation Edit
Toubal	Sophie	No	123-45...	Golf	Email	11/12/2009 07:00:00		Golf Course: Club Malibu # of Players: 4 Tele...	PrintConfirmation Edit
Toubal	Sophie	No		Problem Resolution		11/12/2009 00:00:00		Problem: rigatoni wihde salad, steal cel. arug...	PrintConfirmation Edit
Toubal	Sophie	No		Dining Reservations		11/03/2009 21:00:00		Restaurant: Restaurant Gary Danko Address:...	PrintConfirmation Edit
Toubal	Sophie	No		Dining Reservations		11/03/2009 21:00:00		Restaurant: Restaurant Gary Danko Address:...	PrintConfirmation Edit
Toubal	Sophie	No		Golf		11/03/2009 20:00:00		Golf Course: Club Malibu # of Players: 4 Tele...	PrintConfirmation Edit

See also

- [Logbook Screen](#)
- [Search by Name](#)
- [Advanced Searches](#)
- [Accessing Logbook Information](#)
- [Creating a New Logbook entry](#)
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- [Cloning a Logbook Entry and Recurrences](#)
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Home > Logbook Usage > Search by Name

Search by Name

When attempting to locate the requests of a specific guest, the user will enter 3 or 4 letters of the guest's last name into the "Last Name" field provided in the Search tab display screen, then click on the Search button to the far right.

The screenshot shows the 'Search Logbooks' interface. In the search bar, 'Last Name: Toub' is entered. Other search criteria include 'Reference Date: All Dates', 'Status: All', and 'Category: All'. Below the search bar are buttons for 'Set as default search' and 'Run default search'. To the right, there are buttons for 'Today', 'Updated Today', and 'Due & Overdue'. A dropdown menu for 'My Searches' is set to 'Please select'. At the bottom, there are 'Selected' and 'All' radio buttons, and buttons for 'Clear', 'Export to CSV file', and 'Print'. The main area displays a table of search results:

Last Name	First Name	Profiled	Room	Category	Notify	Reference Date	Who	Description	Operations
Toubal	Sophie	No		Problem Resolution		11/12/2009 09:00:00		Problem: rigatoni w/side salad, steal cel. arug...	Print Confirmation Edit
Toubal	Sophie	No	123-45	Golf	Email	11/12/2009 07:00:00		Golf Course: Club Malibu # of Players: 4 Telep...	Print Confirmation Edit
Toubal	Sophie	No		Problem Resolution		11/12/2009 00:00:00		Problem: rigatoni w/side salad, steal cel. arug...	Print Confirmation Edit

See also

[Logbook Screen](#)

[Searching Logbook Entries](#)

[Advanced Searches](#)

[Accessing Logbook Information](#)

[Creating a New Logbook entry](#)

[Save and Repeat](#)

[Cloning a Logbook Entry and Recurrences](#)

[Printing Confirmations](#)

[Printing Itineraries](#)

Home > Logbook Usage > Advanced Searches

Advanced Searches

As in our other features, there are a myriad of other search options available for the user. By using the "Advanced Search" tab, the user can locate logbook entries with specific criteria and save the search in "My Searches" for easy retrieval of this same information at another time.

The screenshot shows the CA Web Logbook Advanced Search interface. A dropdown menu on the left is open, showing various search categories like Arrival Date, Category, Created Date, etc. Several items are selected, indicated by a blue highlight. The main search area has three criteria selected: 'Arrival Date' (is 11/09/2009), 'Category' (is Dining Reservations), and 'Status' (is Incomplete(red)). The results table shows several entries matching these criteria, including dining reservations for guests like Toubal, Bokan, and David.

Last Name	First Name	Profiled	Room	Category	Notify	Reference Date	Who	Description	Operations
Toubal	Sophie	No		Dining Reservations		11/09/2009 21:00:00		Restaurant: Restaurant Gary Danko Address: 400 Jefferson Street San Francisco, CA 94102 USA	PrintConfirmation Edit
Bokan	Philip	No	1234	Dining Reservations	Email	11/09/2009 17:30:00	PB	Restaurant: Coppino's Address: 400 Jefferson Street San Francisco, CA 94102 USA	PrintConfirmation Edit
David	Beckham	VIP		Dining Reservations		11/09/2009 11:00:00	xu	Restaurant: LAX Address: 1 World Way Telephone: 310-477-1234 Facsimile: 310-477-1235 Email: xu@lax.com	PrintConfirmation Edit

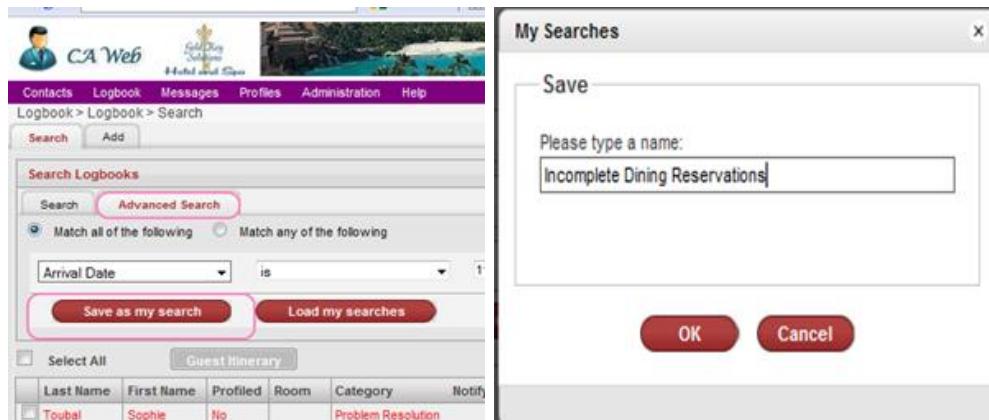
The user has the ability to add multiple criteria to the search through the use of the plus (+) button to the right side of the screen. The minus (-) button can be used for removing criteria from your search. An example follows.

This screenshot shows the CA Web Logbook Advanced Search interface with a single search criterion selected: 'Category' (is Dining Reservations). The 'Selected' radio button is checked. The results table shows three entries for Dining Reservations.

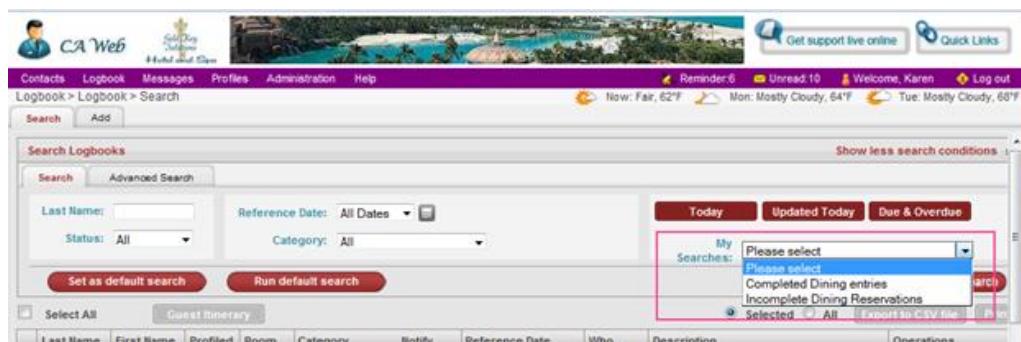
Last Name	First Name	Profiled	Room	Category	Notify	Reference Date	Who	Description	Operations
Toubal	Sophie	No		Dining Reservations		11/09/2009 21:00:00		Restaurant: Restaurant Gary Danko Address: 400 Jefferson Street San Francisco, CA 94102 USA	PrintConfirmation Edit
Bokan	Philip	No	1234	Dining Reservations	Email	11/09/2009 17:30:00	PB	Restaurant: Coppino's Address: 400 Jefferson Street San Francisco, CA 94102 USA	PrintConfirmation Edit
David	Beckham	VIP		Dining Reservations		11/09/2009 11:00:00	xu	Restaurant: LAX Address: 1 World Way Telephone: 310-477-1234 Facsimile: 310-477-1235 Email: xu@lax.com	PrintConfirmation Edit

Save these multi-criteria searches by clicking on the "Save as my Search" button.

The screen to the right will appear to enable the user to label each search. Click OK and the search is saved for future use.



Once the search is saved, it can be recalled anytime the same search criteria is needed. Just look at the drop down list of "My Searches" in the main screen display.



See also

- [Logbook Screen](#)
- [Searching Logbook Entries](#)
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- [Printing Confirmations](#)
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Home > Logbook Usage > Accessing Logbook Information

Accessing Logbook Information

All logbook entries may be opened by either clicking directly on the logbook entry or by clicking the "Edit" to the right of the main screen display.

Last Name	First Name	Profiled	Room	Category	Notify	Reference Date	Who	Description	Operations
Toubal	Sophie	No		Problem Resolution		11/12/2009 09:00:00		Problem: nigatoni w/kale salad, steak cel. arug...	Print Confirmation Edit
Toubal	Sophie	No	123-45	Golf	Email	11/12/2009 07:00:00		Golf Course: Club Malibu # of Players: 4 Tele...	Print Confirmation Edit
Test	Test	No		Dining Reservations		11/11/2009 01:01:00		Restaurant: Tony Roma's Credit Card: 4233 M...	Print Confirmation Edit
Test	Test	No		Airline Reservation		11/11/2009 00:00:00	SK	Departure Time/City: aaaaaaaaaaaaaaaaaaaa...	Print Confirmation Edit
Toubal	Sophie	No		Problem Resolution		11/1/2009 00:00:00		Problem: nigatoni w/kale salad, steak cel. arug...	Print Confirmation Edit
Holland	Frank	No	123	Dining Reservations		11/10/2009 20:00:00		Restaurant: Absinthe Brasserie & Bar Address...	Print Confirmation Edit
Test	Test	No		Airline Reservation		11/10/2009 00:00:00			Print Confirmation Edit
Toubal	Sophie	No		Dining Reservations		11/09/2009 21:00:00		Restaurant: Restaurant Gary Danko Address: 8...	Print Confirmation Edit
Bolan	Philip	No	1234	Dining Reservations	Email	11/09/2009 17:30:00		Restaurant: Cicchetti Address: 400 Jefferson ...	Print Confirmation Edit

Users may have multiple logbook entries open at the same. They will be designated by a tab with their name on it and a little red circle with an x inside for closing the tab when the user is finished. In this example, Daniel Grossman is the last entry opened.

Guest Information

Salutation: Please Select	Arrival: 11/09/2009	Guest Notification: In Person
Last Name: Grossman	Departure: 11/09/2009	Group Name: Please Select
First Name: Daniel	Primary Email:	Select Profile
Room Number: 123456	Primary Phone:	

Entry

Reference Date: 11/09/2009	Time: 08:00:00 pm	Entry Type: Jazz
Name of Club: Ale Garden Cafe	Number in Party: 4	Special Comments: outdoor seating
Address: The Cannery Courtyard	Special Requests:	Credit Card/Exp:
Phone Number: (415) 928-4340	Confirmed By: Mario	

Status: complete (black)

Guest Itinerary
Set Reminder
Print
Email

See also

- [Logbook Screen](#)
- [Searching Logbook Entries](#)
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Home > Logbook Usage > Creating a New Logbook entry

Creating a New Logbook entry

The "Add" tab is used whenever a new guest request is entered into CA Web.

Specific information is required whenever establishing a new logbook entry. The required information is indicated by a little red dot located to the immediate left of the data line as highlighted in the example below. Although there are no red dots associated with data entry fields within the "Guest Information" area, it goes without saying that the "Last Name" and "First Name" of the guest should be entered at all times.

This screenshot shows the 'Add' screen for creating a new logbook entry in CA Web. The 'Guest Information' section contains fields for Salutation (Mr), Arrival date (11/10/2009), Guest Notification (Please Select), Last Name (Holland), Departure date (11/13/2009), Group Name (Please Select), First Name (Frank), Primary Email, Room Number (123), Primary Phone, and a 'Select Profile' button. The 'Entry' section includes Reference Date (11/10/2009), Time (08:00 AM), and Entry Type (Please Select). Red circles highlight the required fields: Salutation, Arrival, Guest Notification, Last Name, Departure, Group Name, First Name, Primary Email, Room Number, Primary Phone, Reference Date, Time, and Entry Type. The status is listed as 'Incomplete (red)'.

All logbook entries require that the Reference Date, Time and Logbook Type fields in the "Entry" area of the screen be entered, as indicated by the red dots. After this information has been entered new information relevant to the specific logbook category will then fill the Entry area as shown in the example below for a Dining Reservation.

This screenshot shows the 'Add' screen for creating a new logbook entry in CA Web, specifically for a Dining Reservation. The 'Guest Information' section is identical to the previous screenshot. The 'Entry' section now includes fields for Reference Date (11/10/2009), Time (08:00 AM), and Entry Type (Dining Reservations). A red circle highlights the 'Entry Type' field. Below this, the 'Restaurant' section is expanded, showing fields for Telephone, Special Comments, Confirmation, Notes, Address, Special Requests, Confirmed With, and Smoking Preferences. A 'Select Contact' button is also present. The status is listed as 'Incomplete (red)'.

When a field, such as Restaurant in this example, depends on Contact information contained within your existing database, CA Web provides an expedient solution to retrieving this information quickly and easily.

Enter 3 or 4 letters of the name of a known contact in the "Restaurant" line and click on the "Select Contact" button.

Guest Information

Salutation: Mr	Arrival: 11/10/2009	Guest Notification: Please Select
Last Name: Holland	Departure: 11/13/2009	Group Name: Please Select
First Name: Frank	Primary Email:	
Room Number: 123	Primary Phone:	

Entry

Reference Date: 11/10/2009 Time: 08:00 pm Entry Type: Dining Reservations

* Restaurant: clopp	Telephone:	Special Comments:
Time Requested: 08:00 pm	Number in Party:	Confirmation:
Address:	Special requests:	Notes:
Credit Card:	Confirmed With:	Smoking Preferences: Please Select

This screen will appear. Double click on the requested contact, or highlight the contact and then click the OK button.

Select Contact to Display

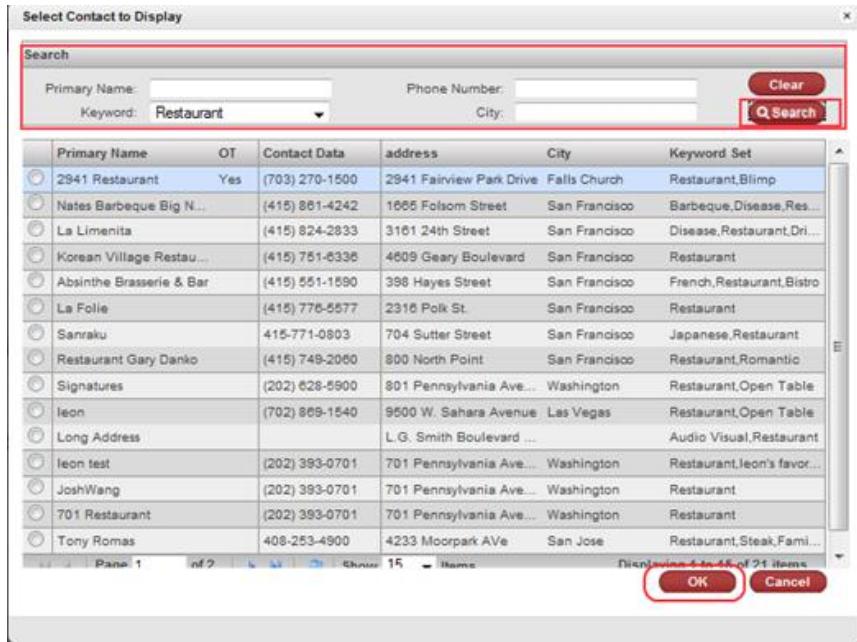
Search

Primary Name: clopp	Phone Number:	
Keyword: Please Select	City:	

Primary Name	OT	Contact Data	address	City	Keyword Set
Cioppinos	(415) 775-9311	(415) 775-9311	400 Jefferson Street	San Francisco	Italian,Restaurant

Page 1 of 1 Show 15 items Displaying 1 to 1 of 1 items

The Select Contacts button can be clicked without entering any information. This method is used to search out a contact based on other search criteria such as Keyword, Phone Number and City. This screen will appear with the full database. Here the user will enter the search criteria, such as "Restaurant" in the Keyword field and then click the Search button.



When the correct vendor is located, double click directly on the name of the vendor or highlight the vendor and click on the OK button.

When this is done, the selected contact will populate the proper fields within the logbook entry.

The user at this time will fill out the remaining relevant fields. NOTE: All fields may not be necessary, such as Special Instructions or Notes. Leave these areas blank when not needed.

After the completion of the remaining fields, it is important to identify the Status of the logbook entry. The choices available to the users are in the drop down selection with the appropriate color coding, as in the example above. Be sure to click on the Save button when complete.

After saving the entry, it will change in appearance.

At the very top of the name of the guest will appear in the new tab that has been created. Just under the tab, there is an ID number has that been assigned to the entry, the User Name of the creator of the logbook entry and the Entry Date.

The screenshot shows the Logbook screen with the following details:

- Guest Information:**
 - Salutation: Mr.
 - Last Name: Holland
 - First Name: Frank
 - Room Number: 123
 - Arrival: 11/10/2009
 - Departure: 11/13/2009
 - Primary Email: [redacted]
 - Primary Phone: [redacted]
 - Status: incomplete (red)
- Entry:**
 - Reference Date: 11/10/2009
 - Time: 08 : 00 pm
 - Entry Type: Dining Reservations
 - * Restaurant: Absinthe Brasserie & Bi
 - Telephone: (415) 551-1590
 - Number in Party: 4
 - Special Requests: booster seat
 - Confirmation: [redacted]
 - Notes: [redacted]
 - Credit Card: [redacted]
 - Confirmed With: Antoine
 - Smoking Preferences: No
- Action Buttons:**
 - Save
 - Delete
 - Save & Repeat
 - Clone This Entry
 - Change Contact (highlighted)
 - Edit Contact (highlighted)
- Links:**
 - Links
 - Notes
 - Reminders
 - History
- Buttons:**
 - Add New Link
 - Input Link
 - Preview

The new screen gives you the opportunity to Change or Edit your Contact Selection. Follow the same steps used when selecting the Contact.

In addition to the information entered, there are now additional tabs available to use by the staff. This section will be discussed in our Advanced Usage Best Practices publications.

If the user is making multiple reservations for the same guest or multiple reservations for the same type of reservation CA Web has fast, efficient shortcuts to streamline the workload.

See also

- [Logbook Screen](#)
- [Searching Logbook Entries](#)
- [Search by Name](#)
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Home > Logbook Usage > Save and Repeat

Save and Repeat

When making repeat reservations for the same guests, using the Save and Repeat shortcut eliminates the extra steps that would be required if each entry were saved and closed.

This screenshot shows the Logbook application interface. The top navigation bar includes 'Contacts', 'Logbook', 'Messages', 'Profiles', 'Administration', and 'Help'. Below the navigation is a header with 'Reminder 6', 'Unread 9', 'Welcome, Karen', and 'Log out'. The main content area shows a logbook entry for guest 'Holland'. The 'Guest Information' section contains fields for Salutation (Mr), Last Name (Holland), First Name (Frank), Room Number (123), Arrival (11/10/2009), Departure (11/13/2009), Primary Email (frank@gmail.com), and Primary Phone (123-456-7890). The 'Entry' section includes fields for Reference Date (11/10/2009), Time (08:00:00 pm), Entry Type (Dining Reservations), Restaurant (Absinthe Brasserie & Bar), Telephone (415) 551-1590, Number in Party (4), and Special Comments. On the right side, there are buttons for 'Save', 'Delete', 'Save & Repeat' (which is highlighted with a red oval), 'Clone This Entry', and a status dropdown set to 'Incomplete (red)' with options like 'Guest Itinerary', 'Print', and 'Email'. A sidebar on the right lists 'Guest Confirmation' with 'Print' and 'Email' options, and a language dropdown set to 'English'.

When the Save and Repeat button is clicked, a new logbook entry is created with the exact same guest information that was contained in the old logbook entry as seen below.

This screenshot shows the Logbook application after the 'Save & Repeat' button was clicked. The interface is identical to the first screenshot, but now it displays two entries for guest 'Holland'. The second entry has the same guest information and entry details as the first. The 'Save & Repeat' button is no longer highlighted.

Now the user can finish the logbook entry with the next request and so on until all the requests have been entered.

See also

- [Logbook Screen](#)
- [Searching Logbook Entries](#)
- [Search by Name](#)
- [Advanced Searches](#)
- [Accessing Logbook Information](#)
- [Creating a New Logbook entry](#)
- [Cloning a Logbook Entry and Recurrences](#)
- [Printing Confirmations](#)
- [Printing Itineraries](#)

Home > Logbook Usage > Cloning a Logbook Entry and Recurrences

Cloning a Logbook Entry and Recurrences

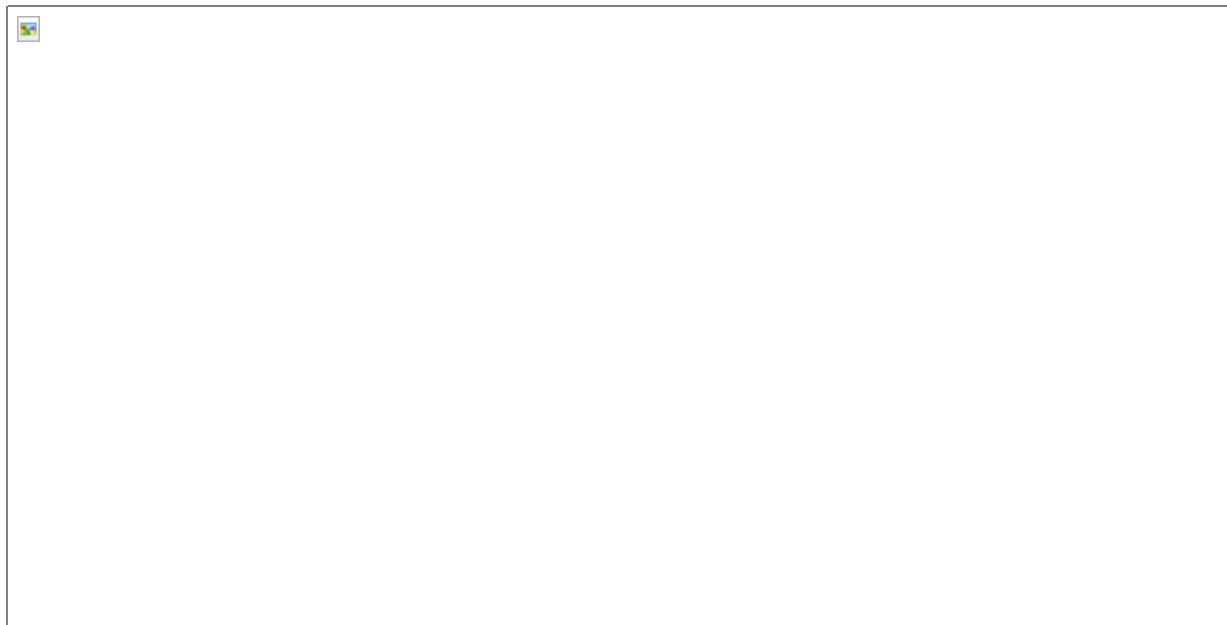
Another shortcut is the ability to clone logbook entries. On an existing logbook entry, the "Clone This Entry" button is located to the far right of the screen next to the Save and Repeat button.

This screenshot shows the Logbook entry page for guest ID 1092, Karen Reumeier, on 11/10/2009. The 'Clone This Entry' button is highlighted with a red box. Other visible buttons include 'Save', 'Delete', 'Save & Repeat', and 'Print'. The page includes sections for Guest Information and Entry details.

Cloning is perfect when guests request the repetition of certain reservations for the length of their stay, such as Golf everyday for the week or Dining every night and so forth. In this example, not only is the guest information repeated but also the activity. The only input necessary may be a change in the reference date, the time or the user can even change the Contact information without re-entering the entire logbook information.

This screenshot shows the Logbook entry page with several fields highlighted by a red box, indicating they are being cloned. These include the guest information section and the entry details section, specifically the restaurant name, time, and contact information.

You also can create recurring requests.



See also

[Logbook Screen](#)
[Searching Logbook Entries](#)
[Search by Name](#)
[Advanced Searches](#)
[Accessing Logbook Information](#)
[Creating a New Logbook entry](#)
[Save and Repeat](#)
[Printing Confirmations](#)
[Printing Itineraries](#)

Home > Logbook Usage > Printing Confirmations

Printing Confirmations

Confirmations can be printed in 2 ways. The first is simply clicking on the "Print Confirmation" text in the Logbook main screen display as shown below.

The screenshot shows the Logbook main screen with a list of entries. The columns include Last Name, First Name, Profiled, Room, Category, Notify, Reference Date, Who, Description, and Operations (which includes PrintConfirmation and Edit). The first entry in the list has its 'Print' button highlighted with a blue box.

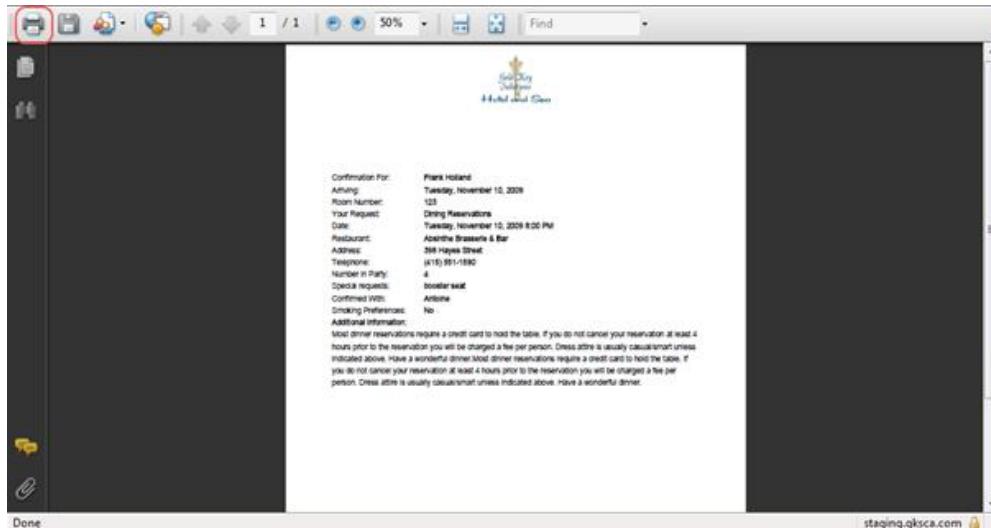
Another option is to print the Confirmation directly from the logbook entry itself, as displayed below. Notice that there are other print options available in the drop down as well.

The screenshot shows a detailed view of a logbook entry for ID 1092. It includes sections for Guest Information (Salutation: Mr., Last Name: Holland, First Name: Frank, Room Number: 123) and Entry details (Reference Date: 11/10/2009, Time: 08:00:00 pm, Entry Type: Dining Reservations). On the right, there's a sidebar with Status (complete (black)), Guest Itinerary, Set Reminder, and a dropdown menu for Guest Confirmation. The 'Print' option in this dropdown is highlighted with a red box.

Click on the Print button

This screenshot is identical to the previous one, showing the same logbook entry and sidebar. However, the 'Print' button in the Guest Confirmation dropdown menu is now highlighted with a red box, indicating it has been selected.

The confirmation will be displayed. Click on the printer for the final product.



See also

[Logbook Screen](#)
[Searching Logbook Entries](#)
[Search by Name](#)
[Advanced Searches](#)
[Accessing Logbook Information](#)
[Creating a New Logbook entry](#)
[Save and Repeat](#)
[Cloning a Logbook Entry and Recurrences](#)
[Printing Itineraries](#)

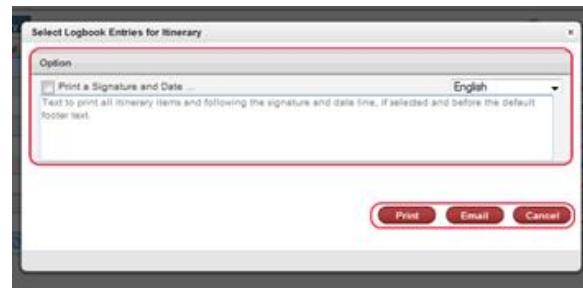
Home > Logbook Usage > Printing Itineraries

Printing Itineraries

Itineraries can be created by clicking on the boxes to the immediate left of the logbook entries you want on a combined itinerary. The box, "Selects All" may be checked instead, depending on the users' look up and needs. The "Guest Itinerary" button will highlight as soon as the first box is checked. When all applicable logbook entries have been selected, click on the Guest Itinerary button.

Last Name	First Name	Profiled	Room	Category	Notify	Reference Date	Who	Description	Operations
Toubal	Sophie	No		Problem Resolution		11/12/2009 09:00:00		Problem: rigatoni w/white salad, steal cel. aragu...	PrintConfirmation Edit
Toubal	Sophie	No	123-45	Golf	Email	11/12/2009 07:00:00		Golf Course: Club Malibu # of Players: 4 Telep...	PrintConfirmation Edit
Toubal	Sophie	No		Problem Resolution		11/11/2009 00:00:00		Problem: rigatoni w/white salad, steal cel. aragu...	PrintConfirmation Edit
Toubal	Sophie	No		Dining Reservations		11/09/2009 21:00:00		Restaurant: Restaurant Gary Danko Address: 80...	PrintConfirmation Edit
Toubal	Sophie	No		Dining Reservations		11/03/2009 21:00:00		Restaurant: Restaurant Gary Danko Address: 80...	PrintConfirmation Edit
Toubal	Sophie	No		Golf		11/03/2009 20:00:00		Golf Course: Club Malibu # of Players: 4 Telep...	PrintConfirmation Edit
Toubal	Sophie	No		Problem Resolution		11/03/2009 00:00:00		Problem: rigatoni w/white salad, steal cel. aragu...	PrintConfirmation Edit
Toubal	Sophie	No		Dining Reservations		09/05/2009 20:00:00		Restaurant: Cafe Reggio Address: 4112 Geary...	PrintConfirmation Edit
Toubal	Sophie	No		Transportation		09/05/2009 19:00:00		Vendor Contact Number: AAA Limousine Type of Ve...	PrintConfirmation Edit

CA Web will present this screen. The user has the option to print a guest signature line, or enter a personal note before clicking on the Print button. The user may also Email the itinerary.



Because of the user's ability to pick any logbook entries to form an itinerary, this feature is very beneficial for creating combined itineraries for parties with different last names that may be traveling together as in the following example.

Itinerary for: Frank Holland and Sophie Toubal

Dining Reservations:

For: Frank
Room number: 123
Completed by: Karen Neumayer
Date: Tuesday, November 10, 2009 08:00 PM
Restaurant: Alimentari Ristorante & Bar
Address: 399 Hayes Street
Telephone: (415) 881-1990
Number in Party: 4
Special requests: booster seat
Comments: Anytime
Smoking Preferences: No

Additional Information:
Most dinner reservations require a credit card to hold the table. If you do not cancel your reservation at least 4 hours prior to the reservation you will be charged a fee per person. Dining attire is usually casual/elegant unless indicated above. Have a wonderful dinner.

Golf:

For: Sophie
Completed by: Karen Clancy
Date: Tuesday, November 03, 2009 08:00 PM

Additional Information:
A 45 minute cancellation is necessary to avoid any penalties. Please allow 20 minutes prior to your scheduled tee time for check in.

See also

- [Logbook Screen](#)
- [Searching Logbook Entries](#)
- [Search by Name](#)
- [Advanced Searches](#)
- [Accessing Logbook Information](#)
- [Creating a New Logbook entry](#)
- [Save and Repeat](#)
- [Cloning a Logbook Entry and Recurrences](#)
- [Printing Confirmations](#)

Home > Contact Usage

Articles in this section



Contact Screen



Searching Contacts



Advanced Searches



Adding New Contact Information



Contact Information

See also

Welcome
Installation
Introduction
Logbook Usage
Reminders
Messages
Profiles
Basic Administration
PCI Best Practices
Videos
Keyboard Shortcuts
FAQ

Home > Contact Usage > Contact Screen

Contact Screen

The Contact Screen contains a Search tab, an Add tab and an Advanced Search tab. When looking up information the Search or Advanced Search tabs will be used. When establishing a new Contact, the Add tab will be used.

The screenshot shows the CA Web interface for managing contacts. At the top, there's a navigation bar with links for Contacts, Logbook, Messages, Profiles, Administration, and Help. On the right side of the header, there are buttons for 'Get support live online', 'Quick Links', 'Reminder: 0', 'Unread: 12', 'Welcome, Karen', 'Log out', and weather information (Now: Cloudy, 63°F, Fri: Showers Early, 67°F, Sat: Partly Cloudy, 69°F). Below the header, the page title is 'Contacts > Contacts > Search'. The main content area is titled 'Search Contacts' with tabs for 'Search' (which is selected) and 'Advanced Search'. There are search filters for 'Primary Name:' (a dropdown menu), 'Keyword(s)' (a dropdown menu set to 'All'), and 'Open Table:' (a dropdown menu set to 'All'). Below these are buttons for 'Set as default search', 'Run default search', 'My Searches: Please Select', 'Clear', and 'Search'. A table displays contact information with columns: Primary Name, OT, Phone Number, Address, City, Keyword(s), Proximity, Rating, Price Range, and Operations. The table shows five entries: La Fole, Restaurant Gary Danko, Sanraku, Sushi Roku - Las Vegas, and Signatures. Each entry includes a color-coded status indicator (blue for preferred vendors, red for closed/do not use, black for phonebook usage). The bottom of the screen shows pagination (Page 1 of 1), a 'Show 25 items' button, and a note indicating 'Displaying 1 to 5 of 5 items'.

Color Coding for the Contacts is selected by each property. In this example the colors selected represent the following:

Blue – Preferred Vendors

Red – Closed or do not use contacts

Black – Phonebook usage

See also

[Searching Contacts](#)
[Advanced Searches](#)
[Adding New Contact Information](#)
[Contact Information](#)

Home > Contact Usage > Searching Contacts

Searching Contacts

To find a specific contact, click on the Search tab and enter the first 3 or 4 letters into the "Primary Name" field and click Search.

Primary Name	OT	Phone Number	Address	City	Keyword(s)	Proximity	Rating	Price Range	Operations
Restaurant Gary Danko	(415) 749-2060	800 North Point	San Francisco	Restaurant	*****	\$\$\$			Logbook Edit Web

You can also locate contacts with a more general search by using the "Keyword" if you know the function the contact performs or services they offer such as Restaurant or Florist.

Primary Name	OT	Phone Number	Address	City	Keyword(s)	Proximity	Rating	Price Range	Operations
Absinthe Brasserie & ...	(415) 551-1590	398 Hayes Street	San Francisco	French, Restaurant, Bistro	***				Logbook Edit W
Bella Voce Ristorante	(415) 772-5199	83 Coton street, san fra...	San Francisco	Italian, Restaurant, Bistro	4 Miles	*****	\$\$	\$\$\$	Logbook Edit W
Ceppinos	(415) 775-9311	400 Jefferson Street	San Francisco	Italian, Restaurant	1.5 Miles	*****	\$\$	\$\$\$	Logbook Edit W
La Fole	(415) 778-5577	2316 Polk St.	San Francisco	Restaurant	*****	\$\$	\$\$\$	Logbook Edit	
Restaurant Gary Danko	(415) 749-2060	800 North Point	San Francisco	Restaurant	*****	\$\$	\$\$\$	Logbook Edit W	
Sanraku	415-771-0803	704 Sutter Street	San Francisco	Japanese, Restaurant	2 Miles	***	\$\$	Logbook Edit W	
Signatures	(202) 628-5900	801 Pennsylvania Ave. ...	Washington	Restaurant, Open Table	***	\$\$	Logbook Edit W		
2941 Restaurant	Yes	(703) 270-1500	Falls Church	Restaurant, Bistro	***	Logbook Edit			
Absinthe Brasserie & ...	(415) 551-1590	398 Hayes Street	San Francisco	Restaurant	****				Logbook Edit

All contacts may be opened by clicking directly on the contact or by clicking on the "Edit" on the right of the screen

See also

[Contact Screen](#)
[Advanced Searches](#)
[Adding New Contact Information](#)
[Contact Information](#)

Home > Contact Usage > Advanced Searches

Advanced Searches

There are also a myriad of other search options available for the user. By using the "Advanced Search" tab, you can locate contacts with specific criteria and save the search in "My Searches" for easy retrieval of this same information at a later time.

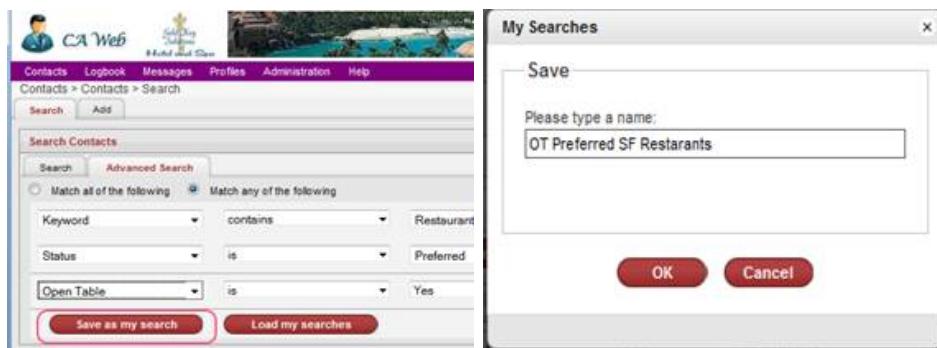
Phone Number	Address	City	Keyword(s)	Proximity	Rating	Price Range	Operations
(415) 776-5577	2316 Polk St.	San Francisco	Restaurant	*****	\$\$\$	Logbook Edit	
(415) 749-2060	800 North Point	San Francisco	Restaurant	*****	\$\$\$	Logbook Edit Web	
415-771-0803	704 Sutter Street	San Francisco	Japanese, Restaurant	2 Miles	****	\$	Logbook Edit Web
(202) 628-5900	801 Pennsylvania Ave. N.W.	Washington	Restaurant, Open Table	***	\$\$	Logbook Edit Web	
(702) 733-7373	3500 Las Vegas Blvd S...	Las Vegas	Restaurant, Sushi				Logbook Edit

You have the ability to add multiple criteria to your search through the use of the plus (+) button to the right side of the screen. The minus (-) button can be used for removing criteria from your search. An example follows.

Primary Name	OT	Phone Number	Address	City	Keyword(s)	Proximity	Rating	Price Range	Operations
Absinthe Brasserie & ...	Yes	(415) 551-1590	398 Hayes Street	San Francisco	French, Restaurant, Bistro	***		Logbook Edit W	
Bella Voce Ristorante		(415) 772-5199	83 Cohan street, san fra.	San Francisco	Italian, Restaurant, Bistro	4 Miles	*****	\$\$	Logbook Edit W
Ceppinos		(415) 775-9311	460 Jefferson Street	San Francisco	Italian, Restaurant	1.5 Miles	*****	\$\$\$	Logbook Edit W
La Folie		(415) 776-5577	2316 Polk St.	San Francisco	Restaurant		*****	\$\$\$	Logbook Edit
Restaurant Gary Danko		(415) 749-2060	800 North Point	San Francisco	Restaurant		*****	\$\$\$	Logbook Edit W
Sanraku		415-771-0803	704 Sutter Street	San Francisco	Japanese, Restaurant	2 Miles	****	\$	Logbook Edit W

You can then save these Advanced Searches by clicking on the button "Save as my Search".

You will get the screen to the right to label your search. Click OK and the search is saved for you for use at any time.



To recall the saved Advanced Search criteria, click on "My Searches" in the main search screen and choose from the selection of saved searches as shown below.

Primary Name	OT	Phone Number	Address	City	Keywords(s)	Proximity	Rating	Price Range	Operations
701 Restaurant	(202) 393-0701	701 Pennsylvania Ave.		Washington	Restaurant		***		Logbook Edit
Absinthe Brasserie & ...	(415) 551-1590	398 Hayes Street		San Francisco	French Restaurant,Bistro		**		Logbook Edit Web

See also

[Contact Scene](#)
[Searching Contacts](#)
[Adding New Contact Information](#)
[Contact Information](#)

Home > Contact Usage > Adding New Contact Information

Adding New Contact Information

The Add tab is utilized whenever the user wants to add a new contact to the existing database.

Specific information is required whenever establishing a new contact. The required information is indicated by a little red dot located to the immediate left of the data line as highlighted in the example below. In this sample, the name, address and phone number of the contact has been entered. Now we must enter the keywords that will associate this vendor with their services and functions.

To enter in keyword information click on the button "Select Keywords". You will see this screen.



You may enter as many keywords as applies to the services provided by each vendor. To navigate to the different keywords, you may either use the scroll at the bottom and sides or you can use the shortcut by typing a letter of the keyword onto your keyboard. CA Web will take you to that section of the keyword screen display.

A checkmark needs to be entered into each box designating the keywords being assigned to each vendor. Be sure to click the OK button when you are finished selecting the keywords for the contact.

After selecting the keywords, your contact information will look similar to this example.

Before you save your information by clicking on the Save button in the upper right side of your screen, you will have the opportunity to designate a status for the contact. This will determine the color of the vendor in the main screen display as described in Contact Screen.

Contact Information

- * Primary: Tony Romas
- Name: Tony Romas
- Phone Number: 408-253-4900
- Address: 4233 Moorpark AVE
- Cross Street:
- City: San Jose
- State: CA
- Postal Code: 95129
- Country:

Notes

Links

Status: preferred (blue)

Manage Links

Keyword(s): Family, Restaurant, Ribs, Steak

Select Keywords

Rate and Price Range

Area and Proximity

Area: Please Select

Proximity:

Price Range: Not Rated

Price Range: Unknown

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If your contact provides a website for their services, you may add this information for easy access during work hours. Start by clicking on the button "Manage Links" and you will see this screen.

Add New Link

Input Link: www.tonyromas.com

Preview

Upload File to Server

Browse...

Link Description URL

Quick Descriptions: Please select

Describe the Document:

Quick Descriptions: Please select

Please select

Directions

Menu

Price List

Schedule

Map

Photograph

Resume

Web Site

Add Clear Close

Enter the URL address in the space designated for "Input Link" as shown in this example. A preview button is provided that enables you to check the address you have entered without leaving your current screen. After you have verified that the URL address is a good one, you need to label the address. You may do this by either entering a label for "Describe this Document" or selecting a "Quick Description" from the drop down.

Be sure to click ADD with either option after each URL address is entered. The user may enter as many websites as they wish.

When you exit the Link screen, you will see the Web link in the "Links" area of the Contact.

Contact Information

- * Primary: Tony Romas
- Name: Tony Romas
- Phone Number: 408-253-4900
- Address: 4233 Moorpark AVE
- Cross Street:
- City: San Jose
- State: CA
- Postal Code: 95129
- Country:

Notes

Links

Status: preferred (blue)

Manage Links

Keyword(s): Family, Restaurant, Ribs, Steak

Select Keywords

Rate and Price Range

Area and Proximity

Area: Please Select

Proximity:

Price Range: Not Rated

Price Range: Unknown

After all the desired information has been entered, you must remember to save the information by clicking the Save button.

See also

[Contact Screen](#)
[Searching Contacts](#)
[Advanced Searches](#)
[Contact Information](#)

Home > Contact Usage > Contact Information

Contact Information

All contacts may be opened by either clicking directly on the contact or by clicking the "Edit" to the right of the screen (example on page 2).

You may also have multiple contacts open at the same time. They will be designated by a tab with their name on it and a little red circle with an x inside for closing the contact when the user is finished. In this example, the Bella Voce is the most recently opened contact.

Once a contact is open a lot of information becomes available to you. In addition to the name, address and phone number, there is location for "Notes" about the contact, the Keywords that have been assigned and so on.

If a link has been created to the contact's website or other Internet information that may be available, you can simply click directly on the link in the box to the right labeled "Links" and CA Web will open a new tab for the link selected giving the user easier access to menus, locations, online reservations, directions and so on.

There are also tabs on the lower portion of the screen that provide you additional tabs for Log Notes, Extra Contact information, Directions, Map, Guest List Text, Open Table, Status Messages and History. These items will be discussed in Advanced Users Best Practices publications.

See also

[Contact Screen](#)
[Searching Contacts](#)
[Advanced Searches](#)
[Adding New Contact Information](#)

[Home](#) > [Reminders](#)

Articles in this section



[Logbook Reminders](#)



[Contact Reminders](#)



[Profile Reminders](#)

See also

[Welcome](#)
[Installation](#)
[Introduction](#)
[Logbook Usage](#)
[Contact Usage](#)
[Messages](#)
[Profiles](#)
[Basic Administration](#)
[PCI Best Practices](#)
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[FAQ](#)

Home > Reminders > Logbook Reminders

Logbook Reminders

Logbook Reminders are usually action items that a Staff Member needs to follow up on in order for a task to be completed.

Logbook Reminders:

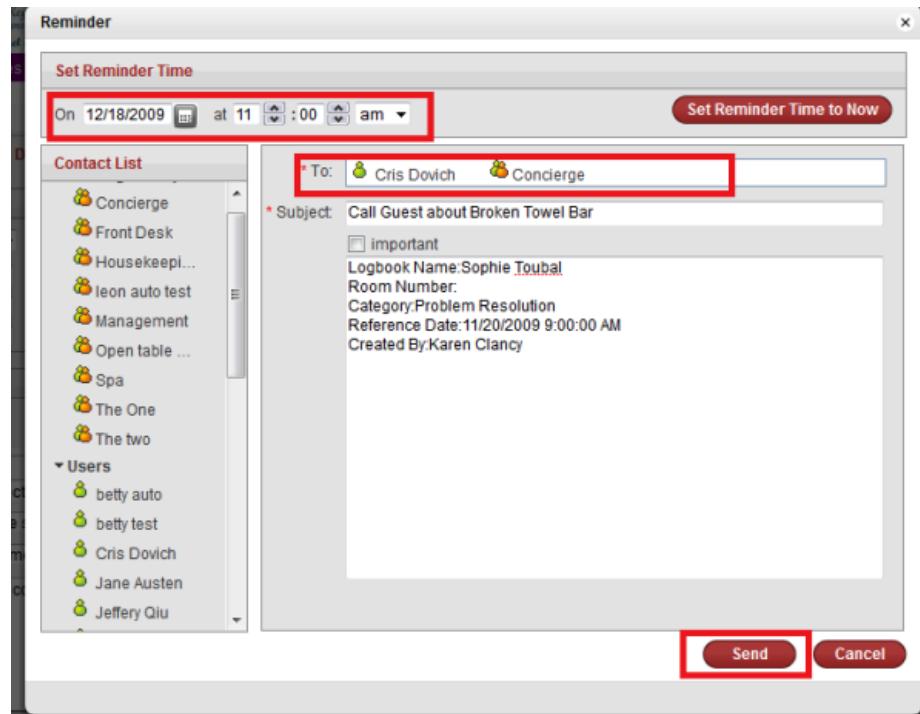
Select the logbook entry that you would like to send the reminder about. Open that entry.

There are two things that need to be done:

- <!--[if !supportLists]-->1. <!--[endif]--> In the note field state why you are sending a reminder.
- <!--[if !supportLists]-->2. <!--[endif]-->Then Click the Button Reminder

The screenshot shows the 'Guest Information' and 'Entry' sections of a logbook entry. In the 'Entry' section, there is a 'Notes' field containing the text: 'we called the company and parts will be sent next week: please follow-up with guest as soon as possible'. A red box highlights this notes field. To the right of the entry section, there is a sidebar with buttons for 'Guest Itinerary', 'Set Reminder' (which is also highlighted with a red box), 'Print', 'Email', and language selection ('English').

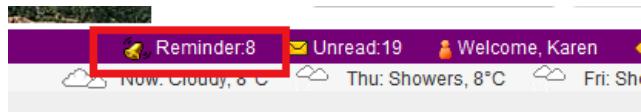
After you click the reminder button a new box will come up:



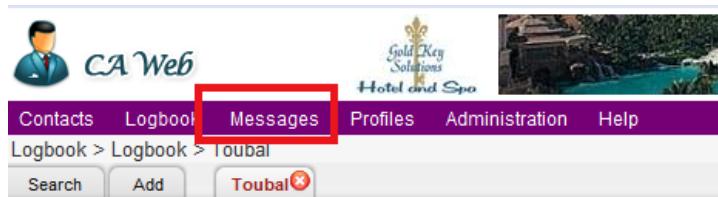
To Send the Message you need three things:

- <!--[if !supportLists]-->1. <!--[endif]-->Date and time that you want to be reminded.
- <!--[if !supportLists]-->2. <!--[endif]-->Who you are sending it to - single click on the names or department
- <!--[if !supportLists]-->3. <!--[endif]-->Then strike Send

These Reminders will pop up on the date and time they were programmed to pop up and you will see them on your toolbar once if you hit the remind me again button.



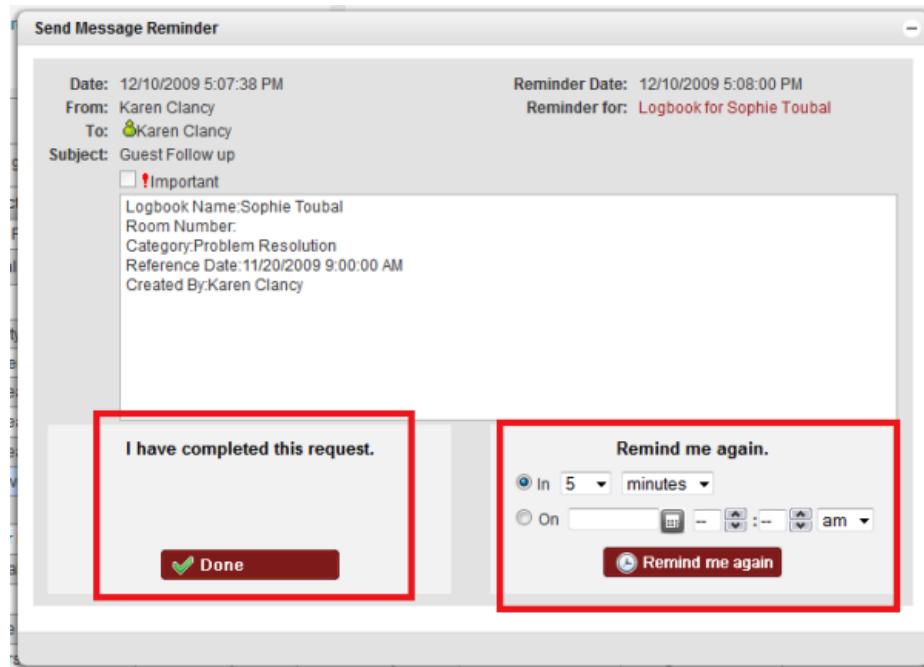
You may also go to the Messages Tab to view all Reminders and Messages:



Here is what the screen looks like if you click on:

	Date	Subject	Sent From	Logbook Name	Room Nu
<input type="checkbox"/>	12/10/2009 5:12:20 PM	special attntion.....	Karen Neumeier	N/A	N/A
<input type="checkbox"/>	12/10/2009 5:12:14 PM	demo	Karen Neumeier	N/A	N/A
<input type="checkbox"/>	11/2/2009 8:54:59 AM	Security in the Lobby	Karen Clancy	N/A	N/A
<input type="checkbox"/>	10/21/2009 5:22:17 AM	Test sendmessage b...	leon xuxu	N/A	N/A
<input type="checkbox"/>	10/28/2009 9:27:31 AM	Jim Dean, resolution	Philip Bokan	Sophie Toubal	
<input type="checkbox"/>	10/17/2009 8:05:00 AM	Jim Dean, resolution	Philip Bokan	Sophie Toubal	
<input type="checkbox"/>	10/28/2009 9:27:42 AM	Jim Dean, resolution	Philip Bokan	Sophie Toubal	
<input type="checkbox"/>	10/1/2009 10:10:35 PM	O Convidado de VIP ...	Philip Bokan	N/A	N/A
<input type="checkbox"/>	10/1/2009 10:23:41 AM	Test	Karen Clancy	N/A	N/A
<input type="checkbox"/>	10/1/2009 11:29:15 AM	Dinner Reservation	Karen Clancy	Michael Corleone	6767
<input type="checkbox"/>	10/1/2009 11:29:13 AM	The Call	Cris Dovich	shepherd	

<!--[if !vml]--><!--[endif]-->Reminders are designated with the Bell Symbol. You may click on any of the bells to retrieve the message or it will "Pop-up" on the designated time. Here is how it looks when it "Pops-Up":



See also

[Contact Reminders](#)
[Profile Reminders](#)

Home > Reminders > Contact Reminders

Contact Reminders

Under Construction...

See also

[Logbook Reminders](#)
[Profile Reminders](#)

Home > Reminders > Profile Reminders

Profile Reminders

Under Construction...

See also

[Logbook Reminders](#)
[Contact Reminders](#)

[Home](#) > [Messages](#)

Articles in this section



[Messages Overview](#)

See also

[Welcome](#)
[Installation](#)
[Introduction](#)
[Logbook Usage](#)
[Contact Usage](#)
[Reminders](#)
[Profiles](#)
[Basic Administration](#)
[PCI Best Practices](#)
[Videos](#)
[Keyboard Shortcuts](#)
[FAQ](#)

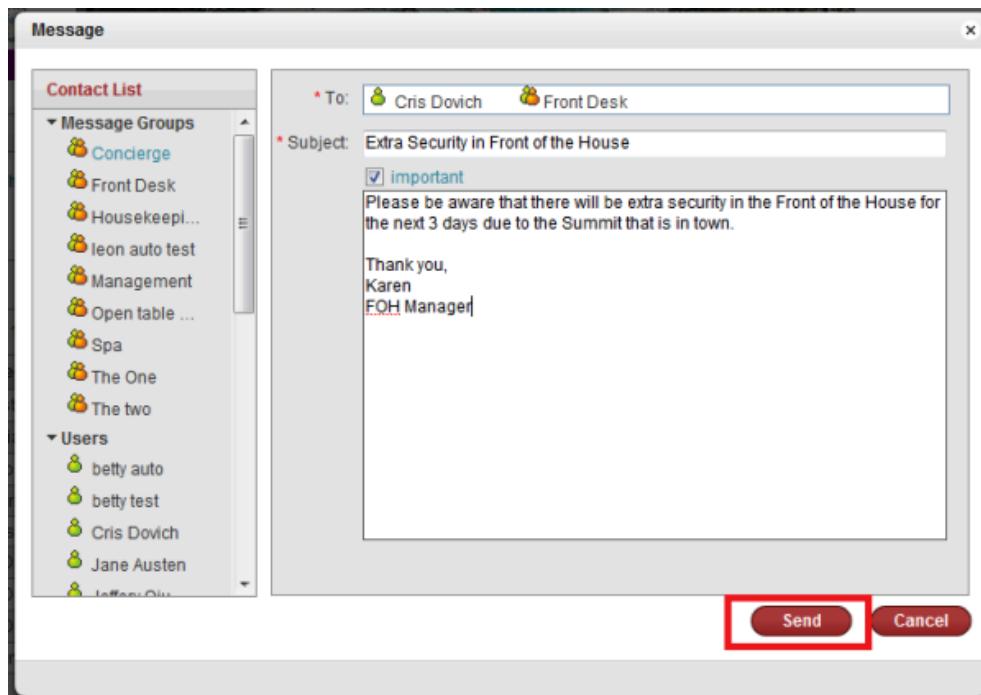
Home > Messages > Messages Overview

Messages Overview

Messages are an inter-staff communication.

From the "Message Tab" you can type in any message and send it to either staff member or a group (or department) of staff members.

First select Create Message > Select the staff members or Message Group that you would like to send it to and then click Send.

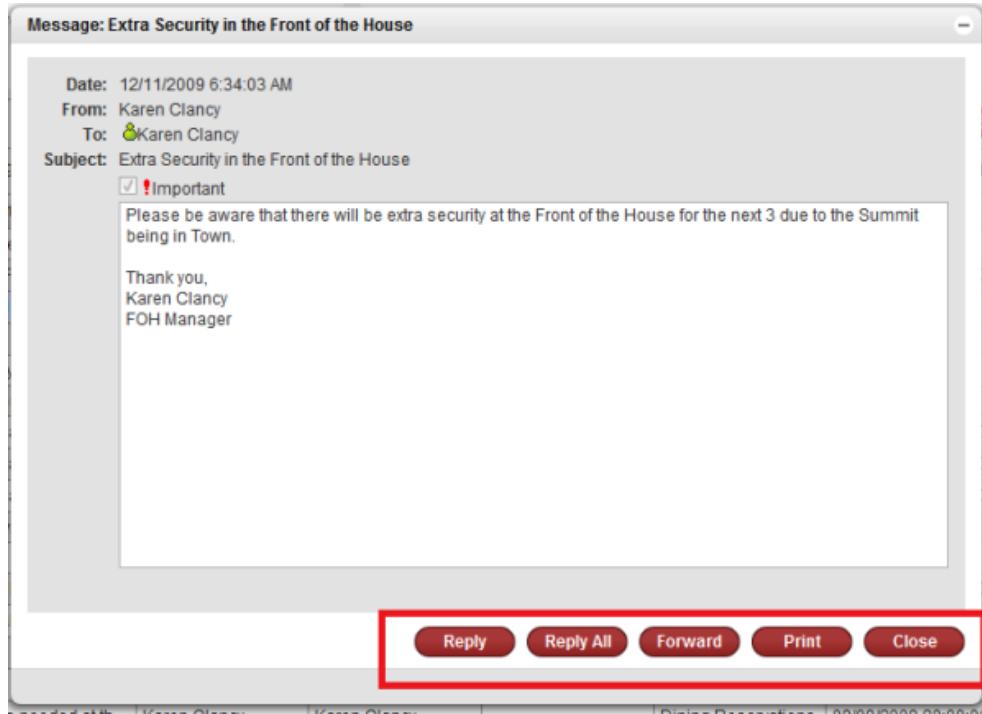


To Read your messages:

Go to Messages> click on the Message> click View

Room Number	Category	Reference Date	Created By	Operations
N/A	N/A	N/A	N/A	View

This will then bring up the message:



You have many options that you can do from here:

<!--[if !supportLists]-->1. <!--[endif]-->Reply back to the person that sent it
<!--[if !supportLists]-->2. <!--[endif]-->Reply All to everyone copied on the message
<!--[if !supportLists]-->3. <!--[endif]-->Forward it on to someone else
<!--[if !supportLists]-->4. <!--[endif]-->Print it
<!--[if !supportLists]-->5. <!--[endif]-->Close it.

See also

[Home](#) > [Profiles](#)

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[Search A Profile](#)



[Add A Profile](#)



[Linking a Profile to Logbook](#)

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Home > Profiles > Search A Profile

Search A Profile

Profiles is linked with the Logbook to keep all VIP Guests information organized and easily accessible.

Search Profiles:

Enter part of the guest's last or first name and select search

(picture)

To bring up the entry double click on the last name of the guest. This will bring up the guest's profile. If you would like to create a new logbook entry for this guest simply just click Create Logbook and it will put you directly into the logbook.

(picture)

This way you can see all of the guest information as you are talking to them.

(picture)

See also

[Add A Profile](#)

[Linking a Profile to Logbook](#)

Home > Profiles > Add A Profile

Add A Profile

Under Construction...

See also

[Search A Profile](#)
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Linking a Profile to Logbook

Under Construction...

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It is important to note that only the property designated Site Administrators and/or those individuals given these permissions will have access to this area of CA Web.



[Contact Keywords](#)



[Creating and Editing Logbook Categories](#)

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Home > Basic Administration > Contact Keywords

Contact Keywords

The use of Contact Keywords in CA Web is instrumental in not only identifying vendors and their services but also providing the user with an expedient alternative search method i.e. Tony Romas restaurant might have the following keywords; restaurant, dinner, ribs and family. The user can now look up Tony Romas by any of these keywords, in addition to the vendor name and address.

CA Web for each property comes with a basic Contact Keyword list of approximately 400 keywords. Each property can add to this existing list whenever a new word is needed. There is no limit to the number of keywords that can be in the database or assigned to each vendor. Although any words can be added; for best results try to keep the keywords very broad for easy look-up.

To add a new Contact Keyword to your database go to the following tab:

Administration >Contact Keywords>Add Keyword Enter the new Keyword and click on Add.

If the Keyword already exists in the list, CA Web will give you a message telling you so. You must acknowledge this message by clicking on the "x" to remove it. CA Web will not add the word to the database again.

Editing a Keyword

You may also Edit your keywords in the area marked as "Edit Keyword". Highlight the word you wish to change, enter the word you wish to replace it with in the Rename field and click "Rename" as in the example below.

See also

[Creating and Editing Logbook Categories](#)

Home > Basic Administration > Creating and Editing Logbook Categories

Creating and Editing Logbook Categories

In CA Web, Logbook Categories are used to track guests' requests, whatever they may be! The property can create Logbook categories for any activity they wish to track i.e. Management can track their Manager's Logs through logbook categories such as: Incident Reporting, Guest Complaints and/or Pre-Arrival calls. There is no limit to the types of Logbook Categories that can be created.

To add a new category go to >Administration>Logbook Categories. Go to the Add area of the screen and enter the Name of your new Logbook Category and click on the Add button.

The screenshot shows the 'Add' section of the Logbook Categories screen. A red box highlights the 'Category' input field containing 'Housekeeping Re:' and the 'Add' button below it. The main list of categories on the right shows items like 'Airline Reservation', 'Amenity Order Internal', etc., each with a delete icon.

After clicking the Add button, the new Logbook Category is added to the list of existing categories already in the database. The screen will also provide additional choices for your Logbook Category and the ability to construct your data entry panel. When editing simply click on the Logbook Category and follow the same procedures.

The screenshot shows the 'Edit Selected Category' screen for 'Housekeeping Requests'. The 'Category' field is set to 'Housekeeping Requests'. The 'Roles' section includes checkboxes for Site Administrator, Concierge Manager, Concierge, Bell Desk Operat..., Loss Prevention, IM Group, and Role test IM. Below this is a table for defining data entry fields, with the first row showing 'Label' as 'Please Select', 'Type' as 'Please Select', 'Link to Contact Field' as 'Do Not Link this Element', 'Do not Print' as an unchecked checkbox, and 'Required' as an unchecked checkbox.

In the data entry panel setup form, the Administrator is provided with a label for each line of information that is required to complete a request or service for the category being designed. As in the example below for Housekeeping Requests, the first label reflects the Type of Service being requested. The Requested Time of Service and the number of Days the service will be required.

Copy all fields from: Please Select Clone						
Label	Type	Link to Contact Field	Do not Print	Required Field	Operations	
Type of Service:	Selection	Do Not Link this Element	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Requested Time of Service:	Time	Do Not Link this Element	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Number of Days Needed:	Please Select	Do Not Link this Element	<input type="checkbox"/>	<input type="checkbox"/>	+ -	

The field next to the Label is the Type of data or information that will be entered into this line when a user is filling out the request for the guest. There are multiple options depending on the type of information that will be required to be entered into this field, such as a date, a time, or a number. Simple text is most widely used for free form entry.

Simply highlight the selection that best goes with the label. The box that is highlighted in this example is "Selection" and comes with a handy tool.

Copy all fields from: Please Select Clone						
Label	Type	Link to Contact Field	Do not Print	Required Field	Operations	
Type of Service:	Selection	Do Not Link this Element	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Requested Time of Service:	Please Select	Do Not Link this Element	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Date	Text	Do Not Link this Element	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Time	Text	Do Not Link this Element	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Number	Text	Do Not Link this Element	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Selection	Text	Do Not Link this Element	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Credit Card Number	Text	Do Not Link this Element	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Credit Card Expiry	Text	Do Not Link this Element	<input type="checkbox"/>	<input type="checkbox"/>	+ -	

The Selection option gives the Administrator a "pencil like" icon to the right, highlighted in blue in the above sample. When the Administrator clicks on the icon, a list of choices can be created by the Administrator that presents a "selection" of options to the user when entering the guest's request in CA Web. Just enter each choice and click the Add button.

Maintain Select Options

Type of Service: extra pillows	+
vacuum	x
dusting	x
fresh linen daily	x
turn down services	x

Cancel

The next field is the "Link this Contact Field". This link is very important when you are dealing with logbook categories that will require contact information as part of the guest request such as Dining Reservations. (Refer to Best Practices Basic Logbook Usage) As you can see in this picture there is a drop down list of options on the kind of information you want to link to the contact information. The first label in the example below lists "Restaurant". In that case you would want CA Web to link the "Contact Name" (highlighted below). For the Address label you would link "Address" from the drop down and so on. Many Logbook Categories won't require this kind of linking but it is a real time saver for those that do.

Copy all fields from: Please Select Clone						
Label	Type	Link to Contact Field	Do not Print	Required Field	Operations	
Restaurant:	Text	Contact Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+ -	
Time Requested:	Time	Do Not Link this Element	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Address:	Text	Contact Name	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Credit Card:	Credit Card Numbr	Address	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Telephone:	Text	Cross Streets	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Number in Party:	Number	Phone Number	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Special requests:	Text	Log Notes	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Confirmed With:	Text	Directions	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Special Comments:	Text	Cuisine	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
Confirmation:	Text	Price Range	<input type="checkbox"/>	<input type="checkbox"/>	+ -	
		DO NOT LINK THIS ELEMENT	<input type="checkbox"/>	<input type="checkbox"/>	+ -	

Continuing to the right, there is an ability to flag each line with a "Do Not Print", if the Administrator does not want this information printed on the Guest Itinerary or Confirmation. A "Required Field" identifier is also provided in the event the Administrator needs to ensure this information be filled in with every

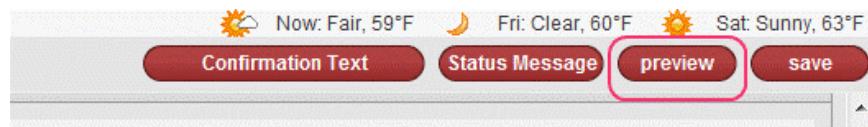
entry made for this category. Simply enter a checkmark as in this example for either of these requirements.

The last column provides the ability to expand on the number of data entry elements used for each category. Click on the plus (+) to add another line for more information or the minus (-) to remove a line of information.

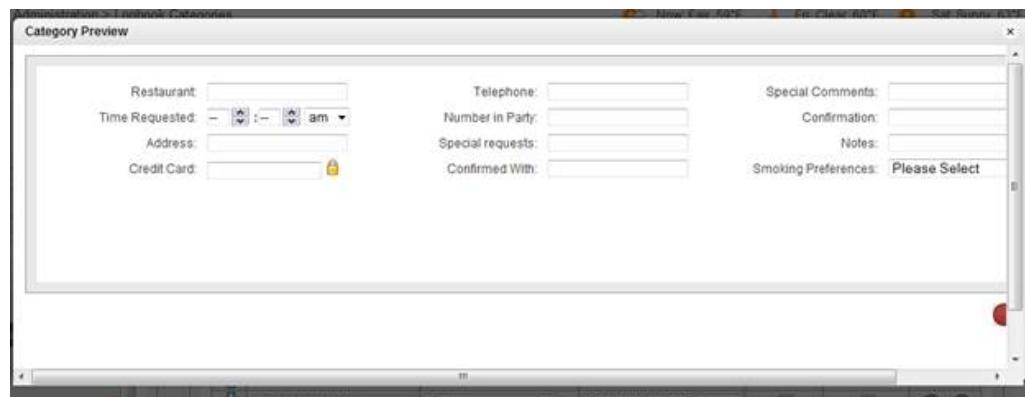
If it is necessary to change the order that the information is in, 2 arrows to the immediate left of the data entry element will either move the line up or move it down. Keep clicking the appropriate arrow until the element is in the proper location of the design.

Label
Restaurant:
Time Requested:
Address:
Credit Card:
Telephone:

You may check on the design of the data entry panel at any time by clicking on the "Preview" button in the top right of the screen.



A preview of the way the data entry panel will appear to the user will become viewable, allowing the Administrator to make any changes before the Logbook Category becomes active.

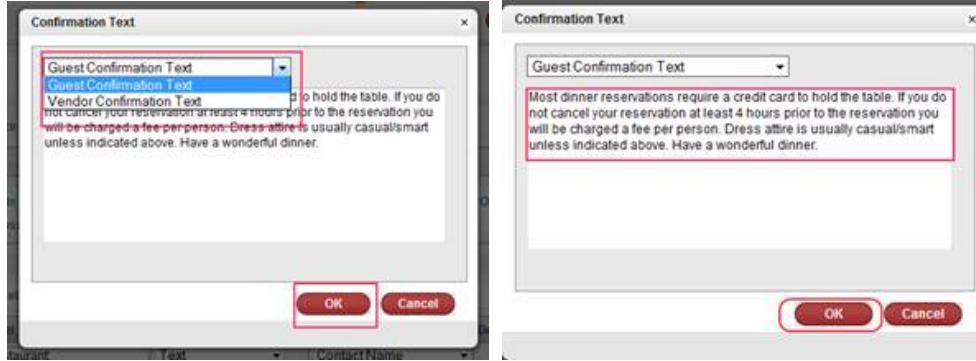


Other information that will be valuable to Administrators is determining the Roles that have access to this logbook category. In the center of the example below is a listing of the Roles that have been created for this property. A checkmark in the box indicates that this Role has access to this logbook entry. No checkmark, no access. (Refer to our Best Practices Administration PCI Standards for Implementation and Credit Card Information for the discussion on Roles and Rights)

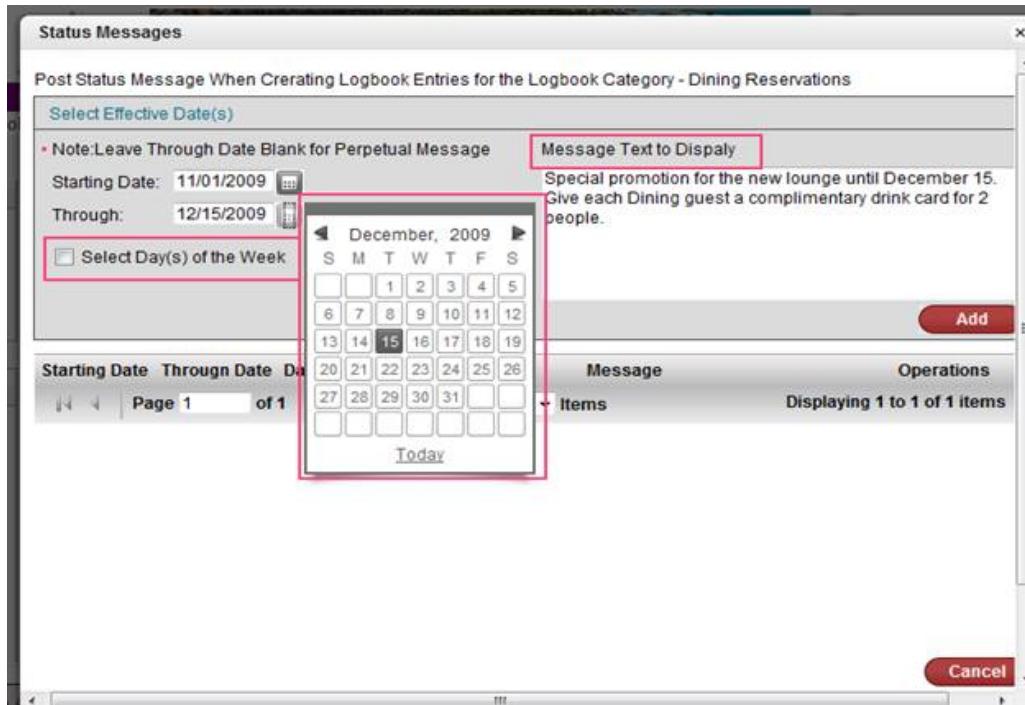
Label	Type	Link to Contact Field	Do not Print	Required Field	Operations
Restaurant	Text	ContactName	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Some Logbook Categories may require a general disclosure of cancellation or other relevant information that can be provided to the guests on their Itineraries and Confirmations in order to avoid possible penalties or be aware of specific requirements for the activity. In CA Web we refer to this information as the "Confirmation Text" and it can be added to any category by simply clicking on the button located near all the other buttons at the top right of the screen. When selected a textbox will appear. The Administrator has the option of either entering a Vendor Text (appears on Vendor service form) or a Guest Text (appears on Guest Confirmation and Itinerary).

Type the text in the main open body of the screen and click OK.



The "Status Message" button gives the Administrator the ability to flag a Logbook Category with a message to the users for all entries made in this category. When this option is selected, this screen will appear.



Select the dates you wish the message to appear from the drop down calendar. If the message is only to run for certain days in the week, such as only on Sundays, check the box next to "Select Days of Week". Enter checkmarks into the applicable days of the week you want the message displayed to the user. If this box is left unchecked, CA Web will run the message every day of the week.

Enter the message you want to appear when this logbook entry is initiated by a user in the "Message Text to Display" box and click Add.

Status Messages

Post Status Message When Creating Logbook Entries for the Logbook Category - Dining Reservations

Select Effective Date(s)

Note: Leave Through Date Blank for Perpetual Message

Starting Date: 11/01/2009 Through: 12/15/2009

Select Day(s) of the Week

S	M	T	W	T	F	S
<input type="checkbox"/>						

Message Text to Display

Special promotion for the new lounge until December 15. Give each Dining guest a complimentary drink card for 2 people.

Add

Starting Date	Through Date	Days of Week	Message	Operations
11/01/2009	12/15/2009	Sun Mon Tue Wed Thurs Fri Sat	Special promotion for the new lounge	Edit Delete

Page 1 of 1 Show 5 Items Displaying 1 to 1 of 1 items

This will save the information and display the newly entered status message in the lower portion of the screen. The Administrator can now Edit or Delete the message by clicking on either of those words on the far right. In the meantime the upper screen is ready to go for the next message.

Status Messages

Post Status Message When Creating Logbook Entries for the Logbook Category - Dining Reservations

Select Effective Date(s)

Note: Leave Through Date Blank for Perpetual Message

Starting Date: Through:

Select Day(s) of the Week

Message Text to Display

Special promotion for the new lounge until December 15. Give each Dining guest a complimentary drink card for 2 people.

Add

Starting Date	Through Date	Days of Week	Message	Operations
11/01/2009	12/15/2009	Sun Mon Tue Wed Thurs Fri Sat	Special promotion for the new lounge	Edit Delete

Page 1 of 1 Show 5 Items Displaying 1 to 2 of 2 items

When a logbook entry is made for this Logbook Category and the reference date entered is for any date within the date range outlined for the Status Message, it will appear to the user as displayed below.

Contacts Logbook Messages Profiles Administration Help

Logbook > Logbook > Add

Reminder: 6 Unread: 9 Welcome, Karen

Now: Fair, 59°F Fri: Partly Cloudy, 60°F

Search Add

Guest Information

Salutation: Please Select	Arrival: <input type="button" value="..."/>	Guest Notification: Please Select
Last Name: <input type="text"/>	Departure: <input type="button" value="..."/>	Group Name: Please Select
First Name: <input type="text"/>	Primary Email: <input type="text"/>	<input type="button" value="Select Profile"/>
Room Number: <input type="text"/>	Primary Phone: <input type="text"/>	

Entry

Reference Date: 11/17/2009 <input type="button" value="..."/>	* Time: <input type="button" value="-- : -- : --"/> am	* Entry Type: Dining Reservations
Special promotion for the new lounge until December 15. Give each Dining guest a complimentary drink card for 2 people.		
* Restaurant: <input type="text"/>	Telephone: <input type="text"/>	Special Comments: <input type="text"/>
Time Requested: <input type="button" value="-- : -- : --"/> am	Number in Party: <input type="text"/>	Confirmation: <input type="text"/>

And last but not least.....be sure to use the last little button on the right on the display screen and always remember to SAVE SAVE SAVE.

See also

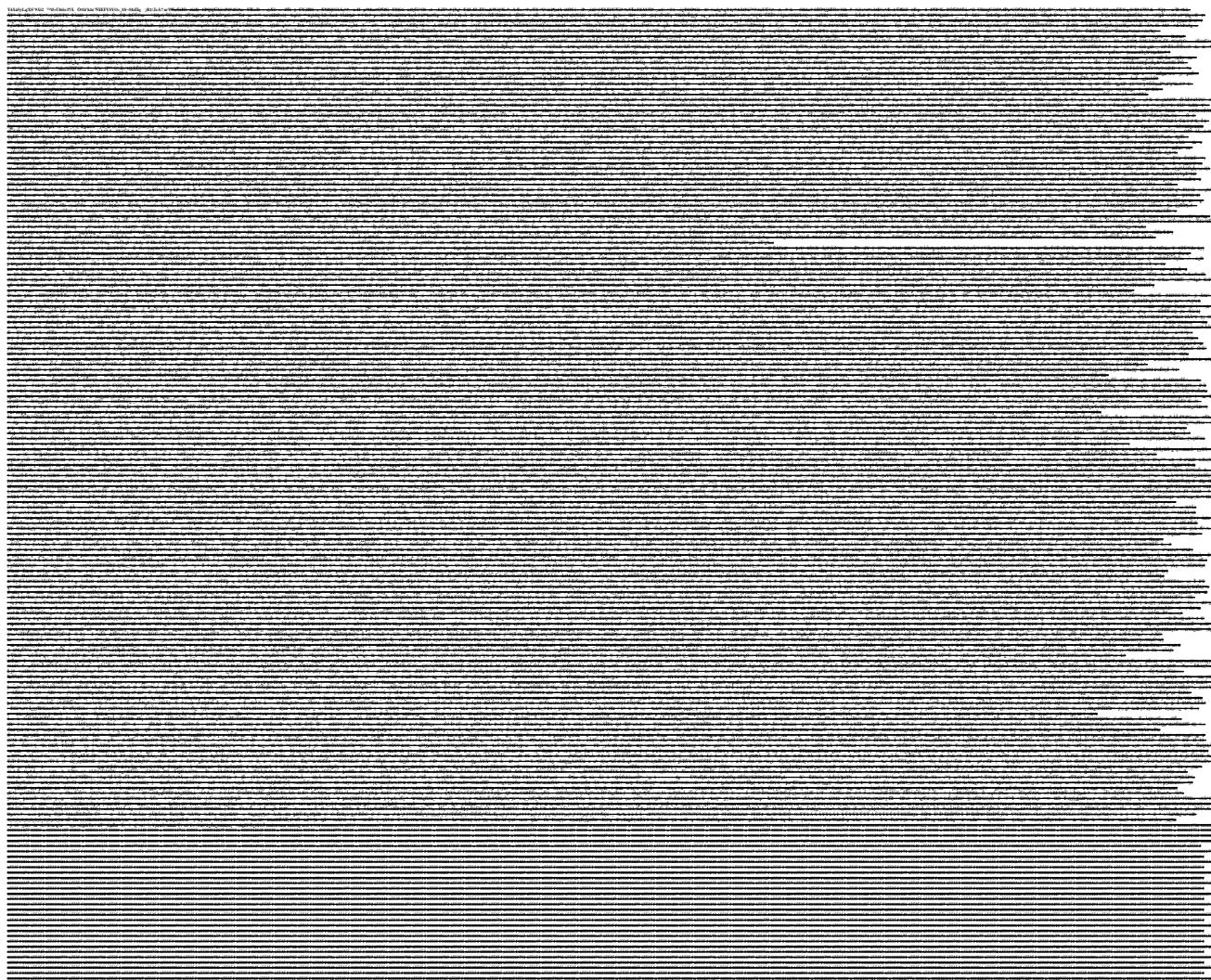
[Contact Keywords](#)

information security risk management process. This document provides recommendations for how to implement the PCI DSS requirements in a manner that is consistent with sound information security risk management practices. It is intended to help organizations better understand the requirements and how to implement them effectively. The document also provides guidance on how to evaluate the effectiveness of the implementation.

The document is organized into several sections:

- Introduction:** Provides an overview of the document and its purpose.
- Scope:** Describes the scope of the document and the types of organizations it applies to.
- PCI DSS Requirements:** Provides a detailed description of the PCI DSS requirements, including the cardholder data environment, merchant environment, service provider environment, and payment gateway environment.
- Implementation Guidance:** Provides guidance on how to implement the PCI DSS requirements, including recommendations for how to identify and mitigate risks, how to manage compliance, and how to evaluate the effectiveness of the implementation.
- Evaluation:** Provides guidance on how to evaluate the effectiveness of the implementation, including recommendations for how to perform a self-assessment and how to engage external auditors.
- Appendices:** Provides additional resources, including a glossary of terms, a list of references, and a sample self-assessment form.

This document is intended to be used in conjunction with the PCI DSS requirements and the PCI DSS self-assessment form. It is not a substitute for the PCI DSS requirements or the self-assessment form. It is intended to provide guidance and best practices for implementing the PCI DSS requirements in a manner that is consistent with sound information security risk management practices.



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Shortcuts List

Contact selection from Logbook entry keyboard shortcut is CTRL+ENTER

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